



## PWYLLGOR DATBLYGU STRATEGOL A CHYFLENWI GWEITHREDOL STRATEGIC DEVELOPMENT AND OPERATIONAL DELIVERY COMMITTEE

<b>DYDDIAD Y CYFARFOD: DATE OF MEETING:</b>	28 April 2022
<b>TEITL YR ADRODDIAD: TITLE OF REPORT:</b>	Public Services Board – Assessment of Local Well-being
<b>CYFARWYDDWR ARWEINIOL: LEAD DIRECTOR:</b>	Jo McCarthy, Deputy Director of Public Health
<b>SWYDDOG ADRODD: REPORTING OFFICER:</b>	Anna Bird, Assistant Director – Strategic Partnerships, Diversity and Inclusion

**Pwrpas yr Adroddiad** (dewiswch fel yn addas)

**Purpose of the Report** (select as appropriate)

Ar Gyfer Trafodaeth/For Discussion

### ADRODDIAD SCAA SBAR REPORT

#### Sefyllfa / Situation

The Well-being of Future Generations (Wales) Act 2015 (WFGA) became law in April 2015 and provides a legislative framework aimed at improving the social, economic, environmental and cultural well-being of Wales.

Hywel Dda University Health Board (HDdUHB) has both individual and collective responsibilities under the Act and the Board. The Strategic Planning and Operational Delivery Committee (SDODC), needs to be assured that arrangements are in place, and action is being taken to ensure compliance with these responsibilities.

The purpose of this report is to present the Assessment of Local Well-being for each (Public Services Board (PSB) within the Hywel Dda area. The assessments have been approved by each PSB and are due to be published no later than May 2022 in line with legislative requirements.

#### Cefndir / Background

The Well-being of Future Generations (Wales) Act 2015 requires each local authority area in Wales to establish a PSB. HDdUHB is therefore a member of Carmarthenshire PSB, Ceredigion PSB and Pembrokeshire PSB, and is represented on these strategic partnerships by the Chair, the Deputy Chief Executive/Medical Director and the Director of Public Health.

The WFGA places a collective well-being duty on each health board to improve the economic, social, environmental and cultural well-being of its area through its contribution to meeting seven national well-being goals established by Welsh Government. In broad terms the well-being duty means that a PSB must:

1. Assess the state of well-being in its area (i.e. prepare and produce a “Local Assessment of Well-being”). The first assessments were published in May 2017 and must be refreshed at least once in every electoral cycle.

2. Set local objectives (i.e. “Well-being Objectives”) to maximise its contribution within its area to achieving the national well-being goals.
3. Prepare and publish a plan (i.e. “Well-being Plan”) setting out its local objectives and the steps it proposes to take to meet them.
4. Take all reasonable steps to meet its objectives.

Work has been on-going to refresh the Assessments of Local Well-being since March 2021 and regular progress reports have been presented to the PSBs and included in the Statutory Partnership Update reports received at each meeting of HDdUHB’s Public Board. The purpose of the assessment is to gain a comprehensive picture of the state of well-being of local people and communities, now and for the future. The assessment seeks to capture a broad spectrum of economic, social, environmental and cultural factors that impact on people’s daily lives. This includes identifying the strengths, assets, challenges and opportunities that citizens in each local authority area face.

The Committee received an update at its meeting on 24<sup>th</sup> February 2022 outlining the process which has been undertaken to develop the assessments, including the collaborative arrangements between the three PSBs and the input of the Health Board in support of the engagement activities.

### **Asesiad / Assessment**

The publication of a PSB Assessment of Local Well-being is a requirement of the Well-being of Future Generations (Wales) Act 2015. Crucially, involving people and communities is at the heart of improving well-being, therefore, engagement and consultation has been one of the activities undertaken alongside the analysis of existing sources of data and information.

Each Assessment of Local Well-being has now been approved by the PSBs and are due for publication by May 2022, in line with legislative requirements. The content of the assessments will be used as the evidence-base to set the objectives in the Local Well-being Plan that must be published by each PSB in 2023. PSB Well-being Plans will set out how the PSB will improve the well-being of its communities against seven national well-being goals over the next 5 years. PSBs are required to set these objectives in a way that accords with the sustainable development principle i.e. act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

The assessments (attached as Appendices 1-3) are being presented to the Committee for information and awareness as they provide valuable insights to the Health Board to support its own strategic planning, operational delivery and transformation agenda. In addition to the main assessment document, Carmarthenshire and Ceredigion PSBs produced community area profiles. These provide a high level overview of the population, social, economic, environmental, cultural and health status within these Upper/Middle Super Output Areas (USOA/MSOA) and may be useful when considering developments of primary and community services at locality level. Pembrokeshire PSB are planning to develop a similar overview later in the year.

### **Argymhelliad / Recommendation**

The Committee is asked to note:

- the Local Assessments of Well-being for Carmarthenshire, Ceredigion and Pembrokeshire, which have been approved by each PSB and will be published by May 2022 in line with legislative requirements.

- Carmarthenshire and Ceredigion PSBs have produced community area profiles, which may be useful when considering developments of primary and community services at a locality level.

### Amcanion: (rhaid cwblhau)

### Objectives: (must be completed)

Committee ToR Reference: Cyfeirnod Cylch Gorchwyl y Pwyllgor:	2.1 To receive an assurance on delivery against all relevant Planning Objectives falling in the main under Strategic Objectives 4 ( <i>The best health and wellbeing for our individuals, families and our communities</i> ) and 5 ( <i>Safe, sustainable, accessible and kind care</i> ), in accordance with the Board approved timescales, as set out in HDdUHB's Annual Plan.  2.3 Provide assurance to the Board that, wherever possible, University Health Board plans are aligned with partnership plans developed with Local Authorities, Universities, Collaboratives, Alliances and other key partners
Cyfeirnod Cofrestr Risg Datix a Sgôr Cyfredol: Datix Risk Register Reference and Score:	N/A
Safon(au) Gofal ac Iechyd: Health and Care Standard(s):	Governance, Leadership and Accountability
Amcanion Strategol y BIP: UHB Strategic Objectives:	All Strategic Objectives are applicable
Amcanion Llesiant BIP: UHB Well-being Objectives: <a href="#">Hyperlink to HDdUHB Well-being Objectives Annual Report 2018-2019</a>	9. All HDdUHB Well-being Objectives apply

### Gwybodaeth Ychwanegol:

### Further Information:

Ar sail tystiolaeth: Evidence Base:	Well-being of Future Generations (Wales) Act 2015
Rhestr Termiau: Glossary of Terms:	Contained in the body of the report
Partïon / Pwyllgorau â ymgynhorwyd ymlaen llaw y Pwyllgor Datblygu Strategol a Chyflenwi Gweithredol: Parties / Committees consulted prior to Strategic Development and Operational Delivery Committee:	Carmarthenshire PSB Ceredigion PSB Pembrokeshire PSB

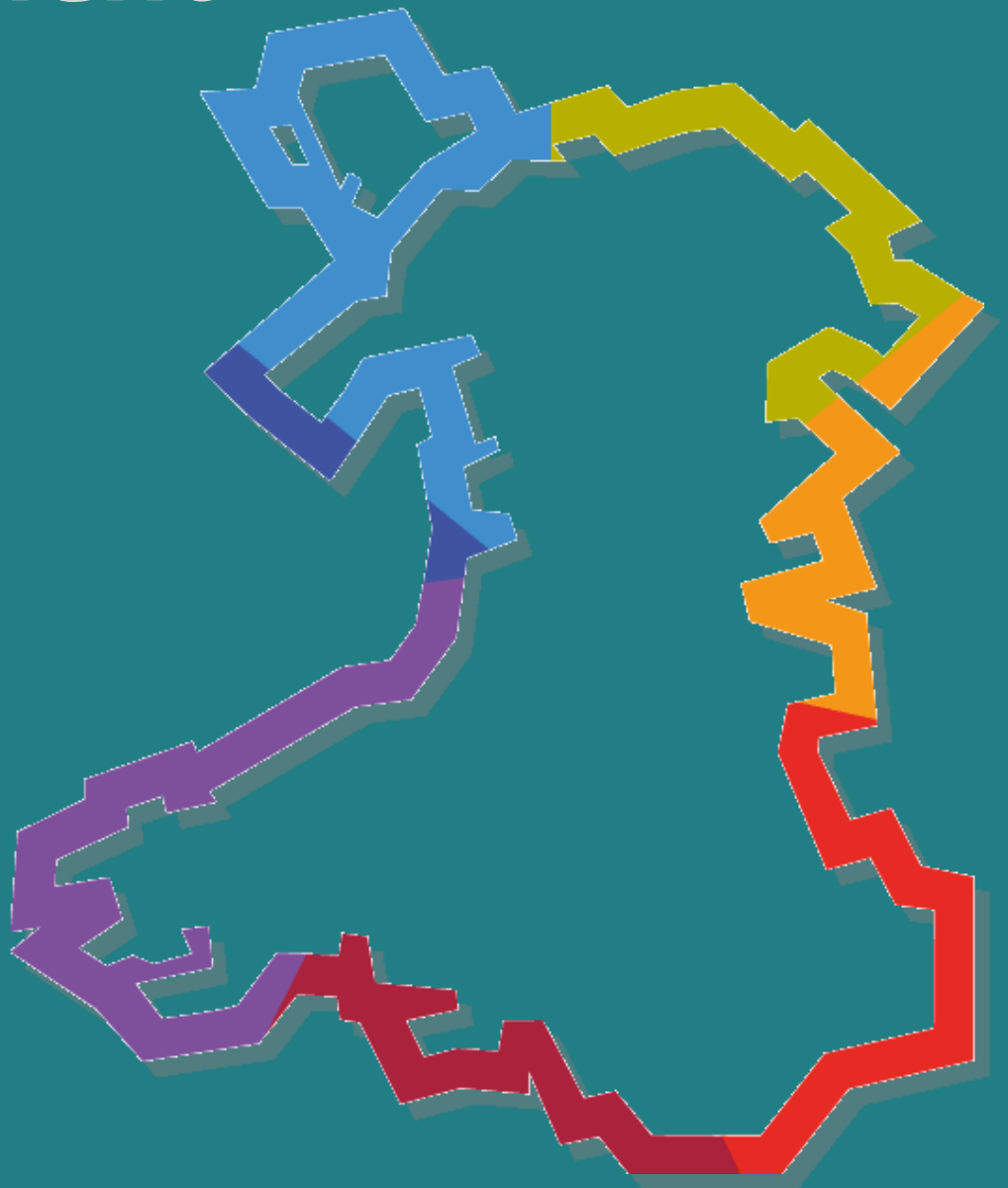
<b>Effaith: (rhaid cwblhau) Impact: (must be completed)</b>	
<b>Ariannol / Gwerth am Arian: Financial / Service:</b>	N/A
<b>Ansawdd / Gofal Claf: Quality / Patient Care:</b>	The Assessments of Local Well-being highlights the needs of the population in terms of social, economic, environmental and cultural well-being.
<b>Gweithlu: Workforce:</b>	N/A
<b>Risg: Risk:</b>	N/A
<b>Cyfreithiol: Legal:</b>	N/A
<b>Enw Da: Reputational:</b>	N/A
<b>Gyfrinachedd: Privacy:</b>	N/A
<b>Cydraddoldeb: Equality:</b>	N/A

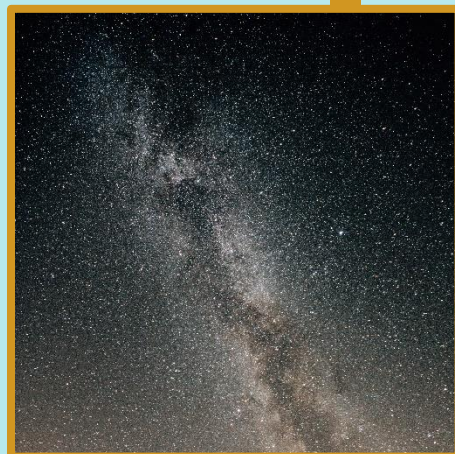


# Carmarthenshire

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## Local Well-being Assessment





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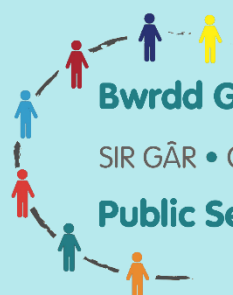
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**LLESIANT  
CENEDLAETHAU'R DYFODOL  
WELL-BEING OF  
FUTURE GENERATIONS**



**Bwrdd Gwasanaethau Cyhoeddus**

SIR GÂR • CARMARTHENSHIRE

**Public Services Board**

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# INTRODUCTION





# What is Well-being?

Well-being means different things to different people. Well-being is closely linked to quality of life; being comfortable, healthy, happy and safe. Public bodies have a duty, under the Well-being of Future Generations Act, to improve well-being in their local area. This latest Well-being Assessment is the first step in helping us plan our collaborative approach to do that.

## What is the Well-being of Future Generations Act?

The Well-being of Future Generations Act was introduced in April 2016 with the intention to create the Wales we want for now and in the future. Within this Act, Public Services Boards (PSBs) were created to encourage co-production and joined up working from public bodies, to improve the social, economic, environmental and cultural well-being in their area. Each PSB must have representation from:

- Local Authority
- Local Health Board
- Fire and Rescue Authority
- Natural Resources Wales.

Other partner organisations may be invited, in Carmarthenshire these are:

- Coleg Sir Gâr
- University of Wales Trinity Saint David
- Dyfed Powys Police
- Dyfed-Powys Police and Crime Commissioner
- Department for Work & Pensions
- Carmarthenshire Association of Voluntary Services
- Welsh Government
- National Probation Service
- Brecon Beacons National Park Authority.

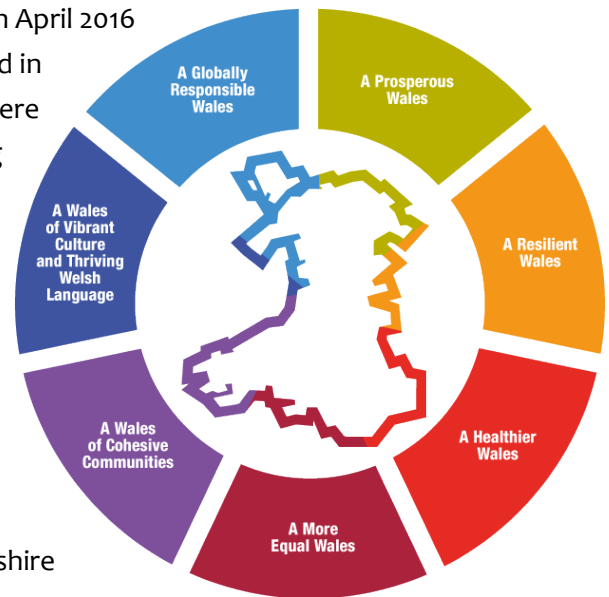


Figure 1: Future Generations National Well-being Goals

The Act defines seven national Well-being Goals:

Goal	Description
A prosperous Wales	An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.
A resilient Wales	A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change.
A more equal Wales	A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio-economic circumstance).
A healthier Wales	A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
A Wales of cohesive communities	Attractive, safe, viable and well-connected.
A Wales of vibrant culture and thriving Welsh language	A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.
A globally responsible Wales	A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

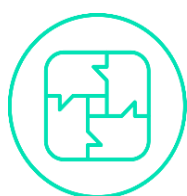
One of the requirements of a PSB is to prepare a Local Well-being Plan every five years, using a Well-being Assessment to feed into the planning phase. This is the second Assessment that the Carmarthenshire PSB has undertaken.

We are presenting this assessment at a time when considerations about the current and future well-being of Carmarthenshire has never been so important. The issues presented by COVID-19, climate change, Brexit and changing demographics have highlighted new challenges for individuals and communities and these challenges have not been felt equally. Those who were already experiencing inequalities because of poor health, poverty or because they live in marginalised communities have been hardest hit by the direct and indirect harms of the pandemic and are likely to experience additional disadvantage as we shift to 'recovery.'

Through all of this work the PSB must follow the ‘sustainable development principle’ - ensuring that the needs of the present are met without compromising the ability of future generations to meet their own needs. To apply the sustainable development principle, public bodies must follow the five ways of working:



Long Term



Integration



Involvement



Collaboration



Prevention

This will ensure that we work better together, learn from previous mistakes and use future thinking to tackle some of the challenges we are facing. Further information on applying the five ways of working is seen on page 17.

## How did we undertake the Assessment?

### A Regional Approach

Carmarthenshire PSB has worked collaboratively locally and regionally to produce this assessment. Carmarthenshire, Ceredigion and Pembrokeshire PSB's have worked in partnership to share resources, expertise and capacity in order to reduce the duplication of work. Officers from the three PSBs and Regional Partnership Board (RPB)/West Wales Care Partnership have worked together to develop a consistent methodology and approach which would culminate in three Well-being Assessments (one for each PSB) and a Population Needs Assessment for the RPB. Under this network, the following regional groups were set up at different stages of the assessments' delivery to lead on specific elements of work:

- Joint Methodology Sub-Group
- Engagement Group & Survey Sub-Group
- Data / Writing Group

Working in this way ensured that the assessments' production was collaborative (between public sector partners and the third sector) in terms of data provision, analysis and interpretation.

This Well-being Assessment has drawn together local and national data and evidence and an overview of the findings are included in this report as well as the following supplementary reports:

- Consultation and Involvement report
- A source document for all the evidence and data used in this report
- Environment and Climate Change analysis
- Well-being profiles for each community area
- Case studies from PSB members.

Responses gathered as part of community engagement sessions are considered alongside analysis of various sources of data and research. Clear themes have been identified in our county, which will allow us to target areas of need when we move from the assessment to planning phase over the course of the next year.

## Regional Data

Carmarthenshire, Ceredigion and Pembrokeshire's PSBs worked together on a desktop data gathering exercise to understand well-being in the three local areas. A wide range of local, regional and national sources were considered. The data review exercise helped to build an understanding of the area's context, challenges and priorities to be considered as part of the situation and response analysis. It also began to highlight the areas needed to be prioritised in the Assessment and which were included as part of our futures thinking.

By working collaboratively across the West Wales region, we were also able to identify cross-boundary well-being issues across the three PSB areas, such as climate change, child poverty and housing affordability. The identification of these regional issues will support well-being planning across West Wales following publication of the assessments in 2022.

## The Impact of COVID-19

The COVID-19 pandemic has had an impact on the production of this Well-being Assessment, and in particular the ability to assess well-being. The pandemic has raised some new issues relating to well-being and brought some existing issues to the fore.

In assessing well-being, there is a trade-off between the short-term COVID-19 impact and the longer-term future trends that existed prior to the pandemic. To help to counter the skewing of trends towards the immediate COVID-19 response, the assessment draws reference to the specific impacts of the pandemic separately where they are known. At the time of writing, we are still learning about the impacts, which accounts for one of the largest data gaps in the assessment.

The Hywel Dda Director of Public Health Annual Report (2021) highlights current research on the short and long-term impact of COVID-19, specifically how existing structural inequalities have led to an uneven distribution of suffering in terms of illness, poverty, unemployment, housing an

access to green space. Research by Public Health Wales and Public Health England has found the following disparities in the risk and outcomes from COVID-19:

- Age - those 80 years of age or older being seventy times more likely to die than those under the age of 40
- Sex – risk of dying amongst those diagnosed is also higher in males
- Deprivation - people living in deprived areas have higher diagnosis and death rates than those living in affluent areas
- Ethnicity – death rates are higher among people of Black and Asian ethnic groups
- Learning disabilities - a Public Health England report found that people with a learning disability were between 4 and 6 times more likely to die from COVID than the general population and this disparity was greater for younger age groups
- Disability - data published in September 2020 by the ONS shows that in the period March to July 2020, almost 7 in every 10 COVID related deaths in Wales were disabled people. Evidence also suggests that this death rate was not the inevitable consequence of impairment, as many deaths were rooted in socio-economic factors
- Increases in mental ill health
- Increases in child poverty.

The pandemic has brought health inequalities to the fore and has escalated the need for a wholly different approach to recovery and health improvement. Marmot's COVID-19 Review (Build Back Fairer: The COVID-19 Marmot Review, The Health Foundation, 2020) concluded that inequalities in social and economic conditions before the pandemic contributed to the UK's high and unequal death toll from COVID-19. Health inequalities such as deprivation, low income and poor housing have meant poorer health, reduced quality of life and early death for many people. Rather than create new inequalities the pandemic has exacerbated these existing inequalities causing further hardship to those who were already suffering.

In conjunction with the short and long-term impact of COVID-19 there are other factors that will have an effect on future well-being and should be considered as part of this assessment and the Well-being Plan for the county. According to Public Health Wales (PHW) the short and long-term impact of COVID-19, Brexit and climate change on health, well-being and equity is described as the 'Triple Challenge' (Rising to the Triple Challenge of Brexit, COVID-19 and Climate Change for health, well-being and equity in Wales). The key determinants affected by this challenge are mental well-being, food insecurity, health behaviours, environmental policy and regulation, employment and working conditions. The population groups affected by this are those in rural communities and in agricultural occupations, those on low incomes and children and young people.

As part of its COVID-19 recovery plan Hywel Dda University Health Board undertook an engagement exercise (Building a healthier future after COVID-19) to understand how access to care and overall health and well-being had been affected by the pandemic. Some of the emerging themes to be considered as part of the Well-being Plan include:

- The impact of poverty on transport, food and housing
- A better balance between virtual and face-to-face services
- The impact of the pandemic on mental health and wellbeing, waiting lists and existing health conditions
- The need for care closer to home, support to self-manage conditions and the importance of community activities and support groups.

In addition, the Future Generations Commissioners (FGC) report on 'Inequality in a Future Wales' examines key future trends in relation to the future of work, climate change and demographic change and considers how current and future policy associated with these trends can provide opportunities to reduce inequalities. Priorities for action arising from this report and in the consultations undertaken locally have identified the following:

#### Work:

The pandemic has highlighted entrenched labour market inequalities especially for the young, women, disabled people and ethnic minorities who are more likely to work in low-paid, unskilled jobs and in sectors that were vulnerable to shut down during the first and subsequent waves of the pandemic. According to the findings of the FGC report most of the job growth in the UK during the first part of 2021 was in highly skilled jobs in science and technology; occupations where those aforementioned marginalised groups, are not present in large numbers thereby transposing inequalities from one economic era to the next.

It is clear that pre-existing inequalities in the workforce are being reinforced by policies that do not reflect the changes needed to ensure work is accessible to all with equal pay for equal work. According to the FGC report the Wales we want to work in should include:

- Policies, support and training to increase the number of women, ethnic minorities and disabled people in the digital and green economy to support sector growth and reduce inequalities
- Involve employers and employees in the redesign of jobs to ensure they take account of automation and digitisation
- Incentivise training and re-training/re-skilling.

#### Climate Change:

Climate change not only has an impact on national geopolitical stability, socio-economic security and health but there is also a strong relationship between climate change and inequalities with the poorest and most marginalised groups being most likely to be exposed to the negative effects without the resources to cope and recover (Welsh Government, 2019c).



In addressing climate change in Wales, the Welsh Government have focused on reducing emissions to meet 'low carbon targets' in sectors such as housing, transport, energy and agriculture. The FGC acknowledges in their report on 'Inequalities in a Future Wales,' that there is a lot of uncertainty about what these changes will mean for local communities. National and local policy, therefore, must be clear about how the economic benefits of a low carbon economy will be shared including how new 'green' technologies and strategies for sectors like housing, transport, waste management, agriculture or protecting the natural environment will reduce inequalities and promote future wellbeing.

As part of our local engagement, we will continue to talk to local communities and especially those that are directly affected by climate change to ensure we have a better understanding of their concerns and priorities for action in the future.

#### Demographic Change:

There are several factors that contribute to this priority area, these include an ageing population, a fall in the birth rate, stalling life expectancy and a widening gap in healthy life expectancy between the most and least deprived parts of Wales. In addition, premature death (under the age of 75) is substantially more common in deprived communities, particularly in males who have a 33 per cent excess death rate compared with affluent communities. Deprived area mortality rates were high for a variety of causes of death including cancers (especially lung cancer), heart disease, respiratory disorders (especially chronic obstructive pulmonary disease), injuries and suicide.

An ageing population is likely to increase inequalities in terms of the demand for and the allocation of funding for traditional services such as education, health and social care. In addition, there are growing generational divisions because of the distribution of wealth, home ownership and digital literacy. Key findings from the FGC report include:

- Adopting a life course approach to promote long-term well-being and incorporate into health and care services to reflect changing needs over time
- Increase digital literacy to meet increasing demand
- Design a care system that brings communities of need together putting age equality at the centre of new policy development, particularly for health and social care, mental health, community cohesion, digital inclusion and childcare.

#### Engagement and Consultation

The Assessment was 'engagement led' to ensure that the views of our residents were the main drivers for producing the document, placing them at the heart of the next Well-being Plan. In preparing for the engagement, workshops were held with regional PSB partners in May and June 2021 to explore their ideas on how to conduct the engagement and the actual content of the regional Well-being Survey and stakeholder events. The engagement activities were developed based on these views, some examples of which were the desire to include more open-ended

questions in the Well-being Survey, run the survey in September after the summer holidays and conduct a specific schools survey to record responses from younger people.

Consultation and involvement was carried out over two steps:






Initial engagement – this was carried out to inform the writing of the first draft of the Well-being Assessment. This stage took place from June - October 2021. Regionally this consultation received 1333 responses - Carmarthenshire (609), Ceredigion (405) and Pembrokeshire (319).

Consultation on the draft assessment – a consultation exercise took place on the draft assessment during the winter of 2021/22. The consultation received 26 responses in total, 22 from individuals and 4 responses received from organisations. The organisations that responded were Llanedi Community Council, CYCA (Connecting Youth, Children and Adults), Early Years & Prevention Team, Carmarthenshire County Council and one unknown organisation. The consultation was distributed to all town and community councils, electoral members, partner organisations and many network groups within the county as well as those that had indicated in the initial consultation that they wished to be kept informed of developments. The responses received were positive of the draft well-being assessment and any suggestions for improvement have been incorporated into the final document. Respondents were asked which three themes they thought we should focus on to improve the well-being of local people and communities? The three themes which were mentioned repeatedly were:

- Poverty – which included child poverty, food poverty and in-work poverty as well as creating better paid jobs
- Health – which includes access to GPs, dentists and medical appointments, dementia services and mental health support
- Environment – climate change and access to outdoor leisure and green spaces for all.

## Sustainable Development Principle

To assist in adhering to the sustainable development principle we have applied the five-ways of working through the development of this assessment. The table below provides details of how we have threaded the ways of working into our approach:

 <p>Long Term</p>	<ul style="list-style-type: none"> <li>• Continuation of the Public Services Board / Regional Partnership Board Network to build on collaboration and involvement for the future.</li> <li>• Futures thinking questions included in the survey.</li> <li>• Consideration and analysis of future trends information where available.</li> <li>• Development of “Gorwel” – helps bridge the data gaps over the medium and longer-term. The assessment will be updated as new information and statistics is made available.</li> </ul>
 <p>Integration</p>	<ul style="list-style-type: none"> <li>• The assessment will be used by a range of partners and stakeholders to plan for future service delivery. It will be essential for those partners to integrate and align their developments and provision to address some of the wider population well-being matters raised in the assessment.</li> <li>• On-going engagement between partners will be essential to align and ensure collective action can be taken forward to respond to the assessment findings.</li> <li>• Sharing of organisational intelligence to inform local service planning and response will be key going forward.</li> </ul>
 <p>Involvement</p>	<ul style="list-style-type: none"> <li>• Demographic mapping was undertaken, seldom heard voices and those with protected characteristics were prioritised for virtual stakeholder events.</li> <li>• The Life Stages Model utilised by the PSB's in the region allows us to recognise the interrelationships between the different needs based on the various life stages but also the interdependency. The golden thread of the national well-being goals will also drive this response and on-going involvement will be essential as the revised well-being plan is developed and implemented.</li> <li>• The involvement of residents and stakeholders has been extensive and integral to our engagement exercises. This represents the beginning of an ongoing conversation about well-being in Carmarthenshire.</li> <li>• More than 1000 residents and stakeholders have been involved in the process with several opportunities for the general public to express their views.</li> <li>• The PSB is keen to ensure that this dialogue continues during the next well-being plan and that individual PSB members also share the findings of their involvement work with service users, residents and other stakeholders in order to respond fully to issues raised.</li> </ul>
 <p>Collaboration</p>	<ul style="list-style-type: none"> <li>• Assessment undertaken in collaboration with a wide range of PSB partners, local and regional.</li> <li>• Worked as a West Wales Cluster to deliver the Assessment under the PSB/RPB Network.</li> <li>• Developed Regional Well-being Survey and Regional Stakeholder Toolkit.</li> <li>• Close collaboration with Hywel Dda University Health Board and the West Wales Care Partnership.</li> <li>• Regional Well-being Co-ordinator employed to oversee the delivery of the assessments and ensure consistency in our approach.</li> </ul>
 <p>Prevention</p>	<ul style="list-style-type: none"> <li>• Many of the interventions to respond to the population needs identified in the assessment will need to be driven with a focus on preventative action. The key with many of the challenges identified is early recognition and intervention to stop matters escalating and creating greater demand.</li> <li>• We can use the assessment to target areas where preventative work can be undertaken through collective action across PSB partners.</li> </ul>

## Key Themes

The responses gathered from the various forms of engagement for the assessment have been considered alongside analysis of various sources of data and research. Clear themes have been identified in our county which will allow us to target areas of need when we move from the Assessment to Planning phase over the course of the next year.

### New Beginnings

Rates of low birth weight babies have fallen and are lower than the Welsh average.

Birth rates have reduced by 10% over the last 5 years.

Immunisation rates have been increasing yet remain lower than the national average.

An increased number of children have been attending Flying Start placements, the majority of these children are exceeding expected milestones by 2 years of age.

Childcare settings are finding recruitment of staff difficult, particularly for Welsh medium staff.

Breastfeeding rates have risen across Hywel Dda University Health Board region.

### Childhood

Children were impacted by not seeing their friends or extended families during lockdowns.

A quarter of our parents who have English as their first language stated that they would support their children through a Welsh medium education in our regional survey.

There has been an increase in children classified as “children in need” by social services. This is likely exacerbated by pressures exerted on families by the COVID-19 pandemic.

Almost a third of children are living in poverty.

Parents and carers have identified that the cost of childcare can be prohibitive.

Levels of childhood obesity are amongst the worst in Wales.

From engagement with schools young people expressed that they were highly concerned about COVID-19, climate change, jobs, poverty and the environment.

### Youth

Bullying and cyberbullying were key issues raised in engagement with young people.

School closures during the pandemic had a significant impact on the well-being of young people.

Substance misuse by young people roughly follows the national average.

Accessibility to areas to socialise with friends has a positive impact on the well-being of young people.

Carers Trust Crossroads West Wales service support 214 young carers in the county. Young carers disproportionately suffer from anxiety and feelings of isolation.

There has been an increase in the highest grades achieved by pupils undertaking GCSEs and A-Levels.

The gap between attainment of pupils who receive Free School Meals and those who do not has widened.

Access to training and jobs has been identified as a key local issue by young people.

Young people are also concerned about levels of homelessness and domestic violence.

## Adulthood

Over a third of our households continue to live in poverty.

In-work poverty is an increasingly common problem.

The cost of living is rising across the UK, with more working families experiencing poverty.

Levels of reported exercise and physical activity are amongst the highest in Wales.

In most areas of Carmarthenshire levels of smoking have significantly reduced.

We have the fifth worst figure for adults who report fewer than two healthy lifestyle behaviours (not smoking, eating fruit or vegetables daily, never or rarely drink, physically active for an hour every day).

Carmarthenshire has a high number of adults who are overweight or obese.

The percentage of adults who drink more than recommended guidelines has increased and is one of the highest in Wales.

The referrals received for support with alcohol and drug issues has reduced, as a result of the pandemic.

Over 70% of our residents agree that there is good community cohesion in their local area.

Carmarthenshire remains one of the safest areas of the UK.

Engagement with our communities highlighted 'feeling safe' as a key issue in their area.

Outdoor refuse fires have been continuously increasing over the last 5 years.

Road traffic collisions remain high - this is affected by our large network and high traffic flow within the county.

There has been a 27% increase in the average house price between 2016 and 2021.

Levels of homelessness and those at risk of homelessness are high in the county.

Carmarthenshire has the most Welsh speakers in Wales.

Carmarthenshire has one of the highest suicide rates in Wales.

Mental ill health remains a significant concern for many adults.

Referrals for domestic abuse have significantly increased since the pandemic and show no sign of decline.

Climate change and the nature emergency are the significant challenges in our time.

Risk of flooding affects many residential properties in the county.

Water pollution, from nitrates and phosphorus, is affecting water quality.

Carmarthenshire has one of the highest rates of fly tipping in Wales, incidences have increased fourfold over the last four years.

## Ageing Well

The proportion of older adults reporting that they are in good health is the 5th lowest in Wales.

Older people in Carmarthenshire feel the pressures of the loss of public transport systems that many rely upon to maintain independence.

A high percentage of older people volunteer in their local communities.

Contrary to the trend seen across Wales, less over 50s in Carmarthenshire are in paid work.

The move to an increasingly digital world has the potential to leave some feeling left behind and compound issues of loneliness.

The ageing population in Carmarthenshire will require the NHS and the Local Authority to plan for the expected increased demand for health and social care services

Dementia prevalence projected to significantly increase in the next 15 years.

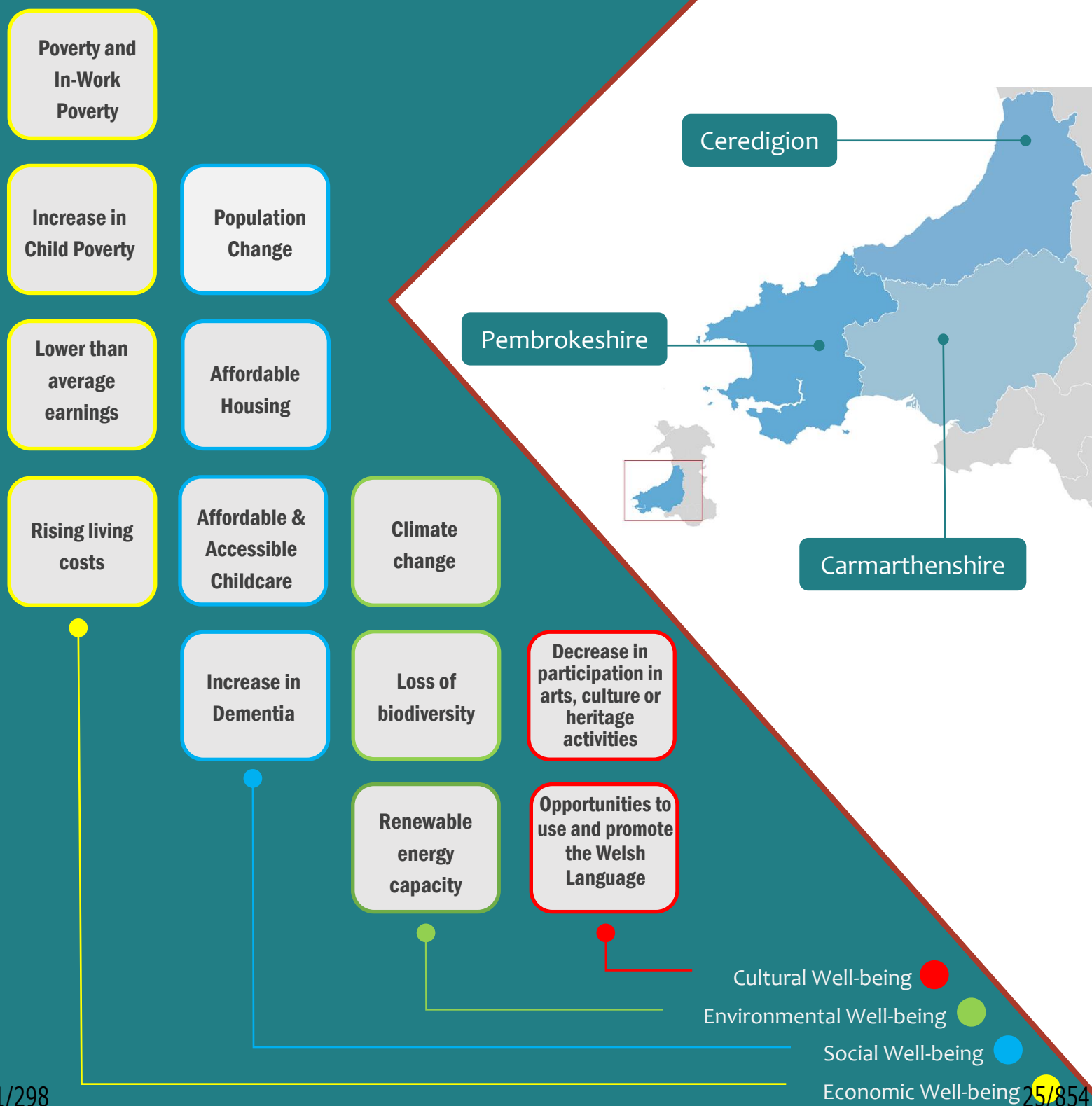
The cost of residential and nursing care is high, approximately £33,500 a year. This creates stress and uncertainty for those who require care.

# KEY REGIONAL WELL-BEING THEMES

The collaborative working we have undertaken during the production of this assessment with regional partners has given rise to a number of cross-boundary or regional issues affecting the whole of the West Wales Region.

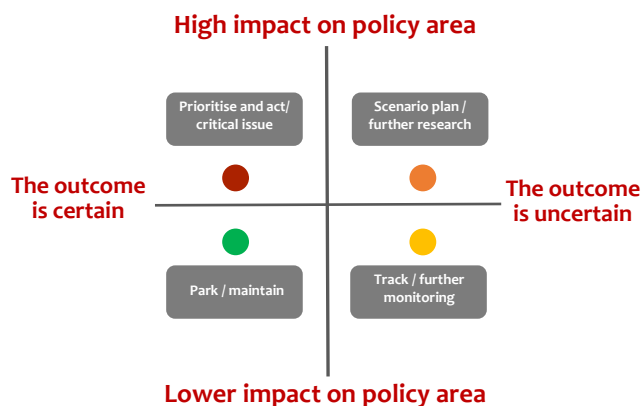
The Regional Data Group, responsible for the analysis and writing of this round of assessments, has identified the following key regional themes based on the data available, the results of the regional well-being survey and the findings of the stakeholder events conducted during the summer of 2021. The aim is to help clarify the collective challenges we face now and in the future.

West  
Wales  
Region





We have used the *PSB Futures Impact/Certainty Matrix* to provide an indicative assessment of the main themes identified in the Assessment. The aim is to provide context to the findings by providing an initial assessment based on the core data set and the engagement conducted during the summer of 2021. The matrix assesses the themes according to the level of **priority** and their **certainty** of happening, as defined in the sample to the right.



Description	Park or Maintain	Track/ Further monitoring	Scenario plan/ Further research	Prioritise/ Critical issue for area
<b>New Beginnings</b>				
Rates of low birth weight babies have fallen and are lower than the Welsh average.	●			
Birth rates have reduced by 10% over the last 5 years.		●		
Immunisation rates have been increasing yet remain lower than the national average.		●		
An increased number of children have been attending Flying Start placements.	●			
Childcare settings are finding recruitment of staff difficult, particularly for Welsh medium staff.			●	
Breastfeeding rates have risen across Hywel Dda University Health Board region.	●			
<b>Childhood</b>				
Children were impacted by not seeing their friends or extended families during lockdowns.		●		
A quarter of our parents who have English as their first language stated that they would support their children through a Welsh medium education.		●		
There has been an increase in children classified as “children in need” by social services.			●	
Almost a third of children are living in poverty.				●
Parents and carers have identified that the cost of childcare can be prohibitive.		●		
Levels of childhood obesity are amongst the worst in Wales.			●	
From engagement with schools, young people expressed that they were highly concerned about COVID-19, climate change, jobs, poverty and the environment.		●		

Youth				
Bullying and cyberbullying were key issues raised in engagement with young people.			●	
School closures during the pandemic had a significant impact on the well-being of young people.		●		
Substance misuse by young people roughly follows the national average.		●		
Accessibility to areas to socialise with friends has a positive impact on the well-being of young people.	●			
Carers Trust Crossroads West Wales service support 214 young carers in the county.		●		
There has been an increase in the highest grades achieved by pupils undertaking GCSEs and A-Levels.	●			
The gap between attainment of pupils who receive Free School Meals and those who do not has widened.			●	
Access to training and jobs has been identified as a key local issue by young people.		●		
Young people are concerned about levels of homelessness and domestic violence.			●	
Adulthood				
Over a third of our households continue to live in poverty.				●
In-work poverty is an increasingly common problem.				●
The cost of living is rising across the UK, with more working families experiencing poverty.				●
Levels of reported exercise and physical activity are amongst the highest in Wales.	●			
In most areas of Carmarthenshire levels of smoking have significantly reduced.	●			
We have the fifth worst figure for adults who report fewer than two healthy lifestyle behaviours.			●	
Carmarthenshire has a high number of adults who are overweight or obese.			●	
The percentage of adults who drink more than recommended guidelines has increased and is one of the highest in Wales.			●	
The referrals received for support with alcohol and drug issues has reduced, as a result of the pandemic.		●		
Over 70% of our residents agree that there is good community cohesion in their local area.	●			
Carmarthenshire remains one of the safest areas of the UK.	●			
Engagement with our communities highlighted 'feeling safe' as a key issue in their area.		●		

Outdoor refuse fires have been continuously increasing over the last 5 years.			●	
Road traffic collisions remain high.			●	
There has been a 27% increase in the average house price between 2016 and 2021.		●		
Levels of homelessness and those at risk of homelessness are high in the county.			●	
Carmarthenshire has the most Welsh speakers in Wales.		●		
Carmarthenshire has one of the highest suicide rates in Wales.				●
Mental ill health remains a significant concern for many adults.		●		
Referrals for domestic abuse have significantly increased since the pandemic.			●	
Climate change and the nature emergency are the significant challenges in our time.				●
Risk of flooding affects many residential properties in the county.			●	
Water pollution, from nitrates and phosphorus, is affecting water quality.				●
Carmarthenshire has one of the highest rates of fly tipping in Wales.			●	
Ageing Well				
The proportion of older adults reporting that they are in good health is the 5th lowest in Wales		●		
Older people in Carmarthenshire feel the pressures of the loss of public transport systems.			●	
A high percentage of older people volunteer in their local communities.	●			
Contrary to the trend seen across Wales, less over 50s in Carmarthenshire are in paid work.		●		
The move to an increasingly digital world has the potential to leave some feeling left behind.		●		
The ageing population in Carmarthenshire will require the NHS and the Local Authority to plan for the expected increased demand for health and social care services		●		
Dementia prevalence is projected to significantly increase in the next 15 years.				●
The cost of residential and nursing care is high, approximately £33,500 a year. This creates stress and uncertainty for those who require care.			●	





# CARMARTHENSHIRE CONTEXT



## Carmarthenshire Context

The 2020 mid-year population estimates (ONS) give Carmarthenshire a total population of 190,073 residents, making it the 4<sup>th</sup> largest local authority in Wales and increasing by 9.5% since 2001.

Carmarthenshire borders Pembrokeshire to the West, Ceredigion to the North, Powys to the East, and both Neath Port Talbot and Swansea to the South-East. The Brecon Beacons National Park covers approximately 9% of Carmarthenshire, with approximately 1% of Carmarthenshire's population estimated to reside within the National Park.

The population of Wales is expected to rise by 2.7% by 2028, with the population of Carmarthenshire projected to rise approximately in line with that of Wales at 2.4% by 2028. Our projected population by 2028 is 192,100.

Although our population growth rate of 9.5% since 2001 now exceeds the national rate, it continues to be lower than neighbouring Pembrokeshire (10.6%) and Swansea (10.3%). However, it retains a higher growth rate than Neath Port Talbot (6.3%), Powys (4.8%), and Ceredigion (-3.2%). Net internal migration continues to be the dominant driver of population change in the county.

Our most recent data on the age profiles of domestic migrants presents a continuing trend of predominantly student populations migrating out of Carmarthenshire, with little evidence of return in the 20-29 young adult age groups. The net inflow is highest in the 30-65 age range and corresponds with an average higher net inflow of 0-14 year-olds. This is likely due to family age migration.

In terms of migration linkages between Carmarthenshire and surrounding areas, the largest positive net exchanges have been with Swansea, Ceredigion and Neath Port Talbot. For the outflow, the dominant net outflow has been to Cardiff, with smaller net outflows to Bristol; both influenced by the annual migration of students to higher education.

In the 2011 Census results, there was a significant decline in the number of Welsh speakers in our county, from 50.3% in 2001 to 43.9% in 2011. This is the first time in the county's history that the percentage has fallen below half of our population.

It should be noted that there is no longer a single ward in Carmarthenshire where over 70% of the population speak Welsh. During the ten years between the Censuses, the wards of Pontyberem, Llannon, Gorslas and Cwarter Bach have fallen below this percentage. The pattern of decline is seen across the county, but the main decrease appears to have been in the Amman Valley between 2001 and 2011.

The highest percentage of Welsh speakers is now seen among the school-age population with the percentage of our older population falling significantly with each decade. The lowest percentage of Welsh speakers in Carmarthenshire is seen in the 25-44 age group. This is pertinent

as it is the age group most likely to raise families and make use of the Welsh language within our workplaces.

2011 Census results show that 76% of Carmarthenshire's population were born in Wales and just 1.9% are from non-white ethnic backgrounds. However, according to the Local Labour Force Survey / Annual Population Survey (2021), 4% of Carmarthenshire's population is from a Black, Asian, and Minority Ethnic background. We do note caution when using this information, as the survey is based on a smaller sample of population and on demographic trends that pre-date the COVID-19 pandemic. To supplement our evidence however, a total of 4,730 EU residents living in our county applied to the EU Settlement Scheme by the 30 June 2021 deadline; this is 2.5% of the current estimated population of Carmarthenshire.

The 2011 Census informs us that, of the 78,820 household in Carmarthenshire, 32% of households had one person with a long-term health problem or disability which is 2% above the Wales average of 30%. Of these, 5% of households have dependent children living there. The Carmarthenshire population is one of the sparsest in Wales at just 78 people per km<sup>2</sup> who live across a diverse county of both urban and rural communities. There are three major towns of Llanelli, Carmarthen and Ammanford which are home to 25% of the population.

Carmarthenshire has a diverse range of scenic and historic attractive landscapes, from open uplands to rolling lowland farmland. These local landscapes contribute to a sense of pride, culture, and local identity. People's experience and interaction with the environment can also positively affect health and well-being.

During 2020, 27,691 households in Carmarthenshire were classed as living in poverty which is a slight increase on the previous year of 27,576. Poverty is defined as when a "household income is less than 60% of the GB median income" (in 2020 less than £19,967).

The 2019/20 National Survey for Wales showed that 11.3% of participating households in Carmarthenshire were classed as living in material deprivation. This is below the Welsh average of 12.9% and a reduction on the previous year's figure of 13.5%. Due to COVID-19, there is no updated data available for the measure.

According to the 2019 Welsh Index of Multiple Deprivation (WIMD) which is the official measure of relative deprivation for small areas in Wales, Carmarthenshire has 3 areas within the 100 most deprived areas in Wales. These are Tyisha ranked as 17th most deprived area in Wales, followed by Glanymor in 68th and Bigyn in 84th position.

For the purposes of this assessment, six community areas have been identified across Carmarthenshire based on Upper Super Output Areas (USOA's), see map below. Where relevant this assessment will highlight key issues affecting community areas and any significant differences between them.

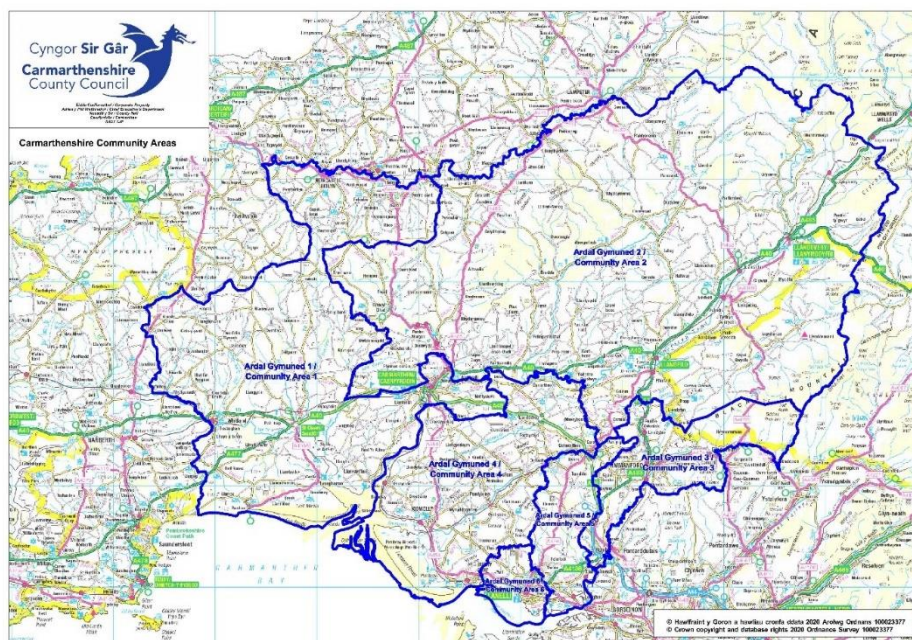


Figure 3: Carmarthenshire Upper Super Output Areas

Table 1: Community Areas broken down by ward

Community Area 1 (Population 32,054)	Community Area 2 (Population 33,840)	Community Area 3 (Population 30,108)
Carmarthen Town North	Abergwili	Ammanford
Carmarthen Town South	Carmarthen Town West	Betws
Cenarth	Cilycwm	Garnant
Laugharne	Cynwyl Elfed	Glanaman
Llanboidy	Cynwyl Gaeo	Hendy
Llangeler	Llandeilo	Llandybie
Llangunnor	Llandovery	Pontaman
Llansteffan	Llanegwad	Quarter Bach
St. Clears	Llanfihangel Ar Arth	Saron
Trelech	Llanfihangel Aberbythych	Tycroes
Whitland	Llangadog	
	Llanybydder	
	Manordeilo & Salem	
Community Area 4 (Population 32,742)	Community Area 5 (Population 30,923)	Community Area 6 (Population 30,406)
Burry Port	Bynea	Bigyn
Glyn	Dafen	Elli
Gorslas	Felinfoel	Glanymor
Kidwelly	Llangennech	Hengoed
Llanddarog	Llannon	Lliedi
Llangyndeyrn	Llwynhendy	Tyisha
Pembrey	Penygroes	
Pontyberem	Swiss Valley	
St. Ishmael		
Trimsaran		



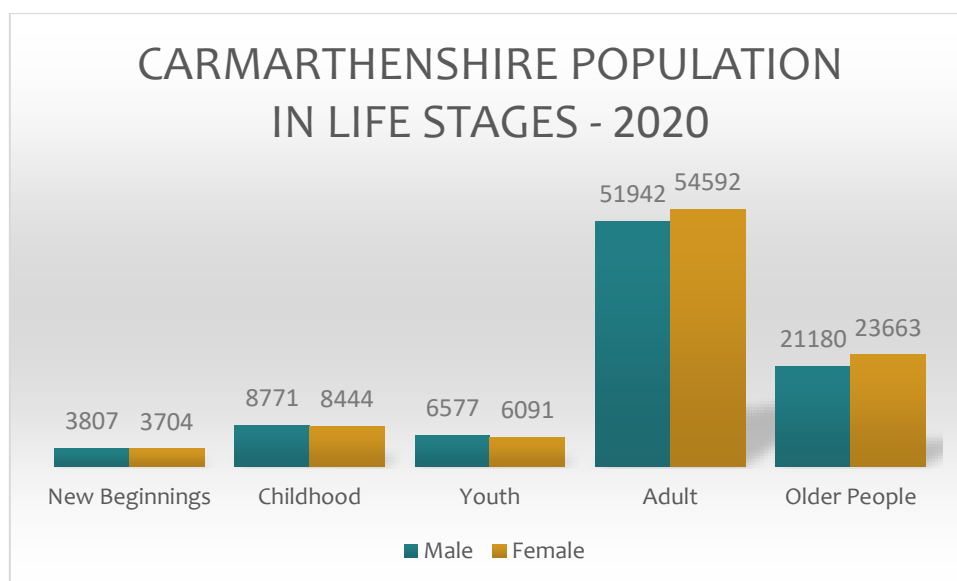


Figure 4: Life Stages

The figures from the 2020 mid-year population estimates shows that, whilst the 6 community areas are rather similar in population for ‘New Beginnings’, ‘Childhood’, ‘Youth’ and ‘Adult’, it shows clearly that there are less older people living in Community Area 6 than any other area - over 32% less than Community Area 2 which has the highest number of older people living in its community.

Table 2: Age profiles of the six Community Areas, showing number and percentage.

	New Beginnings		Childhood		Youth		Adulthood		Ageing Well	
Community Area 1	1,183	3.7%	2,759	8.6%	1,952	6.1%	17,624	55%	8,536	26.6%
Community Area 2	1,139	3.4%	2,873	8.5%	2,289	6.8%	18,738	55.4%	8,801	26%
Community Area 3	1,168	3.9%	2,799	9.3%	2,051	6.8%	16,945	56.3%	7,145	23.7%
Community Area 4	1,126	3.4%	2,720	8.3%	2,221	6.8%	18,025	55.1%	8,650	26.4%
Community Area 5	1,308	4.2%	3,014	9.7%	2,290	7.4%	17,716	57.3%	6,595	21.3%
Community Area 6	1,309	4.3%	2,954	9.7%	2,108	6.9%	18,069	59.4%	5,966	19.6%

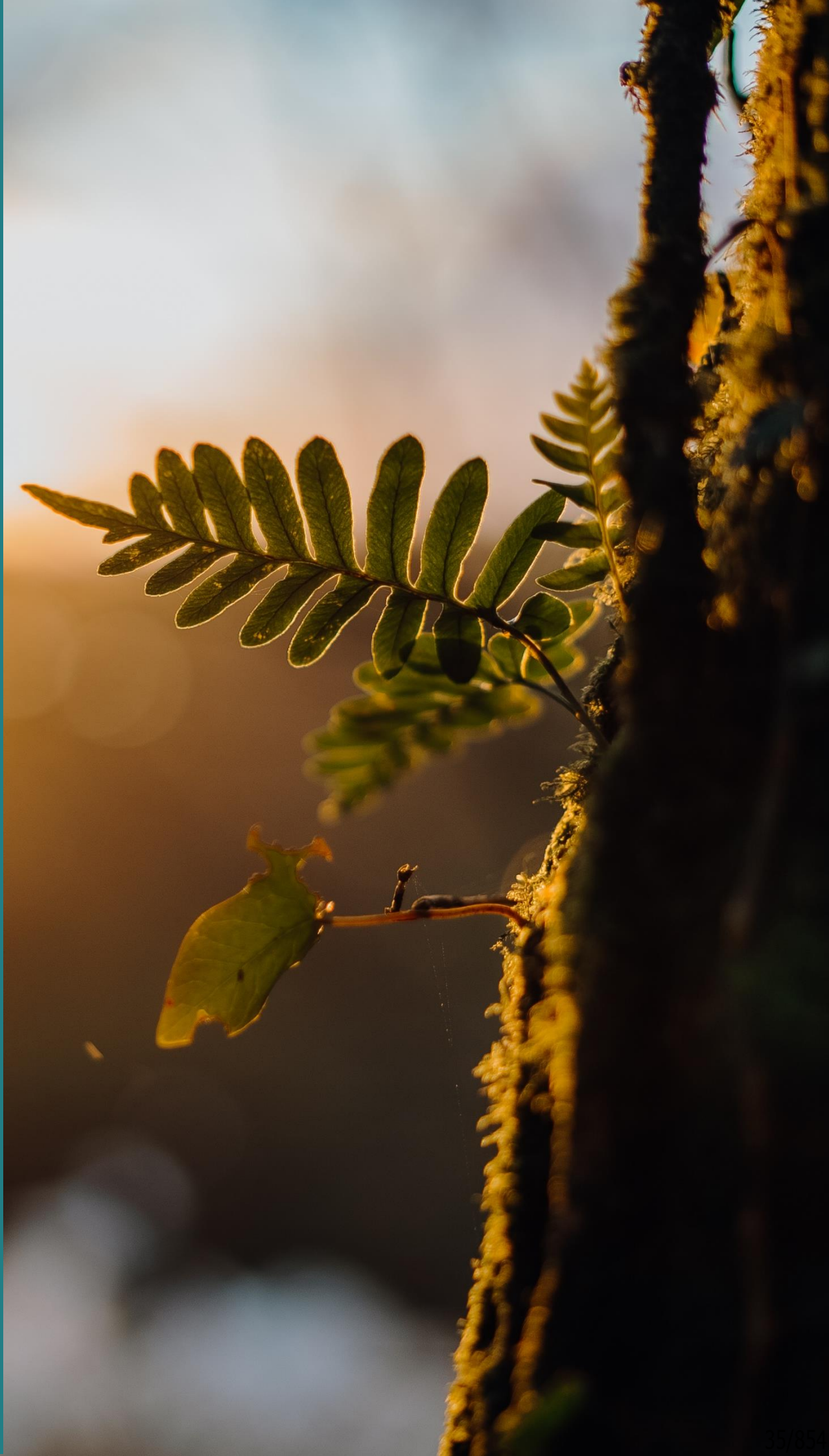
## National Well-being Indicators

Welsh Government introduced a suite of 46 National Well-being Indicators to measure progress against the 7 national well-being goals of the Well-Being of Future Generations (Wales) Act 2015. Although these are national measures intended to progress overall levels of well-being across Wales, Carmarthenshire's PSB has undertaken an exercise to assess current performance against these well-being measures where data is available at Local Authority level, to provide clearer insight into levels of well-being in our county. Our Town and Community Councils have their roles to play in assisting us achieve these goals.

The National Well-being Indicators will be featured under the relevant life stages as part our assessment.

As of October 2021, Carmarthenshire have ten measures in the red zone (amongst the worst results in Wales) including 'homeless prevention' and '% of properties with a high or medium risk of flooding'. There are nineteen measures in the green zone (amongst the best results in Wales) including '% adult smokers' and 'Capacity of renewable energy equipment installed'. A number of measures have seen a significant change in year-on-year results, for example the proportion of children aged 4 to 5 years who are overweight or obese has increased from 26.6% in 2017/18 to 30.4% in 2018/19 therefore moving from 12<sup>th</sup> to 18<sup>th</sup> position amongst the worst figures in Wales.

# NEW BEGINNINGS



# Welcome to the world

Children learn and develop more from birth to five years old than at any other time in their lives. A baby's earliest experiences shape their brain development and have a lifelong impact on mental health and well-being, so it is critical that all children get the best start in life. It is therefore vitally important to be born into a healthy environment that has clean water and air, provides local food and strong ecological resilience that can adapt to climate change.

## Birth weight

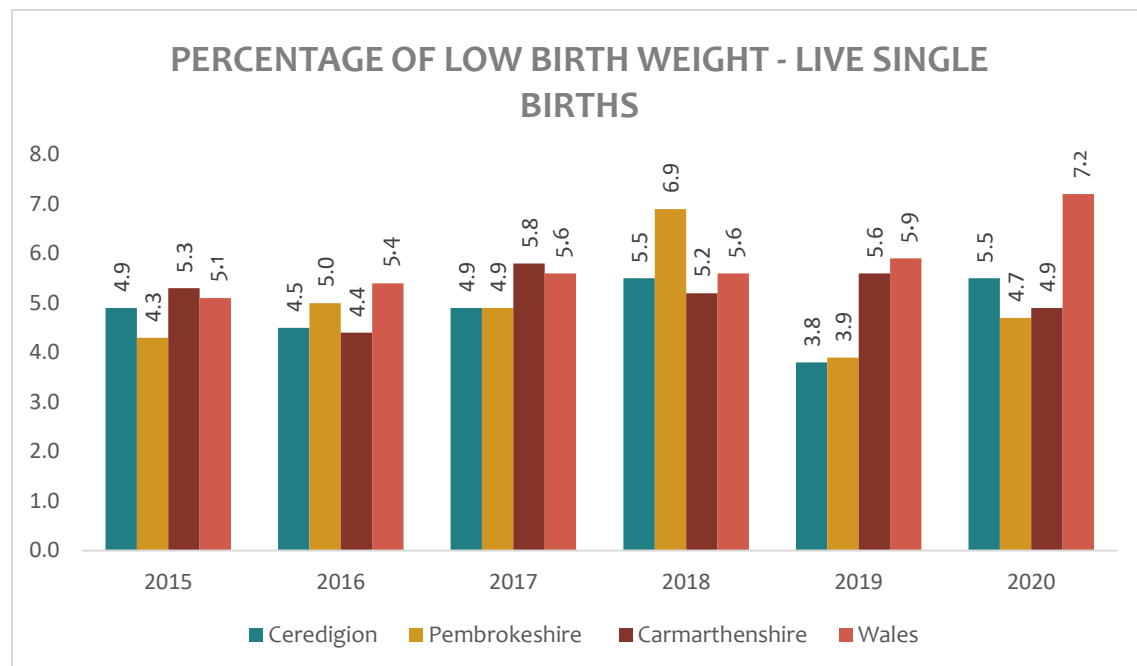


Figure 5: Low birth weight

Low birth weight can result in health and social disadvantages throughout childhood and adult life, it is therefore positive that the number of low-birth-weight babies in Carmarthenshire has remained below the Wales rate since 2018. To expand, Carmarthenshire's rate of low birth weight babies was the 3rd lowest in Wales when it fell to 4.9% in 2020 compared to the Welsh average of 6.1%.

Figures from the Office of National Statistics (ONS) indicate that the birth rate for Carmarthenshire has reduced by over 10% from 2015 to 2019 when it fell to 1,656. This pattern is reflected across the whole of Wales.

## Immunisation Rates

Immunisation rates for children aged 4 and under continue to increase, seeing a rise of 5% between April 2016 and 2019 to 86.5%. However, our rates continue to be below the latest Welsh average of 88%. Areas of lower uptake continue to be targeted and it is hoped that ongoing increases will be seen as people are more aware of the importance of being vaccinated, as a result of the pandemic.

## PERCENTAGE OF ALL CHILDREN UP TO DATE IN THE IMMUNISATION SCHEDULE BY AGE FOUR

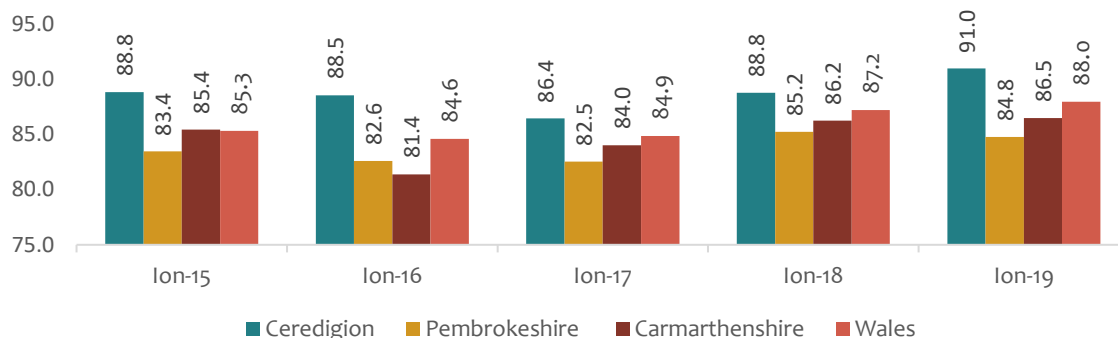


Figure 6: Immunisation rates

### Breastfeeding

Breastfeeding is recommended exclusively for the first 6 months of a child's life and continued until at least 2 years of age. Breastfeeding rates at birth continue to rise throughout the Hywel Dda University Health Board (HDUHB) area. However, a decline in the rate of mothers breastfeeding for longer than six months has been observed. Breastfeeding has been shown to have positive health outcomes for both baby and mother, reducing rates of asthma, infection, types of cancer, obesity and more. Breastfeeding rates are higher amongst older mothers.

## Family foundations

Families are the founding environment that we all experience as individuals and as such the well-being of the family as a unit has a huge influence on the well-being of the individuals within it.

Research has shown that antenatal classes which focus on preparing parents for the changes and challenges of parenthood as well as the birth itself have resulted in more positive outcomes for mother and baby, through improving maternal knowledge and confidence therefore having a positive impact on the families' psychological well-being (Spinelli et al, 2003). This demonstrates the importance of support networks, early intervention, and education in fostering positive family relationships at this early stage.

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### ENGAGEMENT RESPONSES

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Conversations held by West Wales Action for Mental Health (WWAMH) have noted that there is an increased need for mental health support for new parent/parents. The impact the last 18 months has had on new parents and babies without access to face-to-face health visiting, new parent groups, family support and social activity, has been significant.

Responses from the Well-being survey from those who were pregnant or had a baby in the last six months indicated that their main concern was not having access to healthcare or other support that they needed as close to home as possible or available through technology.

## Equal and ambitious start in life

The early years in a child's life are known as the 'foundation years' as they create the foundations on which the rest of life is built, and they remain the time when we have most opportunity to make a difference. To ensure that all people in Wales can reach their full potential, they need to have equality of opportunity. This means addressing not only social and economic inequality but also environmental inequality. Environmental inequalities may be defined as the unequal impact of environmental influences on health and well-being or the unequal access to ecosystem services.

These environmental influences include early-years education or care settings, housing, public spaces, environmental planning, travel and transport, access to nature and environmental problems, such as poor air quality or climate change causing increased energy costs. As well as ensuring children have an equal start in life it is also important that families, communities and services work to ensure each child has the best possible start in life, equipping them with the right tools to develop themselves into thriving children, young people and eventually adults.

Not all children have the same start in life and extra support is provided for those disadvantaged by being born in the most deprived areas. Flying Start is the Welsh Government targeted Early Years programme for families with children under 4 years of age in some of the most disadvantaged areas of Wales. It aims to mitigate the impact of deprivation and poverty on families through the delivery of services in the first 1,000 days of a child's life. In Carmarthenshire, there has been a steady increase in attendance levels at our Flying Start establishments which provide free childcare placements for eligible 2–3-year-olds to help them prepare for school. Pre-pandemic figures showed an attendance rate of just under 80% of those eligible to receive flying start support.

## Welsh Language and Culture

Early language acquisition is important in the development of the child. Welsh language development in the early years can encourage feelings of belonging and a path into the cultural aspects relating to being Welsh. Further improving Welsh language provision will be an important step towards seeing an increase in Welsh speakers in Carmarthenshire. As stated in the Wales Centre for Public Policy Culture Briefing - children are more likely than adults to speak Welsh, with 40% showing the ability in 2018.

## Childcare provision

Attendance at a quality pre-school (aged 0-3) is shown to improve outcomes for children throughout their life course. A longitudinal study funded by the Department of Education found benefits of pre-school attendance included more positive attitudes towards education, improved social behaviour, higher attainment and a reduced risk of worried behaviour. The study found this was particularly significant for children from disadvantaged backgrounds, children with Additional Learning Needs and boys aged 11 (Taggart et al, 2015).



In Carmarthenshire there are currently 252 registered childcare providers providing 4,751 registered places. Of these, 134 (53%) of the providers and 2,737 (58%) of the places are Welsh-medium. The table below gives a further breakdown with the figures in brackets showing those registered as Welsh-medium.

Table 3: Childcare provision in Carmarthenshire

Setting type	Registered providers	Registered places
Childminders	105 <b>(36)</b>	791 <b>(295)</b>
Full day care (Day Nurseries)	39 <b>(10)</b>	1,461 <b>(395)</b>
Full day care (Cylchoedd/Playgroups)	29 <b>(27)</b>	560 <b>(525)</b>
Sessional care	35 <b>(29)</b>	602 <b>(513)</b>
Out of school care	44 <b>(32)</b>	1,337 <b>(1,009)</b>
<b>Total</b>	<b>252 (134)</b>	<b>4,751 (2,737)</b>

In 2020-21, the number of registered childcare providers has increased by 3 and childcare places by 155 compared to the previous year which is encouraging when considering the challenges faced by providers during the pandemic.

The number of Welsh-medium childcare settings has decreased by 5 childcare settings with a loss of 91 Welsh-medium places in 2020-21.

The pandemic has had a significant impact on our local childcare sector. Between March and June 2020 many childcare providers had to modify or restrict their childcare services considerably, and in some cases close their doors completely. Despite a short period of recovery between July and the end of the 2020 calendar year, a further peak in the Pandemic during the winter months resulted in further impact on the sector, with many childcare services being affected detrimentally as a result of staff being unable to work, reduced demand for childcare or as a result of being unable to access their normal premises. It is difficult at this stage to predict at this stage what the long-term impact of the pandemic will be on the childcare sector. Each year a number of registered childcare providers de-register for various reasons including retirement, ill health or to pursue other employment opportunities. Maintaining provision is therefore a constant annual challenge. We already know that a number of local childminders and day nurseries including a large Welsh medium nursery, have closed and are in the process of de-registering with the Care Inspectorate for Wales. It is possible we may see a further reduction in the number of registered childcare providers and places within Carmarthenshire. We anticipate the sector will continue to need significant support to bounce back from what has been a very



challenging and uncertain period. Many have experienced significant losses in income due to disrupted services.

A number of childcare providers are currently experiencing difficulties attracting and recruiting qualified staff. Issues in relation to recruitment were seen prior to the pandemic with providers reporting that finding qualified Welsh-medium staff was challenging. There is evidence of staff leaving the sector and starting a new career outside childcare, noting staff fatigue due to Covid regulations, low pay and profile as potential reasons. During the last five years, we have seen high numbers of qualified childcare staff leaving the childcare sector to become Learning Assistants within schools, teachers or nurses. Childcare for many is seen as the beginning of a career progression for individuals.

We saw a reduction in the number of Meithrin playgroups in Carmarthenshire before the pandemic in 2019/20 – 57 compared to the previous year's 60. The number of children attending Meithrin playgroups has continued to reduce steadily and reduced from 1,606 to 1,307 in the same period. These reductions could be due to parents accessing full day care rather than sessional childcare, especially following the introduction of the Childcare Offer for Wales to support working parents by providing fully funded childcare for 3- to 4-year-olds. Increasingly, Cylchoedd have changed their registrations from sessional to Full Day Care providers, responding to the needs of working parents and some are expanding to provide services during the school holidays.

There has been an increasing trend in the number of pupils in Carmarthenshire who transfer from the Meithrin Playgroups to a Welsh language school.

Despite a fall in 2019/20 to just over 93% from 94.5%, there has been an increase from 87% in 2015/16. Several initiatives may have contributed to this – Cymraeg 2020, the Welsh Government target to have 1 million Welsh speakers by 2050, the Carmarthenshire Welsh in Education Strategic Plan and Camau – the Welsh skills programme to support the childcare sector staff to develop and adopt new Welsh language skills to give early years children every opportunity to play through the medium of Welsh.

The last Childcare Sufficiency Assessment (2017-22) identified that there appeared to be insufficient full day care, childminders and out of school care within pockets of the county. The next CSA in 2022 will consider the results of the recent Welsh Government National Parent Survey which received over 800 responses from Carmarthenshire parents. It will look to assess the sufficiency of current childcare provision, ensuring that all needs are catered for in terms of language delivery and location. This has come to the forefront as some parents' needs have changed due to the impact of the pandemic. With more people now working from home, this could change the demand for and desired location of their childcare. The numbers that are bracketed in the table below (Table 4) refer to the Welsh medium figures.

Table 4: Registered Childcare Providers

Setting type	Registered providers	Registered places
Childminders	105 <b>(36)</b>	791 <b>(295)</b>
Full day care (Day Nurseries)	39 <b>(10)</b>	1,461 <b>(395)</b>
Full day care (Cylchoedd/Playgroups)	29 <b>(27)</b>	560 <b>(525)</b>
Sessional care	35 <b>(29)</b>	602 <b>(513)</b>
Out of school care	44 <b>(32)</b>	1,337 <b>(1,009)</b>
<b>Total</b>	<b>252 (134)</b>	<b>4,751 (2,737)</b>

Following numerous consultations with parents/carers of children 0-7 years and professional working within the Early Years services (midwifery, Health Visiting, Speech and Language, education, childcare, education, family support) Welsh Government are investing in the Transformation of Early years services across Wales. Carmarthenshire has been involved in this as a Pathfinder for a number of years and is piloting an integrated way of working across maternity and Early Years services in the Cwm Gwendraeth area.

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#### ENGAGEMENT RESPONSES

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Evidence from our survey in terms of a Prosperous Carmarthenshire, highlights lack of sufficient and affordable childcare as a key concern. Of those who responded that were expecting or had a baby in the last six months, accessing childcare was a key element in them being able to access a variety of employment opportunities and the possibility of starting a new business, so that they could provide a stable income for their families.

# National Well-being Indicators

Noted below are the National Well-being Indicators and associated local indicators relevant for the New Beginnings life stage;

Ref No	Indicator Definition	Year	Rank out of 22 Authorities	Score, Welsh average and Change since last result	
				Carms	Welsh Avg
1	% of low-birth -weight babies	2020	3 <sup>rd</sup>	4.9% Improved	6.1%
2a	Male life expectancy at birth	2017-19	12 <sup>th</sup>	78.3 years Improved	78.5 years
2b	Male inequality gap in life expectancy Sloped Index of Inequality (SII) in years	2015-17	16 <sup>th</sup>	7.3 years Declined	7.4 years
2c	Female life expectancy at birth	2017-19	12 <sup>th</sup>	82.4 years Improved	82.3 years
2d	Female inequality gap in life expectancy Sloped Index of Inequality (SII) in years	2015-17	5 <sup>th</sup>	3.4 years Improved	6.1 years

# CHILDHOOD



## Strong Foundations

Our childhood years are key to our development and can impact on our well-being in future years, having lifelong effects on many aspects such as obesity, heart disease and mental health, to educational achievement and economic status. Developing Integrated Maternity and Early Years services are important and essential in meeting the needs of families across the county. Engaging with parents to educate and support them during the antenatal stage and throughout the early years will ensure parents are equipped with the knowledge and skills needed to contribute positively to their child's development during pregnancy, to birth and beyond and as a result children will meet developmental milestones, become school ready and will succeed as they progress through life. Effective prevention and early intervention delivered through an integrated model of service delivery will improve children's immediate and future well-being and outcomes, as well as their health, relationships, emotional development, educational achievement, and life chances. They can also reduce the personal, social and economic burden of illness, mental ill-health and social disadvantage.

Giving every child the best start in life is crucial to reducing inequalities across our lives so early intervention is key to long term health and well-being.

It is also paramount that we create school environments that nurture children's behavioural and educational attributes from early on as this can impact well-being across the spectrum for children as they grow. A healthy climate resilient natural environment is key in providing this strong foundation for children now and through their childhood years. It provides clean air and water and enables sustainable local food production. Access to nature for physical health and well-being is fundamental to providing children with the building blocks for life and can help tackle inequalities.

## Welsh-medium Education

The Welsh in Education Strategic Plan (WESP) for Carmarthenshire 2022-2032 aims to ensure significant growth in Welsh-medium education and training, to increase the number of people of all ages who become fluent in Welsh, English and other Languages.

The vision is for Carmarthenshire to be a county where the Welsh language is a living, prosperous and vibrant language in bilingual, strong, and sustainable communities. Welsh-medium education is of course fundamental to the Welsh Government's National Strategy, Cymraeg 2050: A million speakers.

According to annual School Census figures at pupil level, the percentage of 7-year-olds assessed in Welsh (first language) has remained relatively constant between 2016 (54%) and 2021 (58%), with the 2021 cohort at 57%. For 11-year-olds, the percentage has remained constant between 41% and 45%, with the 2021 percentage being 45%. For 13-year-olds (year 9), the percentage has remained constant between 41% and 43%, with the 2021 percentage being 42%.

Welsh language education is an important factor in the culture surrounding the Welsh language in Carmarthenshire. Being educated through the medium of Welsh provides opportunities to experience areas of Welsh culture that are steeped in heritage such as the Eisteddfodau, poetry and Welsh literature. The WCPP briefing paper on Culture tells us that the ability to speak Welsh is associated with higher subjective well-being. Welsh speakers are more likely to participate in arts and sports events, and fluent speakers are far more likely to attend events delivered through the Welsh language.

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## ENGAGEMENT RESPONSES

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As part of our involvement work, we met virtually with seven local schools. Many of the pupils were members of School Councils, Eco Councils and were Global Goalkeepers. Our conversations were structured around happiness, things that were important to them and their hopes for the future.

Schools play a key role in supporting pupils through their life journeys. As part of our involvement work, our pupils explained the support that is in place, including the use of Speakr, as an online tool to support them to note their feelings and concerns. Pupils were very clear on where they could access support and the importance of their local school and education through the Covid-19 came through clearly. Our children explained that their schools and the staff had given them a sense of safety and security during the lockdowns.

Our local conversations support the detailed research undertaken by the Children's Commissioner for Wales, *Coronavirus and Me: A nationwide survey of the views and experiences of children and young people in Wales (January 2020)*. Almost 20,000 children and young people took part in the research.

The research outlines how difficult life has been for our children and young people and specific feedback from children aged 3-7 notes how they missed their friends, families, and experiences.

Our young people noted the importance of their local communities, and the majority could see themselves staying in their respective areas in the future.

*“Dwi’n caru fy Ysgol, a dwi eisiau gwneud yn siŵr bod fy mhlant i yn ddisgyblion yma.”*

Climate change was a concern and pupils in our rural areas explained that they had enjoyed seeing nature reappear during the first and second lockdown and that seeing aeroplanes in the sky again had reminded them of the action needed.

# Childhood challenges

## Adverse Childhood Experiences

We need to seek to build healthy relationships, families, and communities. During school years, children experiencing Adverse Childhood Experiences (ACEs) may display a heightened emotional state of anxiety and consequently be distracted from educational pursuits, resulting in poor educational attainment.

Early in 2016, Public Health Wales published the first Welsh ACEs study. Examples of ACEs include physical or sexual abuse or where there is mental health, parental separation or alcohol or drug abuse in the household.

The study revealed that 47% of adults in Wales have suffered at least one ACE in their childhood and 14% suffered four or more. It highlighted the correlation between harmful experiences in childhood and poor well-being outcomes in adulthood.

The study results show that compared to those who experienced no harmful experiences, people who experienced four or more harmful experiences in childhood were four times more likely to experience high-risk drinking in adulthood, be six times more likely to be a smoker and five times more likely to have low mental well-being. ACEs are associated with poor educational achievement and the development of a wide range of other harmful behaviours too, such as risky sexual behaviour, violence and crime. They are also linked to the development of diseases such as diabetes, mental illness, cancer, and cardiovascular disease, and ultimately to premature mortality.

Factors that can reduce the risk of outcomes related to poor well-being in those who suffered four or more ACEs include positive relationships, community support and cultural connections. There is also a strong correlation between sports participation in childhood and lower lifetime mental illness.

Home Office funding from the 'Early Action Together Programme' benefited our county by creating a foundation of understanding across partner agencies including a common use of terms and understanding of resilience factors to counteract the effects of ACEs. This was achieved through multi-agency training events. We have adopted a strengths-based approach when undertaking assessments to ensure that resilience factors feature within any intervention plan.

## Children known to social services

The number of children who are looked after by the local authority in Carmarthenshire is the lowest in Wales. In March 2021, there were 148 Looked After Children, which equates to 40 per 10,000 population compared to the Welsh average of 115. This number has significantly reduced, steadily decreasing year on year since 2014 as more families have been supported to stay together. This has been despite the increased challenges faced due to the COVID-19 pandemic. This is positive news as looked after children are more likely to have been exposed to multiple



risks associated with poor long-term outcomes before entering care and are more likely to report emotional well-being issues and perform less well at a school.

The poorer mental health and well-being outcomes for these young people can be a result of past experiences of abuse, neglect and difficult relationships as well as the potential trauma of the process of being taken into care and experiences such as frequent or short notice moves between placements.

The fall in numbers is a result of our continued focus on preventative work, with robust systems in place to keep children safe in the home, preventing them from being looked after where possible and appropriate.

The number of children on the child protection register was 78 at March 2021, a similar number to the previous two years. It does tend to fluctuate and had increased to 95 at end September 2021, with recent times proving to be very challenging due to the pandemic. Families have faced difficulties in relation to safeguarding issues when under lockdown and adhering to restrictions. Domestic abuse has also increased substantially during 2020/21 and features highly in cases of children on the register. The register is important in monitoring children at risk of harm and maintains a safety plan that keeps them safely at home wherever possible.

A reduction has also been seen in the number of Children in Need – now known as being in receipt of care and support. These children are getting support from the statutory service but remain living at home. In our county, there were 764 on 31 March 2021 compared to 809 on 31 March 2016 when the last Well-being Assessment was completed. The latest figure was an increase from 589 in March 2020 after a period of year-on-year reductions. This is attributable to the pandemic as families have faced increased struggles, including an increase in domestic incidents resulting in more children needing support.

During the pandemic there was also less availability of preventative services providing face-to-face support for families and so there has been a decrease in the number of cases being able to be stepped down from statutory services in 2020/21 to these preventative services. Numbers have also increased as the nature of referrals for support has been increasingly complex so statutory support has been needed and some families opted out of receiving support during the pandemic waiting for restrictions to lift and therefore resulting in an increased number of cases at the end of March 2021.

## Child Poverty

Carmarthenshire is now seeing its highest levels of child poverty in recent years which is a similar pattern across Wales. In 2020, 31.3% of our children aged up to 15 were living in households with less than 60% of the average income before housing costs. This was just above the Welsh average of 30.6%. An increasing trend has been seen over the last six years and our levels have remained higher than the Welsh average each year.

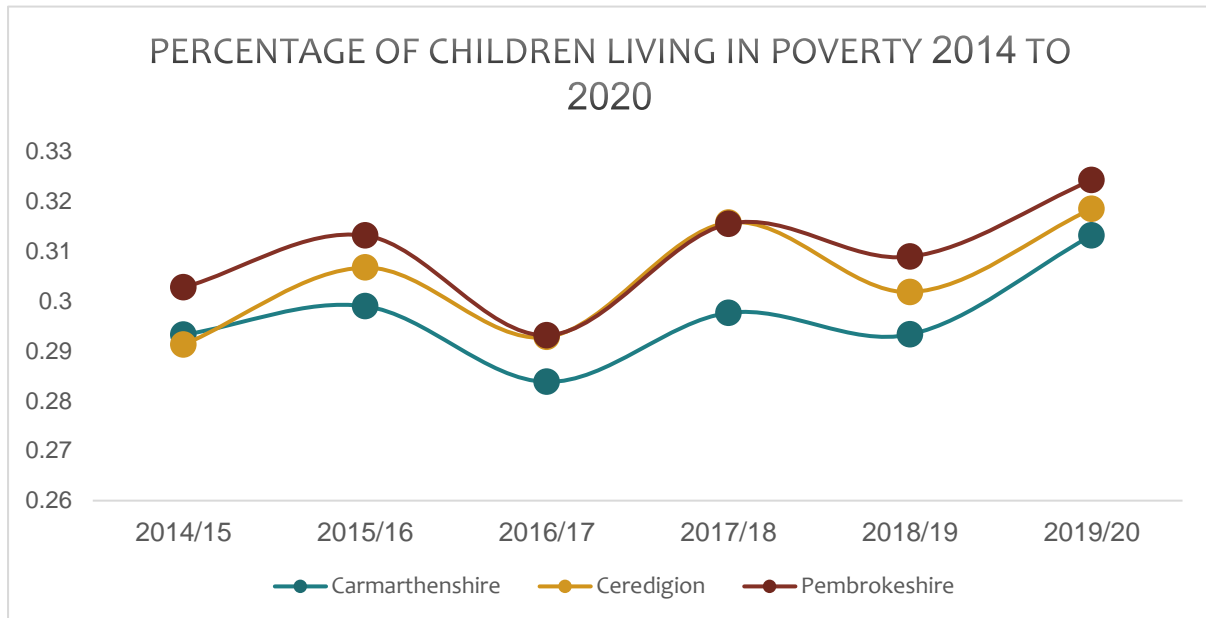


Figure 7: Graph of children living in poverty

Two of our wards – Tyisha and Glanymor – were in the top 20 worst wards for childhood poverty in Wales, both at 41.3%.

The number of children living in workless households is 8.8%; a rate which has seen significant annual reductions in recent years from over 15% in 2015. The county is still ranked 2<sup>nd</sup> lowest and is well below the Welsh average of 13.5. This is a positive trend with more households seeing parents in employment but should not be treated in isolation of the fact that more children are living in poverty within our county, regionally and nationally in Wales.

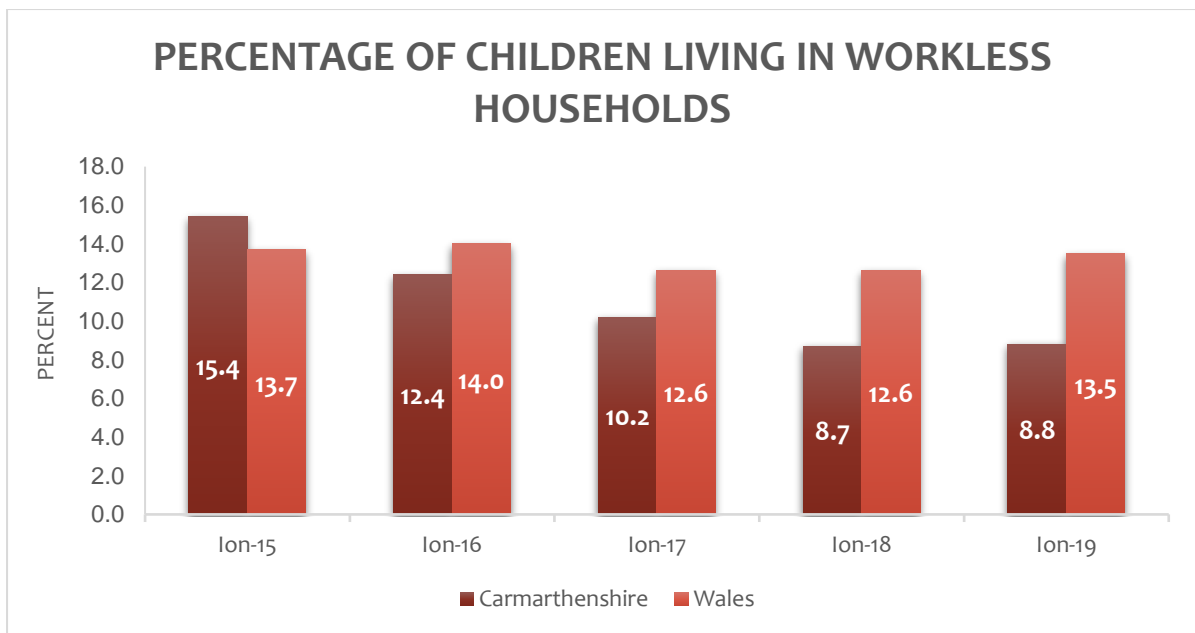


Figure 8: Graph of children living in workless households.

However, it is concerning to see Future Trends Report data to 2020 which shows that the rate of poverty in households, where all working age adults are in work, has increased. This shows a concerning trend that being in work does not necessarily pull households out of poverty.

Research shows that children growing up in workless households experience consistently poorer outcomes in relation to educational attainment and cognitive ability than their counterparts whose parents are always working. Those whose parents had been out of work for two or three years while they were growing up spent more time not in education, employment, or training between ages 15 to 18 than children from households of different employment compositions (Schoon et al, 2012). However longitudinal evidence indicates that there are often several risk factors at play which create negative outcomes and well-being for children from workless households. It is therefore important that we view these issues in context to gain a holistic understanding and therefore develop accurate responses and preventative measures to challenges posed to the well-being of children now and in future.

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## ENGAGEMENT RESPONSES

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Poverty was a key issue affecting the well-being of year 7 pupils from Ysgol Bro Dinefwr and was the second highest concern about their local area as they grow up, as seen later in this section.

## Childcare

Our latest Childcare Sufficiency Assessment (CSA) (2017-22) identified that cost was the most important factor (27.8%) identified by the 33% of parent/carers who were not using registered childcare. This number is an increase on the 27% who did not access paid childcare in the 2013 Survey that was undertaken to inform the 2014-17 CSA. Costs have continued to increase, both pre- and post-pandemic with rises in utilities, wages and pensions and additional cleaning and PPE costs needed since 2020.

Family and friends provided informal childcare for those 33% of parent/carers who were not using registered childcare.

However, the CSA 2017-22 consultation carried out with 102 grandparents, highlighted the growing role grandparents are playing in providing informal childcare with 90% providing childcare on a regular basis. 41% are looking after their grandchildren once or twice a week and 33% providing childcare for 3 or 5 days a week. 43% stated they were providing more childcare this year compared with the previous year.

## Growing up healthy

### Play

The 2022 Play Sufficiency Assessment is exploring why families value play, the barriers which prevent children and young people from playing and the impact of the COVID-19 pandemic. In the context of the assessment play is wide reaching and covers leisure and recreational activities.

The parent and carer survey, undertaken in 2021, that supports the assessment found that 61% of families value play more as a result of the pandemic with discussions in focus groups highlighting the important role of play in children's physical health, mental health, and well-being. 61% of survey respondents say that the pandemic has made them value play more. However, 64% say COVID-19 has resulted in their family playing less.

A blend of indoor and outdoor play is popular with families with the top four places for play being 'in a play area with swings, slides and other equipment to play on' (68%), 'in our friends house or garden' (57%), 'in our house or garden' (54%) and 'indoor play centre' (40%).

72% of parents highlight barriers which make it difficult for their children to play, these include; road traffic (49%), litter/dog mess and broken glass (35%) other adults (29%) and the pandemic (28%). Parents and carers are concerned about their children's safety with 36% of survey participants saying, "I often worry and so I sometimes find it difficult to let them play out" compared to 6% who stated "I don't worry, I let them play out all the time."

43% of families want to play more and encouraging children to play and providing high quality play opportunities for all children contributes to developing resilience which in turn will help mitigate the negative effects of ACEs. Play is also a means of reducing the inequalities between children living in families that can afford costly play activities and those that cannot.

## Obesity

Carmarthenshire is the 5<sup>th</sup> worst county in Wales for levels of childhood obesity. The latest figures show a concerning spike in obesity in children, following a downward trend which had been seen since 2014/15. In 2018/19, almost a third of children aged 4 to 5 were overweight or obese. Our figure of 30.4% for this period showed a 4% rise on the previous year and was 3.5% higher than the Welsh average.

Obesity causes ill health including diseases of the heart and circulation as well as some cancers and causes early death. There is an increased rate of Type 2 diabetes among obese children. Evidence shows that 80% of children who are obese at age 4-5 years remain obese into adulthood. This is a particular concern as estimates suggest that being overweight reduces life expectancy by about three years and being obese reduces life expectancy by 10 years. Obesity is more prevalent in deprived areas. A 6.2% difference is seen between the prevalence of obesity in children of this age living in the least deprived quintile compared to those living in the most deprived quintile in Wales and there is evidence that this gap is growing.

One of the primary methods of tackling increasing levels of obesity in children is through encouraging them to engage in physical activity. The Sports Wales School sports survey in 2018 showed an increase in the percentage of children in Carmarthenshire taking part in at least three occasions of activity per week from 46.9% in 2015 survey. We improved our ranking from the 16<sup>th</sup> to the 10<sup>th</sup> highest in Wales. When taking part in team sports, our pupils noted that they felt free and without worry.

## Childhood concerns

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### ENGAGEMENT RESPONSES

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Our youth service engaged with 160 year 7 pupils from Ysgol Bro Dinefwr in October 2021 to talk to them about their views on well-being.

When asked about what had affected their well-being, COVID was the issue that had had the most impact with 142 mentions. The young people had felt isolated and very lonely and were affected by not being able to see their friends or leave the house due to lockdown restrictions. They had enjoyed having quality family time but were concerned about future lockdowns.

Climate change was the next highest area of concern (130) with strong views expressed. The engagement was carried out as part of a wider discussion surrounding climate change on that day. We are confident that the views of our young people are well represented but context should be considered in this instance. This was followed by depression and anxiety (102) from being in lockdown and not communicating with others. There were also concerns raised about fitting in with their peers. Other issues raised were bullying and cyber bullying over social media (93), poverty (76) with some saying that their families needed more money for food and clothes and body dysmorphia (67) with boys and girls talking about how they feel about their body or appearance.

Bullying also affects young people's mental health, emotional well-being, sense of self and their ability to connect to society which, if extreme and sustained enough can have lifelong consequences. In addition, the complicated bi-directional nature of mental health and bullying, i.e., some young people are bullied as a result of their mental health issues and some young people develop mental health issues as a consequence of being bullied, means that some of the most vulnerable children are at increased risk of long-term impacts.

When asked what help they needed, getting support was the key suggestion (135) and although they mentioned different people, they could get support from, they were very unsure who to reach out to. It was clear that the young people needed one trusted adult that they could confide in (73).

A concerning issue raised was wanting more money for food (71) as several young people were worried about the effect it was having on their family. Help with bullying (62) was also an issue and stemmed back to having a trusted person to talk to. Outdoor learning (52) was suggested as they felt they could express themselves better and learn more.

When asked what their biggest concerns were about their local area as they grow up, the top issue raised by the young people was jobs (118) followed by poverty (112) and the environment (105). Other concerns discussed were housing (21) and community spaces (12).

The biggest problem facing the world right now was climate change according to the young people (122), followed by nature emergency (20), famine (15) and war (3).

# National Well-being Indicators

Noted below are the National Well-being Indicators and associated local indicators relevant for the Childhood life stage:

Ref No	Indicator Definition	Year	Rank out of 22 Authorities	Score, Wales average and change since last result	
				Carms	Welsh Avg
5a	Proportion of children aged 4 to 5 years who are overweight or obese	2018-19	18 <sup>th</sup>	30.4%	26.9%
				Declined	
5b	At least three occasions per week of extra-curricular and community sport. (Schoolyears 3-11)	2018	10 <sup>th</sup>	47.7%	47.6%
				Improved	
7a	Average "Capped 9" score for all Year 11 Pupils	2019-20	6 <sup>th</sup>	367.2 score	354.4 score
				Improved	
7b	Average "Capped 9" score for non-FSM (Free School Meals) Year 11 pupils	2019-20	6 <sup>th</sup>	384.2 score	376.2 score
				Improved	
7c	Average "Capped 9" score for FSM Year11 pupils	2019-20	6 <sup>th</sup>	315.6 score	298.9 score
				Improved	
7d	% gap between FSM and non FSM pupils on the "Capped 9" score	2019-20	7 <sup>th</sup>	19.6%	22.9%
				Improved	
18b	% of children living in workless households	2019	2 <sup>nd</sup>	8.8%	13.5%
				Improved	



# YOUTH





## Growing independent adults

The transition from childhood to adolescence is a challenging one which brings a number of changes and fluctuations in our experiences and understandings of well-being and its influences. A key part of adolescence is forging our identity and individuality which is influenced by a multitude of relationships, external factors, hormones, hobbies and interests. It is vitally important that an individual has plenty of opportunities to gain new experiences and learn new things throughout adolescence. The importance of understanding the value of our natural environment is key to becoming responsible citizens, while also being aware of the opportunities it can provide and the challenges in tackling the current climate and nature emergencies.

### Broadening horizons

Support for our school children to gain the skills and learning they need to lead happy, healthy, fulfilling lives has continued in difficult circumstances.

### Welsh-medium education

Carmarthenshire continues to develop robustly as a bi-lingual authority with inspiring Welsh-medium education offered to all learners. Schools, families and learners are effectively supported as they progress along the language continuum, with Welsh Language centres providing a high standard of Welsh language immersion support.

### Examinations

Formal examinations for A Level, AS and GCSEs for summer 2021 were cancelled by the Welsh Government. Schools and colleges used their professional judgement to determine learners' grades for qualifications, using a range of evidence from the specification content their students had been taught. As 2021 was a unique year due to the pandemic, this will need to be taken into consideration when comparing results.

In 2021, there was an increase in A Level entries and an upward trend across all grades. An increase in the number of grades being awarded A\* or A was seen with a rise of 8.5% at A\* and 5.3% for A\*-A grades.

Whilst there was a decrease in the number of AS entries in 2021, the level of attainment sees an upward trend in comparison to 2019. Similarly, an upward trend was evident in 2021 across all grades at GCSE.

The last published average score based on the best 9 exam results including English, Welsh and maths, for Year 11 pupils during 2019/20 (2018/19 Academic Year) is 367.2 where girls had an average score of 378.5 and boys 356.4. This is an improvement on the previous year and well above the Welsh average of 354.4

While the educational attainment of children in Wales has improved overall, children living in deprivation show poorer attainment on all performance measures and is particularly prevalent in the attainment of grades A\*-A. The gap is seen to increase as pupils progress through school. The

gap between the average score for best exam results of young people living in deprivation (measured by eligibility for free school meals) and young people who do not receive free school meals is measured. The percentage gap in our county was 19.6, the 7<sup>th</sup> lowest, compared to the Welsh average of 22.9. The work is ongoing to look at how to measure progress and well-being across all our learners and this continues to be a development area.

Compulsory education is changing in Wales. The changes will fully come into force from September 2022 with a new curriculum and it will be interesting to see the impact of this on attainment levels. The new curriculum is being introduced as attainment levels in Wales and levels of achievement do not meet expectations or societal needs. The new curriculum aims to provide young people with the skills they will need in the future. The delivery of this ambitious change will be an opportunity to prepare young people for the world of work through the development of softer skills. The involvement of businesses with schools will be essential going forward and will build on the successful Business Class and Education Business Exchange programmes.

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## ENGAGEMENT RESPONSE

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Carmarthenshire school pupils were also comparative to the national average in terms of their general well-being, with an average of 85% of pupils being satisfied with their lives. About three quarters of pupils felt generally supported in terms of their emotional needs, with 35% of pupils reporting having been bullied, which is also directly comparable with the national average. Bullying and cyber bullying over social media was also a key issue raised by 7 pupils from Ysgol Bro Dinefwr when asked about what affected their well-being as part of our engagement work in 2021. More information on the engagement event is available in the childhood section.

### Elective Home Education

During the pandemic, an increase has been seen in the number of children being home schooled in Carmarthenshire. Numbers are currently at 455 (November 2020, up from 284 in November 2018). Welsh Government funding has been utilised to provide additional support for electively home educated learners. Welsh lessons are also continuing to be offered to home educated young people and are split into three groups: Beginners, Intermediate and Advanced. Feedback from parents notes that the pandemic has given them confidence to fully transition to elective home education.

### Not in Education, Employment or Training (NEET)

Work continues towards ensuring all young people are in education, employment or training. Reducing the number of NEET young people reduces the effects of poverty and the wider cost to society of support services, reliance on benefits and offending. It is essential to maximise the life opportunities of children, ensuring that as many young people as possible can progress to school Sixth forms, Further Education Colleges, apprenticeships, training provision or work.

During 2019/20 Academic Year, 32 school leavers (1.8%) were recorded as NEET. While this still remains just above the Welsh average, it is half the number reported in the last well-being assessment of 69 pupils (3.4%). This significant reduction could be attributed to the Youth Engagement and Progression Framework which focuses on the early identification of 'at risk' individuals and promotes targeted support for those that need it.

## First Independence

Throughout adolescence, as curiosity meets opportunity, there are various experiences on offer to young people, not all of which can have positive outcomes or effects on well-being.

### Smoking

Responses from the 2017/2018 School Health Research Network (SHRN) suggest that the Carmarthenshire figures on all school pupils who currently smoke less than once a week were very low, at 2%. The highest percentage was 5% for year 11 pupils.

E-cigarette use was significantly higher with 43% of year 11 pupils noting that they had tried them. Alcohol use was the only behaviour where Carmarthenshire pupils admitted to a slightly higher use than the national average, with 49% of all pupils admitting to drinking alcohol, 3% higher than the national average. This figure is as high as 78% in year 11 pupils, again 3% higher than the national average. Cannabis use was very low with only 3% of all pupils reporting having used cannabis in the last 30 days. However, 18% of all pupils noted that they had been offered cannabis in the last 12 months.

### Substance misuse

The pandemic and resulting lockdowns and schools' closures had a significant impact on numbers getting support for substance misuse due to the reduced access to young people and schools and colleges being one of their main sources of referrals.

During 2020/21, the young person substance misuse service in Carmarthenshire received 45 referrals for young people aged under 18. This was a 37% drop on the 71 referrals received for the same period in 2019-20.

During the same reporting period, there were 37 young person assessments, which was a 40% reduction on the 62 assessments completed in 2019/20.

The two main substances recorded for referrals received by young person services during the same reporting period were cannabis which came top at 52%, followed by alcohol at 28%.

On average our brains keep growing and developing into our mid-20s. Taking drugs and drinking alcohol can affect the development of the brain, particularly the prefrontal cortex, the area of the brain used for decision making. Taking drugs at an early age increases the chances of becoming addicted. There is also an increased chance of developing health problems later in life, such as heart disease, high blood pressure and sleep disorders.

## Sex and relationships

According to the SHRN data from 2017/18, a quarter of the county's school pupils in year 11 reported having had sexual intercourse which was the same as the national average, and the most common age for having had sexual intercourse for the first time being 15 years of age, the same as the national average. 15% of those who had had sexual intercourse reported having had sex for the first time when younger than 14, which is 5% lower than the national average.

While pregnancy and parenthood are positive choices for some young people, for others, unintended pregnancy can have negative social and psychological consequences. Having children at a young age can affect the health and well-being of young women and can limit educational and career prospects. Socio-economic disadvantage can be both a cause and an effect of young parenthood.

The teenage pregnancy rate is decreasing in Carmarthenshire and is currently at 14.8 per 1,000 females aged under 18. This figure is below the Welsh average of 18.9.

## Making Connections

### Young People

Chatting and being with friends is the most popular activity for young people (aged 12 to 17), with 84% of respondents stating that 'play and hanging out' made them happy in the Carmarthenshire Play Sufficiency Assessment Young People Survey 2021. Opportunities to spend time with friends also made young people feel excited (43%), free (42%) and active (43%). 44% of young people say they hang out with friends most days, with popular activities including chatting and being with friends (64%), going to the cinema (38%), exploring (34%) and spending time with family (30%).

Popular places to spend time with friends include local grassy area or field (37%), play area with swings or slides (27%), the beach (29%) and the streets where they live (25%).

The biggest barriers to hanging out with friends are 'there's nothing to do here' (38%), 'I don't go out if it's rainy or cold' (37%) and the pandemic (37%). 57% of young people who took part in the survey think there is not enough for them to do in their community. 62% would like to hang out and play more, with 59% saying 'transport to get there' would help them do this.

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## ENGAGEMENT RESPONSES

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A total of 6,436 or 67% of students across 12 schools in our county took part in a School Health Research Network (SHRN) survey in 2017/18. The survey was also underway in our schools during September 2021, with results expected during 2022. Data covered pupils' behaviours in the following areas - food, fitness and physical activity, well-being and emotional health, substance use and misuse and sex and relationships. The data from 2017/18 generally revealed that Carmarthenshire pupils were comparable to the national average in almost all areas surveyed.

The survey found that younger pupils were generally more likely to engage in healthy behaviours regarding food, fitness and physical activity. For example, 65% of year 7 pupils were likely to eat breakfast every day compared to 46% of year 11 pupils. Younger pupils were also more likely to be physically active and less likely to be sedentary. This reflected the national average across the age groups.

## Loneliness and Isolation

According to the WCPP briefing on Loneliness and Isolation and data from the ONS, one in six of the population is lonely. For all age groups, higher deprivation aligns with higher levels of loneliness. Those aged 16-24 living in the 20% most deprived areas of Wales are the loneliest. However, amongst younger people, those with a long-term illness, disability or infirmity are 2.5 times lonelier than the national average. By comparison, for those younger people living in the least deprived areas or in very good health, levels of loneliness are significantly lower. Older age groups are typically less lonely. However, this is not the case for those in very bad health.

Interventions based on age alone, rather than on cohorts within particular age categories, may not reach the people who need them.

Physical activity has positive impacts on lifetime well-being but during COVID, a general decrease has been seen in children's levels of physical activity. The decrease has been comparatively greater for children living in low-income areas.

## Young carers

According to the 2011 Census, 1,803 young people (aged up to 24 years) were providing unpaid care in Carmarthenshire. Research has shown that young carers are more likely to achieve poorer educational outcomes – which is a key determinant of later well-being. Carers aged 16–18 are twice as likely to be NEET compared to their peers. In Wales in 2020, 45% of young carers reported that they were not able to spend enough time on their schoolwork and 58% felt that their education was suffering. 36% of young adult carers said that their education was suffering, impacting on their hopes and opportunities for the future.

In 2019/20, 87 young carers were supported by social services. Figures dropped to 71 in 2020/21, during lockdown, but referrals have significantly increased since April 2021. During 2020/21, the Carers Trust Crossroads West Wales service, who work with young carers referred on to them by social services, supported 151 young people aged under 18 and 63 young adult carers aged up to 25. The service also noted a decline in referrals during the initial stages of the pandemic, but the support required by those already on the service rose significantly and has continued to stay high despite the ease in restrictions. Many have found their caring role to have increased during this time due to the increased isolation and the loss of respite care. This is only being added to as more families are being asked to take on higher caring roles to ease the pressures on hospitals and cover for the lack of social care packages available. These pressures are largely showing themselves in a decline in the mental health of young carers, with them feeling more isolated and a significant number struggling to balance their caring role with their education. Research has shown that almost half (45%) of young adult carers suffer from mental health problems.

Common issues that have been raised by young carers upon referral are anxiety as well as a sense of isolation and a lack of understanding amongst their peers and teachers. In response, Crossroads West Wales recently established a team to visit schools and colleges to educate the staff and pupils about Young Carers and the support that can be offered to them, with the aim of improving knowledge and understanding.



## Migration of young people

The average migration of the population of Carmarthenshire over the last 5 years:

Table 5: Net Migration

Age Range	In	Out	Net
0-15	581	487	+94
16-24	910	990	-80
25-44	1273	1180	+93
45-64	756	565	+191
65+	405	307	+98

The only age range that has had an average net migration over the last five years is in the 16-24 range. Young people often look further afield for education and training as they approach their 20s. Flying the nest is a normal part of becoming an independent adult; however, it is important to attract young people to learn and work in the area. According to the Future Trends Report, it is forecasted that there will be a reduction in the population of under 25s across the country as well as in Carmarthenshire. The ageing population forecast for Carmarthenshire could result in less people available to work across all sectors.

## Involving our Young People

The importance of access to training and jobs was highlighted by the Carmarthenshire Youth Council in Autumn 2020, in the annual 'Make Your Mark' event, the biggest UK youth consultation. Young people voted online to cast one vote for the topic they cared about most in their county and a topic which was the most important for them in the UK. In Carmarthenshire, the local issue with the most votes (21.3%) were access to training and jobs. 'Jobs' was also the top concern raised by Year 7 pupils from Ysgol Bro Dinefwr when asked about their concerns about their local area as they grow up. More information on the engagement event is available in the childhood section.

The second local issue was homelessness with 20.9%, see the adulthood section for further information. Domestic violence was the 3<sup>rd</sup> highest with 17%. The Carmarthenshire Youth Council has also voted for domestic abuse as their priority issue for this year, wanting to research the topic to give a young people's perspective on the issue.

Domestic violence has a devastating impact on the well-being of children and young people that can continue to affect their adult lives. This has been recognised by the recent Domestic Abuse Act, which recognises children as victims themselves.

## Mental Health

Concerns over mental health has also been a key issue raised by young people. In the ‘Make Your Mark’ consultation, supporting their mental health was voted the topic of most importance to the UK, by a third of our Youth Council representatives. During the well-being session held with the Police & Crime Commissioner’s Youth Forum with five young people from Carmarthenshire, mental health featured highly in the comments made. When asked what well-being means to you, two of the four comments made by the young people were around mental health – one about looking after their mental health daily and the other related to the importance of mental health during the pandemic when they had not been able to socialise and interact and learn from others. When asked about concerns for the future, one of the five people spoke about mental health and needing the tools to recognise when things may be going wrong.

Research by the Children’s Commissioner for Wales shows that the COVID-19 pandemic has impacted significantly on the emotional and mental health of young people. When agreeing with the negative statements as part of the survey, 63% of 12–18-year-olds agreed that they were worried about falling behind with learning and 61% agreed that they were worried about how the pandemic could affect their qualifications.

It is also important to highlight that many 12–18-year-olds did not know where to go for help and support for their mental health, beyond their friends and family.

Other than mental health, when asked about future concerns, the other four members of the Police & Crime Commissioner’s Youth Forum, spoke about the environment – beaches, climate change, wildlife and pollution. Taking action on the Climate Emergency was also voted for by the Carmarthenshire Youth Council as their 3<sup>rd</sup> highest topic of most importance in the UK, with 9% of the votes, as noted in the Adulthood section.

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### ENGAGEMENT RESPONSES

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The following concerns are reflected in the prosperous section of the 2021 Well-being Survey. Lack of affordable housing (57%) (346 responses) and suitable job opportunities (52%) (312 responses) were the two biggest concerns amongst respondents on the economy in the future. Respondents aged 16-24 stated their concerns were:

- Lack of suitable job opportunities (71%)
- Lack of training and skills that fit the needs of the local economy job/market (71%)
- Lack of affordable housing (71%)

Although the loss of young people from the county was not a specific concern, if the relevant training and skills required in the current economic market is not met along with suitable job opportunities and affordable housing then we will suffer from losing our youth to other areas/countries.

The two biggest concerns in relation to the thriving language and culture of Carmarthenshire is house prices being unaffordable for local people 72% (413 recipients) and young people moving out of the local area/Wales to study/work 56% (322 recipients)

The other key issue for the UK, raised by our Youth Council was ‘free university’ which was second with 23%.



# ADULTHOOD





Our adult years are when we are physically mature and at our physical peak. During adulthood, we start to settle down and become more stable emotionally. As we progress through adulthood, we become more autonomous, further establishing ourselves as an independent person with our own life. We gain a fuller appreciation of our natural environment and both the positive and negative impacts it can have on our lives. The natural environment supports our economy, provides jobs and continuity of essential services and recreational opportunities. Accessible high quality natural resources are essential components of our health and well-being. Improving air and water quality, reducing flood risk and driving forward a Green Recovery is essential to our future resilience as we strive to mitigate against and tackle the nature and climate emergency.

## Well-being

Well-being findings results from the Office of National Statistics (ONS) 2019/20, so pre-pandemic, show that there is an increase in people feeling anxious and a decrease in the number feeling happy and satisfied, levels which are worse than those for across Wales and the UK. The number feeling life is worthwhile has a general upward trend and is currently equal to the scores for Wales.

## Making ends meet

On 31 March 2021, the Socio-economic Duty came into force in Wales. The overall aim of the duty is to deliver better outcomes for those who are living in less favourable social and economic circumstances than others in the same society – this means that they are facing socio-economic disadvantage.

The Duty places a legal responsibility on bodies when they are taking strategic decisions to have due regard to the need to reduce the inequalities of outcome resulting from socio-economic disadvantage.

The WCPP Brexit and COVID-19 briefing tells us that when an individual suffers a loss of income it has a bigger impact on their well-being than if they were to see a gain in income. This is particularly important when considering the dual affect that Brexit and COVID-19 have had on the economy in Carmarthenshire and Wales and the long-term impacts that we are likely to see come from this.

## Income

The median annual household income of £28,186 for Carmarthenshire is below that of the Wales figure of £28,999. Figures in Carmarthenshire are now the 9<sup>th</sup> lowest in the whole of Wales, compared to being the 7<sup>th</sup> lowest when the last Well-being Assessment was completed five years ago. Our gross disposable income per head in 2018 was £16,813, 12<sup>th</sup> lowest compared to rest of Wales but below the Welsh average of £17,100.

Income levels vary across the county, and it is important to note the gap of over 22% between the highest and lowest Community Area figures; from Community Area 2 with £31,455 which is well above Carmarthenshire and Wales figures, to Community area 6 with £25,770. The disparity between levels of poverty across the community areas ranges from 30% of households living in poverty in Community Area 2 compared to 39.5% in Community Area 6.

Of the 10% (190) most deprived Lower Super Output Areas (LSOA) in Wales, 5 are within our county. The top 4 are within Community Area 6 and the 5<sup>th</sup> in Community Area 5:

Table 6: The five most deprived areas in Carmarthenshire

LSOA	Carmarthenshire Ranking	Wales Ranking	Community Area
Tyisha 2	1	17	6
Glanymor 4	2	68	6
Bigyn 4	3	84	6
Tyisha 3	4	144	6
Llwynhendy 3	5	172	5

Poverty

Over a third of our households continue to live in poverty which is a concern. However, it is positive to note that the percentage of households in Carmarthenshire living in poverty has reduced by 2% in the last five years since the last Well-being Assessment. In 2020, 33.8% (27,691) of Carmarthenshire households were living in poverty, and this continues to be above the Welsh average of 32.9%. This ranges from 30% in Community Area 2 to just under 40% in Community area 6.

Poverty and deprivation have serious detrimental effects, impacting across all aspects of well-being. It limits the opportunities and prospects for children and young people and damages the quality of life for all. Poverty is too often an intergenerational experience which poses a significant threat to experiencing positive well-being both now, and in the future.

Department for Work and Pensions data on the percentage of each age group in Wales living in relative income poverty shows that 22% of working-age adults in Wales (2017-2020) were living in relative income poverty. This percentage remains steady in Wales but is still above that seen for other UK countries.

As food prices, energy bills and general costs continue to rise across the UK it is becoming harder for households to stay above the poverty line. This is compounded by the fact that wages are not rising to meet the extra costs. This means that more working households are experiencing poverty.

An estimated 144,504 households are at risk of being in fuel poverty in Wales, spending between 8% and 10% of their household income on fuel costs. This is equivalent to 11% of households in Wales. Data is not held regarding the estimated levels of fuel poverty by local authority area.

Our conversations with representatives from the Gypsy and Traveller Community have noted concern in terms of fuel poverty amongst the population. Fuel poverty is an area we would like to explore further, especially in context of our protected groups.

## Employability

Increasing employability is fundamental to tackling poverty and reducing inequalities. It has a significant impact on our health and ability to function in our everyday lives.

Information from the Annual Population and Labour Force Survey March 2021 shows the percentage of employment in different occupational breakdowns within the county.

1: Managers, directors and senior officers	10%
2: Professional occupations	19%
3: Associate professional & technical occupations	11%
4: Administrative & secretarial occupations	8%
5: Skilled trades occupations	12%
6: Caring, leisure & other service occupations	14%
7: Sales & customer service occupations	9%
8: Process, plant & machine operatives	7%
9: Elementary occupations	10%

Data from Business Register and Employment Survey (BRES) 2019 indicated that the majority of posts in Carmarthenshire are full-time (63%) and the leading employment industries are human health and social work activities and wholesale and retail trade, repair of motor vehicles and motorcycles and manufacturing.

Commuting patterns from the Annual Population Survey 2020 indicate that 62,600 people live and work within Carmarthenshire, 16,200 commute out of Carmarthenshire for work and 14,900 commute into the area for work. These figures could, of course, have changed dramatically since the pandemic.

According to Stats Wales in March 2021 Carmarthenshire has the third lowest rate in respect of employment compared to the rest of Wales. Employment rates have reduced from 71.7% in March 2020 to 68.6% (year ending March 2021). This is amongst the lowest in Wales and below the national average of 72.2%. However, these figures are not unexpected and demonstrate how challenging this year has been for the labour market, the highest employment rate is recorded in Monmouthshire at 78.3%

The difference between the employment rate of disabled and non-disabled residents in Carmarthenshire continues to be a concern. The employment rate for those without a disability (77.1%) continues to be considerably higher than those with a disability (49.7%). This is a disability employment gap of 27.4 percentage points which is below the national average disability



employment gap of 30.8. This is an improvement on the situation five years ago when the gap in the employment rate was 34.4 percentage points locally.

### Working age population

Carmarthenshire has seen a downward trend of working aged people who are economically active since 2017 from 79% to 74% in 2020. This is opposite to the increase seen across Wales. This decline in our county significantly increased in 2020, which is likely attributable to the pandemic whereby labour force participation has been under significant stress. Perceptions of key sectors and work in general have been detrimentally affected with wider national level research suggesting that Wales will continue to see rising economic inactivity levels through to 2023. The Future Trends Report forecasts a continued decline in the working age population (16-64) in Wales of 2% by 2043.

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## ENGAGEMENT RESPONSE

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In our conversations with the Carmarthenshire Disability Partnership, members discussed economic and social well-being and highlighted the fact that many disabled people were continuing to shield and did not have the confidence that public spaces were safe. This was seen as a potential barrier to employment and in accessing services for support to return to employment and training.

### Job creation and retention

On a positive note, we saw an increase of 23% in the number of jobs created in Carmarthenshire between 2001 and 2018 - the third highest increase across Wales and the highest seen in the more rural counties. The main sectors recruiting before 2018 were health and social care, retail, education and tourism and hospitality, what could be classified as the foundational economy sectors. This aligns with the fact that there are less workless households in Carmarthenshire than previously. It should be noted that this has not come with a decrease in levels of poverty as poverty in households has increased even where all working age adults are in work - as noted in the childhood section.

However, challenges have been seen during the pandemic in this area with a cumulative total of 26,900 jobs supported by the Coronavirus Job Retention Scheme at various times since it started. The furlough rate decreased at a consistent rate from January 2021. There were still 2,960 individuals on furlough in the county in August 2021.

Recruitment levels, however, in recent months have exceeded pre-pandemic levels as the period of economic recovery has progressed. Vacancies are concentrated in Health and Social Care, Tourism and Hospitality, Transport and Logistics and Construction. A number of key sectors are reporting that they are currently experiencing acute recruitment challenges with anecdotal

evidence suggesting that attributable reasons include the pandemic, Brexit, perceptions of sectors and unattractive working conditions.

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## ENGAGEMENT RESPONSE

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As part of our involvement work, we met with service users and providers from our Armed Forces community. Organisations from across the region noted an increase in contact from Veterans in terms of job retention, furlough and the economic impact on their households. Many service users had faced challenges in terms of their mental health and some situations had triggered Post Traumatic Stress Disorder (PTSD). It also became apparent that even though Veterans want to retrain, the pandemic has had an impact on educational and training opportunities. Service providers highlighted that the full impact of the pandemic had not yet been seen and that the Armed Forces community needs clear and consistent advice through the transition period, as life returns to a level of normality.

There have also been delays in applications for financial support and benefits, which has led to an increase in requests for emergency support for food and basic staples for families. Delays have also been seen across the region in terms of housing benefit which could potentially lead to an increase in homeless Veterans owing to emergency provision in housing coming to an end.

According to the WCPP briefing paper on Brexit and COVID-19 we can expect to see the agriculture and food sector and the tourism sector continue to be affected by Brexit. These industries are large employers of Carmarthenshire residents and play an important role in the economy of the local area. The situation will need monitoring to ascertain the real impact that Brexit will continue to have on people's lives.

### Claimant count

The number of people claiming Job Seekers Allowance in the county has declined in the last 12 months from 0.8% of the working age population in September 2020 to 0.4% in August 2021. The highest rate in that month of 0.8% was located in Felinfoel situated in Community Area 5 and Garnant within Community Area 3.

The Jobseekers' Allowance claimants for the community areas for August 2021 indicates that Community Area 1 had the lowest rate in the county with 0.2% whereas Community Areas 3 and 6 had a higher rate, 0.6% and 0.5% respectively, compared to the figure for Wales of 0.3%.

### Well-being in work

Being happy in work is important for well-being and the latest figures in April 2019 showed that the percentage of people moderately or very satisfied with their jobs was 79% - but this was over

3% lower than both the figure two years previously and the Welsh average. This ranked Carmarthenshire the 6<sup>th</sup> lowest in Wales. A number of factors can affect job satisfaction therefore it is difficult to determine the exact cause of falling rates in the county.

### Qualifications and training

In Carmarthenshire, we have seen an increase in the level of qualification at National Qualification Framework (NQF) Level 3 since 2015 to a figure of over 62% in 2020, which is just above the Welsh average. For those reaching NQF level 4 or above in Carmarthenshire, figures have increased slightly from 33.7% in 2015 to 40.7% in 2020, just below the average in Wales (41.4%). The number with no qualifications is continuously reducing, with Carmarthenshire ranked 10<sup>th</sup> in 2020 with 6.6% compared to the Welsh average of 7.3%.

Increasing qualifications levels will continue to be a key policy area for Welsh Government as skills levels are a key determinant of economic growth. A number of interventions delivered via EU Structural Funds within the county such as ReAct, Cam Nesa and Skills for Industry are focussed on upskilling and reskilling individuals. Additional factors could be possible improved progression routes within education, increased investment in lifelong learning and targeted interventions for young people aged 16-24 at risk of becoming NEET.

## Lifestyle choices

Lifestyle choices impact on our future health and well-being. Carmarthenshire residents compare well to the rest of Wales in some areas such as smoking and physical activity, however, there are a number of lifestyle choices where we compare poorly.

### Exercise and physical activity

We have the 4<sup>th</sup> lowest figure for reporting exercise or physical activity for less than 30 minutes per week – 27.6% compared to the Welsh average of 33%. We rank 6<sup>th</sup> highest at 35.1% for the percentage participating in sporting activity 3 times or more a week but this remains below the Welsh average of 32.2%.

### Smoking

We have seen a year on year reduction in smoking rates since 2013/14 and now rank 6<sup>th</sup> with only 16% of our population smoking in 2019/20. However, there are areas in the Health Board area where rates of smoking have not changed, for example, in parts of Llanelli, 27-31% of the adult population still smoke. Smoking rates are nearly 3 times higher in the most deprived fifth of Wales compared to the least deprived fifth of Wales. The gap has narrowed in the last 8 years.

The reduction in smoking is due to legislation in Wales to reduce access to and the visibility of tobacco products and reduce exposure to tobacco smoke in enclosed spaces and cars carrying children. This is coupled with increased investment in smoking cessation services in both health care and community settings.

A slight reduction has been seen in the use of e-cigarettes by adults to 6.7%. We remain the 7<sup>th</sup> highest in Wales, just above the Welsh average.

We have the 5<sup>th</sup> worst figure in Wales for the percentage of adults who have fewer than two healthy lifestyle behaviours at 12.4% and worse than the previous result of 8.8% and the Welsh average of 10%.

## Obesity

Being overweight and obese has an impact on life expectancy, morbidity, mortality and health and social care costs. According to the National Survey for Wales Carmarthenshire has the 7<sup>th</sup> highest number of adults who are overweight or obese (18/19 & 19/20) of 63.6%, this is an increase of almost 6 percentage points from a result of 57.8% in 16/17 & 17/18. The current figure is well above the Welsh average of 59.9%. When looking at the obesity rates in isolation, we have the 6<sup>th</sup> highest obese adult population – 28.2% (18/19 & 19/20), an increase of almost 6 percentage points since 16/17 & 17/18.

Mild obesity is associated with the loss of 1 in 10 potential disease-free years during middle and later adulthood (40-75), and severe obesity the loss of 1 in 4. This increasing loss of disease-free years as obesity becomes more severe occurs in both sexes, among smokers and non-smokers, the physically active and inactive, and across socio-economic groups.

Studies have also demonstrated a relationship between adverse childhood experiences (ACEs) and adult obesity. Persons who had experienced four or more categories of childhood exposure, compared to those who had experienced none, had 1.4-to-1.6-fold increase in physical inactivity and obesity. As with children, higher incidences of overweight and obesity are also found in adults who live in more deprived areas.

Before the pandemic, national initiatives encouraged more activity and participation in a healthy diet and raising awareness of health risks, such as 'Healthy Weight, Healthy Wales'.

Obesity is an area we would like to research further.

## Alcohol and substance misuse

In 2018/19 & 2019/20, we had the 3<sup>rd</sup> highest percentage of adults in Wales who drink more than the recommended guidelines. This was an increase of 1.5 percentage points to 21.5 since 2017/18 & 2018/19 compared to the Welsh average of 18.6%.

As a result of the pandemic and subsequent lockdowns, a reduction was seen in both the number of referrals received for support with alcohol and drug issues and the number of assessments completed in 2020/21 compared with the figures for 2019-20.

In 2020/21, the number of alcohol referrals was 540, a reduction of 3.75%, with 525 assessments undertaken, 10.5% fewer than in 2019/20. For drug referrals, the figure was 553, 1% lower and 552 assessments were done, a reduction of 2%.

Impacts were also seen on the number of cases where treatment was completed. During the same period, the figure was 431 for alcohol, which shows an 18% reduction, and 389 for drugs, a fall of 12%.

The three main substances clients were referred into adult drug and alcohol services for support with, in 2020/21 were alcohol, which came top at 35%, followed by heroin at 13.4% and cannabis at 10.2%.

## Part of a community

Well-being is affected by the area in which you live and according to the 2020/21 National Survey for Wales almost 90% of our residents are satisfied with their local area as a place to live. Over 90% are satisfied with their ability to get to/access the facilities and services they need which is a significant increase on the previous figure of 75% in 2018/19 now ranking 4th out of the 22 local authorities in Wales.

### Community Cohesion

According to the 2020/21 National Survey for Wales, our residents feel that they live in cohesive communities with almost 70% agreeing that there is good community cohesion in their local area, an improvement on the previous figure of just over 50% in 2018/19 and very close to the Wales average. Almost 80% feel that people in their local area treat each other with respect, higher than the Wales average of 75%.

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## ENGAGEMENT RESPONSE

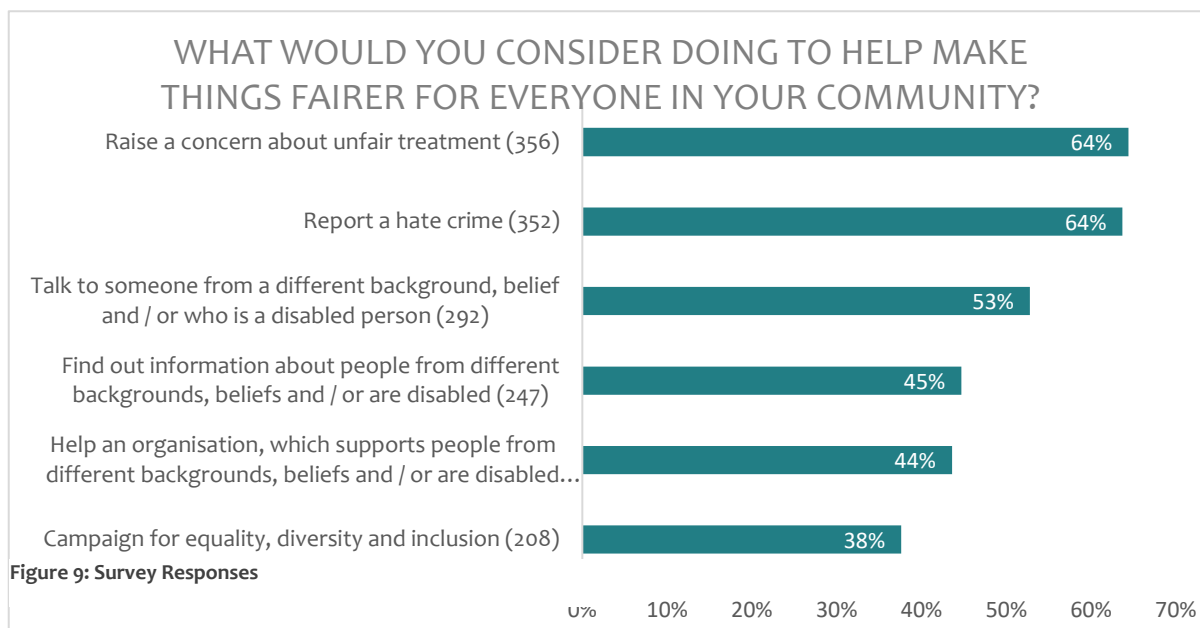
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Recent consultation in 2020 with representatives from a number of sectors of the community showed overall positive opinions towards current community cohesion in Mid and South-West Wales. Focus groups were held with Black, Asian and Minority Ethnic communities; EU (non-Welsh) citizens, rural and isolated communities, first language Welsh speakers, Gypsy / Traveller Communities, Syrian Refugees, LGBTQ+ people, disabled people and/or people with health conditions and young people. 77% of the interviewees referred to community cohesion as good. It was recognised that there was potential for improvement and perceived “tensions”, or “problems”.

63.7% perceived Brexit as having a negative impact on community cohesion in Mid and South-West Wales. However, positive attitudes were shown towards the impact of COVID-19 on community cohesion although there were concerns about the longevity of the positive impacts, with concerns around different rising negative impacts. 67.3% of survey respondents believed that community cohesion had either improved (40%) or not changed (27.3%) since the beginning of the pandemic.

As part of our Well-being Assessment consultation work, our Black, Asian, and Minority Ethnic residents were equally concerned with threats of extremism, prejudice and hate crime. In terms of community cohesion, our Lesbian, Gay, Bisexual and Transgender community noted concern regarding community resources being closed, prejudice and lack of investment in their local community.

Raising concern about unfair treatment and to Report a hate crime were the top two things that Carmarthenshire residents would consider doing to help make things fairer for everyone in their community when asked as part of the 2021 Well-being Survey.



## Hate Crime

Victim support has seen an 11% increase in the number of people seeking support after experiencing a hate crime during 2020-21 compared to 2019-20. The majority of these incidences were race and nationality related (71%), an increase on the previous year.

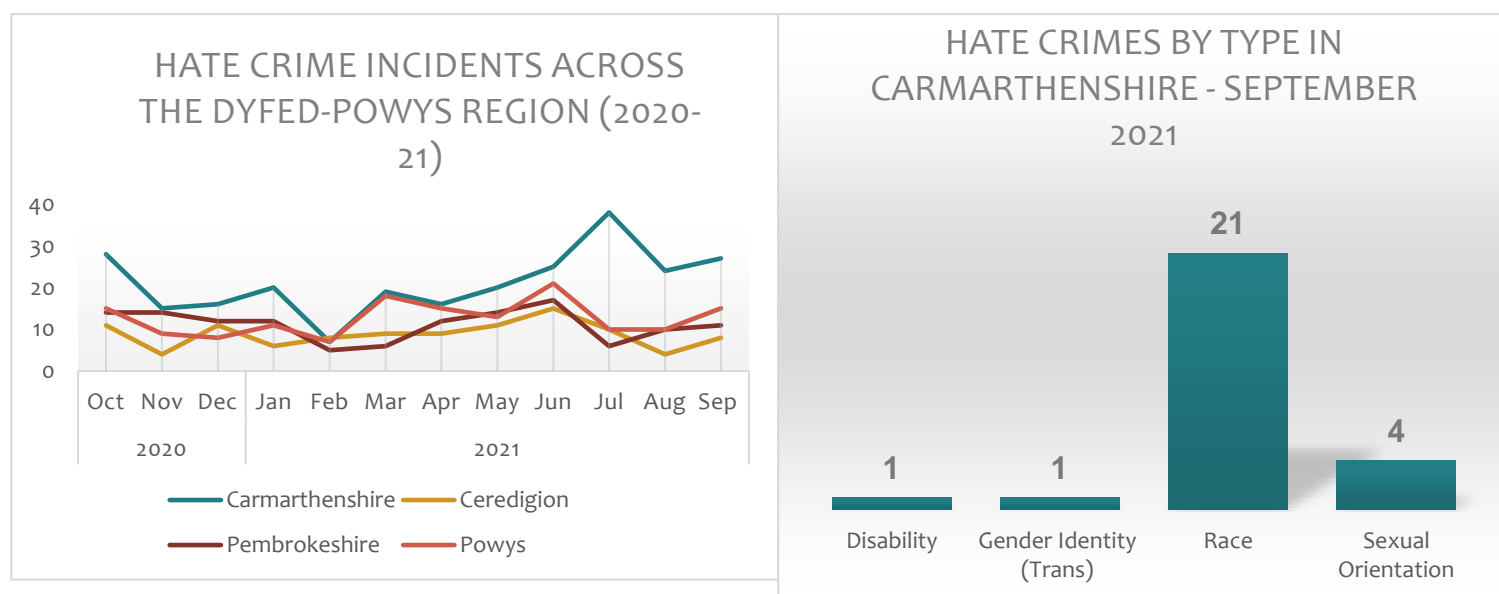


Figure 10: Hate Crime Figures; source Victim Support

## Community Safety

The county remains one of the safest areas in the UK and Dyfed-Powys the safest Police Force area in England and Wales with the lowest crime rates. Of 22 local authority areas, Carmarthenshire ranks 9<sup>th</sup> safest with a rate of 65.18 crimes per 1,000 population.



There were 12,305 crimes reported in the county in 2020/21, a slight increase of 1% on the previous year. Increases were seen in relation to violence against the person – up from 5,147 to 5,770; drug offences – up from 680 to 896; and public order offences – from 852 to 1,211. It is noted that the increase in violence against the person is primarily due to a change in recording of harassment and stalking offences. The increase in drug offences will have been affected by the increased proactivity by the police during the lockdown period.

Of the 10% (190) most deprived Lower Super Output Areas (LSOA) in Wales, six are within Carmarthenshire in terms of Community Safety. This domain considers deprivation relating to living in a safe community and covers actual experience of crime and fire, as well as perceptions of safety whilst out and about in the local area. Not surprisingly these cover the three community areas of our biggest three towns of Llanelli, Carmarthen and Ammanford.

Table 7: Crime Volumes 2020-2021 by Community Area

LSOA	Carmarthenshire Ranking	Wales Ranking	Community Area
Tyisha 2	1	17	6
Carmarthen Town South 1	2	19	1
Elli 2	3	30	6
Ammanford 2	4	43	3
Tyisha 3	5	86	6
Glanymor 4	6	97	6

According to the 2020/2021 crime figures received from Dyfed Powys Police, Community Area 6 has the highest level of recorded crime with violence against a person being the highest of all. The area includes the wards of Bigyn, Elli, Glanymor, Hengoed, Lliedi and Tyisha which are located in some of our most deprived areas within the county.

Crime Volumes by Community Area 2020/2021	Community Area 1	Community Area 2	Community Area 3	Community Area 4	Community Area 5	Community Area 6
Arson & Criminal Damage	207	143	217	174	207	412
Burglary by Dwelling	39	39	48	63	57	143
Burglary by non-dwelling	21	12	15	20	14	40
Drug Offences	188	87	155	77	116	271
Miscellaneous Crimes against Society	58	41	54	34	47	77
Possession of a weapon	21	5	17	3	13	29
Public order offences	236	109	188	157	160	322
Robbery	1	1	1	3	3	14
Sexual offences	56	52	75	59	50	110
Theft	345	139	147	126	187	464
Vehicle offences	26	33	53	29	61	112
Violence against another person	805	601	829	836	1915	1616
<b>Annual Total</b>	<b>2003</b>	<b>1262</b>	<b>1799</b>	<b>1581</b>	<b>2830</b>	<b>3610</b>

In response to their concerns in respect of community cohesion, respondents stated that they were mainly concerned with:

- Lack of investment in their communities (72%)
- Community resources being closed down (66%)
- The voice of local communities not being heard (54%)

Respondents from Community Area 5, those aged 45-54 and those who were expecting or had a baby in the last 6 months were mainly concerned with 'feeling unsafe and afraid of crime'.

### Domestic abuse, domestic violence and sexual violence

Police recorded crime figures note that there were 2,779 victims of domestic abuse between 1st November 2020 and 31st October 2021 in Carmarthenshire. While the reported crime figures remain similar to the previous year, there has been a significant increase in the numbers of referrals to specialist services since the pandemic. This includes a high focus on community-based support and support for children and young people. Numbers have steadily increased throughout the pandemic and show no sign of decline.

This is an area we would like to research further.

The pandemic has had a significant impact on the nature and severity of domestic abuse, domestic violence and sexual violence. Lockdown and restrictions resulted in isolation and cut individuals off from support networks, opportunities for disclosure and access to face-to-face support. We cannot begin to estimate the true impact this has had on the lives of individuals, or the increased levels of abuse suffered. It is evident that throughout the pandemic and during periods following the easing of restrictions, referrals have spiked and continue to rise. It is not known if this a temporary increase in demand or will be a sustained increase in need.

There has been an increased complexity in support needs seen with mental health issues contributing to individuals needing longer and more intense periods of support. Housing has also been identified as a key issue in increasing complexity around support due to a lack of move on and second stage accommodation and a general lack of domestic abuse specific supported accommodation that meets diverse and individual needs of individuals.

The specialist support providers are managing to meet current demand through increased capacity funded by very short-term funding via a variety of sources and the good will of their committed teams. However, this is not sustainable. The impact on the workforce of the increased caseloads and in complexity also needs to be considered. There is a national issue around recruitment into the field with a lack of qualified candidates.

### Feeling safe

However, importantly, in terms of public perception of safety, the National Survey for Wales 2018/19 figures show that the number feeling safe was 76.1%, ranking 7th of the 22 Local Authorities. That figure was lower than the previous survey in 2016/17 of 76.9% when we ranked 6th. Responses from the Well-being survey indicated that people Feeling safe in their home and in their community were the highest things people valued about living in their communities.

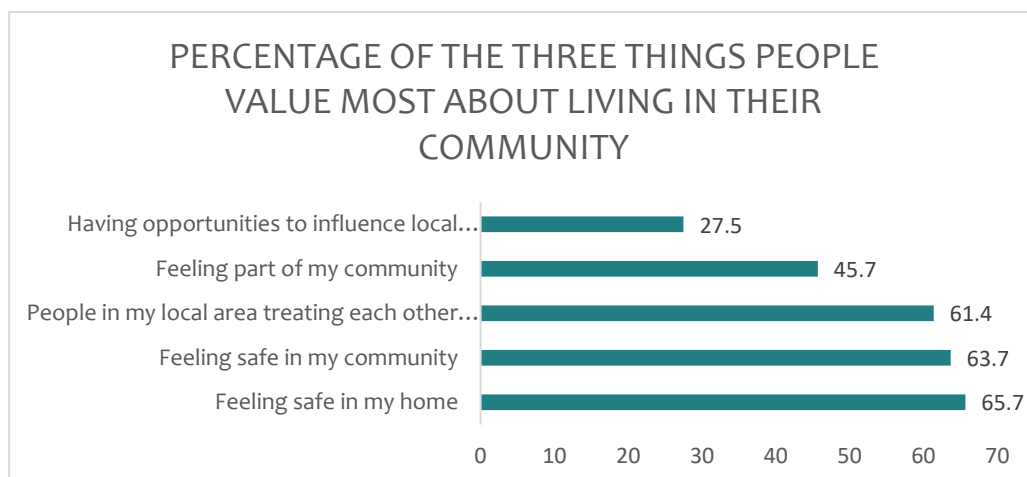


Figure 11: Survey Responses

A slight increase has been seen in the number of incidents of fire with 543 incidents during 2020/21 compared to 530 the previous year. The main incident category was 'outdoor refuse' related with 137 incidents, of which 90 were categorised as deliberate. These outdoor refuse related fires have continuously increased over the last 5 years and are now higher than the number of dwelling fires. The higher number of incidents take place between March and May.

The number of deliberate fires is on the increase in Carmarthenshire with 220 incidents in 2020/21 compared to 143 in 2016/17. The highest number of deliberate fires in Carmarthenshire in the latest figures was in Community Area 6 which consists of Glanymor and Tyisha wards. The areas of Carmarthen Town North, Cynwyl Gaeo, Cilycwm and Llandovery, in Community Areas 1 and 2, have no records of deliberate fires for this period, although the numbers in Community Area 2 are on the increase as shown in the table below:

Table 8: Deliberate Fires

<b>Deliberate Fires by Community Areas</b>	<b>2016/17</b>	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>	<b>2020/21</b>	<b>Total per Community Area over 5 years</b>
Community Area 1	10	18	14	15	10	<b>67</b>
Community Area 2	8	7	15	9	22	<b>61</b>
Community Area 3	24	23	28	29	46	<b>150</b>
Community Area 4	22	20	42	20	27	<b>131</b>
Community Area 5	34	51	47	65	41	<b>238</b>
Community Area 6	45	59	48	58	74	<b>284</b>
<b>Total</b>	<b>143</b>	<b>178</b>	<b>194</b>	<b>196</b>	<b>220</b>	

The number of road traffic collisions in Carmarthenshire have been consistently high at around 200 per year between 2016/17 and 2019/20 but a significant reduction was seen during 2020/21 when the figure was 117. This coincides with the number of people Killed or Seriously injured on Carmarthenshire roads which halved to 55 during 2020/21. COVID-19 lockdown during 2020 has

had a dramatic effect on this data with far less traffic on the roads. However, despite the reduction, we still have the 3rd highest number of people killed or seriously injured on our roads which, at 3468km or 2155 miles, is the second largest network and the third most trafficked in Wales. As the number of vehicles return to pre-pandemic volumes, it is likely that an increase in the number of people killed or seriously injured will be seen.

## Housing

### Affordable housing

Good quality, energy efficient and affordable homes promote health and well-being, helping to build sustainable communities and create places where people want to live.

There is a need for more affordable homes in the county. There has been a 27.1% increase in the average house price for a first-time buyer in Carmarthenshire between 2016 (£112,497) and 2021 (£142,919).

This is an area we would like to research further.

Data published by the ONS (August 2021 in terms of chargeable second homes in Carmarthenshire, indicates that there are 1,087 properties in the county. The highest proportion (19% of properties) being in St. Ishmael, Llangyndeyrn and Llanddarog, followed closely with 18% in the areas of Laugharne, Llansteffan, Llanboidy and Whitland.

### Homelessness

Homelessness, and the risk of homelessness, poses significant risk to a person's well-being, negatively impacting on emotional, mental and physical health as well as indicating poor social and economic circumstances.

The Housing (Wales) Act 2014 implemented new duties on Councils in relation to homelessness. Prior to its implementation, the legal duties for Councils focussed on those priority households who became homeless and then only if they passed a number of 'tests' that would determine if they were legally entitled to assistance. From March 2020, however, the COVID-19 pandemic meant that we would have to treat all households who are homeless or threatened with homelessness as 'priority need' and that we would have a duty to house them.

In Carmarthenshire, 1921 households presented as being homeless or threatened with homelessness during 2020/2021. The main reasons why people contacted us are families will not accommodate them, notices from landlords and relationship breakdowns. From the 380 cases where we were able to carry out prevention work, we were able to prevent 46% of households from becoming homeless. Whilst our prevention has increased this year (50%), preventing homelessness has become more difficult with there being more people with complex housing issues and people leaving it until a point of crisis to contact the Council for help when they are facing housing difficulties resulting in little opportunity to prevent homelessness.

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## ENGAGEMENT RESPONSE

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Members of the Carmarthenshire Disability Partnership highlighted the importance of arts and culture during the pandemic. Being able to access digital opportunities supported mental health and well-being and members valued the ReConnecting project through the 50+ Leadership Group. It's also important to note that members were concerned about reintroducing face to face sessions, on grounds of safety but also in terms of venues being inaccessible and lack of transport.

Early intervention and prevention must be our key priority moving forward. We want to ensure that homelessness is rare, brief and unrepeatable. Due to the complexities of the people presenting we will need to continue to work closely with our partners. This is to ensure there is specialist support and services for people with complex needs including mental health and substances misuse conditions, those who have a history of offending and have difficulties in maintaining tenancies. We need to establish what additional resources are required to reduce offending in the County and more collaborative work for young people to help them remain at home until they are ready for independent living, improving access to support and assistance for those fleeing domestic abuse and where necessary sourcing appropriate safe housing.

The number of households successfully prevented from becoming homeless was 23.9 per 10,000 which was the 4<sup>th</sup> lowest in Wales, a similar ranking to the previous two years. This compares poorly with other areas in Wales and the Welsh average of almost 50%.

In the youth consultation, 'Make Your Mark' in 2020, representatives from the Carmarthenshire Youth Council, stated that homelessness was their second highest topic they were concerned about locally. For more information on this consultation, see the youth section.

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## ENGAGEMENT RESPONSE

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In our conversations with the Armed Forces community, Housing and Homelessness were key issues in terms of Social Well-being. Quality, affordable housing is a significant issue, especially in the context of Veterans who are ready to move on from supported housing.

### Cultural activities

Enjoying our spare time by doing the things that make us happy is key to ensuring we have positive well-being. Research has shown that, in general, people in Wales who regularly attend or participate in cultural activities are more likely to report higher subjective well-being and potential mental health benefits are seen.

It is interesting to note that participation does vary according to a number of factors and those less likely to participate include those aged over 75, those on low incomes and people from Black or Asian backgrounds. However, Welsh speakers are more likely to participate in arts and sports events.

## Arts, museums and heritage

There are many opportunities to engage in cultural activities in our county. In 2019/20, overall, our residents were active in pursuing such activities across Wales. Some increased levels of activity were seen compared to the last Well-being Assessment figures shown in brackets. 68% (60%) of residents attended art events, 69% (64%) visited historical sites and 42% (42%) visited museums. We rank 10<sup>th</sup> compared to the rest of Wales for participating in arts events and 8<sup>th</sup> for museum attendance. Residents are particularly active in visiting historic places, ranking 4<sup>th</sup> in Wales. The average number of visitors to Council-owned museums and theatres alone are over 250,000 per annum up to 2019/20 prior to the pandemic.

It is noted, however, that when looking at more frequent participation in cultural activities, Carmarthenshire is ranked lower at 19<sup>th</sup> out of the 22 local authority areas. For the overall percentage of people attending or participating in arts, culture or heritage activities at least 3 times in the past year, our figure is 64% compared to the Welsh average of almost 71%.

In Wales, research on the experience of community groups during the pandemic suggests that place and interest-based groups can help alleviate loneliness and provide a sense of purpose.

## Welsh language

We have the most Welsh speakers in our county compared to the rest of Wales. It is interesting to note that the ability to speak Welsh is associated with higher subjective well-being. According to the last Census in 2011, which is the only source that gives a whole population figure, 43.9% (78,000) of our residents can speak Welsh. This was a significant decline from the 2001 Census. During 2013 research was undertaken and analysis of Census data was commissioned, and in March 2014, 'The Welsh language in Carmarthenshire' report was published as an analytical document which identifies the reasons for the decline across the county. Through this work, it became apparent that the factors vary significantly across the county and linguistic planning needs to be tailored for each of our community areas.

As part of the Welsh Language Standards, a Promotion Strategy was drawn up and embedded in the work of the county Strategic Forum. Implementation to fill initial gaps identified was immediately initiated. New mapping was undertaken, the Priority Areas project was collaborated, a new leaflet was produced to promote Welsh-medium education and a questionnaire was produced and administered to ascertain the awareness of the county's residents of the Welsh language.

During 2022-23, the forum is leading on a detailed assessment of the first Promotion Strategy. Information from this assessment, alongside the Well-being Assessment and results from the 2021 Census, will form the evidence base for the second Promotion Strategy. This is also a timely



opportunity for reflection on the revised Welsh in Education Strategic Plan and the Welsh Government 'Cymraeg 2050' policy document and action plan.

In 2019/20, over 30% said they spoke Welsh daily and speak more than just a few words. This was a slight increase on the previous figure and ranked us 4<sup>th</sup> in the data available from 11 local authority areas, three times higher than the average.

The number of Welsh speakers, in Wales, aged 3 and over is projected to increase from around 562,000 when the last Census took place to approximately 675,000 in 2049.

Welsh speakers report higher life satisfaction than non-Welsh speakers. The reason why is not clear, however, it may be that geography plays a role, as areas with higher proportions of Welsh speakers tend to have higher average well-being scores and somewhat lower well-being inequality than less Welsh-speaking areas. Rural areas tend to have higher numbers of Welsh speakers and higher average well-being.

When analysing our surveys responses, it is interesting to note that respondents who noted that their first language was English, also had various Welsh language skills. Of those, 21% could speak Welsh, 41% could understand Welsh, 18% could read Welsh and 13% could write Welsh.

Of these respondents, 53% would consider learning or improving their Welsh language skills and 24% would support their children through a Welsh medium education.

## Mental Health

### Mental Health

Mental ill health is something that one in four adults will experience in the course of their lifetime. Our mental health affects how we think, feel and act. Looking after our mental health is as important as our physical health, the link between the two factors of health is becoming increasingly better understood. Poor psychological and emotional well-being can act as a barrier to full participation in society. Issues such as confidence, anxiety, fatigue and stigma can limit an individual's capacity to interact with others or to find work for example.

The number of admissions to mental health facilities in Hywel Dda University Health Board is between 750-900 admissions annually. During 2019-20, the number of admissions to HDUHB health facilities dropped by 20.5% to 717, from the previous year. This drop in admissions is likely due to service changes as opposed to a decrease in demand.

Data from Public Health Wales is gathered from the National Survey for Wales and analysed according to the Warwick-Edinburgh Mental Well-being Scale. "The Warwick-Edinburgh Mental Well-being Scales were developed to enable the measuring of mental well-being in the general population and the evaluation of projects, programmes and policies which aim to improve mental well-being." Prof Sarah Stewart-Brown.

Well-being in Carmarthenshire has improved in line with the rest of the country. The Carmarthenshire score is representative of the average for Wales and the highest in the HDUHB region.

Table 9: Warwick-Edinburgh Mental Health Scores

Area	2016-17	2018-19
Carmarthenshire	50.2	51.1
Wales	50.9	51.4

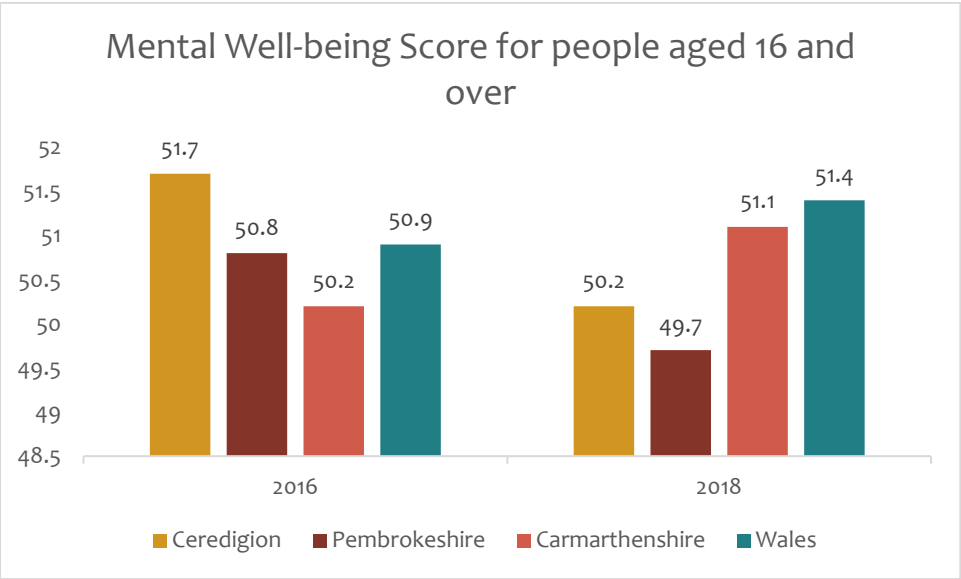


Figure 12: Mental Well-being

Source: National Survey for Wales (Data Unit Cymru)

While the proportion of adults worrying ‘a lot’ about their mental health and well-being increased across the board during the COVID-19 pandemic (from 13% in May 2020 to 31% in January 2021), those living in more deprived areas, women and younger people showed higher levels of worry.

## ENGAGEMENT RESPONSE

As part of the preparation of the Well-being Assessment and the Population Needs Assessment, WWAMH have facilitated many discussions with voluntary organisations, people with lived experience of mental health and carers. Carers/families are often excluded from the support planning and discussions but are often the main source of crisis and acute support. Some families/carers have felt the impact of many face-to-face mental health services being closed and having to cope on their own without any direct support. It has been difficult for carers and families to be separated from family members due to lack of visiting on mental health hospital wards over the last 18 months and some of the wards and individuals have struggled with access to video calls.

People with lived experience of mental health have struggled with limited face to face support options and accessing services via phone and video call. Some of the reasons given for struggling with video calls, telephone calls etc is for some people who are hearing voices, seeing things, having delusions. It can be very difficult to work out what is real and what is not. Some people struggle with paranoia and feel people are talking about them, some struggle with the technology and lack confidence to use it.

Another barrier is access to IT equipment and/or poor internet connection. Some people do not have the financial means for a telephone and internet connection and many places with free Wi-fi have been closed over the last 18 months. There are also concerns that these locations may not be a safe, confidential place. However, others have reported that the use of video meetings and calls has helped increase access to mental health and social activity support and they have learnt new skills. Some people have reported that for them due to their anxiety about leaving the home that video calls have helped with accessing things that would previously have been inaccessible.

Conversations also highlighted difficulty in accessing face to face GP appointments over the last 18 months for mental health support and difficulty of being able to discuss mental health needs over video or phone.

There has been an increase in the complexity and intensity of the support needs of people coming forward for mental health support, so often a range of issues such as mental health and drug and alcohol issues, homelessness and mental health, and mental health and autism will be presented.

Some people feel that social mobility and equality are worse over the last 18 months and the inequalities that have previously been identified have widened significantly.

Suicides

We have one of the highest suicide rates in Wales – the fourth highest number of suicides per county with 22 deaths in 2019. There is a general upward trend in male suicide rates, in the over 65’s and in children in young people. It is believed that rates are increasing, however we are awaiting more current data. We know from recent data published by the Mental Health Foundation that there has been an increase in suicidal ideation during the pandemic.

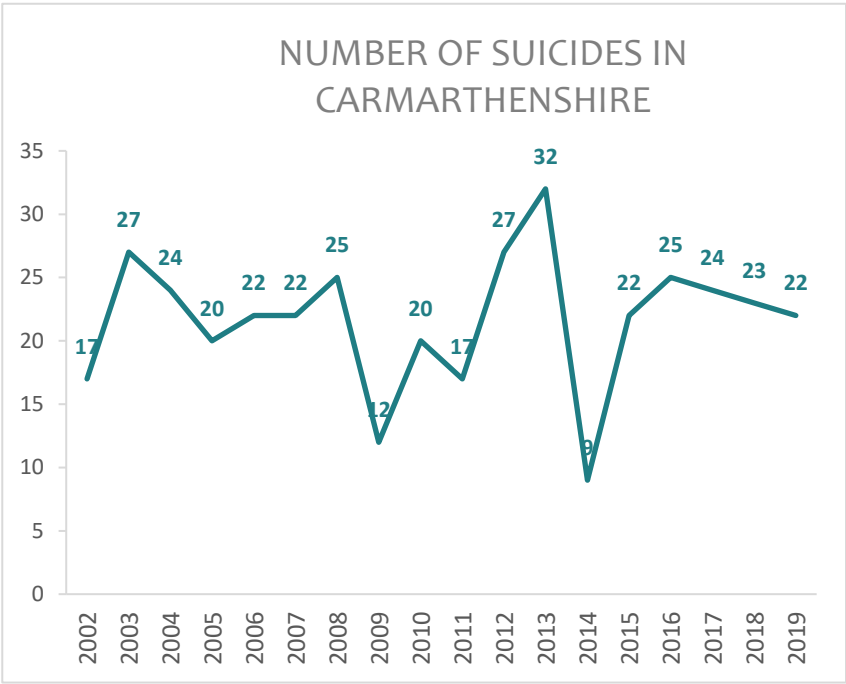


Figure 13: Suicide Rates

Suicide prevention is a priority for social care and safeguarding in Carmarthenshire.

Further feedback from WWAMH, in terms of Crisis support and support out of hours (9am-5pm) is reported by some to be very difficult to access at times and others report poor response as a result of going to A and E due to suicidal thoughts and feelings and no aftercare support. Difficulties with Crisis and Home Treatment Teams at times and some people reporting not meeting criteria for any ongoing mental health support, assessed by CRHT but no follow up. Although some people report excellent support and care during the last 18 months with face-to-face support and follow up support and calls.

## Carers

The Census 2011 identified 23,989 unpaid adult carers living in Carmarthenshire – 13,390 were providing up to 20 hours of care per week, 3,485 were providing between 20-49 hours per week and 7,114 carers were providing care for more than 50 hours per week. Research suggests an increase in the number of unpaid carers in Wales from 1 in 6 people to 1 in 4 people.

The demands of caring can place significant pressures on carers impacting both their physical and mental health and well-being. 72% percent of carers in the UK report mental ill health as a result of caring, and 61% report suffering from physical ill health. Carers in the UK also report being twice as anxious as the general population, are seven times more likely to be always or often lonely compared to the general population; and report a level of happiness at one-third of that of the general UK population. The relationship between caring and well-being differs, depending on, among other things, the type, frequency and duration of care being provided.

Carers have been disproportionally affected by the pandemic with disruption to vital services and respite care. Lockdown restrictions have also meant that carers have been unable to rely on wider family members, friends and community support to help with caring responsibilities and to alleviate some of the pressures of providing significant amounts of care for their loved ones.

Since the pandemic, the local support service has witnessed more carers reaching out for support and presenting with high levels of anxiety and stress. This increase has placed significant demands on services, with figures from October to March 2020-21 compared to the same period the previous year, showing the Carers Information Service seeing a 114% increase in referrals to 537 and the Carers Outreach Service a 141% increase to 227.

Our involvement conversations were structured on the four domains of Well-being - economic, social, cultural and environmental. In discussion with our Welsh Language Strategic Forum, members highlighted the importance of the relationship between the economy and the Welsh language.

To attract and retain our future generations, there needs to be a variety of employment opportunities and we must prepare our young people in terms of digital skills. Carmarthenshire has a good platform on which to build those opportunities and with developments such as Yr Egin, the future is promising in terms of building digital skills through apprenticeship and graduate opportunities.

Members noted that we are over-dependant on public sector employment and that further investment is needed in the private sector and in social enterprises to ensure a variety of career paths. The importance of digital connectivity across the county was also highlighted.

### Survey Responses:

Respondents that stipulated they provided caring duties stated that their main concerns were:

- Continued cuts to public services 77% (100)
- House prices being unaffordable for local people 76% (95)
- Lack of investment in our communities 73% (92)
- Families facing food poverty and concerned about affording food 69% (85)
- Not having access to healthcare or other support that I need, as close to home as possible or available through technology 62% (81)
- Loss of green spaces 57% (75)'Talent drain' to other areas/countries 46% (61)

Respondents of a working age 16-64 stated that their main concerns for the county were:

- Poor digital infrastructure
- Ability to adapt and be resilient to climate change
- People feeling threatened by those who may be different from them
- Not being able to stay living in my own home
- Lack of respect
- Lack of Welsh education schools/colleges
- Referrals of potential victims of modern slavery in Wales increasing

## Environment

Carmarthenshire is celebrated for its natural environment, including magnificent coastal sand dunes, quiet estuaries, steep wooded valleys and rugged uplands. Natural heritage – including the countryside, a particular geographical situation, and the interaction between people and nature throughout history – is an important component of cultural well-being. Evidence suggests that participating in outdoor recreational activities is associated with better subjective well-being. The County has a rich network of ‘designated’ (protected) sites; protected at a national or international level, these include our Special Protection Areas and Ramsar sites, our National Nature Reserves, and Sites of Special Scientific Interest.

The UK Climate Risk Independent Assessment (CCRA3) Summary for Wales assesses the actions that need to be taken on the 61 areas of risk and opportunity outlined in the technical report. Of these, it is advised that 32 require immediate action. These are spread across every section: Natural Environment and Assets, Infrastructure, Health, Communities and the Built Environment, Business and Industry and International Dimensions.

From the report “Inequality in a Future Wales: Areas for action in work, climate and demographic change” it is clear that we must address the potential for widening inequalities particularly when it comes to the impact of climate change. The impacts will be most felt by the poorest and most marginalised in our population.

### Natural Resources

Areas of focus for our county from the South West Area Statement are ensuring sustainable land management, reversing the decline of and enhancing biodiversity, reducing health inequalities and adapting to changing climate. Areas of focus from the Marine Area Statement are building resilience of marine ecosystems, nature-based solutions and adaptations at the coast and making the most of marine planning.

Natural Resources Wales (NRW) published the second State of Natural Resources Report (SoNaRR2020) last year, in this they assess to what extent Wales is achieving the Sustainable Management of Natural Resources (SMNR). SoNaRR2020 concludes that the four long-term aims of the SMNR – stocks of natural resources are safeguarded and enhanced, resilient eco-systems, healthy places for people and a regenerative economy – are not yet being met.





Figure 14 The four aims and the linkages of sustainable management of natural resources.

The natural environment is a huge part of what makes our county such a special place to live and work, it is our most precious inheritance but addressing the climate and nature emergencies presents us with one of the greatest challenges of our time.

Both the climate crisis and nature emergency are interwoven challenges which cannot be solved in isolation. Climate change places our habitats and wildlife at risk, but if helped to recover, healthy natural habitats can store carbon, reduce flood risk, help prevent coastal erosion, improve people's health and well-being, as well as maintain healthy soils, clean water and the pollinators needed for our crops – and therefore sustain us.

The way we interact with our natural resources is vital to the social, economic and cultural well-being of people living in Carmarthenshire today and the generations to come. We need to manage our natural resources sustainably because natural resources that are healthy and thriving are also healthier for people, their communities and for the economy.

## Sustainable Land Management

Agriculture is a main land use in Carmarthenshire. Sustainable land management is hugely important for farmers, the environment, the local economy, our culture and communities. Intensive agricultural practices can damage soil structure which may then contribute to water pollution. This also has a negative impact on the status of our rivers and coastal waters. It is important to reduce any negative impacts of poor land management for the well-being of our residents. A key concern identified in SoNaRR2020 is new ammonia sources associated with the rapid expansion of the intensive poultry developments.

It is important to consider the different impacts that farms can have on the landscape according to how they farm the land. A significant proportion of Carmarthenshire and Welsh farms are family owned and non-intensive in nature. While work can still be done to support all farmers on decreasing their impact on the land and climate a focus should be on reducing the impacts from intensive farming techniques and promoting sustainable practices which produces local foods to the highest quality and environmental standards. Agriculture is of great importance for Carmarthenshire in terms of the environment, economy, culture, language and communities.

The WCPP briefing on 'The Implications of Brexit for Agriculture, Rural Areas and Land Use in Wales' notes that rural Wales has strong and weak points in terms of its economic and social position. The public sector, tourism; SME manufacturing and food businesses are key sectors. Studies suggest that approximately 60% of registered businesses in remote rural market towns were associated with farming. There is also evidence that a lack of medium-sized firms in rural areas is linked to poor infrastructure and services.

Carmarthenshire has a balance of farm types within the county with the main sector being dairy but with a good balance of sheep, beef, general cropping, pigs, poultry. and horticulture. This diversity could be a benefit to the agricultural sector in Carmarthenshire compared to other areas which are more dependent on certain types of farms. Business adaptation and survival going forward will be dependent on this diversity.

The connections between people, environment and culture will be vital for the future of our rural communities and ensuring a partnership approach across sectors will be to the benefit of all parties going forward.

### Air Quality

Clean air is a critical natural resource and is essential in protecting not only our health, well-being and enabling greater physical activity, but also protecting Wales' environment. Air pollution affects both urban and rural areas. No levels of air pollution are 'safe'. Although air pollution has declined in recent decades, nitrogen-containing air pollutants continue to cause significant environmental harm.

Air quality monitoring in Wales is primarily undertaken by local authorities and, through several national networks, managed by the Welsh Government.

The effects of air pollution disproportionately affect those in deprived areas.

Local authorities are responsible to declare Air Quality Management Areas (AQMAs) if national air quality objectives are not likely to be met. In Carmarthenshire, we have three such areas – Llandeilo (declared in 2011) and Llanelli and Carmarthen (both declared in 2016.)

Encouraging the use of the cleanest modes of transport for freight and passengers, active travel and the creation of good quality urban green space, are likely to be key in reducing emissions in the future.

## Wildfires

Wildfires continue to be a problem, as noted in the section on Community Safety, and the areas most affected in our county by deliberate wildfires are: Brynaman, Y Garnant and Glanamau, Llanelli South and Bynea & Llwynhendy. Incidents of wildfires in our county have been more or less steady over the past five years. The environmental harm caused by arson is significant, including affecting water and air quality and damaging or destroying habitats, vulnerable plants, wildlife and grazing.

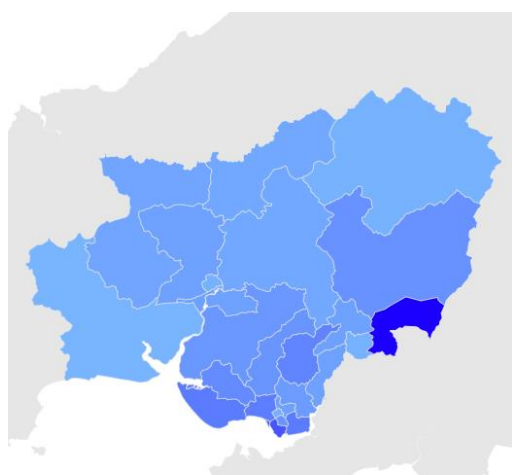


Figure 15: Deliberate grass, woodland and crop fires recorded by MSOA

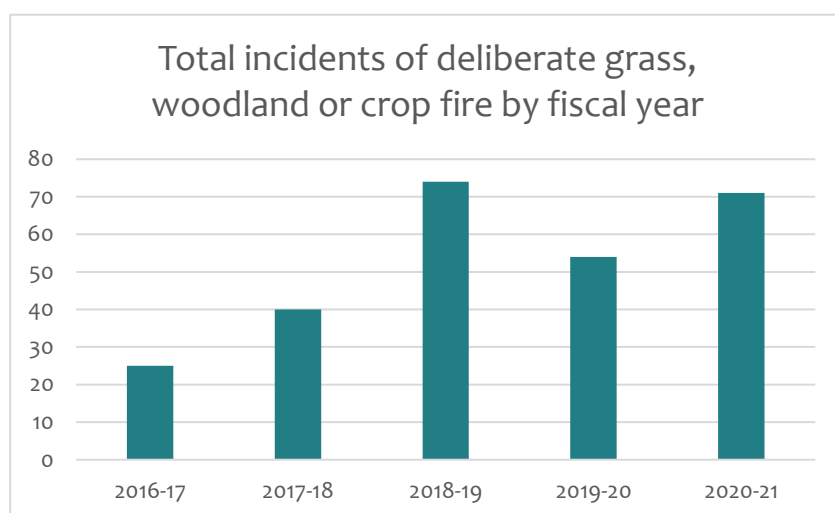


Figure 16: Deliberate grass fires reported by Mid and West Wales Fire and Rescue Service

## Flooding

Just over 15,000 properties in Carmarthenshire are currently at some level of flood risk from river or surface water flooding or coastal overflow. 3,151 properties are at high risk, 2,292 at medium risk and 9,713 properties are at low risk. Of these the vast majority are residential properties. Climate change will increase the number of properties, infrastructure and key services at risk of flooding. Places which do not currently flood will become at risk of flooding and those already known to be at risk will see the level of that risk become greater. Welsh Government have worked on an update to Technical Advice Note 15 (TAN15) which provides guidance for local planning authorities to reduce flood risk and develop away from high risk areas - this will have far reaching consequences on planning and comes into force in 2023.

Extreme weather events will become more common. Three key climate change impacts relative to flood risk are extreme rainfall events, river flood flows and sea level rise.

NRW Communities at Risk Register (CaRR) identifies the 5 Carmarthenshire communities most at risk. Llanelli is considered a 'Significant Flood Risk Area' as it falls within the top 33 communities at risk in the country. Other communities most at risk are Ammanford, Ferryside, Llwynhendy and Dafen.

## Waterways

Our waterways provide us with important natural benefits, many of which contribute to the well-being of local communities and the wider population. These benefits include providing clean fresh water for people to drink, for industry and for agriculture and clean rivers and seas for recreation and enjoyment.

The waterways in Carmarthenshire are being impacted by several significant risks. The water quality is being affected by pollution from nitrates, phosphorus and sediments from agriculture and sewage. Between 2016-2020 there were 507 proven incidents of environmental pollution in Carmarthenshire. 86% were low impact events and 14% were high impact. Agriculture is the primary cause of environmental pollution, contributing to 135 of the totals; followed by oils and fuels, contributing to a further 67 events.

The demand for water must be balanced with the importance of protecting water resources for a healthy environment. Water is taken from rivers in Carmarthenshire for public water supply, agriculture, industry, power generation and amenity use. 90% of the water taken in Carmarthenshire is for public water supply.

Demand for water is increasing as the local population increases and tourism numbers increase. The impacts of COVID led to an even greater increase in tourist numbers but whether this increase will continue in future is unknown.

## Waste

Living in a 'disposable' society where waste is continually generated increases pressure on the use of our natural resources. Once waste is generated it requires treatment at facilities that require land, consume energy and water and produce emissions to the environment. If waste is not handled and treated properly it can be harmful to ecosystems, biodiversity and the well-being of the population.



Figure 17: Percent of all waste recycled

Wales is transitioning to a high recycling nation which is a necessary component of a circular and regenerative economy. However, more needs to be done to prevent waste from being generated if we are to achieve zero waste and one planet living.

Residents in our county have contributed to an excellent level of recycling, at 65% of waste. This figure can still be improved, and we now need to meet Welsh Government's 70% recycling target by 2025.

Fly tipping occurs at a significant level, with the total number of recorded instances in our county being the second highest in Wales, only after Cardiff. Fly tipping has seen a large rise in recent years, after previously reducing up until 2016, the figure has now quadrupled. This is the opposite of the trend seen in our neighbouring counties of Ceredigion and Pembrokeshire where they have seen a significant decrease in fly tipping instances.

## Ecosystem Resilience

Ecosystem resilience is the capacity of ecosystems to deal with disturbances, either by resisting them, recovering from them, or adapting to them, whilst retaining their ability to deliver services and benefits now and in the future. Disturbances include (but are not limited to): habitat and species loss and deterioration; climate change; pollution and invasive non-native species.

Ecosystem Resilience is essential to the people and communities in Carmarthenshire, allowing us to benefit from clean air and water, provision of food, allowing us to be more adaptable to climate change and extreme events such as drought or flooding or simply through the value of landscapes.

Overall ecosystem resilience in Carmarthenshire is generally higher in the north east and south east of the county which reflects a greater diversity of semi-natural habitats in these areas. Resilience is lower in areas where the diversity, extent and connectivity of habitats is poorer. As part of the production of a State of Nature Report for the county by the Carmarthenshire Nature Partnership – and by building existing information - a map of the county will be produced that considers the Diversity, Extent and Connectivity attributes of ecosystem resilience. This will help inform where future action should be focused.

There are 81 Sites of Special Scientific Interest (SSSI) in the county (excluding the area within the Brecon Beacons National Park), one of these also make up the three Special Protection Areas and eight Special Areas of Conservation, sites of international importance. The Brecon Beacons National Park also encompasses a further 15 SSSIs. Carmarthenshire has six Local Nature Reserves (LNRs).

Carmarthenshire is also home to 35 priority habitats and approximately 230 priority species representing 40% of priority species in Wales.

The condition of Carmarthenshire's terrestrial, freshwater and marine SACs and SSSIs was assessed in a recent 'baseline assessment' (2021). This showed that the condition of the features within designated sites was largely unfavourable or unknown. The majority of these protected sites are in unfavourable condition which means that they could be improved.

Significant pressures impacting on the resilience of ecosystems in Carmarthenshire include:

- Climate change - there is clear evidence of climate change in Wales. It will impact life in Wales at every level.
- Agriculture - intensification of farming and an increased use of chemicals has put pressures on the surrounding environment.
- Development – of houses, roads, and industry is a big driver of biodiversity loss, through direct habitat loss and fragmentation.
- Pollution – sourced from air, land or water causes significant environmental harm.
- Invasive non-native species – from plants or animals drives the loss of native species and changes the landscapes in our county.

It is clear that we need to gather more data on the condition of our designated features. Data on the condition of a broad habitat network is lacking. More detailed mapping will help us better

understand our environment and improve upon previous areas of work such as in the connectivity and extent of habitats. A centralised approach and database will help improve this area of research.

## Climate Change

If climate change continues along the path that we are currently experiencing, then we can expect significant changes in the next 30 years. Data presented in the Future Trends Report detail that by 2050 we are forecasted to see average summer temperatures rise by 1.34°C. This could cause an increase in rain by 5% throughout the year, concentrated more in winter as summers experience longer periods of drought. Sea levels are forecasted to rise by up to 24cm in some areas of the country. Carmarthenshire will see the impact of these changes in all areas of life. If the trend continues to worsen the Wales we know could be significantly different by 2080. Addressing these issues now will ensure the future of our future generations in Carmarthenshire and Wales.

The Carmarthenshire Nature Partnership and the work of the partners and the projects they undertake, deliver outcomes that help to conserve and enhance our natural environment and often deliver multiple benefits that improve the well-being of the people that live here. Local Nature Partnerships are a key delivery mechanism that can help provide local focus and delivery of action for priority species and habitats.

In addition, the Environment (Wales) Act 2016 puts into place a duty to plan and manage our natural resources. This includes a duty to require all public bodies, when carrying out their functions to seek to 'maintain and enhance biodiversity' where it is within the proper exercise of their functions and seek to 'promote the resilience of ecosystems'.



## National Well-being Indicators

When considering the national well-being indicators in Carmarthenshire that relate to the environment there is a mixed picture. Levels of nitrogen oxide pollution in Carmarthenshire is considerably below the average level across Wales. The capacity of renewable energy equipment installed compares favourably to other LAs. The rivers in Carmarthenshire are some of the highest quality in Wales (as of 2015).

Areas that need significant improvement include the high number of businesses and homes at a high risk of flooding, as well as the high levels of domestic CO<sub>2</sub> emissions per capita.

Please see below the National Well-being Indicators and associated local indicators relevant for the Adulthood life stage

Ref No	Indicator Definition	Year	Rank out of 22 Authorities	Score, Wales average and Change since last result	
				Carms	Welsh Avg
<b>3</b>	% of adults who have fewer than two healthy lifestyle behaviours	2018-19 & 2019/20	<b>18<sup>th</sup></b>	12.4% <b>Declined</b>	10.0%
<b>3a</b>	% of adult smokers	2018-19 & 2019/20	<b>6<sup>th</sup></b>	16.2% <b>Improved</b>	17.4%
<b>3b</b>	% of adult e-cigarette users	2018-19 & 2019/20	16 <sup>th</sup>	6.7% <b>Improved</b>	6.4%
<b>3c</b>	% of adults who are overweight or obese (BMI 25+)	2018-19 & 2019/20	16 <sup>th</sup>	63.6% <b>Declined</b>	59.9%
<b>3d</b>	% of adults who are obese (BMI 30+)	2018-19 & 2019/20	17 <sup>th</sup>	28.2% <b>Declined</b>	24.1%
<b>3e</b>	% of adults who eat the recommended guidelines of fruit and vegetables	2018-19 & 2019/20	13 <sup>th</sup>	21.7% <b>Improved</b>	24.3%
<b>3f</b>	% of adults who drink more than the recommended guidelines	2018-19 & 2019/20	<b>20<sup>th</sup></b>	21.4% <b>Declined</b>	18.6%
<b>3g</b>	% of adults who reported exercise or physical activity for more than 150 minutes	2018-19 & 2019/20	10 <sup>th</sup>	56.6% <b>Improved</b>	53.2%
<b>3h</b>	% of adults who reported exercise or physical activity for less than 30 minutes	2018-19 & 2019/20	<b>4<sup>th</sup></b>	27.6% <b>Improved</b>	33.0%
<b>4</b>	Levels of nitrogen oxide (NO <sub>2</sub> ) pollution in the air	2019	<b>6<sup>th</sup></b>	5.9 <b>Improved</b>	8.9
<b>8a</b>	% of adults with no qualifications	2020	10 <sup>th</sup>	6.6% <b>Improved</b>	7.3%
<b>8b</b>	% of adults who are qualified to below NQF level 2 and no higher	2020	8 <sup>th</sup>	11.1% <b>Improved</b>	11.8%
<b>8c</b>	% of adults who are qualified to at least NQF level 2 and above	2020	10 <sup>th</sup>	82.3% <b>Improved</b>	80.9%
<b>8d</b>	% of adults who are qualified to at least NQF level 3 and above	2020	10 <sup>th</sup>	62.7% <b>Improved</b>	62.3%
<b>8e</b>	% of adults who are qualified to at least NQF level 4 and above	2020	10 <sup>th</sup>	40.7% <b>Declined</b>	41.4%
<b>9</b>	Gross Value Added (GVA per hour worked (relative to UK average)	2019	9 <sup>th</sup> Available for 12 "areas"	75.9% <b>Improved</b>	84.1%
<b>10</b>		2018	12 <sup>th</sup>	£16,813	£17,100

	Gross Disposable Household Income per head (£)			Improved	
12	Capacity (in MW) of renewable energy equipment installed	2019	3 <sup>rd</sup>	316 MW Improved	4059 MW
14	Ecological footprint - Global hectares per person	2011	13 <sup>th</sup>	3.36 No previous data	3.28%
15	Amount (kg) of waste generate that is not recycled, per person	2019-20	8 <sup>th</sup>	155 Kg Improved	173 Kg
17a	Median Gross Weekly Full-time Earnings (£)	2020	3 <sup>rd</sup>	£572.10 Improved	£541.70
17b	Pay gender difference Difference (£p) between Male and Female median Gross Hourly Pay	2020	11 <sup>th</sup>	£1.56 Declined	£0.62
18a	% households living in poverty Household income is less than 60% of the GM median income	2020	13 <sup>th</sup>	33.8% Declined	32.9%
19	% living in households in material deprivation	2019-20	8 <sup>th</sup>	11.3% Improved	12.9%
20	% people moderately or very satisfied with their jobs.	2019-20	17 <sup>th</sup>	78.9% Declined	82.1%
21	% of people aged 16-64 in Employment	2020-21	20 <sup>th</sup>	68.6% Declined	72.2%
23	% who feel able to influence decisions affecting their local area.	2018-19	10 <sup>th</sup>	18.8% Declined	18.7%
24	% of people satisfied with their ability to get to/ access the facilities and services they need	2020-21	4 <sup>th</sup>	91.0% Improved	86.6%
25	% of people feeling safe (at home, walking in the local area, and travelling)	2018-19	7 <sup>th</sup>	76.1% Declined	71.0%
26	% of people satisfied with local area as a place to live	2020-21	10 <sup>th</sup>	88.6% Improved	87.4%
27	% of people who agree that there is good community cohesion in their local area	2020-21	13 <sup>th</sup>	68.6% Improved	69.4%
27a	% who feel they belong to their local area	2018-19	16 <sup>th</sup>	70.4% Constant	72.4%
27b	% who feel people in the local area from different backgrounds get on well	2016-17	16 <sup>th</sup>	67.7% Declined	72.0%
27c	% who feel people in the local area treat each other with respect	2018-19	8 <sup>th</sup>	79.0% Improved	75.6%
28	% of people who Volunteer	2019-20	11 <sup>th</sup>	27.2% Declined	26.1%
29	Mental Well-being of adults (Average Score out of a maximum 70)	2018-19	12 <sup>th</sup>	51.1 score out of 70 Improved	51.4
31	% of dwellings (those that are assessed by LA) which are free from hazards	2018-19	1 <sup>st</sup>	90.5% Improved	60.9%
32a	Number of properties (homes & businesses) with a high or medium risk of flooding from rivers	2019	18 <sup>th</sup>	1,481 properties New measure	20,518 properties
32b		2019	19 <sup>th</sup>	868 properties	9,792 properties

	Number of properties (homes & businesses) with a high or medium risk of tidal flooding			New measure	
<b>32c</b>	Number of properties (homes & businesses) with a high or medium risk of Surface Water flooding	2019	17 <sup>th</sup>	3,094 properties New measure	53,938 properties
<b>34</b>	Number of households successfully prevented from becoming homeless per 10,000 households.	2019-20	19 <sup>th</sup>	23.9 Declined	49.3
<b>35</b>	% of people attending or participating in arts, culture or heritage activities at least 3 times in the last year	2019-20	19 <sup>th</sup>	70.8% Declined	82.1%
<b>35a</b>	% Who have attended any arts events in Wales (in last 12 months)	2019-20	10 <sup>th</sup>	68.3% Improved	70.4%
<b>35b</b>	% Who have visited a museum in Wales (in last 12 months)	2019-20	8 <sup>h</sup>	42.1% Improved	42.5%
<b>35c</b>	% Who have visited any historic places in Wales (in last 12 months)	2019-20	4 <sup>th</sup>	68.7% Improved	62.5%
<b>36</b>	% adults who speak Welsh daily and can speak more than just a few words	2019-20	4 <sup>th</sup>	30.4% Improved	10.4%
<b>37a</b>	Number of people who can speak Welsh. (Based on the Census)	2011	1 <sup>st</sup>	78,048 Declined	562,016
<b>37b</b>	% of people who can speak Welsh. (Based on the National Survey for Wales)	2019-20	4 <sup>th</sup>	37.4% Declined	16.0%
<b>38</b>	% of people participating in sporting activities three or more times a week	2019-20	6 <sup>th</sup>	35.1% Constant	32.2%
<b>41a</b>	CO2 emissions per capita	2019	13 <sup>th</sup>	5.7 Improved	7.6
<b>41b</b>	Industry CO2 emissions per capita	2019	15 <sup>th</sup>	1.6 Constant	3.5
<b>41c</b>	Domestic CO2 emissions per capita	2019	20 <sup>th</sup>	1.8 Improved	1.5
<b>41d</b>	CO2 emissions of transport per capita	2019	16 <sup>th</sup>	2.2	2.0



# AGEING WELL





The Welsh Government strategy published in October 2021 gives a clear vision of an Age Friendly Wales that upholds older people's rights and promotes intergenerational society. Our aim is to support and promote age friendly communities where people can age well and that we celebrate the positive contributions of older people to society, as, for instance, volunteers, employees and unpaid carers. Age friendly communities that include access to green and blue spaces for health and well-being, but also embrace the circular economy and energy efficiency, will help ensure that we live within our environmental means for future generations.

## Population projections

Welsh Government indicate via their population projections on Stats Wales that the population will continue to grow. Figures show that from 2018 to 2043 there will be over 5% increase in the total population for Carmarthenshire, slightly lower than the Welsh average. Whilst predictions for the under 15 and under 64 age group indicate a decline in population, there is an indication of an increase of over 32% for the people aged over 65 for the same period.

The effects of an ageing population are being felt across Wales, from 2018 to 2028 it is projected that there will be less children in Carmarthenshire and significantly more of the population will be over 65. The healthy life expectancy of the population in Wales has remained relatively stable over the Civic Participation and Employment last decade (Future Trends Report). Considering the healthy life expectancy aids us in projecting the level of healthcare services that will be required in the future.

Table 10: Projected Population Changes

	Base Year	Projection years			2018-2028		2018-2038		2018-2043	
	2018	2028	2038	2043	number	%	number	%	number	%
Children (0-15)	33,220	32,281	31,401	31,980	-939	-2.8%	-1,819	-5.5%	-1,240	-3.7%
Working age (16-64)	110,337	109,067	106,159	106,991	-1,270	-1.2%	-4,178	-3.8%	-3,346	-3.0%
65+ age group	44,011	50,769	57,846	58,248	+6,758	+15.4%	+13,835	+31.4%	+14,237	+32.3%
Total	187,568	192,117	195,406	197,219	+4,549	+2.4%	+7,838	+4.2%	+9,651	+5.1%

Everyone in our community has the right to age well. The World Health Organisation has created a framework to assist in ensuring the creation of age friendly communities. Within this there are eight domains to focus the assessment and planning of the creation of an age friendly community. The following sections cover these domains and lay out the situation as it currently stands in Carmarthenshire.

## Life Expectancy

Life expectancy in Carmarthenshire is in line with the average in Wales, (Males - Carmarthenshire 78.3 years: Wales 78.5 years and Females 82.4 years: Wales 82.3 years 2017-19), the inequality gap in healthy life expectancy is one of the lowest in Wales for both males and females.

There has been no substantial change in the gap between male and female life expectancy and healthy life expectancy during the period 2009-11 to 2015-17. The life expectancy deprivation gap widened for both males and females from a difference of just over 5 years for females in 2002-04 to just over 6 years in 2015-17. The pattern is similar for males with the difference in life expectancy between the most and least deprived fifth being just over 6.5 years in 2002-04 to approximately 7.5 years in 2015-17.

## Deaths and Causes

Some of the largest causes of deaths are heart disease, cancer and dementia. Carmarthenshire currently has a lower rate of deaths due to heart disease and cancer than the Welsh average. The total number of deaths in Carmarthenshire has seen an incremental increase, with a distinct peak in 2020. A total of 185 deaths due to COVID-19 were recorded in the over 50s in Carmarthenshire in 2020, the age distribution of these deaths follows an expected trend of an increase up to the age of 90, and then slightly less. The total number of deaths due to COVID-19 in this age range was still less than the traditional causes of death of heart disease, cancer and dementia.

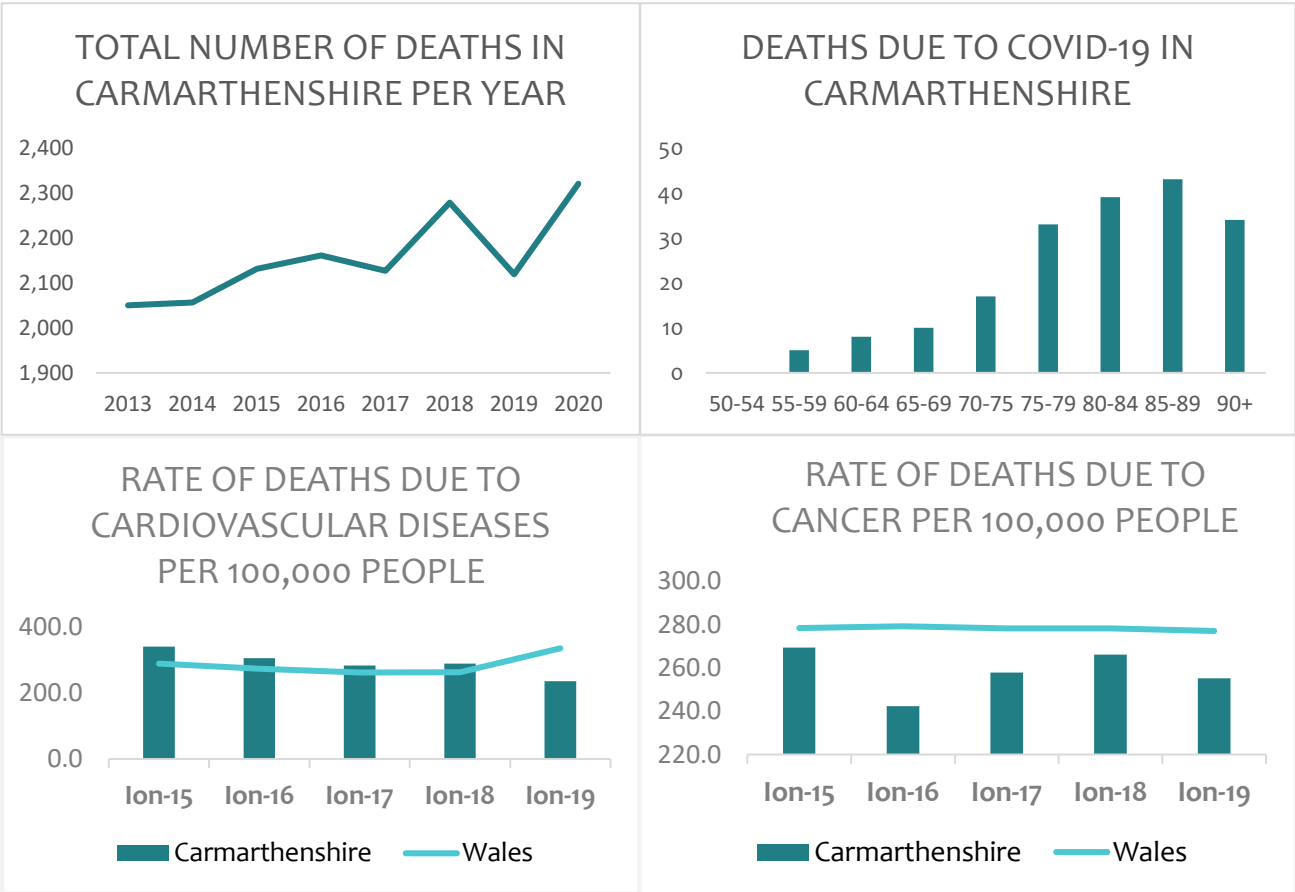


Figure 18: Series of charts detailing causes of deaths in Carmarthenshire



## Outdoor Spaces and Buildings

Access to an outside environment and accessible public buildings have an impact on the quality

**52%** concerned if they were not able to spend time outdoors or in nature and green spaces

**62%** valued access to nature and green spaces

of life of many older people. As people age it is important that there are outdoor spaces where older people can access to walk, with consideration given to potential mobility issues, availability of seating and access to public toilets.

Access to outdoor spaces and nature has been proven to boost the well-being of all people, this is also true for the elderly. Studies have shown that regular time spent outdoors can particularly benefit people suffering from dementia, helping to lower stress levels and blood pressure.

For residents aged 65 and over completing our 2021 Well-being survey **52%** said that ‘Not being able to spend time outdoors or in nature and green spaces’ to stay physically and/or mentally well concerned them and **62%** said that ‘Access to nature and green spaces’ was the thing they most valued in their local environment.

Participation in activity can help older people to sustain their health and well-being, living as well and as independently as possible within supported networks, focused around their own homes and localities. 51.3% of older adults in Carmarthenshire report they are in good health, below the all-Wales average of 56.1%. Carmarthenshire is the 5th lowest in Wales. Only 34.1% of older adults in Carmarthenshire are a healthy weight.

Health Care services working alone can have as little as 10% influence on population health. Leisure services in Carmarthenshire are prioritising older people in their strategic planning.

## Transport

### Transport Links

Private transport fulfils an often-essential function, particularly in rural areas. It is notable that of 23,274 Carmarthenshire residents who do not have access to a car or van, 50% are aged 50 or over (2011 Census). Furthermore only 55% of those aged 80 or over have access to a car or van therefore public transport and community-based services are important support mechanisms to enable people to continue to live within their communities. Such services can mean the difference between a person staying independent at home or entering residential care.

Availability of public transport was already a challenge for older people before the pandemic and that has been exasperated by loss of more services and fear of catching COVID-19 on buses and trains. One Carmarthenshire resident told Age Cymru:

*“Trying to visit my 85 year old father who lives in Kent. I do not drive so would have to travel by coach to go and see him. I panic just at the thought of the idea. (Female, 55-59)”*

The lack of transport was the highest concern (56%) for over 65's when asked about prosperity in the County as part of the Well-being Survey. Followed by lack of affordable housing (55%) and lack of suitable job opportunities (47%).

Well-being survey question 19 - Looking ahead, what concerns you the most about prosperity in the county? (190 respondents aged 65+)

- Lack of transport 56% (107)
- Lack of affordable housing 55% (105)
- Lack of suitable job opportunities 47% (89)

## Housing

### Housing stock suitability

As we age, we require our housing to be warm, accessible and free of trip hazards. In Wales, 28% say that they will need help adapting their home as they get older. In the UK, more than 80% of homeowners aged 65 and over state that they want to stay living in their own home. Housing is an area that we would like to research further. This will include the adoption of green technologies and incorporating energy efficiency into design or retro-fitting to benefit our ageing communities and the planet for future generations. Critical incidents, such as hospital admission and falls, often can lead to admission to residential care. Alternative forms of housing can offer older people choices to maintain their independence and delay or avoid residential care.

## Social Participation

### Communities

The following community based project was suggested as part of our Well-being Survey:

**Trigolion yr ardal yn rhannu sgiliau, a chyd-ddysgu sgiliau garddio, coginio ac ailgylchu.**  
*People in the Community sharing their skills and learning new skills together such as gardening, cooking and recycling*

### Loneliness

Loneliness and social isolation have the same effects on mortality as smoking 15 cigarettes a day. 17% of Carmarthenshire residents report being lonely and just 50.6% report feeling a sense of community. Social networks and friendships not only have an impact on reducing the risk of early death and illness but can also help individuals to recover when they do fall ill.

The WCPP briefing on Loneliness and Isolation highlights that other factors such as long-term illness or disability, poor health and living in deprived areas also coincide with higher levels of loneliness. Individuals from ethnic minority backgrounds and those who do not identify with heterosexuality are also more likely to be lonely, highlighting the importance of considering intersectionality in our work.

It is doubly important for us to consider the impact isolation and loneliness has had over the course of the COVID-19 pandemic. While many of us have seen a return to some sense of normalcy it is important to remember that some of the most vulnerable in our society will still feel the need to shield.

A quote taken from the Age Cymru report on the experiences of people aged 50 or over in Wales during the winter COVID-19 lockdown, and the road to recovery says:

Mixing with other people. [...] I have been on my own for over a year and not gone into a shop or other home. Going inside I find very difficult. Being in a crowd - too many people around me - I avoid. (Shielding female, 55-59)

## Respect and Social Inclusion

### Volunteering

Promoting full economic and societal participation for older people is essential to the Welsh economy, as over 65-year-olds contribute over £1billion annually. Currently, 33.7% of Carmarthenshire adults' volunteer.

During the pandemic some of the opportunities for volunteering became more challenging, leaving some older people without a valuable and social part of their lives.

Across Wales 30% of people aged 65-74 volunteer, more than those in the 24-44 age cohort, of which 24% volunteer. It is clear that older people are active and valued members of their communities. Those who responded to our regional survey contributed thousands of hours of voluntary work to their communities.

Older people who volunteer are less likely to experience loneliness and communities where there is good volunteer activity show good community cohesion.

# Civic Participation and Employment

## Working

Over the last 5 years we have seen a trend of over 50s working across Wales, this is not true of our over 50s community in Carmarthenshire. We are unsure of the reasons behind this; however, the Ageing Well Network will look into this further.

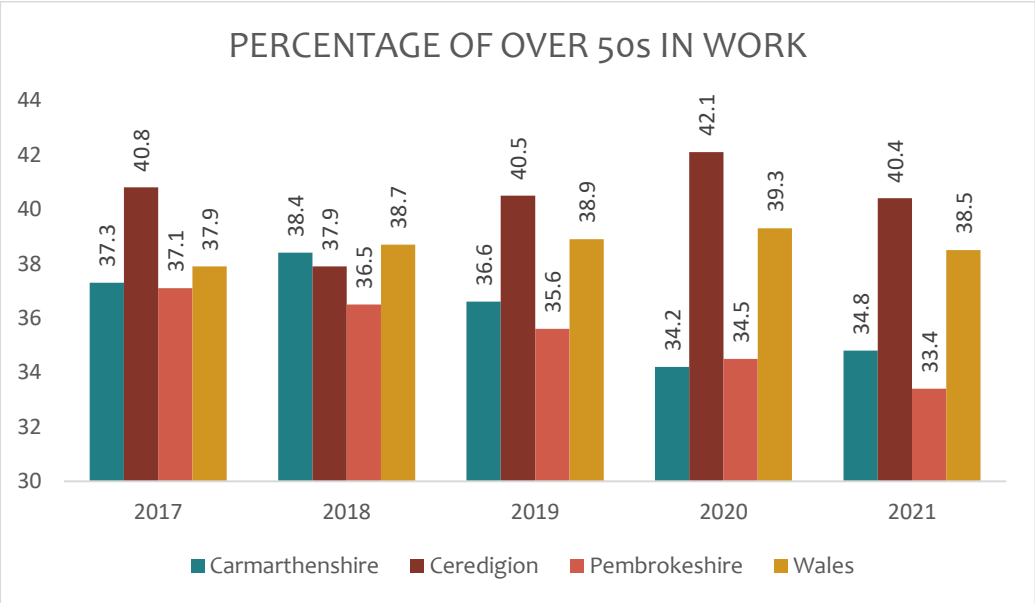


Figure 19: Over 50s in work

Our older generations provide us with a wealth of knowledge, expertise and experience. Harnessing the skills gained through both working and life experiences are significant attributes that older people can share with society. Sharing this knowledge and experience provides opportunities for intergenerational connectivity therefore building community cohesion as well as improving the emotional and social well-being of older people who may otherwise feel outcast and undervalued by society.

## ENGAGEMENT RESPONSE

In our Well-being Survey, almost half (47%) of the 65+ respondents said that they would like to use their skills/knowledge/experience to help others in their community.

Those who responded also noted their concerns about

- How to reduce waste and improve recycling
- A lack of affordable public transport on which everyone feels safe to travel
- Not being able to stay living in their own home
- The voice of local communities not being heard
- Not being able to use the Language of their choice
- Our key natural resources are being depleted faster that they can be replenished

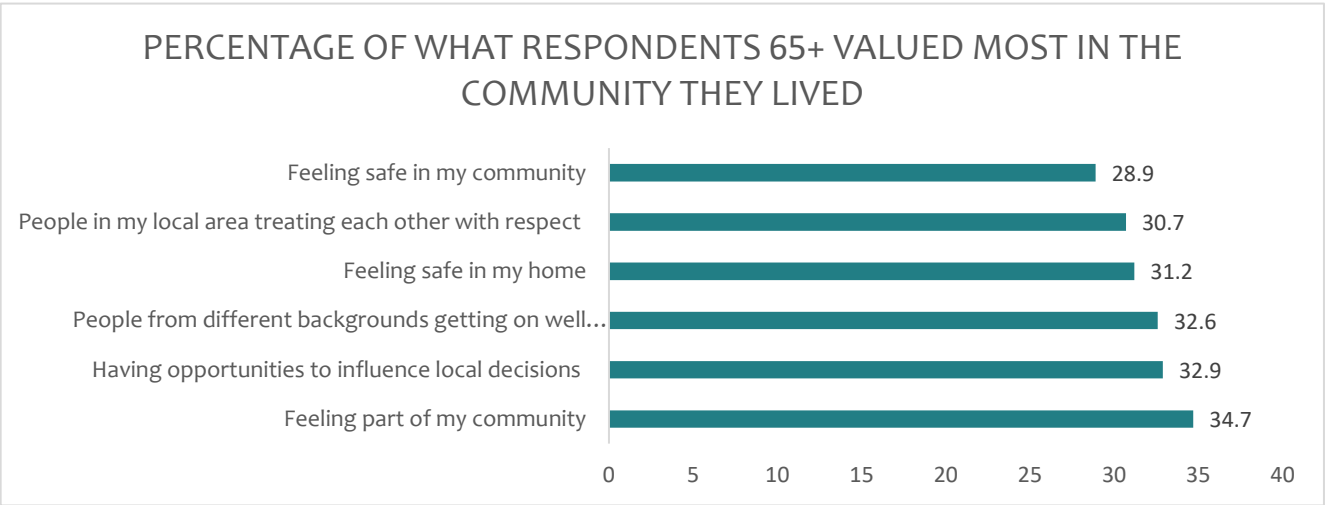


Figure 20: Survey Responses

## Communication and Information

We are living in an increasingly digital age with a growing number of services transferring to digital platforms. The growth in digital communications has been a positive fall back for many families who otherwise would have had little to no contact with each other during the pandemic. This change has the potential to leave older people more secluded.

The WHO Age-friendly Cities Guide states that: "No matter how developed the city; word of mouth is the principal and preferred means of communication for older people". Many older people value personal communication which can be overlooked in the digital age. Oral communication is particularly important for those with visual impairments or low levels of literacy.

Feedback from Age Cymru Dyfed notes that many older people were not confident in using IT and had to quickly learn how to use technology to speak to family, friends, pay for shopping, attend social groups etc. Age Cymru Dyfed delivered a Think Digital project until end of May 2021, which helped over 350+ people get online. The move to digital during the pandemic was a step too far for some people leaving them cut off from services and interaction.

## Community Support and Health Services

### Health

As significantly more of the population of Carmarthenshire is forecast to be aged 65 and over, it is important that we support our communities to stay as healthy as possible to improve healthy life expectancy. It is expected that the growth in this age group will result in increased demand for health and social care services. These are the two main areas of concern our Well-being Survey respondents aged 65+ when asked "Thinking ahead over the next ten years, what concerns you the most about being able to stay physically and/or mentally well?"



## Adult Social Care

A recent report to the Social Care and Health Scrutiny committee, notes that since Spring 2021, we have seen a significant increase in the volume and complexity of new referrals to adult social care both from within the community and from those admitted to hospitals. This appears to be delayed demand following the pandemic as a result of people not being monitored and receiving treatment for ongoing chronic health conditions, not having access to the usual forms of respite, and making active choices to not access services until critical due to understandable fears of contracting Covid. As a consequence of the above, we have seen a very high increase in the number of people requiring assessment and consequently a significant increase in demand, particularly for domiciliary care.

A report by the Statutory Director of Social Services on the Impact of National Social Care Pressures in Carmarthenshire and an additional report on Domiciliary Care, Social Work Workforce and Market Pressures (October 2021) highlights the current pressures and challenges:

- That significant pressures are now more profound and wide ranging than at any time during the management of this COVID-19 pandemic.
- There are growing workforce challenges in the domiciliary care sector leading to increased waiting lists and decreased customer satisfaction.
- This situation is starting to limit our ability to support some of our most vulnerable people in the community.
- Social care and health are under significant pressure and the demand continues to grow exponentially in comparison to capacity.
- Moreover, the added complexity of those presenting to social care services is unique and unprecedented.
- The growing number of Social Worker vacancies, combined with increase in demand for services has seen our allocation waiting list for assessments grow to unacceptable levels. This position is worsening and poses a significant risk to the authority's ability to meet its statutory responsibilities.

## Dementia

The dementias are a group of disorders, characterised by a continual and progressive dying of brain cells, that leads to a deterioration in physical and cognitive functions that are beyond what might be expected from the usual consequences of biological ageing. It affects memory, attention, sensory changes, language, thinking and problem-solving skills. It is projected that there will be a significant increase in people diagnosed with dementia over the next 15 years.

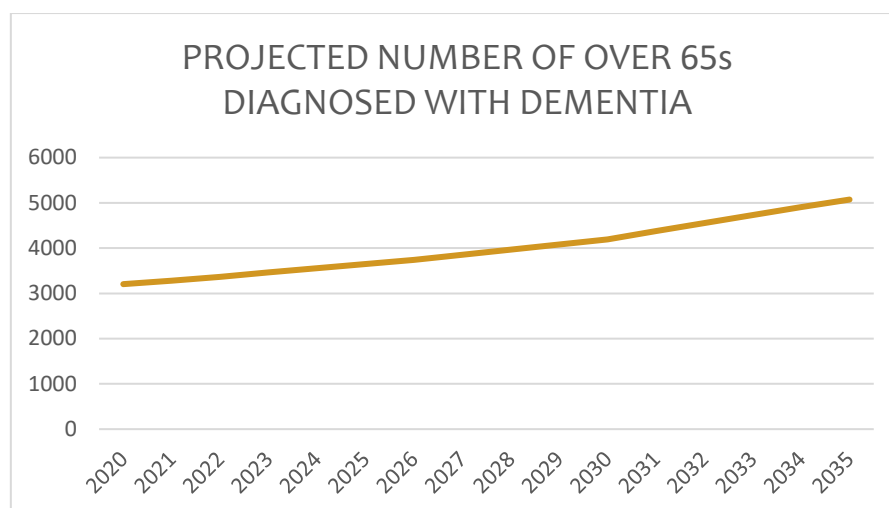


Figure 21: Projected number of dementia prevalence in Carmarthenshire

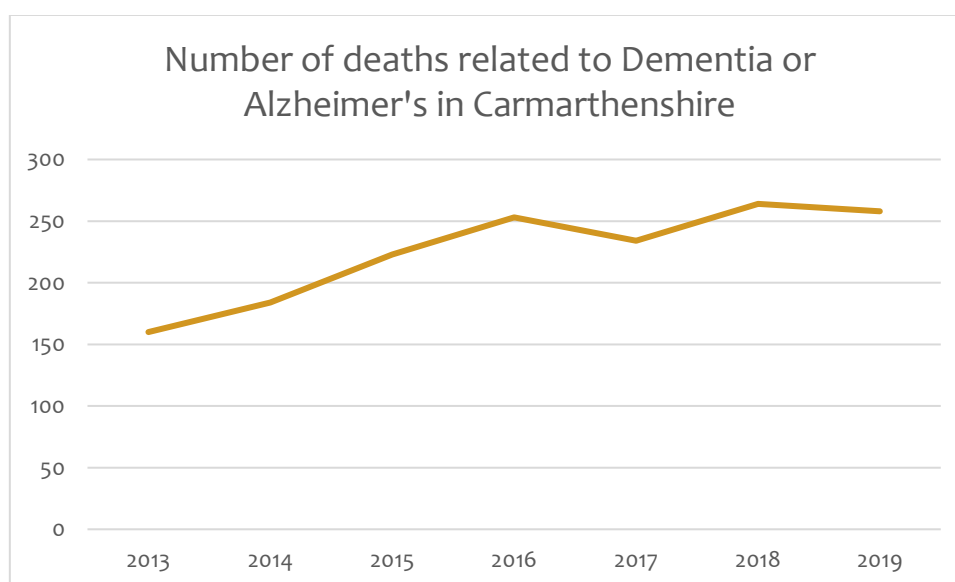


Figure 22: Recorded deaths related to dementia or alzheimer's in Carmarthenshire

The Dementia Action Plan for Wales (DAP) 2018 – 2022 sets out a clear vision for “Wales to be a dementia friendly nation that recognises the rights of people with dementia to feel valued and to live as independently as possible in their communities.”

The PSB will continue to work with the West Wales Care Partnership on creating a safe and inclusive community for those living with a dementia or alzheimer's diagnosis.

## Mental Health

Research by Age Cymru Dyfed highlighted: “Mental health issues have increased. People have become anxious, frustrated, and depressed and some cases angry. There has been no face-to-face grief counselling which has left many depressed and some feeling suicidal. Many people have suffered anxiety about leaving the house. People who have had loved ones in care homes have been unable to visit causing an effect on their mental health.”

## Falls

Falls are the second leading cause of accidental injury or death world-wide and the largest preventable cause of hospital admissions in Wales and across the UK. Falls cost the NHS £2.3 billion per annum. Falls reduction services have been proven to reduce the risk of falling by between 15% and 30%. It is essential that we enhance the availability of services that promote and support ongoing well-being and independence for our frail older adult population. A network of activity programmes can delay dependencies for those with long term needs and provide ongoing specialist help. By developing and investing in high quality, accessible and sustainable facilities we can grow our physical activity provision for high-risk older adults.

## National Well-being Indicators

Noted below are the National Well-being Indicators and associated local indicators relevant for the Ageing Well life stage

Ref No	Indicator Definition	Year	Rank out of 22 Authorities	Score, Welsh average and Change since last result	
				Carms	Welsh Avg
2e	Male healthy life expectancy at birth	2010-14	15 <sup>th</sup>	65 years	65.3 years
				Improved	
2f	Male inequality gap in healthy life expectancy Sloped Index of Inequality (SII) in years	2010-14	5 <sup>th</sup>	10.6 years	18.7 years
				Improved	
2g	Female healthy life expectancy at birth	2010-14	15 <sup>th</sup>	66 years	66.7 years
				Improved	
2h	Female inequality gap in healthy life expectancy SII in years	2010-14	7 <sup>th</sup>	12.5 years	18.2 years
				Improved	
30	% of people who are lonely	2019-20	19 <sup>th</sup>	17.3%	15.4%
				Declined	

# NEXT STEPS



# The Carmarthenshire Well-being Plan

The Well-being Assessment will be the foundation and evidence on which to prepare our Well-being Plan for the county.

The Carmarthenshire PSB has a statutory responsibility to improve the economic, social, environmental and cultural well-being of our county by contributing to the achievement of the seven national Well-being Goals. This includes our work on setting local objectives to maximise our contribution to meeting those goals and demonstrating how we use the Sustainable Development Principle and Five Ways of Working in everything we do.

Our Plan will set out the short, medium and long-term actions to be achieved by the PSB over the next five years up to 2028.

## Regional working

We will work with our colleagues in Ceredigion and Pembrokeshire to continue with the assessment of well-being in our area. The “Gorwel” platform, developed by the region will support this work, in providing well-being data and involvement information.

There is an on-going commitment by the PSB to embrace the principles of continuous engagement, and this is reflected regionally in Ceredigion and Pembrokeshire.

# Carmarthenshire

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## 2021-22 Well-being Consultation and Involvement Report

### **Report on Involvement activity:**

- Regional well-being survey: results for Carmarthenshire
- Virtual Focus groups / workshops
- Consultation on the draft Assessment
- Feedback from statutory partners



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## Introduction & Context

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The Well-being of Future Generations Act requires each of the 22 Public Service Boards to develop and publish a Well-being Assessment. The Assessment will serve as a statement of well-being for each respective county area. In addition to the importance of reflecting quantitative data (e.g., from the Census and other official sources), the guidance stresses that significant engagement with people is critical in adequately making the assessment of well-being.

This report brings together the substantial body of engagement work undertaken in Carmarthenshire to help understand what really matters to people and so guide the development of a Well-being Plan for the County

## Outline of Approach and Involvement Methods

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In the interests of collaboration and making best use of scarce resources, the Public Service Boards of Ceredigion, Carmarthenshire, and Pembrokeshire have taken the decision to work together on their wellbeing assessments. This consistent, regional approach also assists organisations, who are part of the Public Service Board, but whose remit extends beyond Carmarthenshire.

The key components of the regional approach are:

- A survey directed at residents
- An agreed toolkit for undertaking direct involvement work through focus groups virtually or in less formal settings across the region

### Survey

A survey was developed, and a series of questions were formulated under the 7 National Goals of prosperous, resilient, equal, healthier, cohesive, vibrant culture and thriving Welsh language and a responsive Carmarthenshire.

The survey was available in Welsh, English, Polish, Romanian, and Arabic. An Easy Read version of the survey was also available in Welsh and English.

The approach taken in Carmarthenshire was to develop a campaign, targeting potential respondents in the following ways:

- Hosted survey on the Carmarthenshire County Council consultation webpage
- Promotion through all Public Service Board partners and their employees

- Bilingual Facebook and Twitter posts and press releases
- Virtual conversations with local primary schools
- Conversations with young people through Youth Services and the Police & Crime Commissioner Youth Forum
- Mail-out and electronic newsletter to Carmarthenshire's Ageing Well Network (c. 2100 members)
- Liaison with partnerships such as the Carmarthenshire Disability Partnership and Community & Town Councils
- Due to the restrictions in place because of the COVID19 pandemic the promotion of this survey was mostly done virtually. All Town and Community Council clerks received emails regarding the consultation and the elected members were also asked to promote it within their communities.

Alongside the wider communication, specific efforts were made to involve the following seldom heard voices / networks:

- Carmarthenshire Disability Coalition and local representative groups
- Carmarthenshire LGBTQ+ Forum
- Llanelli Multi Cultural Network
- Carmarthenshire Carers Forum and young carers
- Local Authority Tenants
- Family service organisations and family centres
- Support groups for young families
- Leisure, recreation, and sports groups
- Local nature and conservation partnerships
- Organisations who represent rural areas, via the Local Action Group
- Students through University of Wales, Trinity St David
- Local businesses
- Network of organisations who have accessed funding through our Community Bureau

Extensive analysis of the survey features later in this report.

## Toolkit

A regional toolkit was prepared, including a county based and regional presentation, key areas of Well-being for the county, key questions, and a feedback form for sending back to a single point of contact in Carmarthenshire County Council.

The toolkit was used as part of the following involvement activities:

- CAVS Community Centres Network (25.08.2021)
- CAVS Food Producers Network (25.08.2021)
- Welsh Language Strategic Forum (20.09.2021)
- Healthy Environment Delivery Group (22.09.2021)
- Armed Forces stakeholders (22.09.2021)
- Armed Forces service users (29.09.2021)
- Carmarthenshire Disability Partnership (29.09.2021)
- Black, Asian, and Minority Ethnic focus group (28.09.2021)
- Community & Town Council Liaison Forum (30.09.2021)
- CAVS Volunteer Organisers Network (5.10.2021)
- Dyfed Powys Police & Crime Commissioner Youth Forum (5.10.2021)
- West Wales Action for Mental Health, Mental Health & Well-being Network (6.10.2021)
- Youth Support Service – Ysgol Bro Dinefwr (13.10.2021)
- Primary schools

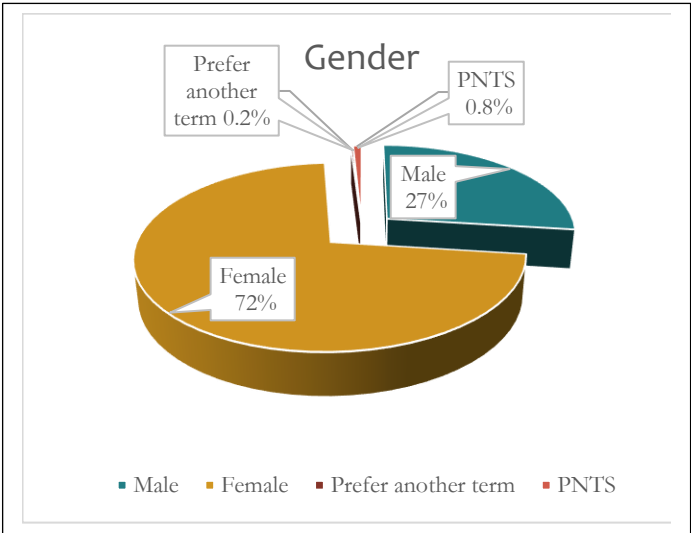
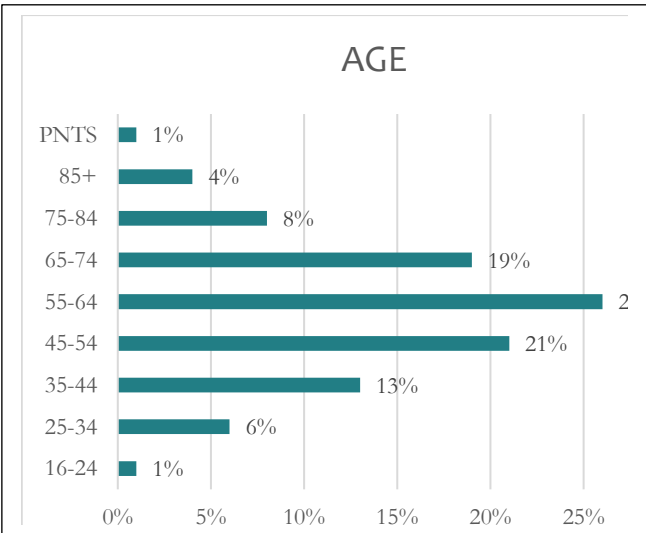
The approach to engagement was underpinned by an extensive media campaign which included press releases, social media posts etc.

## Regional Well-being Survey: Carmarthenshire Results

This section is structured by considering each survey question in turn. The ‘domains’ used within the survey have been retained for the purposes of this report.

Mention will be made of the views of different categories of respondent, to enable comparisons to be drawn. This process is known as the disaggregation of survey data: examining trends by age, gender and other demographic variables to enrich the analysis. Accordingly, proper weight has been given to the views of all those consulted and, in particular, ‘due regard’ given to free text (literal) responses.

### Demographic Profile of Respondents



The regional well-being survey attracted 1333 responses across Carmarthenshire, Ceredigion and Pembrokeshire.



A total of **609 Carmarthenshire residents** responded to the regional well-being survey. A fifth reside in each of Community Area 2 (22%) and Community Area 4 (23%). 19% are residents of Community Area 1, with fewer respondents from CA3 (12%), CA5 (12%) and CA6 (11%).

Two of the most important demographic characteristics for public policy are the age and sex structures. The age breakdown indicates that respondents are from an older age distribution: over half of survey respondents were of working age: 67% aged 16-64, with 32% of pensionable age (65 and over). In respect of age, the highest number of responses received were from the 55-64 cohort (26%), followed by 45-54 (20%) and 65-74 (19%). Finally, there is a significant female: male disparity, with 72% female respondents, 27% male (1% PNTS).

Results from other demographic questions are tabulated below.

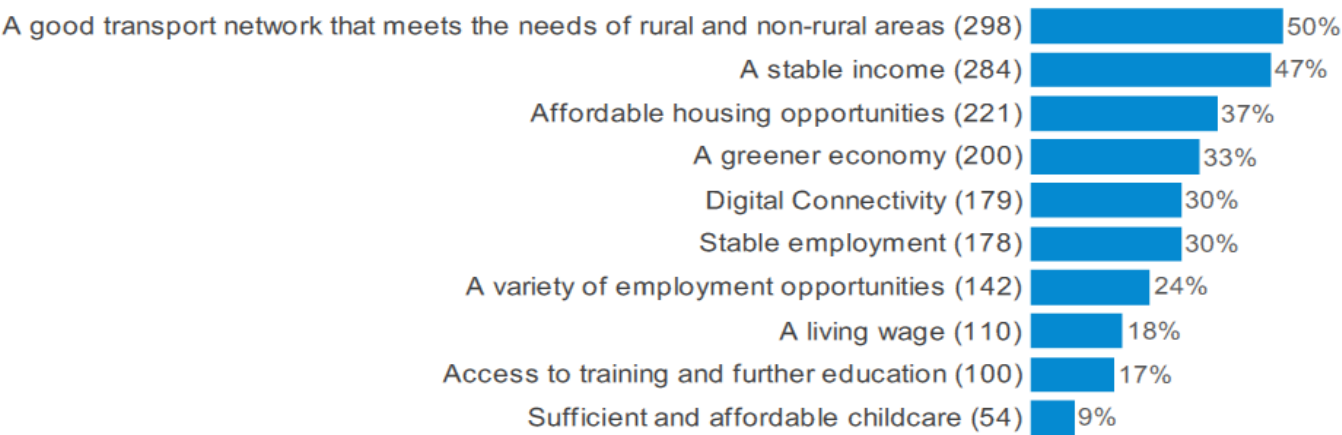
Demographic Characteristic	Overall %	Demographic Characteristic	Overall %	Demographic Characteristic	Overall %
<b>Gender</b>		<b>Relationship</b>		<b>Disability</b>	
Male	27%	Single	16%	Disabled	25%
Female	72%	Married	59%	PNTS	3%
PNTS	1%	Civil Partnership	3%	<b>Religion</b>	
<b>Age Groups</b>		Divorced/Separated	11%	Yes	60%
<16	0%	Widowed	8%	PNTS	3%
16-24	1%	PNTS	4%	<b>Income</b>	
25-34	6%	<b>Sexual Orientation</b>		less than £15k	17%
35-44	13%	Straight	91%	£15-£30,000	28%
45-54	21%	LGB	3%	£30-£45,000	17%
55-64	26%	Other	2%	over £45,000	25%
65-74	19%	PNTS	4%	PNTS	13%
75-84	8%	<b>Ethnicity</b>		<b>Welsh Language</b>	
85+	4%	White	97%	Understand spoken Welsh	48%
PNTS	1%	BME	1%	Speak Welsh	37%
Aged 16-64	67%	Other	1%	Read Welsh	34%
Aged 65+	21%	PNTS	1%	Write Welsh	30%
<b>Transgender</b>		<b>Carers</b>		None of these	42%
Yes	6%	Caring responsibilities	22%	<b>First Language</b>	
PNTS	1%	PNTS	2%	Welsh	22%
				English	77%
				Other	1%



A Prosperous Carmarthenshire

Q18) Which **three** things do you value most in a prosperous community?

The **three** main options that were chosen for Carmarthenshire are listed as follows: A good transport network that meets the needs of rural & non rural areas **50%**, A stable income **47%** and Affordable housing opportunities **37%**.



Probing the results of Q18 by demographic variable uncovers a variance on the basis of locality (community area).

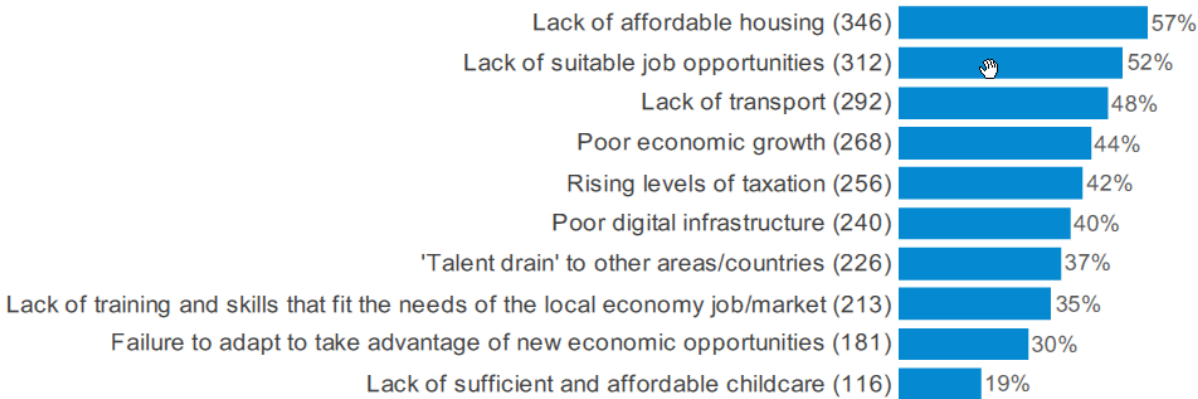
Community Area 1		Community Area 2		Community Area 3	
A living wage	26%	Sufficient and affordable childcare	28%	A living wage	16%
A Greener economy	22%	Affordable housing opportunities	26%	Stable employment	14%
Good transport links that meets the needs or rural & non rural areas	21%	Access to training and further education	25%	A stable income	13%
Community Area 4		Community Area 5		Community Area 6	
Digital Connectivity	27%	Access to training and further education	16%	Access to training and further education	18%
Good transport links that meets the needs or rural & non rural areas	26%	A stable income	15%	Variety of employment opportunities	13%
Sufficient and affordable childcare	24%	Greener economy	12%	Greener economy	12%

In the county, for those aged 16-64 having ‘a variety of employment opportunities’ scored highest (83%) whilst those aged 65+ thought it was more valuable to have a ‘good transport network that meets the needs of the rural and non-rural areas’ (43%). Females however noted that they would value ‘sufficient and affordable childcare’ (83%) whilst the males felt that a ‘greener economy’ (30%) would be of more value. Respondents on a higher income of

£45k+ valued 'sufficient and affordable childcare' (42%) whilst those on the lower income of under £15k valued 'a living wage' (27%).

**Q19) Looking ahead, what concerns you the most about prosperity in the county?**

What concerned respondents most about prosperity in the county was 'lack of affordable housing' (57%) which was followed by 'lack of suitable job opportunities' (52%) and 'lack of transport' (48%). The response to score least responses was 'lack of sufficient and affordable childcare' (19%).



There was a variance in responses from the Community Areas regarding their concerns about prosperity in their county:

- Community Area 1 concerned about 'lack of sufficient and affordable childcare' (24%)
- Community Area 2 'poor digital infrastructure' (27%)
- Community Areas 3 'failure to adapt to take advantage of new economic opportunities' (15%)
- Community Area 4 'talent drain to other areas/countries' (24%)
- Community Area 5 'poor growth' (16%)
- Community Area 6 'failure to adapt to take advantage of new economic opportunities' (15%)

Respondents aged 16-64 were more concerned with 'a poor digital infrastructure' (72%) whilst those aged 65+ stated their concerns were 'lack of transport' (37%). Females however noted that their biggest concern was 'sufficient and affordable childcare' (80%) whilst the males felt that a 'poor economic growth' (31%) was the main concern for them. Respondents on a higher income of £45k+ also stated that 'poor digital infrastructure' was their main concern (30%) whilst those on the lower income of under £15k were most concerned with 'lack of training and good skills that fit the needs of the local economy job/market' (20%).

Q20) What would you consider doing to improve your own or your community's economic circumstances?

Most respondents felt that they were best placed to 'support local businesses' (78%) in order to improve their own or their community's economic circumstances.



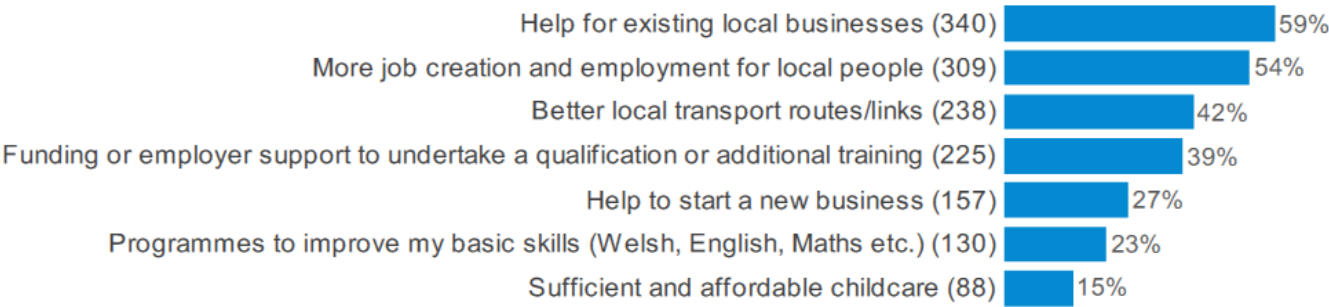
There was a variance in responses for what they would consider doing to improve their own or their community's economic circumstances from the Community Areas.

- Community Area 1 giving a higher % of responses for 'improving my basic skills' (22%)
- Community Area 2 'start new job' (24%)
- Community Area 3 'create jobs and employment for local people' (16%)
- Community Area 4 'start a new business' (26%)
- Community Area 5 'undertake a qualification or training' (15%) and
- Community Area 6 also stating 'improve my basic skills' (16%) was their biggest concern in relation to prosperity.

In order to improve their own or their community's economic circumstances respondents aged 16-64 stated that they would consider 'starting a new job' (95%) whilst those aged 65+ would consider 'supporting a local business' (32%). Most females however noted that would be prepared to 'undertake a qualification or training' (77%) whilst the males felt that they could 'create jobs and employment for local people' (34%) to improve their own or their community's economic circumstances. Respondents on a higher income of £45k+ stipulated that 'starting a new job' (34%) was the main consideration for them whilst those on the lower income of under £15k interestingly enough stated 'create jobs and employment for local people' (22%) was the way to improve their own and their community's economic growth.

Q21) What support would need to be in place to do these things?

Most respondents felt that they would need support such as ‘help for existing local businesses’ (59%) in order to improve their own or their community’s economic circumstances.



Once again there was a variance in responses for what support would be required in order to support respondents to improve their own or their own or their community’s economic circumstances from the Community Areas.

- Community Area 1 giving a higher % of responses for ‘funding or employer support to undertake a qualification or additional training’ (25%)
- Community Area 2 ‘better local transport routes/links’ (25%)
- Community Area 3 ‘more job creation and employment for local people’ (15%)
- Community Area 4 ‘help to start a new business’ (24%)
- Community Area 5 ‘sufficient and affordable childcare’ (18%) and
- Community Area 6 also asked for support in ‘programmes to improve my basic skills’ (15%) as their main support for improving their own and their community’s economic circumstances.

In order to improve their own or their community’s economic circumstances respondents aged 16-64 stated that they would consider ‘starting a new job’ (95%) whilst those aged 65+ would consider ‘supporting a local business’ (32%). Most females however noted that they would ‘undertake a qualification or training’ (77%) whilst the males felt that they could ‘create jobs and employment for local people’ (34%) to improve their own or their community’s economic circumstances. Respondents on a higher income of £45k+ also stated that ‘starting a new job’ (34%) was the main consideration for them, whilst those on the lower income of under £15k interestingly enough stated ‘create jobs and employment for local people’ (22%) was the way to improve their own and their community’s economic circumstances.

Q22) Any other comments on 'A Prosperous Carmarthenshire'?

Total of **53 comments** received, here are a few recurring or possibly useful comments

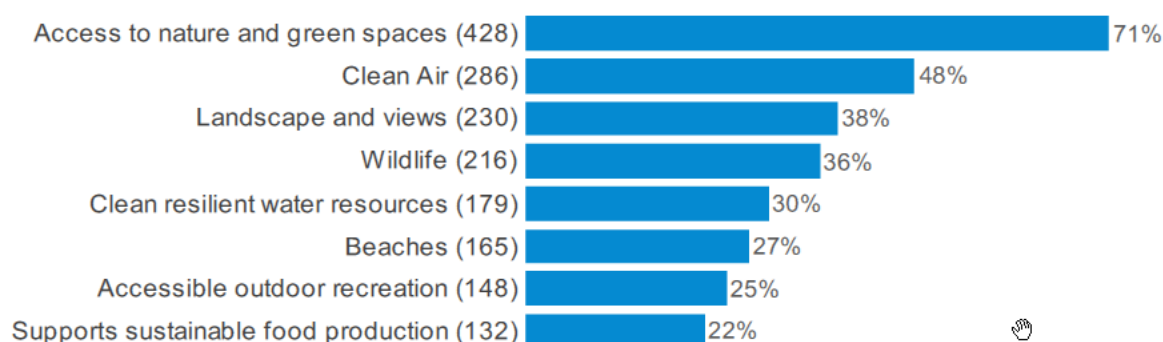


- Need for good public local transport
- Bypass for Llandeilo
- Support and encourage small businesses
- Better accessibility – transport and job opportunities
- Relaxation and different approach to planning permission for rural based businesses
- Subsidise villages to be self-sustaining
- Support young people to stay in the area
- Skilled jobs
- Improved Rural Broadband
- More affordable and eco-friendly homes
- More use of Welsh language in the community and jobs
- Too much Welsh language discrimination in jobs

## A Resilient Carmarthenshire

Q23) Which **three** things do you value most about your local environment?

The **three** main options that were chosen for Carmarthenshire are listed as follows: Access to nature and green spaces **71%**, Clean Air **48%** and Landscape and views **38%**.



Probing the results of Q23 by demographic variable uncovers some similarities in responses but there is a variance on the basis of locality (community area).

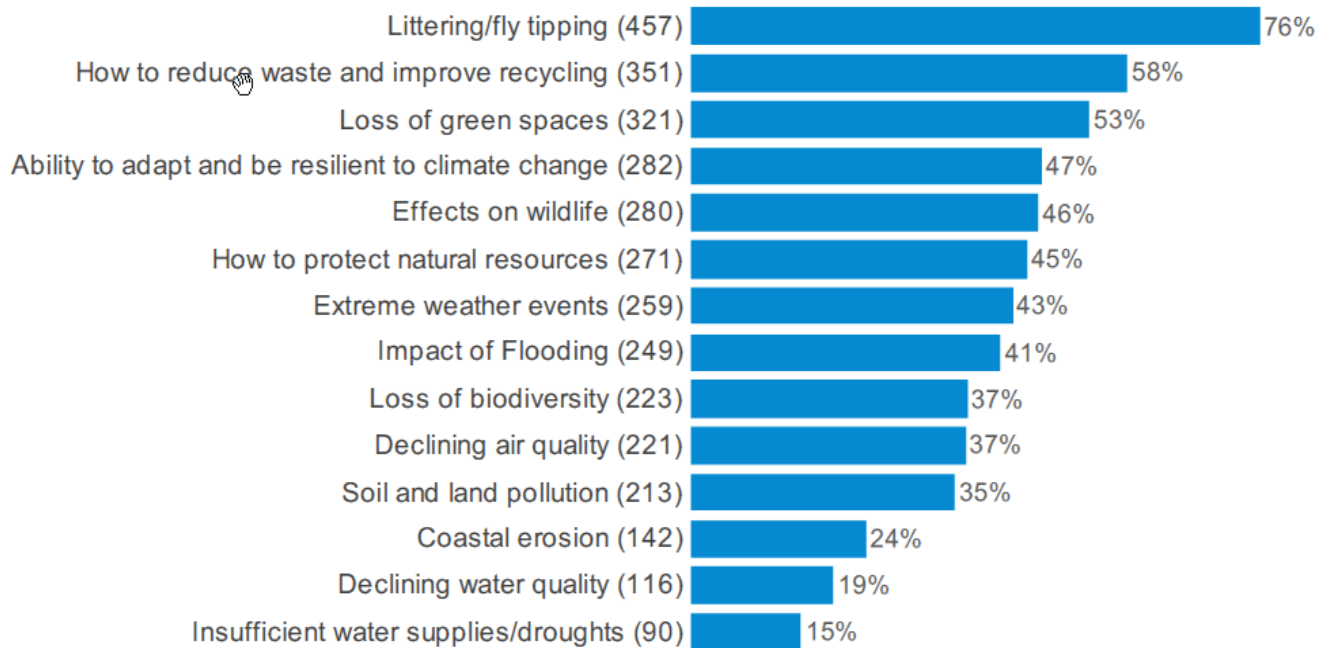
Community Area 1		Community Area 2		Community Area 3	
Support sustainable food production	28%	Landscape and views	27%	Landscape and views	16%
Clean resilient water resources & wildlife	23%	Support sustainable food production	23%	Access to nature and green spaces	13%
Access to nature and green spaces	20%	Access to nature and green spaces	23%	Wildlife	12%
Community Area 4		Community Area 5		Community Area 6	
Clean Air	27%	Access to nature and green spaces	13%	Beaches	22%
Wildlife	26%	Beaches	13%	Accessible outdoor recreation	15%
Beaches	24%	Accessible outdoor recreation	12%	Clean resilient water resources	11%

In Carmarthenshire, ‘beaches’ (77%) was the highest scoring for those aged 16-64 whilst respondents aged 65+ thought it was more valuable to have a ‘clean resilient water resources’ (41%). Female respondents also noted that they would value ‘beaches’ (81%) whilst male respondents felt that ‘landscape and views’ (35%) would be of more value. Respondents on a higher income of £45k+ valued ‘accessible outdoor recreation’ (30%) whilst those on the lower income of under £15k valued ‘wildlife’ (22%). Respondents that stated they were carers valued ‘clean air’ (27%) most about their local environment and those who stipulated they had a disability valued ‘supporting sustainable food production’ (31%). ‘Clean air’ and ‘water resources’ was valued by all age groups.



#### Q24) Looking ahead, what concerns you the most about your local environment?

Carmarthenshire residents were mostly concerned with 'littering/fly tipping' (76%) in their local environment.



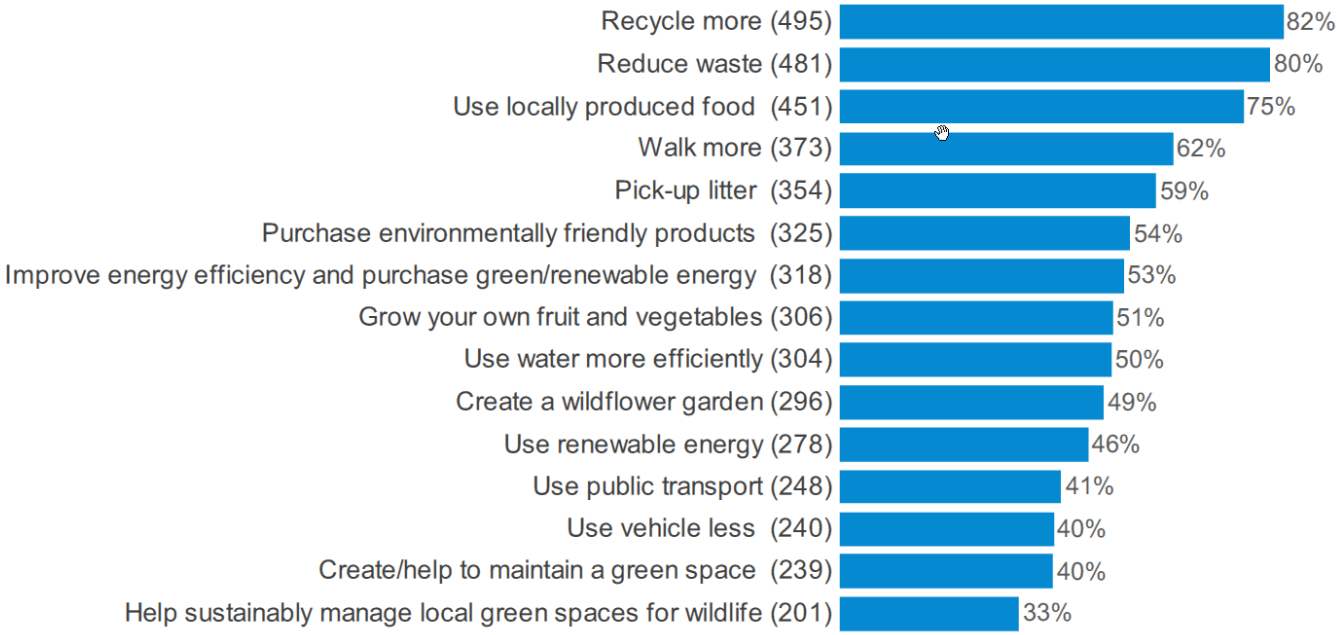
However, in the Community Areas there was a variance from the responses received.

- Community Area 1 were concerned with 'extreme weather events' (25%)
- Community Area 2 'impact of flooding' (29%)
- Community Area 3 'littering/fly tipping' (15%)
- Community Area 4 'declining water quality' (27%)
- Community Area 5 were also declined with 'declining water quality' (17%)
- Community Area 6 (20%) were both concerned mostly about 'coastal erosion'.

Respondents aged 16-64 were more concerned with the 'ability to adapt and be resilient to climate change' (74%) whilst those aged 65+ stated they were more concerned with 'how to reduce waste and improve recycling' (36%). Females were also concerned with 'ability to adapt and be resilient to climate change' (74%) whilst the male gender were mostly concerned with 'declining air quality' (32%). Respondents who had caring responsibilities main concern was 'coastal erosion' (25%) and those with disabilities were more concerned with 'insufficient water supplies/droughts' (30%). Respondents on a higher income of £45k+ stated that 'declining air quality' was their main concern (37%) whilst those on the lower income of under £15k were most concerned with 'effect on wildlife' (22%).

**Q25) What would you consider doing to improve your local environment?**

Most Carmarthenshire residents would consider ‘recycling more’ (82%) to improve their local environment.



There was a variance in the Community Areas as to what they would consider doing to improve their local environment.

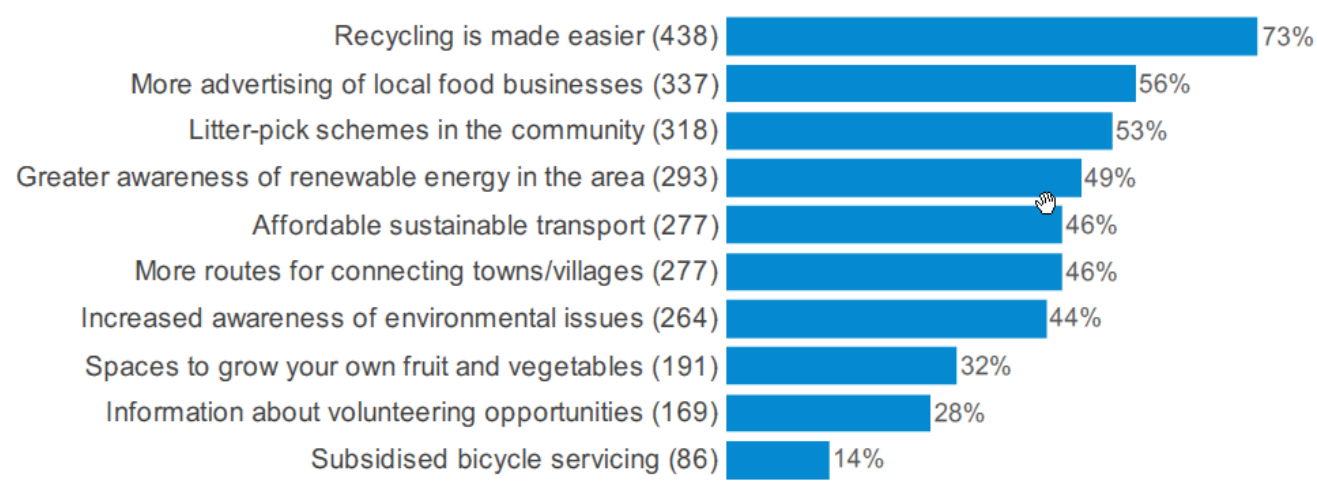
- Community Area 1 would consider ‘create/help to maintain a play space’ (25%)
- Community Area 2 ‘grow your own fruit and vegetables’ (22%)
- Community Area 3 ‘help sustainably manage local green spaces for wildlife’ (14%)
- Community Area 4 ‘use water more efficiently’ (30%)
- Community Area 5 ‘walk more’ (14%)
- Community Area 6 ‘cycle more’ (15%).

Respondents aged 16-64 would consider ‘cycling more’ (86%) whilst those aged 65+ stated they would prefer to consider ‘use public transport more’ (42%). Female respondents would consider ‘create/help to maintain a play space’ (78%) whilst the male gender would consider ‘cycling more’ (33%) to improve their local environment.

Respondents with caring responsibilities would also consider ‘create/help maintain a play space’ (27%) and those with disabilities would consider ‘use public transport’ (29%). Respondents on a higher income of £45k+ stated that they would consider ‘cycle more’ (37%) to improve their local environment whilst those on the lower income of under £15k would consider ‘use public transport’ (23%).

**Q26) What support would you need to be in place to improve your local environment?**

Most respondents stated that to help support them to improve their local environment they would need support for 'recycling is made easier' (73%).



There was a variance in the Community Areas as to what they would support they needed to improve their local environment.

- Community Area 1 required support 'more advertising of local food businesses' (22%)
- Community Area 2 'more routes for connecting towns/villages' (23%)
- Community Area 3 'subsidised bicycle servicing' (15%)
- Community Area 4 'recycling made easier' (24%)
- Community Area 5 'litter-pick schemes in the community' (14%)
- Community Area 6 'information about volunteering opportunities' (16%).

Respondents aged 16-64 would like more support on 'information about volunteering opportunities' (80%) whilst those aged 65+ stated they would like the support with 'affordable sustainable transport' (36%) to improve their local environment. Female respondents would like support on 'information about volunteering opportunities' (78%) to help improve their local environment whilst the male gender would like support on 'greater awareness of renewable energy in the area' (29%).

Respondents with caring responsibilities would like support with 'spaces to grow your own fruit and vegetables' (26%) and those with disabilities would like support for 'affordable sustainable transport' (31%). Respondents on a higher income of £45k+ (30%) and those on a lower income of £15k or less (24%) stated that support for 'subsidised bicycle servicing' would help them to improve their local environment.

Q27) Any other comments on 'A Resilient Carmarthenshire'?

Total of **75 comments** received, here are a few recurring or possibly useful comments



- Multi-user routes for including horse-riding, too much emphasis currently on walkers and cyclists
- Better maintained footpaths and byways and accessible to all
- A park and walk scheme
- Doorstep recycling is now easy – no excuse
- More accessible recycling centres
- More local bottle banks and green waste disposal
- Shortage of allotment spaces in some areas – introduce a ‘garden share’ scheme
- People are happy to volunteer to litter pick
- Anti-litter campaigns to help reduce litter
- Improve access to public transport
- More wildflower meadows in green spaces
- Improve areas with poor air quality
- Managing pollution from farming and industry

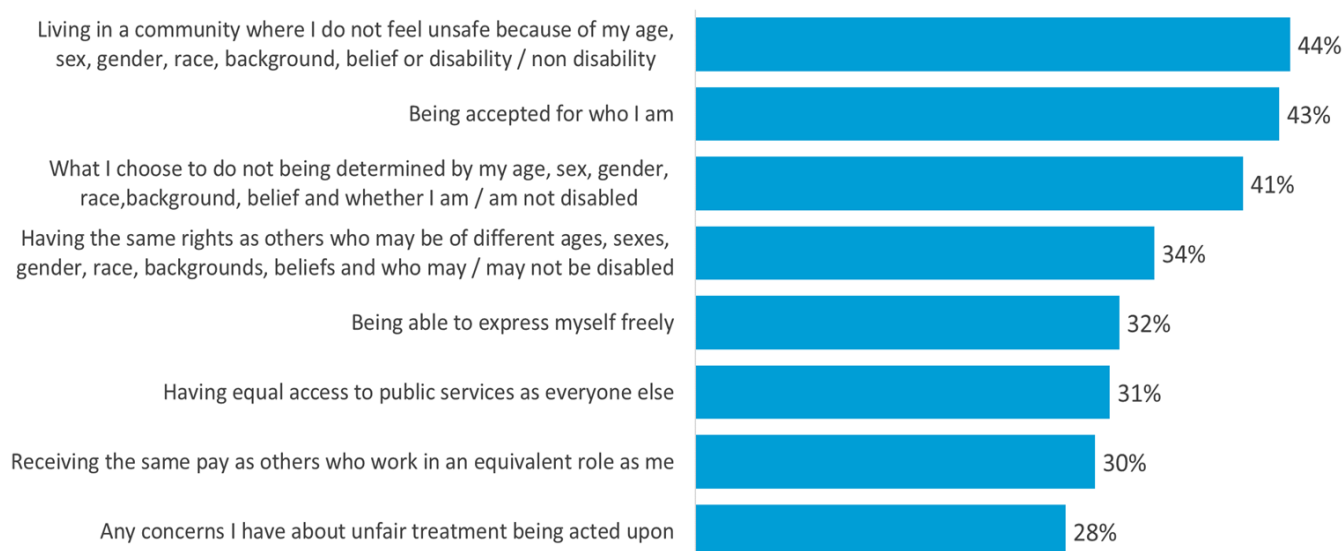
## A More Equal Carmarthenshire

Q28) Which **three** things do you value most about living in a society that strives to be equal for all?

The **three** main options that were chosen for Carmarthenshire are listed as follows: *Living in a community where I do not feel unsafe 44%, Being accepted for who I am 43% and What I choose to do not being determined by my age, sex, gender, race, background, belief and whether I am/am not disabled 41%.*

Community Area 1		Community Area 2		Community Area 3	
What I choose to do not being determined by my age, sex, gender, race, background, belief or whether I am/am not disabled.	23%	Being able to express myself freely	27%	Being able to express myself freely	15%
Being accepted for who I am	22%	Having equal access to public services as everyone else	24%	Any concerns I have about unfair treatment being acted upon	14%
Having equal access to public services as everyone else	22%	Being accepted for who I am	23%	What I choose to do not being determined by my age, sex, gender, race, background, belief and whether I am / am not disabled	13%
Community Area 4		Community Area 5		Community Area 6	
Living in a community where I do not feel unsafe	28%	What I choose to do not being determined by my age, sex, gender, race, background, belief or whether I am/am not disabled	13%	Having the same rights as others who may be of different ages, sexes, gender, race, backgrounds, beliefs and who may / may not be disabled	16%
Receiving the same pay as others who work in an equivalent role as me	25%	Having the same rights as others who may be of different ages, sexes, gender, race, backgrounds, beliefs and who may / may not be disabled	13%	Any concerns I have about unfair treatment being acted upon	15%
Having equal access to public services as everyone else	24%	Being accepted for who I am	13%	What I choose to do not being determined by my age, sex, gender, race, background, belief or whether I am/am not disabled	12%

Probing the results of Q28 by Community Areas and demography uncovers some similarities as well as a variance in responses.



In Carmarthenshire, ‘receiving the same pay as others who work in an equivalent role as me’ (44%) was the highest scoring for those aged 16-64 whilst respondents aged 65+ put more value on ‘living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief or disability/non-disability’ (40%).

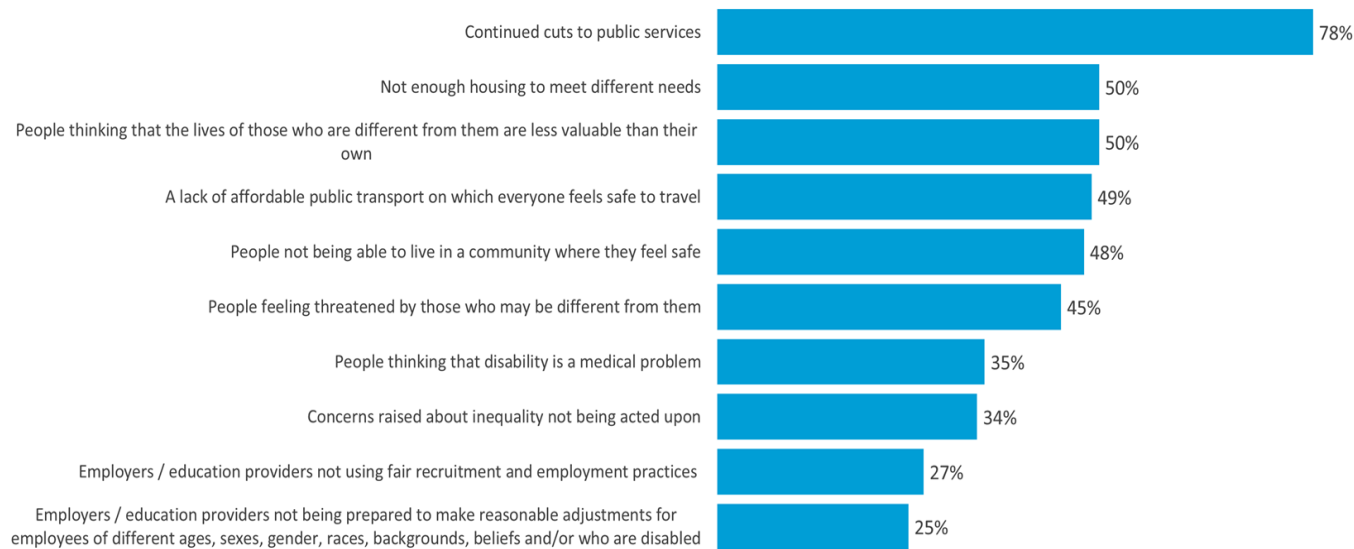
Female respondents also noted that what they would value most about living in a society striving to be equal for all would be ‘receiving the same pay as others who work in an equivalent role as me’ (83%) whilst male respondents felt that ‘being able to express myself freely’ (41%) would be of more value.

Respondents on a higher income of £45k+ also stated that what they valued most about living in a society that strives to be equal for all was ‘receiving the same pay as others who work in an equivalent role as me’ (32%) whilst those on the lower income of under £15k valued ‘being accepted for who I am’ (22%). Respondents that stated they were carers valued ‘living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief or disability / non disability’ (25%) and those who stipulated they had a disability valued ‘being accepted for who I am’ (30%). All respondents with Welsh language skills stated that they valued ‘receiving the same pay as others who work in an equivalent role as me’ as did all respondents aged 54 and under.



**Q29) Looking ahead, what concerns you the most about your community becoming fairer for everyone?**

Carmarthenshire residents were mostly concerned with ‘Continued cuts to public services (78%).



However, in the Community Areas there was a variance from the responses received of what concerns residents had about their community becoming fairer for everyone.

- Community Area 1 were mainly concerned with ‘Employers / education providers not being prepared to make reasonable adjustments for employees of different ages, sexes, gender, races, backgrounds, beliefs and/or who are disabled’ (22%)
- Community Area 2 ‘Not enough housing to meet different needs’ (25%)
- Community Area 3 ‘A lack of affordable public transport on which everyone feels safe to travel’ (15%)
- Community Area 4 ‘People thinking that disability is a medical problem’ (29%) and
- Community Area 5 (15%) and Community Area 6 (14%) were both concerned about ‘People not being able to live in a community where they feel safe’.

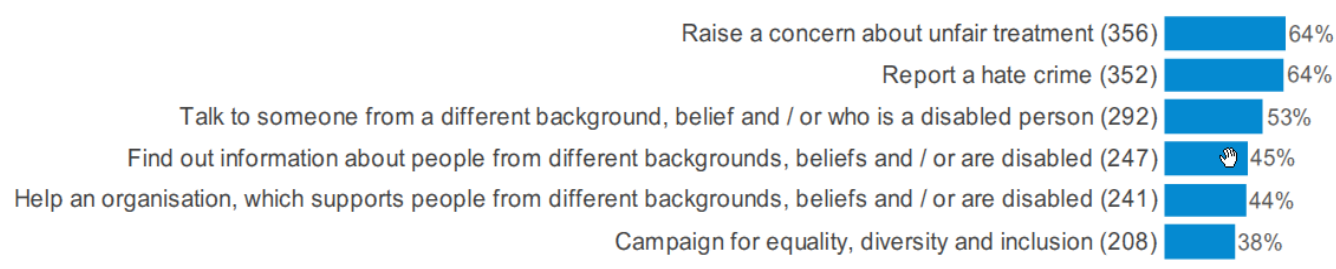
Respondents aged 16-64 were more concerned with the ‘People feeling threatened by those who may be different from them’ (75%) whilst those aged 65+ stated they were more concerned with ‘A lack of affordable public transport on which everyone feels safe to travel’ (35%). Females were concerned with ‘people thinking that disability is a medical problem’ (79%) whilst the male gender were mostly concerned with ‘continued cuts to public services’ (28%). Respondents who described themselves as LGB had concerns regarding ‘Employers / education providers not being prepared to make reasonable adjustments for employees of different ages, sexes, gender, races, backgrounds, beliefs and/or who are disabled’ (6%) whilst those who described themselves as BME had concerns regarding ‘people thinking that

the disability is a medical problem’ and ‘concerns raised about inequality not being acted upon’ (2%) for both responses.

Respondents who had caring responsibilities main concern was ‘Employers / education providers not being prepared to make reasonable adjustments for employees of different ages, sexes, gender, races, backgrounds, beliefs and/or who are disabled’ (28%) and those with disabilities were more concerned with ‘people thinking that the disability is a medical problem’ (38%). Respondents on a higher income of £45k+ stated that ‘people feeling threatened by those who may be different from them’ (27%) was their main concern whilst those on the lower income of under £15k were more concerned with ‘people thinking that the disability is a medical problem’ (25%).

Q30) What would you consider doing to help make things fairer for everyone in your community?

In order to make things fairer for everyone in their community most Carmarthenshire residents would consider ‘raising a concern about unfair treatment’ and ‘report a hate crime’ (64%).



There were some similarities in responses and some variance in the Community Areas as to what they would consider doing to make things fairer for everyone in their community.

- Community Area 1 ‘Help an organisation, which supports people from different backgrounds, beliefs and / or are disabled’ (24%)
- Community Area 2 ‘Help an organisation, which supports people from different backgrounds, beliefs and / or are disabled’ and ‘talk to someone from a different background, belief and/or who is a disabled person’ (20%)
- Community Area 3 ‘talk to someone from a different background, belief and/or who is a disabled person’ (13%),
- Community Area 4 ‘talk to someone from a different background, belief and/or who is a disabled person’ (26%)
- Community Area 5 ‘find out information about people from different backgrounds, beliefs and/or who are disabled’ (14%)

- Community Area 6 'Talk to someone from a different background, belief and / or who is a disabled person' (12%)

In order to make things fairer for everyone in their community respondents aged 16-64 would consider 'Find out information about people from different backgrounds, beliefs and / or are disabled' and 'Help an organisation, which supports people from different backgrounds, beliefs and / or are disabled' (78%) equally whilst those aged 65+ stated they would consider 'Talk to someone from a different background, belief and / or who is a disabled person' (30%). Most female respondents would consider 'Find out information about people from different backgrounds, beliefs and / or are disabled' (81%) whilst the male gender would consider 'raise a concern about unfair treatment' (26%) to make things fairer for everyone in their community.

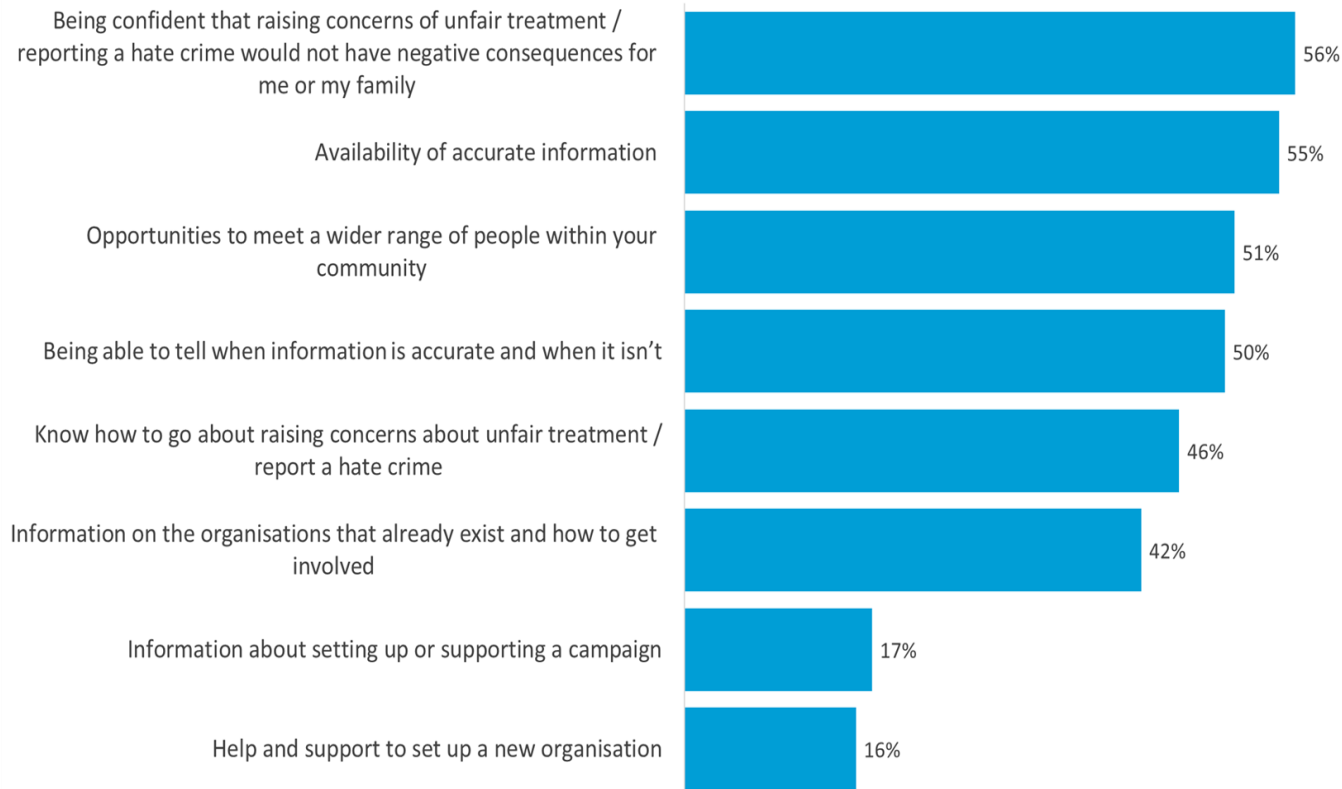
Respondents with caring responsibilities stated that they would also consider 'Talk to someone from a different background, belief and / or who is a disabled person' and 'raise a concern about unfair treatment' (24%) whilst respondents with disabilities would consider 'campaign for equality, diversity and inclusion' (32%).

Respondents who were LGB stated that they would consider 'Helping an organisation, which supports people from different backgrounds, beliefs and / or are disabled' (6%) as did residents who stipulated they were BME (2%).

Respondents on a higher income of £45k+ stated that they would consider 'Helping an organisation, which supports people from different backgrounds, beliefs and / or are disabled' (28%) to make things fairer for everyone in their community whilst those on the lower income of under £15k would consider 'Find out information about people from different backgrounds, beliefs and / or are disabled' (19%).

**Q31) What support would you need to be in place to make things fairer for everyone in your community?**

Most respondents stated that to help support them to make things fairer for everyone in their community they would need support in ‘Being confident that raising concerns of unfair treatment / reporting a hate crime would not have negative consequences for me or my family’ (56%).



Once again there were similarities as well as a variance in the Community Areas as to what they would support they needed to make things fairer for everyone in their local community.

- Community Area 1 required support on ‘Information on the organisations that already exist and how to get involved’ (22%)
- Community Area 2 ‘Opportunities to meet a wider range of people within your community’ (21%)
- Community 3 (15%) ‘Opportunities to meet a wider range of people within your community’ (22%)
- Community Area 4 ‘Information on the organisations that already exist and how to get involved’ (27%)
- Community Area 5 ‘Information about setting up or supporting a campaign’ (19%)
- Community Area 6 ‘Being confident that raising concerns of unfair treatment / reporting a hate crime would not have negative consequences for me or my family’ (13%).

Respondents who were LGB (7%) and transgender (13%) stated that they would need 'Help and support to set up a new organisation' as did residents who stipulated they were BME (4%).

Q32) Any other comments on 'A More Equal Carmarthenshire'?

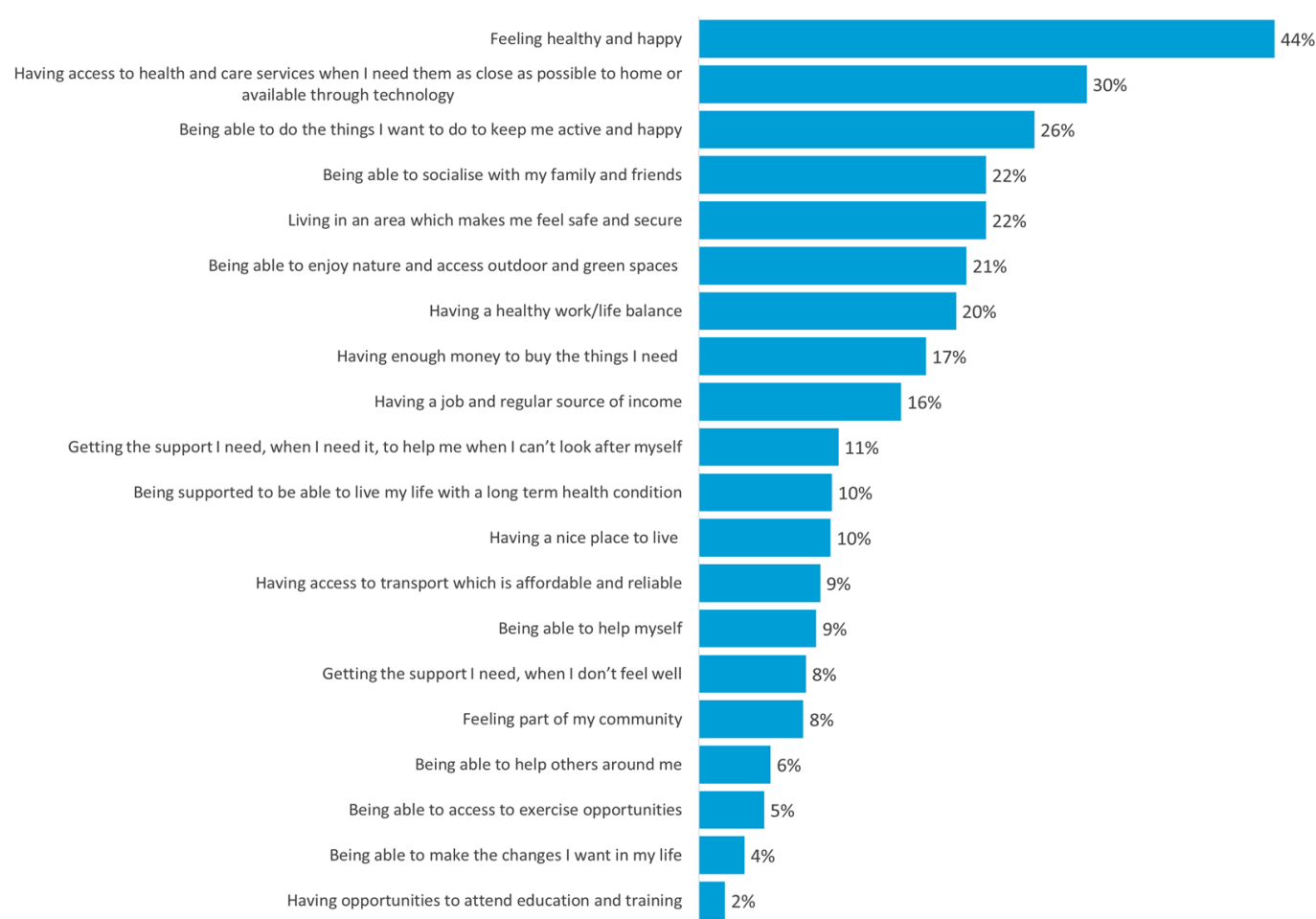
- Statutory organisations including the police and judiciary to operate fairly, openly and with no discrimination
- Recognising that misogyny is a hate crime
- A better reporting infrastructure and support for hate crime
- Police are far too tolerant and woefully under manned and resourced
- Recognising Sex rather than Gender
- Better access to NHS services
- Additional support for the Deaf community
- Better support and working opportunities
- Disabled friendly play equipment in parks
- Religious/faith beliefs being disregarded
- All people should be treated with respect etc we are born equal.



# A Healthier Carmarthenshire

## Q33) Which **three** things do you value most in relations to your physical health and/or mental well-being?

The **three** main options that were chosen for Carmarthenshire are listed as follows: *Feeling healthy and happy 44%, Having access to health and care services when I need them as close as possible to home or available through technology 30% and Being able to do the things I want to do to keep me active and happy 26%.*





Probing the results of Q33 by Community Areas and demography uncovers a variance in responses.

Community Area 1		Community Area 2		Community Area 3	
Feeling part of my community	31%	Being able to make the changes I want in my life	43%	Getting the support I need, when I don't feel well	19%
Being able to help others around me	30%	Being able to access to exercise opportunities	37%	Having access to health and care services when I need them as close as possible to home or available through technology	17%
Getting the support I need, when I need it, to help me when I can't look after myself	30%	Having a nice place to live	30%	Having opportunities to attend education and training	17%
Community Area 4		Community Area 5		Community Area 6	
Having opportunities to attend education and training	42%	Having a job and regular source of income	13%	Being able to help others around me	18%
Being supported to be able to live my life with a long-term health condition	36%	Having enough money to buy the things I need	15%	Having access to transport which is affordable and reliable	16%
Getting the support I need, when I don't feel well	31%	Being able to socialise with my family and friends	14%	Being able to help myself	15%

In Carmarthenshire, 'Having a job and regular source of income' (99%) was the highest scoring for those aged 16-64 whilst respondents aged 65+ put more value on 'Getting the support I need, when I need it, to help me when I can't look after myself' (66%).

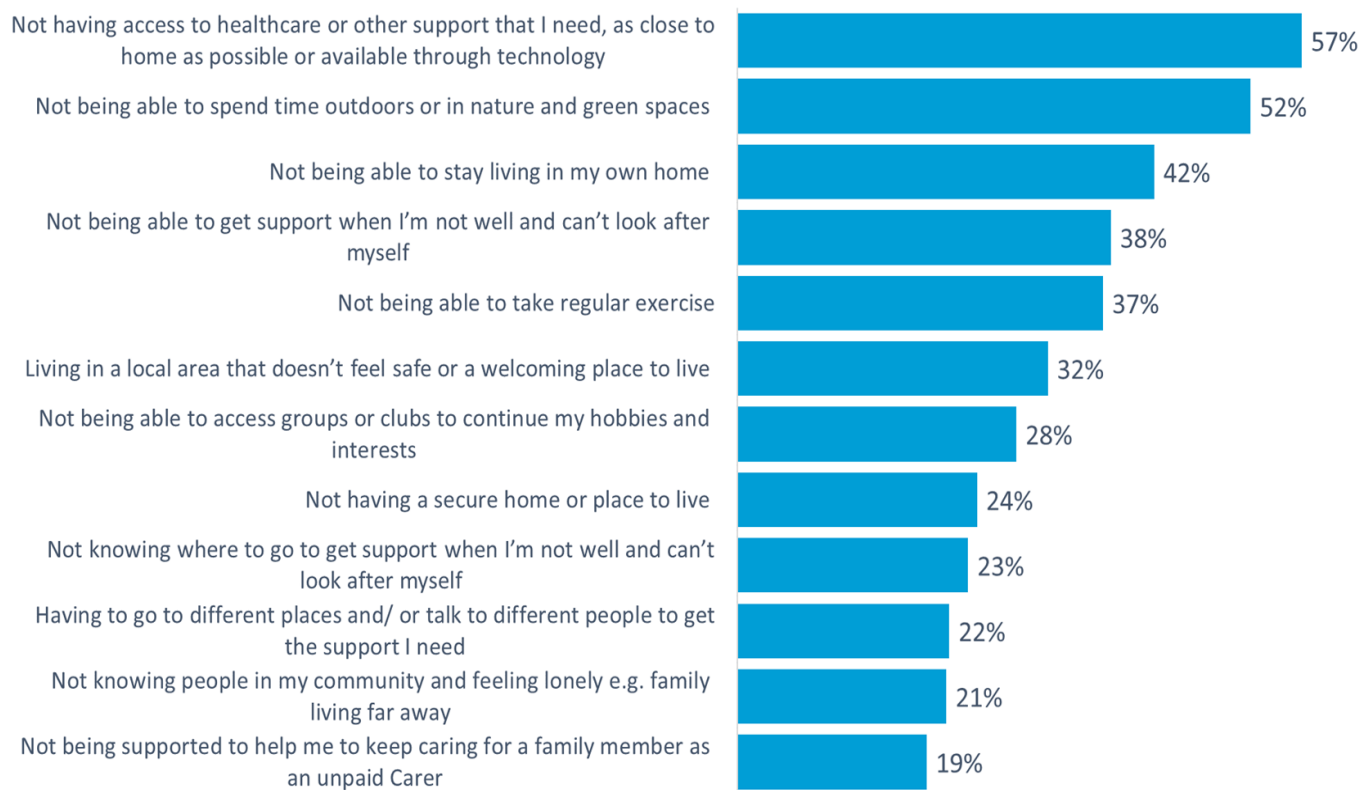
Female respondents also noted that what they would value most in relation to their physical and/or mental well-being would be 'Being able to enjoy nature and access outdoor and green spaces' (82%) whilst male respondents felt that 'Having a nice place to live' (42%) would be of more value to them.

Respondents on a higher income of £45k+ stated that what they valued most in relation to their physical health and/or mental well-being was 'being able to make the changes I want in my life' (43%) whilst those on the lower income of under £15k valued 'being supported to be able to live my life with a long-term health condition' (35%). Respondents that stated they were carers also valued 'being supported to be able to live my life with a long-term health condition' (33%) as well as those who stipulated they had a disability (85%).

Respondents that were expecting or had a baby in the last 6 months valued 'Feeling part of my community' (2%) whilst those on maternity/paternity leave valued 'Having a nice place to live' (2%).

Q34) Thinking ahead over the next ten years, what concerns you the most about being able to stay physically and/or mentally well?

In relation to thinking ahead over the next years about their physical and/or mental well-being Carmarthenshire residents were mostly concerned with ‘Not having access to healthcare or other support that I need, as close to home as possible or available through technology’ (57%).



However, in the Community Areas there was a variance from the responses received of what concerns residents had regarding their physical and/or mental well-being over the next ten years.

- Community Area 1 were more concerned with ‘Not being able to access groups or clubs to continue my hobbies and interests’ (23%)
- Community Area 2 ‘Not having a secure home or place to live’ (24%)
- Community Area 3 ‘Not having access to healthcare or other support that I need, as close to home as possible or available through technology’ (15%)
- Community Area 4 ‘Having to go to different places and/ or talk to different people to get the support I need’ (31%)

- Community Area 5 'Not being supported to help me to keep caring for a family member as an unpaid Carer' (19%)
- Community Area 6 'Living in a local area that doesn't feel safe or a welcoming place to live' (16%).

Respondents aged 16-64 were more concerned with the 'Not having a secure home or place to live' (73%) whilst those aged 65+ stated they were more concerned with 'not being able to stay living in my own home' (50%). Females were concerned with 'Not knowing people in my community and feeling lonely e.g., family living far away' (77%) whilst the male gender were mostly concerned with 'Not being able to take regular exercise' (31%). Respondents who described themselves as LGB also had concerns regarding 'Not knowing people in my community and feeling lonely e.g., family living far away' (7%) whilst those who described themselves as BME had concerns regarding 'Not having a secure home or place to live' (2%).

Respondents who had caring responsibilities main concern was 'Not being supported to help me to keep caring for a family member as an unpaid Carer' (59%) and those with disabilities were more concerned with 'Having to go to different places and/ or talk to different people to get the support I need' (44%). Respondents on a higher income of £45k+ stated that 'Living in a local area that doesn't feel safe or a welcoming place to live' (26%) was their main concern whilst those on the lower income of under £15k were more concerned with 'Having to go to different places and/ or talk to different people to get the support I need' (32%).

Q35) Looking ahead, what could you do to improve your own physical and/or mental well-being?

This section was analysed by the Hywel Dda University Health Board



## **Well-being Assessment Report November 2021:**

**Qualitative analysis of health and wellbeing questions within the regional Public Services Board well-being surveys in the Hywel Dda University Health Board area  
(Report Authors: Charlotte Peat; Anna Bird; Dr Joanne McCarty)**

### **Background**

The publication of a Public Services Board (PSB) Well-being Assessment is a requirement of the Well-being of Future Generations (Wales) Act 2015. Effectively involving people and communities is at the heart of improving well-being, therefore, engagement and consultation has been a key priority for PSB partners.

The three PSBs and the Regional Partnership Board worked collaboratively and developed a Regional Engagement and Consultation Framework. This provided a standardised approach to conducting the engagement and consultation activity for the Assessment of Local Wellbeing across the three PSB areas of Carmarthenshire, Ceredigion, and Pembrokeshire, and align with the work which is on-going to refresh the Population Needs Assessment.

An 'engagement led' approach was taken to ensure the views of our citizens are at the heart of the next set of PSB Well-being Plans. Engagement and Consultation are critical sources of information - they provide qualitative data which will help us to understand people's lived experiences, attitudes, and stories. Furthermore, this process will help identify gaps in the data and point to those groups that may be 'hidden' in numbers (for example, the homeless community). It will also complement the quantitative data gathered from the Well-being Survey, resulting in deeper and more 'nuanced' insights.

Engagement work with partners, stakeholders and citizens took place during August-October 2021 and initially focused on encouraging the completion of a Well-being Survey and targeted Focus Group discussions. Each PSB had its own survey, available in Welsh, English, Polish, Arabic and Romanian to reflect the most prevalent community languages. An Easy Read version was also developed, and citizens were able to complete the survey on-line or as a paper copy.

The Health Board, as a key statutory partner of the PSB, and provided specific support for the analysis of the Well-being Survey questions linked to “A Healthier Wales” which will contribute to the PSB Well-being Assessments, Population Needs Assessment and provide valuable insights to support the core work of the Health Board.

## **Methods**

The PSB ‘have your say’ wellbeing survey was carried out over 13 weeks and included an online survey and postal responses which were then inputted into the online database. The survey included three free-text answer boxes within the health and well-being section of the survey. These were questions 35 to 37 and these were included in this qualitative analysis. Respondents who completed the survey but did not input any free text for any of these three questions were not included in the analysis.

A thematic analysis was used and inductive coding with an iterative process of theme creation. Responses were assessed and grouped into initial themes. Once over half the responses had been looked at by two individuals, the common themes became clearer. These were used as the main themes in the analysis and each theme was assigned a ‘code’ or ‘keyword’. These themes were revisited over the remainder of the responses and informed by any new patterns emerging within the dataset. Any change was then reapplied to all responses.

No more than four themes were identified in any given answer for question 35, while no more than three themes were identified in any given answer for question 36. Hence, each answer for question 35 could be assigned up to four different ‘codes’ relating to four different themes and each answer for question 36 could be assigned up to three different ‘codes’.

Using Microsoft Excel™, the number of times each code had been assigned to the responses for each question could be counted. This was then extended to count the number of times each code, and hence theme, had occurred in subgroups of respondents – including those who answered ‘yes’ to having a disability, those aged 65 and over, and broken down into the three counties (Carmarthenshire, Ceredigion and Pembrokeshire). This count was then expressed as a percentage of the total number of respondents who had entered any free text for that particular question and were in each of these subgroups.

As a quality control measure, a random 10% of the responses were independently coded using the same set of themes and corresponding codes/ keywords by a second person. This resulted in a very high level of agreement in coding.

**Findings**

A total of 1333 surveys were completed regionally. 573 surveys did not include any text response to all of questions 35, 36 and 37. 716, 618 and 199 gave a text response for question 35, 36 and 37 respectively. Answers provided by respondents would often include multiple themes or different points. Each percentage given in the below findings refers to the number of people mentioning a comment relating to a theme, out of the total number of people who gave any text response to that question.

Themes are described below in order of prevalence for each question/ subgroup.

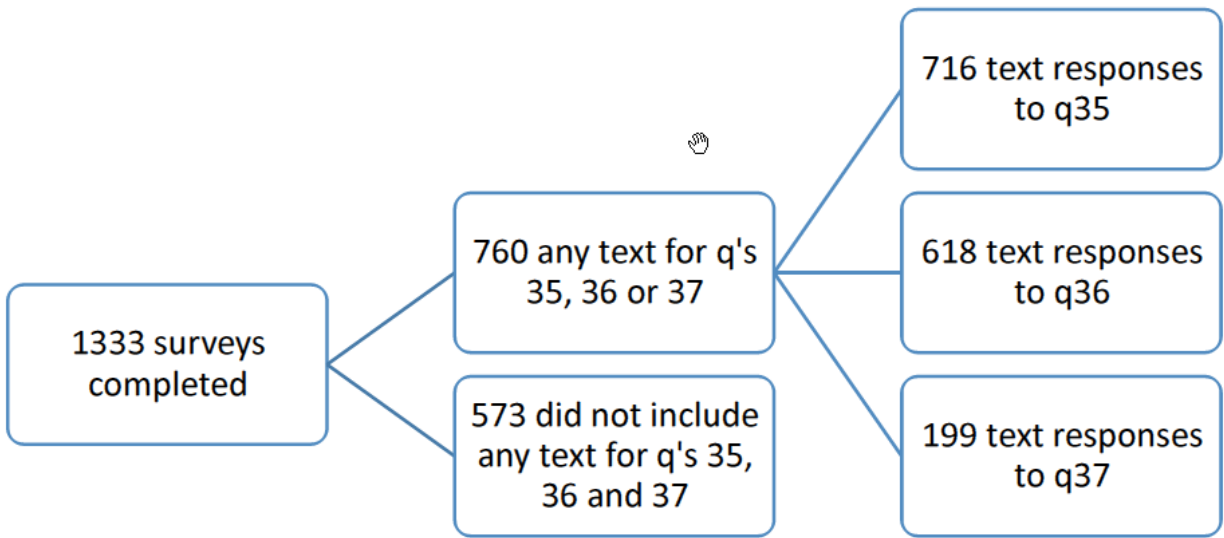


Figure 1. Flowchart of numbers of responses to question 35, 36 and 37

**Subgroups**

Answer to questions 35 and 36 were then broken down into subgroups to identify any possible differences in answers to the whole survey population. This included looking at responses from those answering that they lived in each county (Carmarthenshire, Ceredigion and Pembrokeshire), those regionally answering ‘yes’ to having a disability or long-term health problem, and those regionally aged 65 and above.

There were 320 text responses to question 35 from respondents who answered that they lived in Carmarthenshire.

51% of people living in Carmarthenshire who answered the survey mentioned more exercise, keeping fit or staying active.

13% commented on staying connected with friends, family or community groups, or socialising more, with answers including “...meet with family and friends regularly...”, “...stay in touch/ see loved ones” and “...meet and get to know more people...”.



This was followed by getting outdoors/ accessing green space (8%), looking after own wellbeing (e.g. self-care, self-motivation) at 8% and improving or maintaining a healthy diet (8%).

A better work/life balance or working less hours/ retiring was mentioned by 8% of those in Carmarthenshire who answered question 35.

Answers given did combine comments on exercising or staying active and accessing green spaces or getting outdoors. Examples include “keep visiting beaches and other local beauty spots for exercise and pleasure” and “...exercise and enjoy the beautiful natural environment around me”.

### Q36) What if anything would need to be in place for you to do these things?

273 of those who answered question 36 also answered that they lived in Carmarthenshire. 12% of these people commented on ‘routes’ which included walking, cycling and riding routes or areas that are safe and well maintained. Comments included “local footpaths maintained, most are impassable due to overgrowth, rubbish or landowners blocking them”, “more bridle paths...”, “well-lit paths”, “more cycle paths...” and “footpaths away from traffic”. 10% commented on improved or improved access to healthcare services (including primary care, secondary care, mental health services and dental services), such as “...effective mental health services”, “better accessibility to primary care services...” and “NHS dental care being available”.

A greater availability of, or access to, leisure and exercise classes that are appropriate, affordable or free was mentioned by 10% of those living in Carmarthenshire who gave a text answer to question 36. Comments included “cheaper/easier access to leisure centre facilities, especially the swimming pool”, “leisure centres open more” and “free or reduced fee access to gym/ classes etc”.

9% mentioned a comment relating to support – being listened to and supported, improved social care support, or support from employers.

Q37) Any other comments on 'A Healthier Carmarthenshire'?

Question 37 was less commonly answered than the previous two questions with 199 text responses. It was felt that the answers to this question were predominantly a reiteration of previous points, very specific/ personal or very broad/ unrelated to the topic of health and wellbeing. Therefore, there were no clear themes, and no further analysis was performed on the answers to this question by the Hywel Dda University Health Board.

Total of **84 comments** received, here are a few recurring or possibly useful comments

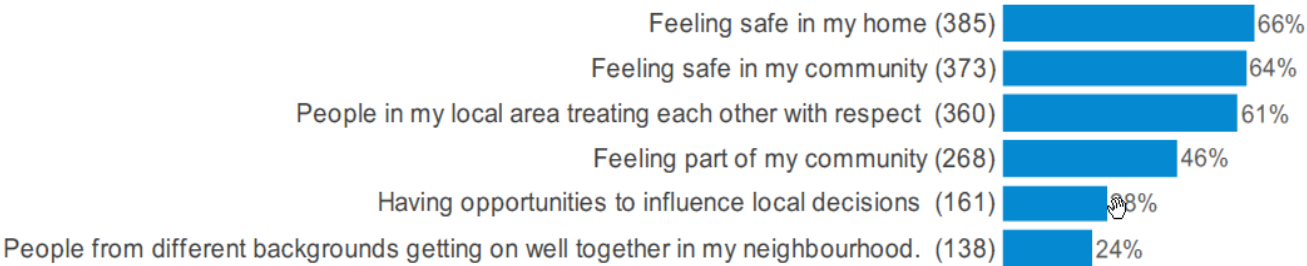


- Community volunteer transport services
- Improved public transport
- Getting to Hospital and GP appointments is a worry to many people
- Outdoor physical exercise is getting more challenging i.e., busier roads, larger and faster farm traffic, quiet electric cars and the threat of increased dog thefts
- Less focus on cycling and more consideration of other sports, horse riding, walking, swimming.
- Improved Green Spaces
- Accessible toilets in towns and villages
- Reduce waiting times with the NHS
- NHS to embrace technology
- Hospital access, GP and dental facilities need to be a priority for an ageing population.
- Improved access to GP services and therefore reduces the use of A&E
- How can it be conducive to healing for women having to accommodate males who identify as women in domestic refuges, rape crisis centres etc when those places exist because of male violence towards women and girls.
- Lack of mental health services
- More anti-alcohol & get up and walk campaigns

### A Carmarthenshire of Cohesive Communities

#### Q38) Which **three** things do you value most about the community that you live in?

The **three** main options that the residents of Carmarthenshire valued most about the community that they lived in are listed as follows: *Feeling safe in my home 66%, Feeling safe in my community 64% and People in my local area treating each other with respect 61%.*



Probing the results of Q38 by Community Areas and demography once again uncovers some similarities as well as a variance in responses.

Community Area 1		Community Area 2		Community Area 3	
People from different backgrounds getting on well together in my neighbourhood.	23%	Feeling part of my community	26%	People in my local area treating each other with respect	15%
Feeling part of my community	23%	People from different backgrounds getting on well together in my neighbourhood.	26%	Having opportunities to influence local decisions	13%
Having opportunities to influence local decisions	23%	Having opportunities to influence local decisions	23%	Feeling safe in my home	13%
Community Area 4		Community Area 5		Community Area 6	
Feeling part of my community	25%	People in my local area treating each other with respect	15%	People from different backgrounds getting on well together in my neighbourhood.	18%
Having opportunities to influence local decisions	24%	Feeling safe in my home	14%	Feeling safe in my community	11%
Feeling safe in my home	24%	Feeling safe in my community	12%	People in my local area treating each other with respect	11%

In Carmarthenshire, ‘feeling safe in my community’ (71%) was the highest scoring for those aged 16-64 whilst respondents aged 65+ put more value on ‘feeling part of my community’ (35%).

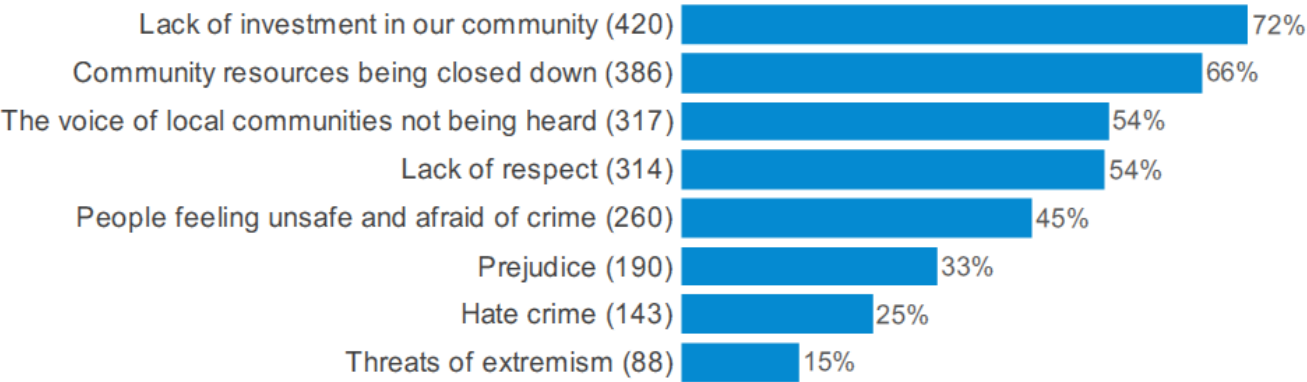
Female respondents noted that what they value most in relation to the community that they live in was ‘feeling safe in my own home’ (76%) whilst male respondents felt that ‘Having opportunities to influence local decisions’ (38%) was of more value to them.

Respondents on a higher income of £45k+ stated that what they valued most in relation to the community that they lived in was ‘Having opportunities to influence local decisions’ (29%) whilst those on the lower income of under £15k valued ‘people from different backgrounds getting on well together in my neighbourhood’ (21%). Respondents that stated they were carers said that ‘feeling part of their community’ (24%) was valuable to them and people who had a disability (32%) and those from a BME (2%) background said that ‘people from different backgrounds getting on well together in my neighbourhood’ would be valuable to them in their community.

Respondents with a religious (70%) belief valued ‘feeling part of the community’ as did those whose first language was stipulated to be Welsh (26%).

**Q39) Looking ahead, what concerns you the most about community cohesion?**

In relation to community cohesion Carmarthenshire residents were mostly concerned with ‘lack of investment in their communities’ (72%).



However, in the Community Areas there was a variance from the responses received of what concerns residents had regarding good community cohesion in their neighbourhood.

- Community Area 1 were more concerned with ‘prejudice’ (22%)
- Community Area 2 ‘lack of investment in our community’ (23%)
- Community Area 3 ‘threats of extremism’ (18%)

- Community Area 4 ‘prejudice’ (27%)
- Community Area 5 ‘people in my local area treating each other with respect’ (15%)
- Community Area 6 ‘threats of extremism’ (20%).

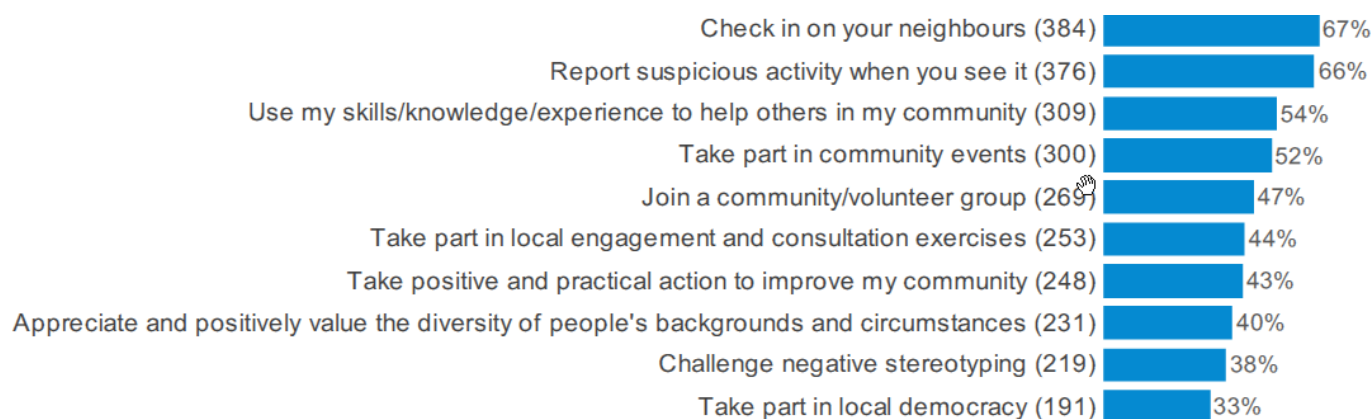
Respondents aged 16-64 were concerned with the ‘feeling part of their community’ (70%) whilst those aged 65+ (39%) and the male gender (29%) respondents stated they were more concerned with ‘the voice of local communities not being heard’. Female respondents were concerned with ‘threats of extremism’ (75%).

Respondents who described themselves as LGB also had concerns regarding ‘prejudice’ (7%) whilst those who described themselves as BME had concerns regarding ‘threats of extremism’ (2%).

Respondents who had caring responsibilities main concern was ‘the voice of local communities not being heard’ (25%) and those with disabilities were more concerned with ‘prejudice’ (31%). Respondents on a higher income of £45k+ stated that ‘lack of investment in their communities’ (27%) was their main concern whilst those on the lower income of under £15k were more concerned with ‘Hate crime’ (22%). A total of 84% of respondents who stipulated their first language to be English were concerned with ‘prejudice’.

#### Q40) What would you consider doing to help achieve good community cohesion in your neighbourhood?

To achieve good community cohesion in their neighbourhoods Carmarthenshire residents would consider ‘check in on their neighbours’ (67%).



There was a variance in the Community Areas as to what they would consider doing to achieve good community cohesion in their neighbourhood.

- Community Area 1 'use my skills/knowledge/experience to help other in my community' (23%)
- Community Area 2 would consider 'taking part in community events' (23%)
- Community Area 3 'report suspicious activity when you see it' (13%)
- Community Area 4 'join a community/volunteer group' (26%)
- Community Area 5 'check in on their neighbours' (13%)
- Community Area 6 'Take part in local democracy' (15%)

To achieve good community cohesion in their neighbourhood respondents aged 16-64 would consider 'take positive and practical action to improve my community' (79%) whilst those aged 65+ stated they would consider 'reporting a suspicious activity when they see it' (34%). Most female respondents would consider 'take part in community events' (80%) whilst the male gender would consider 'report suspicious activity when they see it' (34%) to achieve good community cohesion in their neighbourhood.

Respondents with caring responsibilities stated that they would also consider 'report suspicious activity when they see it' (25%) whilst respondents with disabilities would consider 'challenge negative stereotyping' (28%).

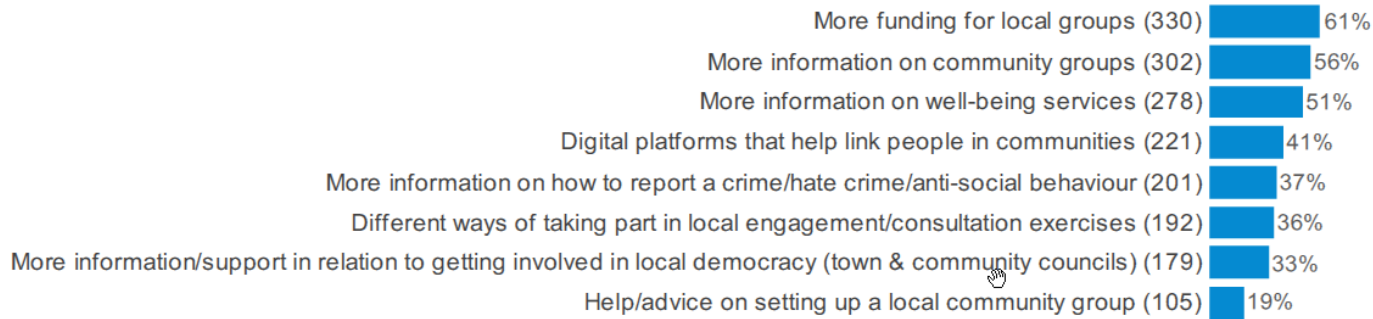
Respondents who were LGB stated that they would consider 'challenge negative stereotyping' (7%) and those that stipulated they were BME would consider 'taking positive and practical action to improve my community' (2%).

Respondents on a higher income of £45k+ stated that they would consider 'taking positive and practical action to improve my community' (32%) to make things fairer for everyone in their community whilst those on the lower income of under £15k would consider 'appreciating and positively valuing the diversity of people's backgrounds and circumstances' (19%).



Q41) What support would you need to be in place to do these things?

Most respondents stated that to help them achieve good community cohesion in their neighbourhood they would need support in ‘more funding for local groups’ (61%).



There was a variance in the Community Areas as to what they would support they needed to achieve good community cohesion in their neighbourhood.

- Community Area 1 ‘digital platforms that help link people in communities’ (26%)
- Community Area 2 ‘more information on community groups’ (21%)
- Community Area 3 ‘more information on how to report a crime/hate crime/anti-social behaviour’ (15%)
- Community Area 4 ‘more information on well-being services’ (26%)
- Community Area 5 ‘help/advice on setting up a local community group’ (17%)
- Community Area 6 ‘more information/support in relation to getting involved in local democracy (town & community councils)’ (16%).

Respondents aged 16-64 would like more support on ‘different ways of taking part in local engagement/consultation exercises’ (79%) whilst those aged 65+ stated they would like the support with ‘more information on how to report a crime/hate crime/anti-social behaviour’ (36%) to achieve good community cohesion in their neighbourhood. Female respondents would also like support with ‘more information on how to report a crime/hate crime/anti-social behaviour’ (77%) whilst the male gender would like support with ‘more information/support in relation to getting involved in local democracy (town & community councils)’ (30%).

Respondents who were LGB stipulated that they would require support with ‘help and advice on setting up a local community group (9%) whilst those stating they were transgender (7%) and respondents from the BME community (2%) stated that they would benefit with support on ‘more information/support in relation to getting involved in local democracy (town & community councils)’.

Respondents with caring responsibilities would like support with ‘more information on well-being services’ (27%) and those with disabilities would like support with ‘how to report a crime/hate crime/anti-social behaviour’ (28%). Respondents on a higher income of £45k+ stated that they would appreciate support with ‘help/advice on setting up a local community group’ (34%) and those on a lower income of £15k or less stated that support regarding ‘more information on well-being services’ (21%) would help them to good community cohesion in their neighbourhood.

#### Q42) Any other comments on ‘A Carmarthenshire of Cohesive Communities’?

Total of **54 comments** received, here are a few recurring or possibly useful comments

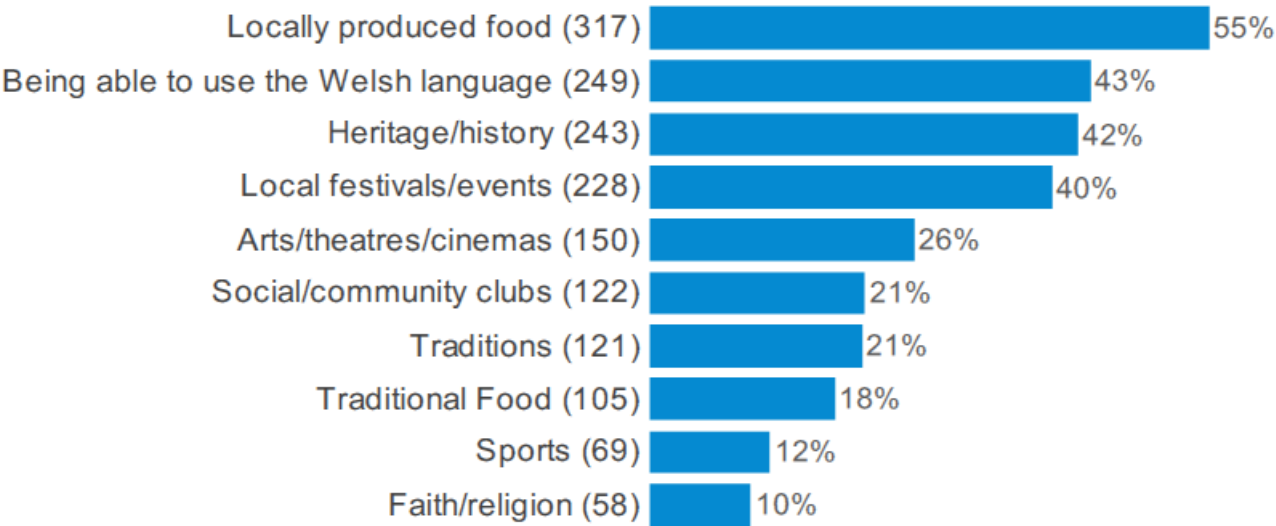


- Lack of funding in communities, centres, and village halls
- Even distribution of support across communities and not only via community councils
- Bring back Day Centres and Meals on Wheels
- Don't have the time to be involved
- Digital platform is great – but there is a percentage that does not have access
- Improved Digital connectivity
- Negativity against English incomers to take part
- Better access to information
- Better promotion of existing national directories such as Dewis and Infoengine
- Mobility issues that prevent me from being as involved
- Involvement of foreigners in social projects not only as volunteers

A Carmarthenshire of vibrant culture and thriving Welsh language

Q43) Which **three** things do you value most in relation to your county’s vibrant community and thriving Welsh language?

The **three** main options that the residents of Carmarthenshire valued most about their vibrant community and thriving Welsh language is listed as follows: *Locally produced food 55%, Being able to use the Welsh language 43% and Heritage/history 42%.*



Probing the results of Q43 by Community Areas and demography uncovers a variance in responses.

Community Area 1		Community Area 2		Community Area 3	
Heritage/History	23%	Being able to use the Welsh language	26%	Faith/religion	17%
Sports AND Traditions	22%	Social/community clubs	26%	Social/community clubs	15%
Arts/theatres/cinemas	22%	Local festivals/events	24%	Heritage/History	14%
Community Area 4		Community Area 5		Community Area 6	
Traditional food	33%	Sports	17%	Arts/theatres/cinemas.	16%
Traditions	33%	Social/community clubs	16%	Sports	15%
Being able to use the Welsh language	28%	Local festivals/events	15%	Locally produced food	13%

In Carmarthenshire, ‘being able to use the Welsh language’ (76%) was the highest scoring for those aged 16-64 whilst respondents aged 65+ put more value on ‘faith/religion’ (55%).

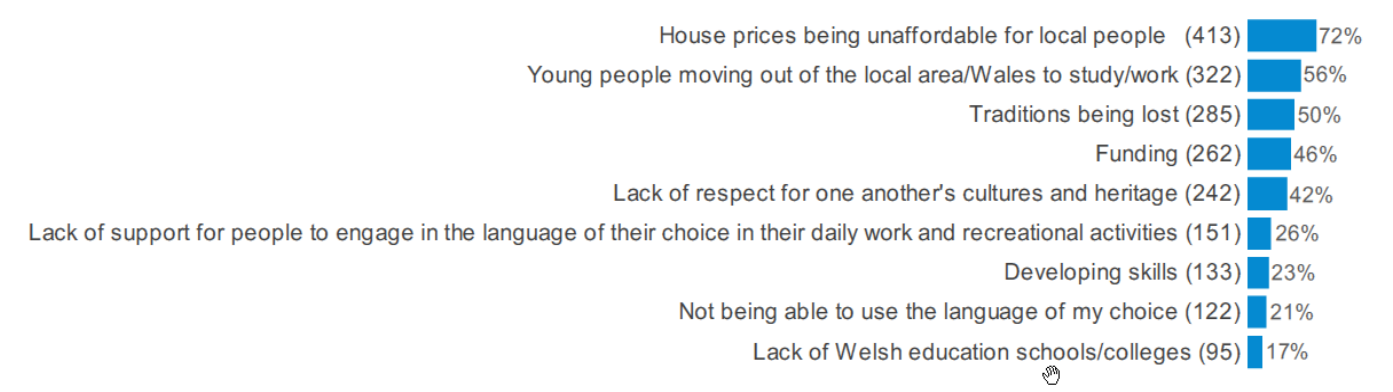
Female respondents noted that in relation to the county’s vibrant culture and thriving Welsh language they valued ‘local festivals/events’ (79%) whilst male respondents felt that ‘sports’ (49%) was of more value to them.

Respondents on a higher income of £45k+ also stated that what they valued most in relation to a vibrant community with a thriving Welsh language was ‘sports’ (35%) whilst those on the lower income of under £15k valued ‘faith/religion’ (22%). Respondents that stated they were carers (29%) and those from the BME community (2%) said that ‘traditions’ what was more valuable. Respondents that stipulated they a disability (39%) and those that indicated they were transgender (11%) valued ‘faith/religion’ in their communities.

Respondents that chose English as their first language valued ‘heritage/history’ (87%) and ‘local festivals/events’ (87%) in their vibrant communities, whilst those who had chosen Welsh as their first language valued ‘being able to use the Welsh language’ (47%) in relation to the county’s vibrant community and thriving Welsh language.

Q44) Looking ahead, what concerns you the most about your county’s vibrant community and thriving Welsh language?

In relation to the county’s vibrant community and thriving Welsh language Carmarthenshire residents were mostly concerned with ‘house prices being unaffordable for local people’ (72%).



Whilst there were some similarities in the Community Areas there was also a variance from the responses received of what concerns residents had regarding the county’s vibrant community and thriving Welsh language.

- Community Area 1 were concerned with ‘young people moving out of the local area/Wales to study/work’ (24%)
- Community Area 2 ‘not being able to use the language of my choice’ (27%)

- Community Area 3 ‘developing skills’ (16%)
- Community Area 4 ‘not being able to use the language of my choice’ (29%)
- Community Area 5 ‘funding’ (14%)
- Community Area 6 ‘funding’ (14%).

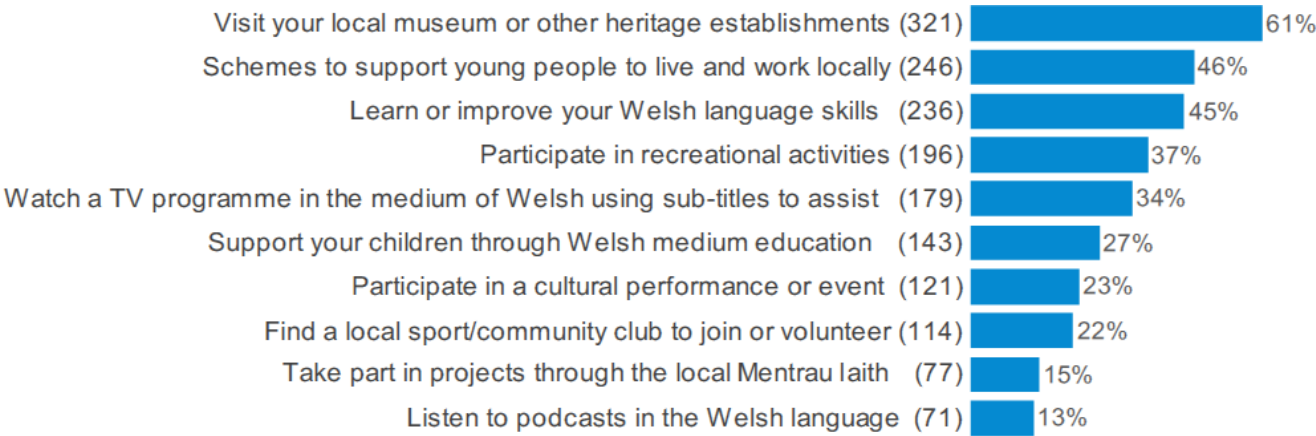
Respondents aged 16-64 were concerned with the ‘lack of Welsh education/schools’ (77%) whilst those aged 65+ were concerned about ‘not being able to use the language of my choice’ (34%). Female respondents were concerned about ‘young people moving out of the local area/Wales to study/work’ (76%) whilst the male respondents were concerned about ‘not being able to use the language of my choice’ (33%).

Respondents who described themselves as LGB were concerned about ‘lack of Welsh education schools/colleges’ (5%) and ‘lack of support for people to engage in the language of their choice in their daily work and recreational studies’ (5%) whilst those who described themselves as BME had concerns regarding ‘developing skills’ (2%). People from the transgender community were concerned about ‘lack of support for people to engage in the language of their choice in their daily work and recreational activities’ (9%).

Respondents who had caring responsibilities main concern was ‘developing skills’ (27%) and those with disabilities were more concerned with ‘not being able to use the language of their choice’ (29%). Respondents on a higher income of £45k+ stated that ‘young people moving out of the local area/Wales to study/work’ (28%) was their main concern whilst those on the lower income of under £15k were more concerned with ‘traditions being lost’ (19%). A total of 86% of respondents who stipulated their first language to be English were concerned with ‘developing skills’ and respondents that stated they held a religion/belief were concerned about ‘lack of Welsh education schools/colleges’ (72%).

**Q45) What would you consider doing to help achieve a vibrant community with a thriving Welsh language?**

To help achieve a vibrant community with a thriving Welsh language Carmarthenshire residents would consider ‘visit their local museum or other heritage establishment’ (61%).



There was a high response to being able to ‘learn or improve Welsh language skills’ from the Community Areas as well as other variance as to what they would consider doing to help them achieve a vibrant community with a thriving Welsh language.

- Community Area 1 ‘learn or improve Welsh language skills’ (23%)
- Community Area 2 would consider ‘find a local sport/community club to join or volunteer’ (27%)
- Community Area 3 ‘participate in a cultural performance or event’ (14%)
- Community Area 4 ‘take part in projects through the local Mentrau Iaith’ (33%)
- Community Area 5 ‘learn or improve Welsh language skills’ (14%)
- Community Area 6 ‘learn or improve Welsh language skills’ (14%)

To help achieve a vibrant community with a thriving Welsh language respondents aged 16-64 would consider ‘take part in projects through the local Mentrau Iaith’ (86%) whilst those aged 65+ stated they would consider ‘visiting their local museum or other heritage establishment’ (34%). Respondents of the female gender would consider ‘learning or improving their Welsh language skills’ (77%) whilst the male respondents would consider ‘taking part in projects through the local Mentrau Iaith’ (27%) or ‘participate in a cultural performance or event’ (27%) in order to help them to achieve a vibrant community with a thriving Welsh language.

Respondents with caring responsibilities stated that they would consider ‘take part in projects through the local Mentrau Iaith’ (32%) whilst respondents with disabilities would consider ‘watching a TV programme in the medium of Welsh using sub-titles to assist’ (25%).

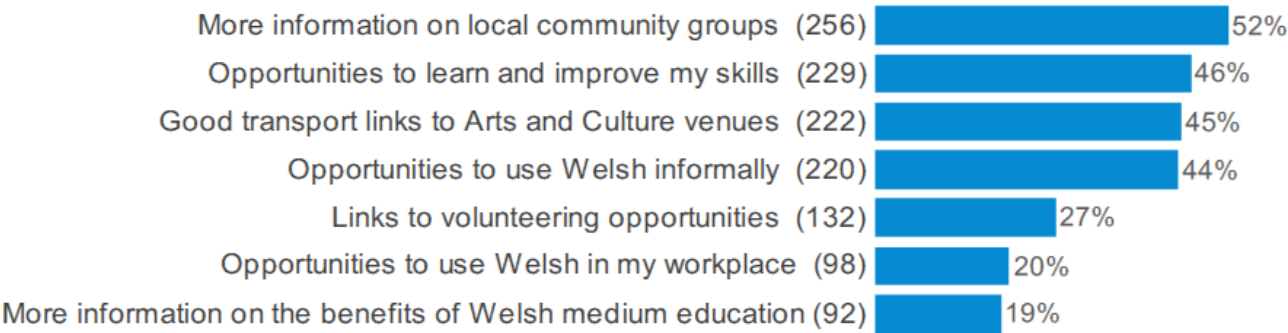


Respondents who were LGB stated that they would consider ‘listening to podcasts in the Welsh language’ (9%) as did respondents that noted they were BME (2%)

Respondents on a higher income of £45k+ stated that they would consider ‘supporting their children through Welsh medium education’ (43%) to help achieve a vibrant community with a thriving Welsh language whilst those on the lower income of under £15k would consider ‘watching a TV programme in the medium of Welsh using sub-titles to assist’ (17%). Respondents that stipulated English as their first language would consider ‘learning or improving their Welsh language skills’ (90%).

**Q46) What support would you need to be in place to do these things?**

Most respondents stated that to help them achieve a vibrant community with a thriving Welsh language they would need support in ‘more information on local community groups’ (52%).



There was a variance in the Community Areas as to what they would support they needed to achieve good community cohesion in their neighbourhood.

- Community Area 1 ‘opportunities to use Welsh informally’ (21%)
- Community Area 2 ‘opportunities to use Welsh in the workplace’ (27%)
- Community Area 3 ‘opportunities to use Welsh in the workplace’ and ‘good transport links to Arts and Culture venues’ (12%)
- Community Area 4 ‘more information on local community groups’ (26%)
- Community Area 5 ‘links to volunteering groups’ (17%)
- Community Area 6 ‘more information on local community groups’ (15%).

Respondents aged 16-64 would like more support on ‘opportunities to use Welsh in the workplace’ (85%) whilst those aged 65+ stated they would like the support with ‘good transport links to Arts and Culture venues’ (39%) to help them achieve a vibrant community with a thriving Welsh language. Female respondents would like support with ‘opportunities to use Welsh informally’ (76%) whilst the male gender would like support with ‘more information on the benefits of Welsh medium education’ (34%).

Respondents who were LGB stipulated that they would require support with ‘opportunities to use Welsh informally’ (6%) as did respondents stating that they were transgender (7%) whilst respondents from the BME community stated that they would benefit with support on ‘links to volunteering opportunities’ (2%).

Respondents with caring responsibilities would like support with ‘opportunities to learn and improve my skills’ (30%) and those with disabilities would like support with ‘good transport links to Arts and Culture venues’ (29%). Respondents on a higher income of £45k+ stated that they would appreciate support with ‘opportunities to use Welsh in the workplace’ (33%) and those on a lower income of £15k or less stated that support regarding ‘good transport links to Arts and Culture venues’ (21%) would help them achieve a vibrant community with a thriving Welsh language.

87% of respondents who stipulated English as their first name stated they would like support with ‘Opportunities to learn and improve my skills’.

#### Q47) Any other comments on ‘A Carmarthenshire of vibrant culture and thriving Welsh language’?

Total of **49 comments** received, here are a few recurring or possibly useful comments

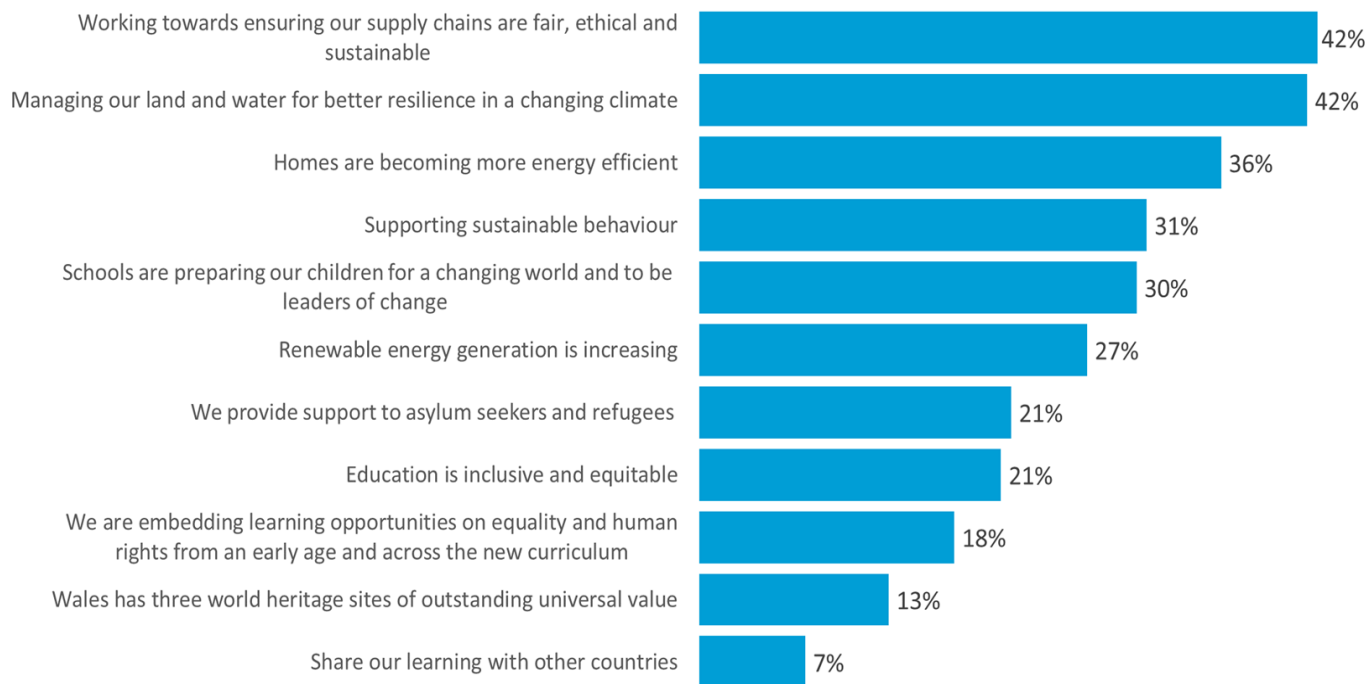
- To include Welsh in business can be expensive with little financial return in investment
- Welsh is a difficult language to learn unless done so from an early age
- More accessible and subsidised adult Welsh lessons
- Support groups for non-Welsh speaking parents helping with Welsh homework
- Too much pressure to speak Welsh
- Losing well qualified staff just because they cannot speak Welsh
- Need to ensure that workplaces nurture, use and develop young people’s Welsh skills that have received Welsh Education
- This is a bilingual community. There should be no discrimination on either side
- There seems to be less opportunity to speak Welsh in our community in areas such as the Surgery, Chemist, Library, Hospital, local shops and on the buses
- The language is very important and should encourage more people to learn and use it.



## A Responsive Carmarthenshire

Q48) Which **three** things do you value most in your county's global responsibility?

The **three** main options that the residents of Carmarthenshire valued most about their county's global responsibility are listed as follows: *Working towards ensuring our supply chains are fair, ethical and sustainable 42%, Managing our land and water for better resilience in a changing climate 42% and Homes are becoming more energy efficient 36%.*



Probing the results of Q43 by Community Areas and demography uncovers a variance in responses.

Community Area 1		Community Area 2		Community Area 3	
Share our learning with other countries	24%	Share our learning with other countries	38%	Wales has three World heritage sites of outstanding universal value	16%
Wales has three World heritage sites of outstanding universal value	23%	Wales has three World heritage sites of outstanding universal value	27%	Homes are becoming more energy efficient	15%
Working towards ensuring our supply chains are fair, ethical and sustainable	23%	Education is inclusive and equitable	25%	We provide support to asylum seekers and refugees	14%
Community Area 4		Community Area 5		Community Area 6	
We are embedding learning opportunities on equality and human rights from an early age	29%	Managing our land and water for better resilience in a changing climate	15%	We provide support to asylum seekers and refugees	15%

and across the new curriculum					
Homes are becoming more energy efficient AND Renewable energy generation is increasing	25% 25%	Homes are becoming more energy efficient	15%	We are embedding learning opportunities on equality and human rights from an early age and across the new curriculum	15%
Managing our land and water for better resilience in a changing climate	24%	Working towards ensuring our supply chains are fair, ethical and sustainable	14%	Supporting sustainable behaviour	13%

In Carmarthenshire, respondents aged 16-64 valued 'We are embedding learning opportunities on equality and human rights from an early age and across the new curriculum' (83%) whilst respondents aged 65+ put more value on 'Wales has three World heritage sites of outstanding universal value' (41%).

Female respondents noted that in relation to valuing the county's global responsibility they valued 'We are embedding learning opportunities on equality and human rights from an early age and across the new curriculum' (84%) whilst male respondents felt that 'renewable energy generation is increasing' (36%) was of more value.

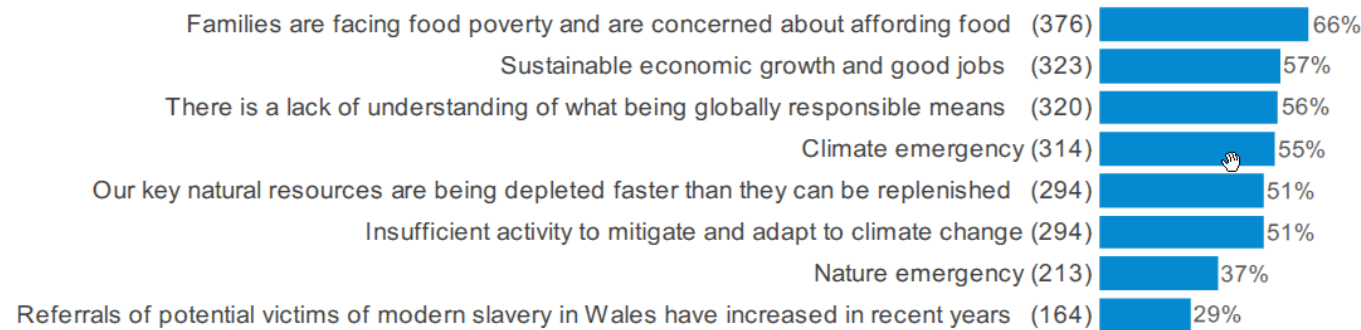
Respondents on a higher income of £45k+ also stated that what they valued most in relation to a county that was globally responsive was 'supporting sustainable behaviour' (32%) whilst those on the lower income of under £15k wanted to 'share our learning with others' (22%). Respondents that stated they were carers (26%) and those who stipulated they were disabled (29%) valued 'homes are becoming more energy efficient'. Respondents from the LGB (6%) and the BME community (3%) stipulated that they valued 'we provide support to asylum, seekers and refugees'.

Respondents that stipulated they were transgender (10%) and those that stipulated they held a religion (73%) thought we should 'share our learning with other countries'.

Respondents that chose English as their first language valued 'managing our land and water for better resilience in a changing climate' (85%) and 'local festivals/events' (87%) in their vibrant communities, whilst those who had chosen Welsh as their first language valued 'sharing our learning with other countries' (38%) in relation to the county's global responsibility.

**Q49) Looking ahead, what concerns you the most about your county's global responsibility?**

In relation to what concerns residents most about the county's global responsibility was 'families facing food poverty and that are concerned about affording food (66%).



However, in the Community Areas there was a variance from the responses received of what concerns residents had regarding the county's global responsibility even though some areas were in agreement with their responses.

- Community Area 1 were concerned with 'nature emergency' (23%)
- Community Area 2 'sustainable economic growth and good jobs' (24%)
- Community Area 3 'nature emergency' (15%)
- Community Area 4 'referrals of potential victims of modern slavery in Wales have increased in recent years' (25%)
- Community Area 5 'insufficient activity to mitigate and adapt to climate change' (13%)
- Community Area 6 'referrals of potential victims of modern slavery in Wales have increased in recent years' (15%).

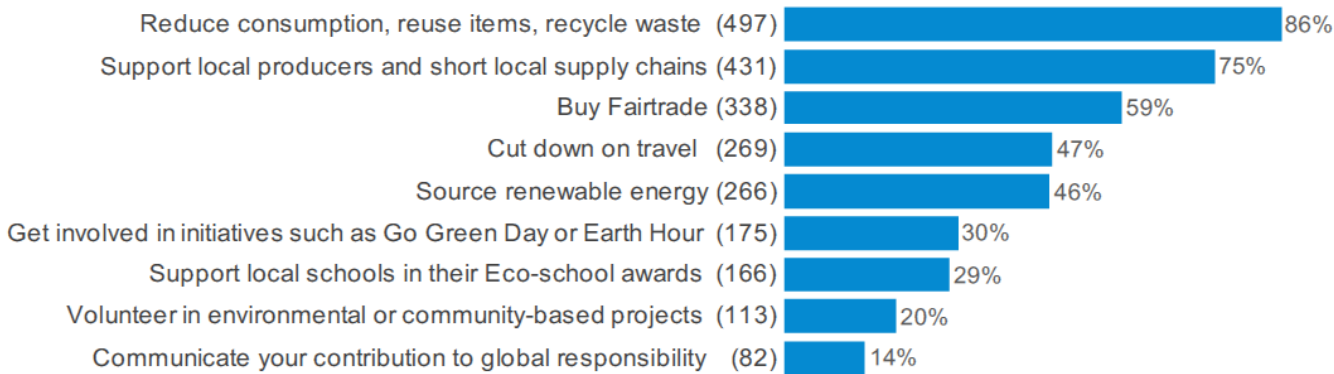
Respondents aged 16-64 were concerned with the 'referrals of potential victims of modern slavery in Wales have increased in recent years' (73%) whilst those aged 65+ were concerned about 'our key natural resources are being depleted faster than they can be replenished' (35%). Female respondents were concerned about 'referrals of potential victims of modern slavery in Wales have increased in recent years' (77%) whilst the male respondents were concerned about 'sustainable economic growth and good jobs' (29%).

Respondents who described themselves as LGB were concerned about 'our key natural resources are being depleted faster than they can be replenished' (5%) whilst those who identified as BME had concerns regarding 'sustainable economic growth and good jobs' (2%). People from the transgender community were concerned about 'referrals of potential victims of modern slavery in Wales have increased in recent years' (8%).

Respondents who had caring responsibilities main concern was ‘there is a lack of understanding of what being globally responsible means’ (24%) and those with disabilities were more concerned with ‘referrals of potential victims of modern slavery in Wales have increased in recent years’ (28%). Respondents on a higher income of £45k+ stated that ‘climate change’ (28%) was their main concern whilst those on the lower income of under £15k were more concerned with there is a lack of understanding of what being globally responsible means’ (19%). A total of 88% of respondents who stipulated their first language to be English were concerned with ‘insufficient activity to mitigate and adapt to climate change’ and respondents that stated they held a religion/belief were concerned about ‘sustainable economic growth and good jobs’ (63%).

**Q50) What could you do to help your community be globally responsible?**

To help achieve their community be globally responsible Carmarthenshire residents stated that they could ‘reduce consumption, reuse items, recycle waste’ (86%).



There was a variance in the Community Areas as to what they would consider doing to help their community be globally responsible.

- Community Area 1 ‘volunteer in environmental or community based projects’ (24%)
- Community Area 2 would consider ‘reduce consumption, reuse items, recycle waste’ (21%)
- Community Area 3 ‘buy Fairtrade’ (13%)
- Community Area 4 ‘communicate your contribution to global responsibility’ (28%)
- Community Area 5 ‘get involved in initiatives such as Go Green Day or Earth Hour’ (14%)
- Community Area 6 ‘communicate your contribution to global responsibility’ (17%)

To help their community be globally responsible respondents aged 16-64 would consider ‘get involved in initiatives such as Go Green Day or Earth Hour’ (83%) whilst those aged 65+ stated



they would consider ‘buy Fairtrade’ (33%). Respondent of the female gender would consider ‘communicate your contribution to global responsibility’ (83%) whilst the male respondents would consider ‘source renewable energy’ (29%) in order to help their community to be globally responsible.

Respondents with caring responsibilities stated that they would consider ‘volunteer in environmental or community-based projects’ (23%) whilst respondents with disabilities would consider ‘communicate your contribution to global responsibility’ (32%).

Respondents who were LGB stated that they would consider ‘volunteer in environmental or community-based projects’ (5%) whilst those that stipulated they were BME said they would consider ‘communicate your contribution to global responsibility’ (2%).

Respondents on a higher income of £45k+ stated that they would consider ‘support local schools in their Eco-school awards’ (32%) to help achieve a vibrant community with a thriving Welsh language whilst those on the lower income of under £15k would consider ‘volunteer in environmental or community-based projects’ (22%).

Q51) What support would you need to be in place to do to these things?

Most respondents stated that to help their community be globally responsive they would need support in ‘information on sourcing local food and resources’ (71%).



There was a variance in the Community Areas as to what they would support they needed to achieve good community cohesion in their neighbourhood.

- Community Area 1 ‘information on decarbonisation and the circular economy’ (24%)

- Community Area 2 ‘workplace projects and training’ (26%)
- Community Area 3 ‘ideas on alternative ways to travel’ (14%)
- Community Area 4 ‘information on sourcing renewable/green energy, community energy opportunities and energy from waste possibilities’ (24%)
- Community Area 5 ‘information on ethical businesses’ **and** ‘opportunities to become involved’ (15%)
- Community Area 6 ‘opportunities to celebrate our diverse communities’ (15%).

Respondents aged 16-64 would like more support on ‘workplace projects and training’ (83%) whilst those aged 65+ stated they would like the support with ‘information on sourcing renewable/green energy, community energy opportunities and energy from waste possibilities’ (29%) to help them achieve a globally responsible community. Female respondents would like support with ‘opportunities to celebrate our diverse communities’ (81%) whilst the male gender would like support with ‘information on decarbonisation and the circular economy’ (30%).

Respondents who were LGB stipulated that they would also like support with ‘opportunities to celebrate our diverse communities’ (6%) as did respondents that identified as BME (3%), whilst respondents stating that they were transgender would like support with ‘workplace projects and training’ (10%).

Respondents with caring responsibilities would like support with ‘opportunities to become involved’ (24%) and those with disabilities would like support with ‘opportunities to celebrate our diverse communities’ (32%). Respondents on a higher income of £45k+ also stated that they would appreciate support with ‘opportunities to celebrate our diverse communities’ (29%) and those on a lower income of £15k or less stated that support regarding ‘opportunities to become involved’ (20%) would help them achieve a globally responsible.

## Q52) Any other comments on 'A Responsive Carmarthenshire'?

Total of **63 comments** received, here are a few recurring or possibly useful comments



- Introduce a 'one-stop shop' for all environmental issues and advice in every town centre
- Informing people of opportunities and using existing resources and better partnership working
- Introduce a community consultation panel to identify initiatives, test ideas
- Plans exist, just need access to funding
- Financial incentives for businesses to make local and sustainable produce more affordable
- Some affordable small trading estates where local machine shops or food producers could work from
- Encouraging companies to become Fairtrade themselves
- Grants for micro energy production
- Explore community based renewable energy schemes
- Reducing motor vehicle travel in rural community is difficult when we need to travel 10 miles to the nearest school, shop, work etc.
- For alternative ways to travel we need an integrated and affordable public transport network
- What about fair trade for our farmers?
- Educate people with basic skills on how to make spaces for wildlife in our gardens, vegetable growing, 'no mow' patches etc.
- Develop the old Debenhams Building it into affordable flats.
- Stop using green land for housing
- The world needs to look at the larger countries, changes in the UK and Wales only will not much difference

# Qualitative evidence collated at events

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## Welsh Language Strategic Forum

20.09.2021

### Economic Well-being

- The importance of a range of diverse jobs
- Need training for the future specifically in the digital field
- Need a range of jobs – there is an over-reliance of public sector jobs, but public sector investment is needed to create that diversity
- Digital and new skills – there is a special platform in the county to create further opportunities
- Need to develop Carmarthen as a digital centre – The Egin Phase 2 was mentioned and the potential of having units around the county to share the opportunities and expertise. It is possible to dovetail with the City Deal
- We talked about Digital Poverty and how to support young people and students to do their job. Similarly, consideration needs to be given to the people who have moved to the county and how the structure of the community is changing
- Similarly, in terms of mobile phone link and further back-to-back considerations – how can the City Deal support the rural agenda?
- Work flexibility offers us the opportunity now to fill skills gaps that exist in the county
- Can opportunities for community and social initiatives be promoted? More encouragement is needed to establish it and share more information
- The relationship between the Welsh language and the Economy needs to be looked at further
- Apprenticeships / Graduate Trainees

### Social Well-being

- The need to share information – ensuring continuous communication structures – needs to create a sense of community belonging and ownership. We need an ongoing conversation.
- A sense of community but only 50% - what is the reason for this? Similarly, why do only 19% of people think they have influence – what is people's impression of the public sector? These statistics underline the need for more engagement opportunities. Need to look after the local councils – can they fill a gap in terms of opportunities for discussion and engagement. Traditional structure is deteriorating – what is the impact of this on the Welsh language? The Welsh language is essential in cohesive communities – how do we assimilate migrants?
- A feeling of belonging and respect?

- Promoting the Welsh Language?
- How do we advertise the opportunities – how can we contribute to our communities / give something back?
- Does digital capacity kill our communities? Have we forgotten how to talk? Impact of this on sport – local rugby clubs losing younger groups of sports. And it's hard to create something new. The whole community needs to be involved.
- How can digital media be developed positively?
- Young people / teens – a particular challenge in terms of self-awareness. How do we get to the young people who don't usually step up? The Llandeilo area was mentioned and young people who fall between two stools? They need sharp and quick opportunities to express their views.

#### Cultural Well-being

- Llandeilo Heritage Centre – a dedicated member of staff to support that work. Links with Amgueddfa Cymru – National Museum Wales and the National Library – more opportunities to visit and locations important to local history and heritage.

## Healthy Environment Delivery Group

21.09.2021

- Nature Positive 2030 is due to be published soon and will be forwarded when available
- Importance of including the National Milestones and Indicators be fed into the well-being survey
- Very close to being in an environmental drought which is different to water company drought
- Consider local community into new developments to ensure community cohesion e.g. sports pitch, allotments, woods etc., other community type facility within the development e.g. could hospital be an energy asset, where buses can recharge batteries.
- Grid capacity across the county could be an issue for further expansion, this has been flagged up to the WG – was supported as an issue
- Non phosphate zones so that renewables can be installed
- Forest, wood, and trees – finding land next to large urban areas is difficult as owners are waiting for development to be granted.
- Forward Planning have commissioned a green and blue infrastructure strategy to determine what opportunities and needs there are within the county for developing more green and blue infrastructure. There is an assessment saying what currently exists, but this strategy would highlight what communities need e.g., amenity value, alleviating flood risk, connectivity of habitats etc. As part of this, three workshops will be conducted, internal stakeholder within authority, Councillors and 8 identified settlements.



## Armed Forces Community Stakeholders

22.09.2021

### Economic Wellbeing:

Veterans leave service looking for roles in community. Skills fit lesser paid than they are currently paid for the skill set in the Armed Forces (AF). Higher paid jobs in West Wales.

Some veterans can't always transfer skills into civilian community. Missed skills in CV, don't realise how much they learn in AF.

GIS schemes for employers. Knowing what companies could give that.

Resettlement CV writing, jobs in Health Board and Council. All on forms, no training on how to fill in form. Understanding what the roles in AF equate to in civvy-street.

Qualifications in military at NVQ level 3 titles rather than what I had to do to put that together and study.

In addition, their family moving feel impact of moving and stability. Having the transition from one post to another and be mindful.

Wife had to stop work for childcare experience – barriers to working struggle to get jobs compared to built-up areas. Some dependants don't like the prospect of moving to remote areas.

Elements for service children. Economic wellbeing for service children? Children should be supported into filling in applications, help with language to transfer. Once in employment supported to upskill, prepare for management role. Trying to offer 'try before you buy scheme for AF Community', to give them some experience. Only offer to veterans - could extend the offer to family members?

### Social:

Feeling of community – very close-knit community, wife of. Social detached/dislocated from an immediate support network. Especially for dual serving couples when one person leaves, especially with children and one perhaps is the primary carer in a new location.

Triple impacted when the non-serving ex serving was trying to integrate back into the community.

A lot of ignorance in AF Community as the help and support available in local area. Need to be aware that you are a member or dependant and that all the support and infrastructure support is available.

Service Children and awareness amongst parents – “didn’t know that my eldest is a service child – helpful to know this”. Need more awareness on what a service child is.

Consideration of use of the language = Veteran? Self-Identification of Veteran. Better - ‘Are you part of the armed forces community’?

Moved to Cross Hands with son and daughter in law. Parent groups difficult. Struggled with Welsh language. Struggled to get involved owing to the Welsh integration into Welsh speaking community.

Enrolled child into school but told ‘no’ because not a Welsh speaker. Support for Welsh Language education and positive action with integration with integration into Welsh Communities.

### **Cultural:**

Lucky in West Wales area with things that you can do as a family. There is so much to do, culturally diverse in West Wales. There is so much to do as a family. Don’t promote and advertise well. The opportunities that we have.

Summer months congested owing to the holiday traffic, great to have tourists but road infrastructure does not support the influx of tourists.

Haverfordwest 15 mins to work, in summer months plenty of things to do here but transport links are lacking which makes up for the lack of infrastructure. Lots of service personnel settle in West Wales.

### **Environmental:**

Lots to do and visit. Transport links future friendly.

More bus shelters along the routes.

Problem for serving personnel predominantly able to park, things are dictated to where you can park for somewhere to park. Difficult to park.

What is important to us as families how much we appreciated the outdoor space – think about outdoors spaces when you build houses. When build houses in the planning stage need to incorporate into planning stage. Think greener in future – infrastructure in the future.

Garden project in Links, having outdoors spaces that was quiet and not in town. Space to be quiet and think. People open up.

Much more investment into usable outdoor spaces, in the local communities. Veterans benefit well for meeting in outdoor spaces and can function well in outdoor spaces. When we design houses think about accessibility to houses.

Veterans can operate and maintain currency and deliver capability outside. Well versed to operating outside. Actively stay in 14sREW because of the green environment around them.

# Armed Forces Services Provider Group

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29 September 2021

## **Economic:**

Families Federation receive lots of phone calls - ARAP situation triggered PTSD. Had veterans walked out of jobs, economic impact on household, furlough ended. Lots of courses being run by charities to facilitate accessing work. However, colleges are not running courses as there is a minimum number required. This has impacted on courses available. People want to retrain, but courses not available.

Furlough ends completely – next month – IMPACT of the fall out is anticipated to be vast.

Citizen's advice – end of furlough. Prior to COVID not many claiming, but now since COVID encountering these issues stress and worry about finance. Support needed to get through transition period. Advice about finances debt, benefits.

H4H seeing increase vets and families struggling. ARAP and finance perspective, emergency grant for food and basic staples for families, changes in employment and mental health impact on families. Increase in psych services, delays in benefits PIP. National delay

ARAP – new service for refugees and their families, CBT with social and psych support.

VC Gallery – increase in veterans presenting with PTSD, psychosis, increase in this.

Alabare – concur with Families Foundation. Veterans in majority are unemployed at time. Delays with benefits and PIP, housing benefit applications delay, increase in homeless veterans owing to emergency provision in housing coming to an end.

## **Social:**

Factors: Quality affordable housing - massive issue. Ready to move on from supported housing but lack of accommodations to move onto. Issue- Finding employment to sustain their financial wellbeing.

What needs to change: -

- Veterans – affordable housing that meets the needs.
- Access to veterans focussed health care.
- Awareness of what the charities do are made aware to the general pop. Training and employment needed. Charities provide with accredited training, but employment is limited.
- Veteran friendly employers – big employers to get veterans into employment.
- PR campaign for veteran friendly employers. Making a proactive campaign.
- Jobs notice board in council that are armed forces friendly.

Town Council – not garrison community. Have lots of veterans in Llanelli area. Do what we can to support veterans. Work closely with Carmarthen County Council.

Lots of regeneration happening in Llanelli. Infrastructure investment. Drawing projects together and trying to highlight opportunities. Difficulties with Furlow coming to end – work together to ID opportunities. Need to work together with charities, to help veteran community. Need to share and market the opportunities to the veterans Community.

H4H – echo quality affordable housing. Housing adaptations delayed waiting lots. Impact on accessibility to community. Community hubs started. Integrated work with change step, etc. having a clinical presence, we look holistically to see what we can sp. Veterans need companionship, regain social interaction, they are hesitant about re-joining community life, Integrated working partnership in supporting our Veterans is needed.

Future generations: VC Gallery – hub model and soft model approach. VC Gallery have multiple access points, through their various activities that they run. Presenting veterans with multiple complex needs. Wholistic assessments are best practice. Getting veterans into mind set for preparing and upskilling people is challenging; to get digital skills. Continually working with police, ambulance, and other agencies.

Service children – Families Federation – Need multi agency support. There is no joined up system, across the public sector authorities so the collateral damage is picked by third sector. Need a much more joined up approach for third sector. Multi agency approach with a system that has joined up information about service children that both public and third

sector can access. Service children may be on the radar of one local authority area, and then move on and drop off the radar in new area.

### **Cultural:**

Investment in long term in the creative arts industry and more dispersed investment. Major investment needed.

We don't have arts offers in LAs. In local theatres there are no outreach programs. Need to bring back art outreach programs, work with theatres more: not just selling tickets. Not funded, don't have capacity. Just selling shows.

Creative arts – is there scope for doing outreach by the Local Authority, not the arts council for Wales. Community arts have taken a hammering, a lot of arts orgs that deliver on the ground are cash strapped. They need some early funding to do progressive work over the long term.

Llanelli Town Council. – session with People Speak Up was good. Furnace Theatre, delivering across the region. Talking and engaging with community, capturing the story of communities. This is what needs to be celebrated. The story square- resource pack, talking to young people in Llanelli about heritage with WW1 and WW2. Provided resource packs with schools. Need to educate young people, culture, arts story telling stories e.g., Connect 2021 project – primary schools in Llanelli. Citizen-ship programs – what it is to be a good a citizen. A lot is about young person's identity with within community and how they feel within the community. Running through the Town Council is education around democracy, voting, WBOFG Act and what that means. Transition program to secondary school. More education at classroom level on culture and diversity. Need CLEVER Engagement with the arts institutes. Llanelli is one of 10 funding area in Wales. What does culture mean? Looking at culture in a very different way. Multicultural network in Carmarthenshire. Joint working and Joint resourcing are needed.

### **Environmental:**

Active travel network. Massive investment in cycle networks needed. Also, green housing. Sustainable living. Tidal lagoon in Swansea etc. Better ways of harnessing renewable energy.

Accessibility access to spaces to go and sustainability. Spaces are kept and preserved.



Energy advice – net zero target. Conflict between Carbon Neutral and financial impact it will have on highest carbon use homes (poorer Communities and private landlord investment). Huge issue not just for veterans but for communities. What can we do to mitigate this conflict? Inform people what their rights are.

Need much more well-run, well-lit in the wintertime, parks and play areas for all generations.

Families Federation- Funding under EU money 80 gardens. Protecting green spaces. Protected SSSI given designated areas. We lose capacity in councils to protect these areas. There are great employment opportunities in green spaces, which are great opportunity for veterans – e.g., rangers in countryside. Looking at new ways lets employ veterans from the Armed Forces Community, by creating outdoor careers to protect our environment.

Logistics and Engineering. Alternative providers for new energy providers building into tenders for suppliers to use with ‘communities of interest’. Scope for building capacity in employment

People feel comforted if veterans are employed within the community. Third sector underpins the statutory. At a strategic level - employment scheme in Dyfed, to have veterans’ specific jobs in the counties.

SSAFA – Veterans RN living alone. The Royal Naval Association started a scheme called SPARKO. Where veteran living alone can speak to someone else through SPARKO TV. It’s a new and innovative way of helping people.

## Carmarthenshire Disability Partnership

29.09.2021

### General feedback:

- It is difficult to get help when you need it. Members queries how do they find people who can support and help the disabled community
- Members noted that there are gaps where we are not functioning properly – we need to identify where people are falling through (either because of technology, general apathy etc)
- People don't listen – this is a comment based on previous experience and engagement. Members of the disabled community reach out regularly; however, they are not involved in decision making and their voices are often lost.

### Economic:

- Improvement in terms of local spend. Local businesses have worked hard during the pandemic to support their communities. Local services have improved in accessibility and flexibility. Members hope that local communities continue to support their local business after restrictions are lifted.
- General concern regarding empty buildings in town centres, could they be utilised as public service / voluntary sector hubs or could they provide opportunities as arts and craft hubs?

### Social:

- Due to the pandemic, many disabled people are still shielding. Safe spaces to socialise and re-build confidence are scarce. Underlying health problems are now compounded by psychological and mobility problems.
- There seems to be a general lack of awareness amongst other members of the public in terms of social distancing, mask wearing etc, and people should be reminded to take care.

### Cultural:

- Arts and crafts have been a lifeline for many disabled people during the pandemic. Members noted the ReConnecting project via the 50+ Leadership Group. Virtual classes have offered a wider range of opportunities and networks for the disabled community and there is a concern about the groups moving back to be face to face sessions. IT is an enabler not a disabler and there should continue to be those hybrid

opportunities for people. Transport remains an issue for disabled people wishing to attend these sessions and moving back to being face to face only further increases social isolation for disabled people.

### **Environmental:**

- Members noted an improvement in air quality during the pandemic. Significantly less use of cars, does this provide an opportunity to refocus people on use of public transport / green transport. Safe walking and navigation spaces are needed. Environmental well-being impacts on happiness and supports people to re-build their confidence.
- Transport remains a key issue and the lack of public transport was highlighted. A key example was given in terms of public transport from Llanelli Town Centre to attend appointments at Prince Phillip Hospital. Could the co-ordination be improved between transport providers and the Health Board?
- Unfortunately, accessibility issues are still apparent in new builds and services. Members noted that there are always factors working against the disabled community. Example of a new 'Living Streets' project being established in Llanelli, which will undertake street audits to highlight accessibility issues in the infrastructure.

### **What does well-being mean to you?**

- Well-being is more than safe spaces. It means an understanding of what I can do to help me.
- Mental health is a specific concern and how to I ensure that I look after my mental health daily
- During the pandemic, Carmarthenshire Youth Council and Dr Mz have been really important to me in supporting me to look after myself
- Mental well-being has been so important during the last year and a half. We are so influenced by events around us; however, by not being able to socialise, we haven't been able to interact and learn from others

### **How can we help improve your well-being?**

- Young people need the tools to maintain their own well-being
- We need to be able to work through key issues
- I want to gain experience of living independently – being able to move after finishing my qualifications
- I want to take a year off after my GCSEs – building up my savings so that I can return to Coleg Sir Gâr
- I see an apprenticeship as my future career path
- I'm at university and it's important that I make my own way – it's a steep learning curve but I need to make my own mistakes. This includes financial independence
- It's important for me to know where I can access support

### **What concerns you about the future?**

- Our beaches
- Climate change
- Wildlife
- Pollution
- Mental health – we need the tools to recognise when things may be going wrong

## West Wales Action for Mental Health, Mental Health & Well-being Network

6.10.2021

Key areas of concern noted as part of the West Wales Action for Mental Health forums and discussions on the Well-being Assessments and the Population Needs Assessments, from Voluntary organisations, people with lived experience of mental health problems and carers.

- **Difficulties in accessing mental health support for some young people**, some young people still not meeting criteria for S- CAMHS but struggle to access any mental health specific community mental health support other than generic youth support and school counselling. Increase in the number of young people expressing mental health distress to voluntary sector services and young people with suicidal thoughts and feelings. Some parents are also struggling and families living so closely together over the last 18 months has caused some problems and difficulties, and relationship breakdowns.
- **Support for carers and families of people with mental health problems** in terms of mental health services engaging with families as part of the care and treatment support. Carers/families are often excluded from the support planning and discussions but are often the main source of crisis and acute support. Some Families/ carers have felt the impact of many face to face mental health services being closed and having to cope on their own without any direct support. Some Carers and families have found it very hard to be separated from family members due to lack of visiting on mental health hospital wards over the last 18 months and some of the wards and individuals have struggled with access to video calls.
- **Some people struggling with limited face to face support options** and accessing services via phone and video call and social media have been difficult for some people. Some of the reasons given for struggling with video calls, telephone calls etc is for some people who are hearing voices, seeing things, having delusions. It can be very difficult to work out what is real and what is not. Some people struggle with paranoia and feel people are talking about them, some struggle with the technology and lack confidence to use it. Some people don't have the IT equipment and/or poor internet connection. Some people do not have the financial means for a telephone and internet connection and many places with free Wi-Fi have been closed over the last 18 months and these may not be confidential places either. Some people have reported that the use of video meetings and calls has helped increase access to mental health and social activity support and they have learnt new skills. Some people have reported that for them due their anxiety

about leaving the home that video calls have helped with accessing things that would previously have been inaccessible.

- **Crisis support and support out of hours (9-5pm) reported by some people to be very** difficult to access at times and number of people reporting poor response as a result of going to A and E due to suicidal thoughts and feelings and no aftercare support. Difficulties with Crisis and Home Treatment Teams at times and some people reporting not meeting criteria for any ongoing mental health support, assessed by CRHT but no follow up. Although some people report excellent support and care during the last 18 months with face-to-face support and follow up support and calls. Twilight Sanctuary and A and E psychiatric liaison services helping but still more work on crisis support is needed to make it as accessible as possible. Also, the work with people in terms of care planning were known to services to help support crisis building and direct easy access to mental health support to help prevent crisis for everyone.
- Difficulty in **accessing face to face GP appointments** over the last 18 months for mental health support and difficulty of being able to discuss mental health needs over video or phone.
- Increased need for **mental health support for new parent/parents** and the impact the last 18 months has had on new parents and babies without access to face to face health visiting, new parent groups, family support and social activity.
- Increase in the **complexity and intensity** of the support needs of people coming forward for mental health support, so often a range of issues such as mental health and drug and alcohol issues, homelessness and mental health, and mental health and autism.
- Some **services still work in silo's separate** from each other in terms of experience for people receiving the support, so housing and mental health are very separate and learning disabilities and mental health are very separate for some people.
- A need for **outreach and befriending support** for all ages rather than people just coming into services and buildings for appointments and helps. Some people will need outreach and befriending support to build up confidence to go out and about again and take part in social activities. Some people are still very afraid and very isolated and not going out which has really contributed to mental health difficulties. Some people in rural areas and away from Llanelli and Carmarthen feel it is harder to access mental health support than in urban settings. This may be due to transport issues but also a lot of services, centres and hubs are in town centres and urban settings rather than being held in rural areas (and many community halls have been closed). There are many challenges with public transport and access to this to resolve and improve.



- **The importance of the statutory, voluntary and community mental health services** that have continued to offer face to face and group support (and the online and phone support etc), and the lifeline these have been for many people during the last 18 months. The importance of the different ways of offering support (face to face, phone, video etc) and how this helps reach a range of different people.
- For some people **peer support, and self-management** and the promotion and development of these is crucial for support services that look at the whole needs of the person and families/carers and offer hope and inspiration for recovery. Great to see more peer support developing including paid Peer Support roles in the NHS.
- Some people feel that social mobility and equality are worse over the last 18 months and the inequalities that have previously been identified have widened significantly.

### Brief presentation

Thank you to the Headteacher / Pupils for being so willing to meet us

The voices of children and young people are so important in the work that you are doing at the moment

We look across Carmarthenshire and gather information about what matters to people and their communities. This includes the things that matter to you now but also to the future. Different things will be important to us all

Our school pupils are our Future Generations, and we want to hear about your work as a school in terms of Wellbeing

If the school does a lot of work in terms of Wellbeing, and is happy to share evidence of that, that would be very useful

### **What makes you happy?**

- Sport and specifically running
- School work
- Reading and specifically the reading group at school
- Animals and specifically horses

### **What is important to you and your family?**

- Family, school and friends
- Family, animals and friends
- Animals, friends and school
- Family, friends and teachers

### **What is important to you for the future? When you are an adult**

- I hope to own a farm and care for animals
- I want to stay in Llanybydder and be a teacher
- I want to be a Vet
- I want to own a smallholding in the Llanybydder area
- Worried about climate change
- Don't like seeing the planes back in the air – enjoyed the quiet at the time of the pandemic
- Want to see less plastic and more recycling and reuse
- Want to see fewer factories across the world

### Any Other Comments

- The school uses spkr as an opportunity for the children to identify their first thing in the morning.
- They have recently created characters for the 4 Purposes of the New Curriculum in Wales. This is the character of a principled, informed Citizen, ready to be citizens in Wales and the world, Ysgol Llanybydder



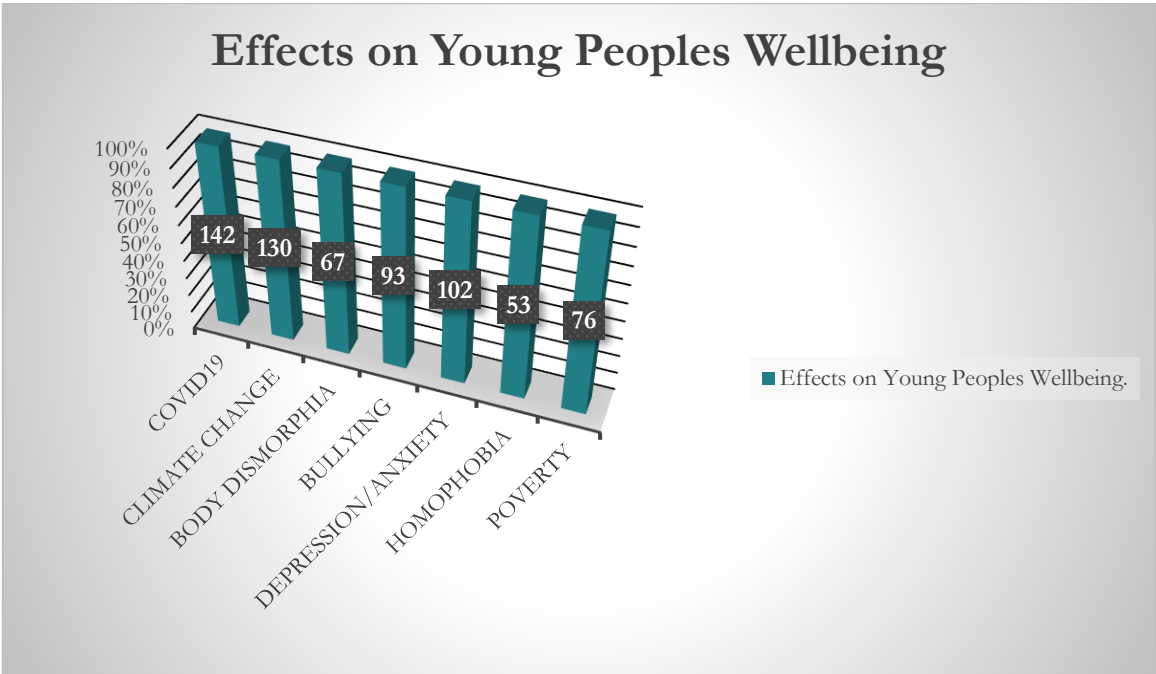
Youth Support Service – Ysgol Bro Dinefwr

As a response to Carmarthenshire Assessment of Local Well-being, Carmarthenshire Youth Support Service took the opportunity to carry out a consultation with year 7 pupils at Ysgol Bro Dinefwr on the 13<sup>th</sup> of October 2021. The consultation consisted of 160 pupils they were split into groups of 4 and every session consisted of 4 groups of 4 as we wanted them to discuss the topic with their peers as well as having their own opinions.

Unfortunately, we were unable to carry out the survey due to there being no Wi-Fi, but I think that this gave us further insight into the young people’s perspective of Wellbeing, what effects their wellbeing and what help they would like to see.

It became clear early in the consultation that COVID19 had had a great impact on their lives, and I would like to add there was more negative than positive!

The main question we asked the young people was what affected their wellbeing. From discussions with us and their peers in their groups they wrote on flipchart paper their thoughts. From this I was able to draw themes and how often they were mentioned.



**Covid-19** has had a great impact on most of the young people. They felt isolated and very lonely. They did however enjoy the quality family time. Not being able to see their friends and for a very long time unable to leave the house due to the lockdown restrictions was

extremely difficult for them. They are still very concerned that we will have another lockdown in the future.

**Climate change** was also a big topic of discussion as they have very strong views on this, but I am not sure if it is what they genuinely think or whether it is what they have heard that has made them feel so strongly about it.

**Body dysmorphia** was also alluded to with boys and girls and how they feel about themselves.

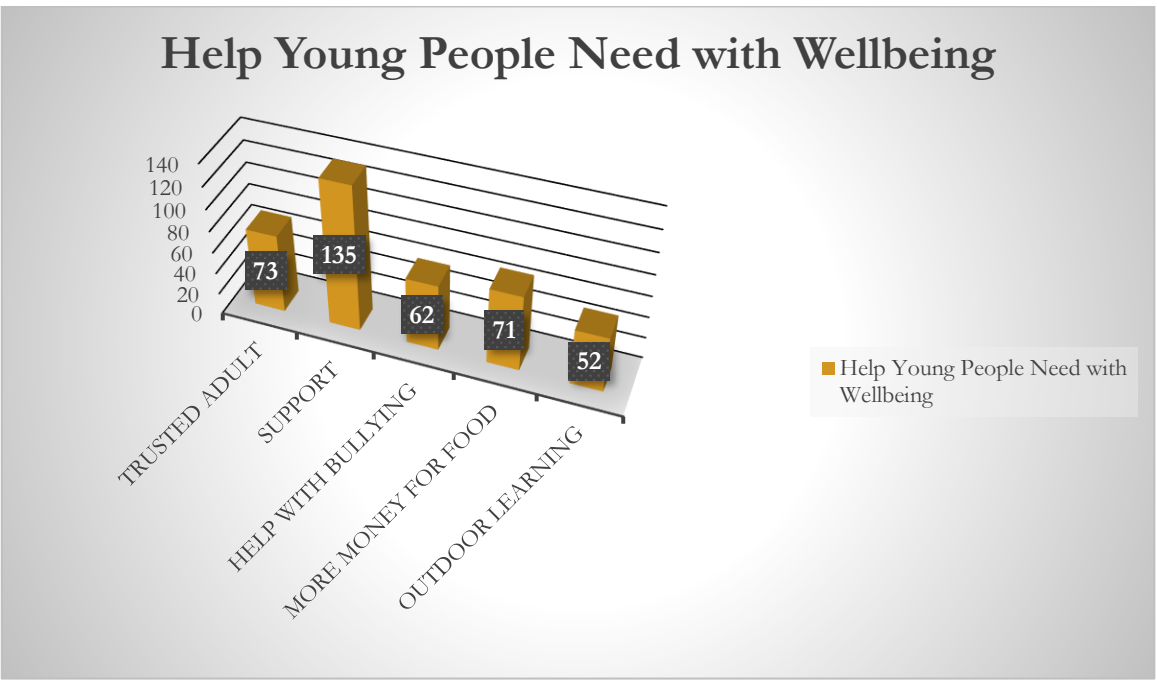
**Bullying** and cyber bullying over the social media platforms.

**Depression/Anxiety** has increased according to the young people as they feel that they have been in lockdown and not communicated with others. Fitting in with their peers was something that came to the fore.

**Homophobia**

**Poverty** was another issue with some of the young people saying that their families needed more money for food and clothes. There was not enough money always for them all to eat.

Another question we asked was what help they felt they needed. From discussions with us and their peers in their groups they wrote on flipchart paper their thoughts. From this I was able to draw themes and how often they were mentioned.



Whilst discussing the help that the young people felt they needed it was clear to see that they all wanted one trusted adult that they could confide in.

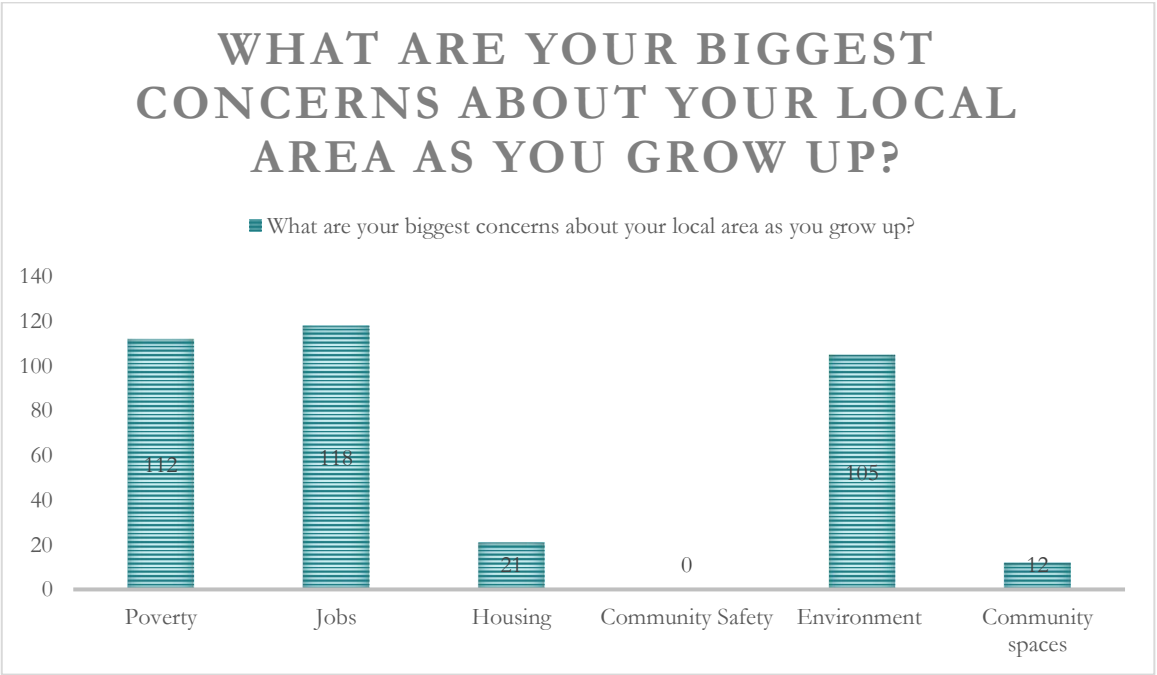
Support was the key with varying ideas from teachers, police, friends, family, and ChildLine, but they were very unsure on who to reach out to for support.

Help with bullying was also an issue as it all stemmed back to having a trusted person to talk to.

More money for food was quite disturbing as there were several young people quite concerned about this and the effects it was having on their family.

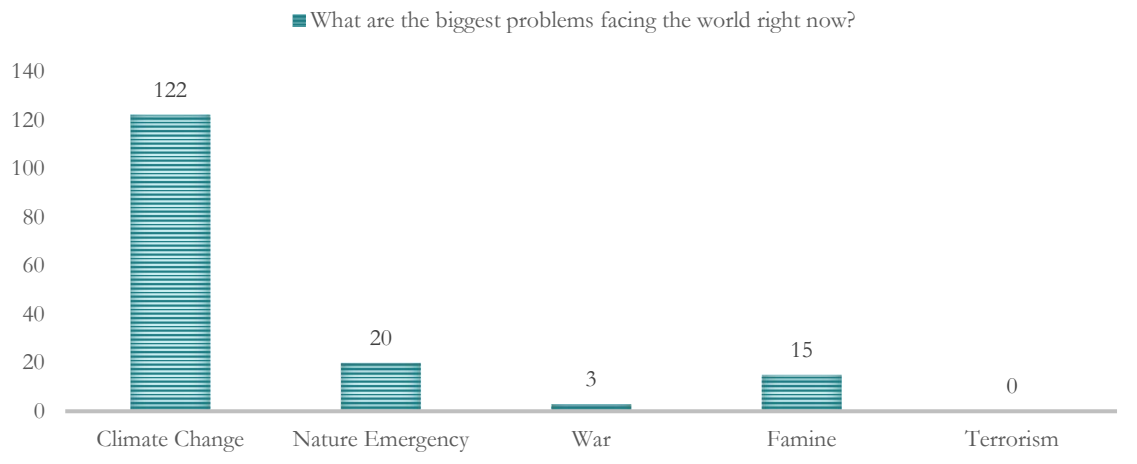
Outdoor learning the young people brought this to our attention also as they felt they could express themselves better and learn more.

When the survey was discussed with the young people it was clear that question 2 Your life now and question 3 Your life in the future were difficult for them. Their life now has changed so much that they couldn't grasp the context and their future they had no idea what they wanted to do. I spoke to some of the teachers at the school with regards to the young people and they were of the same view as myself. They have lost a big chunk of their life and education over the last couple of years and even though they were year 7 pupils they seemed much younger. It would have been more advantageous to have asked older pupils.





## WHAT ARE THE BIGGEST PROBLEMS FACING THE WORLD RIGHT NOW?



It was great to have the opportunity to meet with the young people from year 7 at Ysgol Bro Dinefwr. It would have been advantageous to have had more time with them and to explain in greater detail then they would have been able to understand the questions better. We only had 15 mins for 4 groups of 4 in a round robin setting which didn't give us much time, but it was great to have some input from the young people. It would have also been advantageous maybe to get the input of the older pupils as they may have been able to answer the questions easier especially about their future.

## Ysgol Gymraeg Brynsierfel

### What makes you happy?

- Reading
- Friends
- Peaceful Haven at school – a garden made through the Young Peacemakers project
- Football
- Good education
- Rules and understanding why they are there to help us
- Family
- Yoga at school through Pause and Movement
- School services
- Great teachers

### What is important to you and your family?

- Home
- Kindness
- Welsh Language
- Children's Rights – right to education and right to a safe home

### What is important to you for the future? When you are an adult

- Helping the community and the environment
- That this school is for my children
- Caring for our planet – 'There's no Planet B' (project and video with school)
- Recycling and reuse

### School projects

- Walking the global walk
- Young Peacemakers Award
- Dyfed Powys Police Charter
- There is no Planet B
- Twm y Llew – work with Trinity Saint David University

## Ysgol Gynradd Llandeilo / Llandeilo Primary School

### What makes you happy?

- Food
- Not being in physical pain
- Playing with pets
- Getting friends' company
- Being safe
- Buying things

### What is important to you and your family?

- Making fun things together
- Having fields for the animals
- Don't fall out
- Comfort of mum and dad

### What is important to you for the future? When you are an adult

- Having a job that makes People feel happy
- Help the community, volunteering
- Having time to relax and retire
- Make the planet more environmentally friendly

### Any Other Comments

The school provides dogs to comfort distressed children

The school uses a 'spkr' to give children the opportunity to identify if they are sad without having to speak

The school teaches themes such as kindness, empathy and relaxation to encourage well-being and care of the fellow human beings.

## Ysgol Gynradd Drefach

### What makes you happy?

- Friends, rugby and football, relaxing, watching Wales play rugby
- **What is important to you and your family?**
- Playing with siblings
- Working rugby with dad
- Friends living close by
- Go for a walk on the cycle track on the bikes
- Playing with the dogs
- Quarry in the park – have big slides in the park, Drefach Park better than Cross Hands

- **What is important to you for the future? When you are an adult**

- Driving a car,
- Watching television,
- Going with the children for walks to the park,
- Going with the children on the bikes
- Driving trucks
- Get a job to get something to do
- Getting work to get money
- Get money to buy toys for the children
- Having a house to live in

### Any Other Comments

- They like to have cuddles when they are sad, with a teacher or parents
- The school uses circle time to discuss issues relating to well-being
- A comments box used to be active at school but not since covid.

## Ysgol Gynradd Llangynnwr

### What makes you happy?

- Walking the dog
- Getting fresh air
- Getting on well with my siblings
- Playing games with dad
- Getting on the bike outside
- Playing with friends
- Working with friends at school
- Playing football
- Play netball at the Pod in Carmarthen. The coach is really nice
- Playing sport with a team – feeling free, no worries
- Improve their skills
- School trip
- Doing a good job
- Remembering everything you need in the morning
- Sleep well and wake up not tired

### What is important to you and your family?

- Children do well in school
- Children do their best
- Beach
- That they improve their sporting skills
- Going to see my grandparents
- Going for a walk
- That everyone is kind to each other
- That everyone is calm
- Leisure clubs or we would be stuck in the house with nothing to do

### What is important to you for the future? When you are an adult

- Get a good and important job
- Getting money to buy food
- Car to travel
- Get to see new places
- Having pets
- Getting better at things we do now – like football
- Going for a walk

### Any Other Comments

- The school does a lot of work on growth thinking
- Use spkr
- Mrs Jones is available for a chat when a child feels sad. Mrs Jones helps the children to think about a way of resolving their problems.

## Ysgol Gynradd Pen Rhos

### What makes you happy?

- Being comfortable
- Feeling safe
- Friends
- Playing games with my family
- Playing football
- Being with my friends at school
- Pets
- Working with friends at school

### What is important to you and your family?

- Time together
- Caring for each other and sharing
- That we do our best
- Time with Grandfather

### What is important to you for the future? When you are an adult

- Get a good job – want to go to the Army
- Get a good job – want to be a Teacher
- Get a good job – want to become an Engineer and work with my Grandfather
- Get a good job – want to be a Vet
- Be healthy and happy
- Exercise
- Looking After Our World
- Healthy eating
- Recycle

### Any other comments?

- The children love doing Yoga
- The School has a Gratitude Jar
- The children love doing a daily walking lap on the school grounds



Carmarthenshire Assessment of Local Well-being

Stakeholder Online Event Toolkit



## Contents:

### Introduction

#### Your Stakeholder Event

- Bi-lingual Meetings
- House Keeping
- Icebreakers
- Well-being of Future Generations Video
- Power Point Slideshow
  - Carmarthenshire Background
  - 4 main discussion points
    - Economic Well-being
    - Social Well-being
    - Cultural Well-being
    - Environmental Well-being
  - How to get further involved
    - Regional survey
    - Consultation on the draft Assessment of Local Well-being
    - Engagement and Consultation on the next Well-Being Plan
- Optional – how to use virtual whiteboards and online polls for your event.
- Optional – how to use online polls for your event
- Optional – virtual car park

#### Further Information and background resources

Essentials Guide – Well-being of Future Generations (Wales) Act 2015

Carmarthenshire Factsheet

Carmarthenshire Public Services Board Website

Welsh Government website for the Well-being of Future Generations (Wales) Act 2015

Future Generations Commissioner for Wales website

## **Introduction**

Thank you very much for either offering or considering running a stakeholder event for Carmarthenshire Public Services Board's Assessment of Local Well-being. The voice of key stakeholders is vital in producing the Assessment. The delivery of the stakeholder events needs to be across all the partners of Carmarthenshire Public Services Board.

Carmarthenshire Public Services Board needs to undertake an Assessment of Local Well-being to inform the writing of the next Well-being Plan. We want to gather the views of the people of Carmarthenshire over August and September of 2021. This will be via stakeholder events and also a regional survey, (that we are carrying out with our partners of Ceredigion and Pembrokeshire PSBs). We will use the information that we gather, alongside other data, to write the Carmarthenshire Assessment of Local Well-being.

The online event starts with a short video that gives a background to the Well-being of Future Generations (Wales) Act 2015. We then have a PowerPoint Presentation that gives the Carmarthenshire context, facts and background. The PowerPoint covers four main discussion points.

1. Economic Well-being
2. Social Well-being
3. Cultural Well-being
4. Environmental Well-being

The presentation finishes with an invitation for people to complete the Regional Well-being Survey.

In its simplest form the Stakeholder Event comprises the video and the PowerPoint presentation and is suitable for delivery via Microsoft Teams or Zoom. We have also given you the options of including icebreakers, online polls and virtual white boards. This means that you can adapt your stakeholder event to meet your IT set up and skills as well as tailoring the event to best suit your participants. The event should take an hour to an hour and a half.

Finally, we have provided a Well-being Session Record Form so that you can feedback on the discussion points, which will help to inform the writing of the Carmarthenshire Assessment of Local Well-being.

## **Bi-lingual Meetings**

The below stakeholder event toolkit has been put together so that the sessions can be delivered bilingually in Welsh and English. We advise that you follow your own organisation's policy on holding bi-lingual meetings.

- The short video on well-being is available in Welsh and English.
- The PowerPoint slides are bi-lingual, with Welsh and English text on each slide.

- The stakeholder toolkit is available in Welsh and English.

At Carmarthenshire County Council, we currently use Teams for most of our online meetings. Please contact the Translation Unit for support in organising simultaneous interpretation.

## Housekeeping

You may wish to set out some guidelines for your group with the following points:

- Use the hands up sign or the groups chat if you want to speak or ask questions.
- To put your microphone on mute to prevent any background noise.
- If you are suffering from bandwidth problems to try turning cameras off.
- To respect other people's points of view.
- To take part in a general discussion on well-being and not to share confidential or personal information.
- We hope that you will cover this session in a reasonable amount of time, but please feel to take a break if part of a larger meeting.
- To feel free to use the smiling face, thumbs up and clapping symbols to encourage the facilitator!

## Icebreakers

5-10 minutes

Please feel free to add an icebreaker at the start of your stakeholder event. This is an optional extra for use if you think that this will help the group to relax and get to know each other. Ideally, your group will be around 8 to 16 people. Bear in mind the time taken on icebreakers if the group is too large or not really being of use if there are just a few people at the event. We have suggested a couple of icebreakers below – or feel free to use your own icebreaker!

1. “Week in Three Words”  
Ask people to introduce themselves and to describe their week so far in just three words. You can then summarise by pointing out some of the words that reflect well-being.
2. “This made me laugh”  
Ask participants to share their names and something that has made them laugh in the last 24 hours. You can then reflect on happiness and well-being to help set the scene for the session.

## Well-being of Future Generations Video

3 minutes

Please make sure that you are sharing your screen and then launch either the Welsh or the English language video. The videos only last just over two minutes and give a concise and clear explanation of the Well-being of Future Generations (Wales) Act 2015. It's worth

checking with a colleague beforehand that the video's audio can be heard by others, as sometimes this can cause problems.

To improve accessibility, we recommend that you turn on the subtitles.

Link to Welsh language video on YouTube

[https://www.youtube.com/watch?v=hGGlcqx\\_6jA](https://www.youtube.com/watch?v=hGGlcqx_6jA)

Link to English language video on YouTube

<https://www.youtube.com/watch?v=RuYzNgUZi98>

## **PowerPoint Presentation and Well-being Discussion** 45 minutes to 1 hour

The PowerPoint presentation gives a brief introduction to Carmarthenshire Public Services Board and the engagement event. We have not included details on the Well-being of Future Generations (Wales) Act 2015 already covered in the video. The slides are bi-lingual in Welsh and English. To maximise accessibility, the slides are presented in Arial font, left margin flush and without images and embellishments.

The core part of the PowerPoint covers 4 main discussion points –

- Economic Well-being
- Social Well-being
- Cultural Well-being
- Environmental Well-being

We introduce each theme and discussion point with three key facts relating to well-being in Carmarthenshire.

You will then need to facilitate a discussion on each theme, with two main questions for your group:

- What are the [one of economic, social, cultural, environmental] factors that are important to the well-being of your community?
- What needs to change to secure [one of economic, social, environmental, cultural] well-being for future generations (30-40 years)?

Please remember that you will need to capture the main points from your discussions. We recommend that you organise a meeting note or minute taker. You will need to fill out a Well-being Session Record Form, please see below for further details. You can also record the session on Teams and Zoom for transcription later if participants are happy for you to do so. Please ensure that you have sought their permission.

## **How to get further involved**

The slideshow finishes with invitations to:

- Take part in the regional survey, taking place now.

- Get involved in the consultation on the Draft Assessment of Local Well-being, autumn 2021.
- Get involved in the engagement and consultation for the next Carmarthenshire Local Well-being Plan, summer 2022.

It would be good to signpost attendees to further involvement opportunities for the Assessment of Local Well-Being

The online survey is taking place until 8 October 2021. Participation in the online survey is a great opportunity for people to contribute their individual views. Please go to the County Council Consultations Webpage for a link to the survey.

[Well-being Survey](#)

### **Optional - Virtual Whiteboards**

Whilst discussing the four main themes, you have the optional extra of using a virtual whiteboard on Teams or Zoom. This means that you, or a nominated scribe, can write down the key words. This can help with the overall discussion. The disadvantages are trying to capture too much information on the whiteboard and not being able to see people so clearly due to the whiteboard dominating your video conference screen.

Please see the below videos if you need instruction on how to use whiteboards

How to use the whiteboard in Microsoft Teams

<https://www.youtube.com/watch?v=YBnojDFXo4k>

How to use the whiteboard in Zoom

<https://www.youtube.com/watch?v=jQ4-wrwHAXk>

### **Optional - Online Polls**

This optional extra is a great way to get people to take part in your event, including the quieter members of the group.

We suggest asking a few simple multi-choice questions at the start and at the end of the PowerPoint presentation. After everyone has 'voted' the results will be shown and can generate a short discussion. Please remember to tick the anonymous response button so that people can vote confidentially.

### **Poll questions to ask at the start of your session.**

How would you rate well-being in your community? Please tick one of the following:

Very good

Good

Neutral

Bad  
Very Bad

What are the biggest challenges to well-being in Carmarthenshire at the moment? (Please tick the three most important).

Public Services  
People getting on well together in their communities  
Transport  
Accommodation  
Employment  
Tackling poverty  
Health  
Education  
Digital Connectivity  
Environment  
Climate Change  
Other

**Poll questions to ask at the end of your session.**

How do you feel about well-being in Carmarthenshire after this event? Please tick one of the following:

Very Optimistic  
Optimistic  
Neutral  
Pessimistic  
Very Pessimistic

What do you think will be the biggest challenges to well-being in Carmarthenshire over the next 20-40 years? (Please tick the three most important).

Public Services  
People getting on well together in their communities  
Transport  
Accommodation  
Employment  
Tackling poverty  
Health  
Education  
Digital Connectivity  
Environment  
Climate Change  
Other

Need help with setting up online polls? Check out the below videos.



How to use polls on Microsoft Teams using Microsoft Forms

[How to use the NEW built-in Polls in Microsoft Teams meetings - YouTube](#)

How to use polls on Zoom

[How to Create and Launch Polls in Zoom Meetings | Zoom Polls Tutorial - YouTube](#)

### **Optional – Virtual Car Park**

If a single topic or issue starts to dominate the stakeholder event, park it in the virtual car park. The issue can then be addressed later or a separate meeting if required. The virtual car park is also a good place to park any individual service requests that can be followed up after the stakeholder event.

### **Well-being Session Record Form.**

Please refer to the form for details.

We would be grateful if you could feedback on your event using the form. This means that there will be consistency in reporting and analysis. Please return your forms to [Llinos Evans](#).

### **Further Information and background resources**

[The Essentials. The Well-being of Future Generations \(Wales\) Act 2015](#)

Carmarthenshire Factsheet, included in the toolkit.

[Carmarthenshire PSB Website](#)

[Future Generations Commissioner for Wales website.](#)

[Any questions, please contact Llinos Evans - LlinEvans@carmarthenshire.gov.uk](#)

## Consultation on the draft Well-being Assessment

Further to approval of the draft Well-being Assessment at the Public Services Board on 24 November 2021, the next phase of producing the Assessment was to consult with the public and stakeholders.

Our PSB Members and Statutory Consultees received a copy of the draft Assessment and an invitation to submit comments and suggestions.

All networks and forums who participated in the first involvement exercise received a copy of the draft Assessment and an opportunity to feedback via the online survey (1 December 2021 and 19 January 2022).

During the consultation period, the opportunity was taken to strengthen any areas as required, with partner involvement, based on the outcome of the PSB discussion of the draft Well-being Assessment. Partners also provided case studies of interventions which have been implemented in response to the challenges identified.

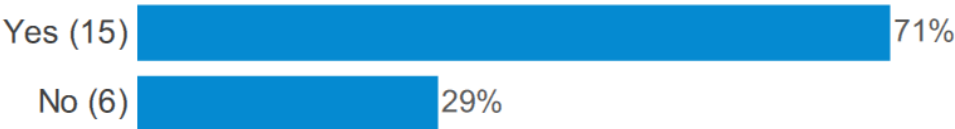
As part of the consultation, responses were received from:

- Office of the Future Generations Commissioner for Wales
- Welsh Government
- Natural Resources Wales (comments incorporated)
- Public Health Wales and Hywel Dda University Health Board
- Carmarthenshire County Council Place and Sustainability division
- Carmarthenshire County Council Integrated Services division
- Carmarthenshire County Council Housing division
- Carmarthenshire County Council Early Years and Childcare Team

# Carmarthenshire Draft Well-being Assessment Consultation responses

The consultation of the draft well-being assessment received 26 responses in total, 22 were from individuals and 4 responses received from organisations. Organisations that responded were Llanedi Community Council, CYCA, Early Years & Prevention Dept. Carmarthenshire County Council and one unknown organisation. The consultation was distributed to all town and community councils, electoral members, partner organisations and many network groups within the county.

## Do you think we have identified the correct matters in regard to the Carmarthenshire Context section?



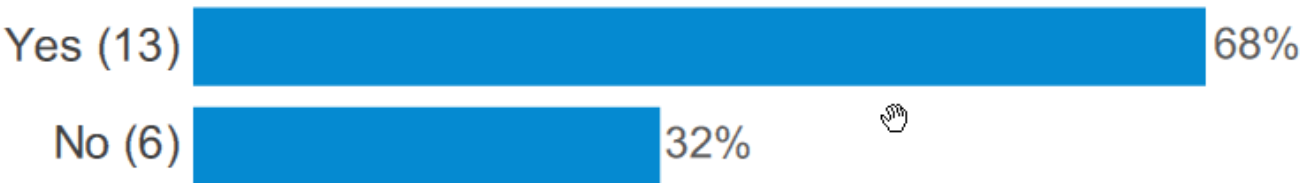
Comments received on the Carmarthenshire ‘Context’ chapter:

- It is such a strategic document it would not really be understood by the public.
- I feel the context seems pretty accurate although with only a slight increase in poverty, how does the county have almost a third of its population in poverty. This is something that needs to be addressed.

Which matters do you think we have missed in relation to the Carmarthenshire ‘Context’ section:

- Community Councils are not recognized as partner organizations
- We have 6 senses, you have completely missed out one of them, hearing and audition has been totally missed, noise and sound are key issues
- IT IS NOT WHAT IS MISSED ITS A LOT OF PAID FOR WORDS THE URGENT TODAY NEEDS COULD HAVE BEEN STARTED YEARS AGO

## Do you think we have identified the correct matters in regard to the ‘new beginnings’ section?



Comments received on the **'New Beginnings'** chapter:

- Respondents stated that the facts were clear and accurate

What matters do you think we have missed in relation to the **'New Beginnings'** section?

- Lack of opportunities for socializing and play
- Hearing is one of our most vital senses, there is nothing here in relation to new beginnings, noise and sound directly affects communication which are vital
- Following numerous consultations with parents/carers of children 0-7 years and professional working within the Early Years services (midwifery, Health Visiting, Speech and Language, education, childcare, education, family support) WG are investing in the Transformation of Early Years services across Wales.

Carmarthenshire has been involved in this as a Pathfinder for a number of years and is piloting an integrated way of working across maternity and Early Years services in the Cwm Gwendraeth area. It would be opportune to include this work within the New Beginnings chapter and or the childhood chapter as it will have a significant impact on the way we deliver these services to families across the region and is a direct response to what families are telling us they need from these services. A regional Maternity and Early Years strategy is being developed and will be finalised by 31st March 2022 which will provide the vision for maternity and Early years services for the next 5 years.

Do you think we have identified the correct matters in regard to the **'childhood'** section?



Comments received on the **'Childhood'** chapter:

- NEED TO DIFFERENTIATE THE DIFFERENCES IN EMOTIONAL DISTRESS AS OPPOSED TO MENTAL ILL HEALTH
- the comment on poverty and childhood obesity is interesting and one would consider the diet of those in poverty and those not in poverty to see where the problem lies.

What matters do you think we have missed in relation to the **'Childhood'** section?

- I am unsure if the voice of the child has been captured
- Lack of opportunities for socializing and informal play
- I am not sure 'obesity is more helpful to focus on than, for example, access to green spaces
- They're killing them with vaccines, wasn't that illegal?

- You've missed on of the key senses, good soundscapes for education and learning is a key issue
- access to outdoor spaces to play was not covered. especially in rural areas.

**Do you think we have identified the correct matters in regard to the 'youth' section?**



Comments received on the 'youth' section:

- I was disappointed not to see a specific priority (red) for youth. e.g. bullying
- homophobia is a real issue for young people
- NEED TO DIFFERENTIATE THE DIFFERENCES IN EMOTIONAL DISTRESS AS OPPOSED TO MENTAL ILL HEALTH
- the school curriculum seems to value academia over vocational, will there be any drive for including vocational learning within the curriculum
- Where the young people have identified bullying as a factor of well-being, it would have been interesting to see what type of bullying is being addressed, e.g. religion or race.

Which matters do you think we have missed in regard to the 'youth' section.

- Although young people have been consulted was this information drawn from a wide range?
- Lack of opportunities for socializing and creative outlets.
- Unless they survive this vaccine holocaust, they won't reproduce, bit of an issue there, heart attacks, blood kits, falling sperm counts, massive increase in still births, 1'800+ deaths from vaccines in UK alone
- For youth, what about the impact on hearing from in ear headphones? Tranquil spaces to de-stress etc, this is vitally important to good health
- A lot of youth programs and youth clubs have closed. There was no reference to community clubs and activities for youth.

Comments received on the 'adult' chapter:

- Suicide rates are a priority, but 'mental health' is only 'monitored' (yellow). Appears strange
- NEED TO DIFFERENTIATE THE DIFFERENCES IN EMOTIONAL DISTRESS AS OPPOSED TO MENTAL ILL HEALTH
- Poverty and in work poverty, needs addressing, and fly tipping is a problem- more police please!

**Do you think we have identified the correct matters in regard to the 'adult' section?**



Which matters do you think we have missed in relation to the **‘adult’** context:

- Again statistical data is great but were a wide range consulted?
- Concerned that 'obesity' isn't a helpful measure of health.
- flooding and climate change need higher priority. isolation and loneliness not identified. Transport
- Doctors silenced, undertaker from England, Maloney I think, observed no death increase until vaccine roll out, a common observation from his Field
- Nothing on noise at all, noise nuisance is a particular concern but noise from transport etc., which has a direct effect on well-being and health just isn't addressed
- Not enough on jobs. Quality of jobs, quantity, gender pay gap and ethnic mix of employed compared to national average.

Do you think we have identified the correct matters in regard to the **‘adult’** section?



Comments received on the **‘older people’** context:

- Insufficient support to older people to be digitally included in the way that suits them best.
- care homes should be available to all, at an affordable price.

Which matters do you think we have missed in relation to the **‘older people’** context:

- noise issues just not covered, I thought there had been a large increase in noise complaints, particularly during covid, where are these

**Themes to Focus on:**

**Theme 1:**

- Increase in jobs that pay well
- Poverty (both child and adult) as a root cause of exclusion, poor lifestyle, mental illness and low attainment
- healthy and active lifestyles for every age

- Child poverty/economic wellbeing
- Providing leisure alternatives to alcohol
- CYBER BULLYING/ RESULT OF COVID
- Tlodi / ardaloedd difreintiedig
- tackling obesity
- poverty and affordable housing
- Face to face appointments with GPs
- adult mental health
- Abolish Senedd
- noise and sound
- Childhood (particularly teenage years and transition from paediatric services)
- Loneliness
- Poverty and in work poverty
- Mental health
- Newid hinsawdd
- in work poverty
- Lower than average earnings
- Mental Health
- Prevention and Early Intervention for families who are in need
- YOUR PLAN 2023-28 WILL NOT ADDRESS URGENT NEEDS RIGHT NOW WHAT IS THAT PLAN ???STARTING TOMORROW

## Theme 2:

- More Green Space for everyone
- Mental health (including dementia) arising from loneliness, anxiety (eg from bullying, hate crime, domestic violence, etc) and leading to high levels of suicide and illness
- equal opportunities early start
- Environmental wellbeing
- Old people
- Families in poverty
- CHILDREN IN NEED. MORE FUNDING TO THIRD SECTOR TO ERADICATE CHILD POVERTY
- gor-dewdra
- tackling attitudes to drugs and alcohol
- climate and flooding
- Access to NHS dentists, good dental care is key to good health
- childhood and adolescent mental health
- No lockdowns
- tranquillity
- Mental Health
- Crime
- Affordable housing
- Obesity



- Tlodi
- poverty
- Loss of biodiversity
- Poverty
- Place based/strength based community development
- BAN ZERO HOURS CONTRACT...CREATE JOBS FOR ALL SCHOOL LEAVERS..WORKING IS THE BEST MEDICINE FOR WELL BEING(THE IN WORD SINCE COVID)

### **Theme 3:**

- Food Poverty
- Pollution of our environment with emphasis on water pollution (esp. by chemicals, silage, etc) and waste (fly tipping, litter, etc)
- economic recovery and growth
- Cultural wellbeing
- Children in poverty
- AFFORDABLE CHILDCARE
- amgylchedd
- disabled and elderly
- transport
- Allow businesses to start operating properly to generate more income and therefore more tax paid
- outdoor pursuits for adolescents to curb obesity issue
- No poison vaccines
- affordability
- Ageing
- Pandemic
- Mental Health and Dementia
- In work poverty
- Tai fforddiadwy
- children in care
- decrease in participation in arts, culture or heritage activities
- Hate Crime
- SORRY BUT HUGE PLANS THAT I HAVE READ SEEMS FAR FETCHED AND COSTLY WHERE I WOULD SPEND THIS MONEY FAR DIFFERENTLY WITH BETTER RESULTS . SO IF YOU CAN PULL IT ALL OFF WITH THE RIGHT OUTCOME GREAT HOWEVER STILL WAITING FOR ENERGY FROM THE SEA AS THE TIDE WILL COME IN AND THE TIDE WILL GO OUT THE WIND DOESNT ALWAYS BLOW

### **Effects of the draft Well-being Assessment on the Welsh language**

- Interestingly the number of Welsh speakers is declining which needs to be addressed
- I believe that the teaching of Welsh should receive even more emphasis - esp. for the 'over 30's. Notwithstanding the pandemic, it needs to be community based and include some 'face to face' input

- could encourage the use and learning of it more as it reports an increase in Welsh and a better well-being with it
- The Welsh language is a fundamental and integral part of life in Carmarthenshire as it is of great importance. The assessment needs to ensure it doesn't have any adverse effects on the use and accessibility to the Welsh language
- Little
- Possibly more Welsh language lessons would help a sense of community cohesion
- Rhaid gwneud y Gymraeg yn ganolog i bob dim - plethu yn naturiol yn hytrach na gorfodi
- Steps should be taken to improve levels of Welsh speaking in the county and monitoring isn't enough especially with the influx of people from England buying properties. Welsh speaking is only going to die if you continue to monitor it and not push it as a priority.
- none
- N/A
- You'll all die if you keep vaccinating
- The Welsh Language is in good hands, Welsh Education is enshrined in law, time to move on to better quality of life
- Good
- it seems that there is a language gap, with the Welsh speaking older population declining and the language with them and the likelihood that Welsh speaking youngsters will leave the county and possibly not return, what support is there for families to learn Welsh alongside their children.
- Hopefully improve support to those who choose Welsh education for their children but are English speakers
- Byddai galluogi pobl leol i aros yn yr ardal gyda swyddi addas, tai fforddiadwy ac ati yn cael effaith bositif ar y Gymraeg.
- Not an issue to me.
- This isn't very well explained --I don't really have enough information to answer this. I think there are more pressing priorities than the Welsh Language
- I don't understand this question

**Any comments on how the draft well-being assessment may affect people's use of the Welsh language.**

- More needs to be done to encourage the use of the language in every aspect of life
- Please see above (also poverty and pre-occupation with other issues - e.g. feeling unsafe to attend evening classes are other issues)
- Might improve the opportunity by making people aware of use and well-being links
- See above
- I am not aware of any obstacles to being bilingual.
- I don't know enough to comment
- Ffocws ar weithgarwch cymunedol - cynnig cyfleoedd trwy gyfrwng y Gymraeg
- none
- N/A
- Doomed either way unless exit gov

- Time to focus and making this County into a place where our children can live with good jobs etc, rather than having to migrate to other countries
- None
- There are far more important issues to address, can we please let the language take care of itself, if people want it, they will use it; if not, they won't!
- As above. I think there are more pressing priorities than worrying about the Welsh Language. The funding could go to creating better jobs for all.
- It would be good to have more incentive to learn the Welsh language, especially within the education sector where we need more diversity of teachers.

## Welsh Government response to the consultation on the draft assessment of local well-being for Carmarthenshire, required by the Well-being of Future Generations (Wales) Act.

Thank you for sight of Carmarthenshire PSB's Assessment of Local Well-being.

Welsh Government acknowledges that the preparation of an assessment and the supporting evidence is a significant undertaking and recognises the amount of work that has been accomplished. Covid-19 has brought huge challenges to the public sector and PSB partners have demonstrated real dedication and resolve in overcoming some truly testing situations over this period. PSBs are demonstrating that they too have a crucial role to play in the recovery from the pandemic, in considering the social, economic, environmental and cultural impacts on communities and co-ordinating the longer-term response. Given all of this, we also recognise that the assessments have been prepared during extraordinary circumstances and this has been taken into consideration when reviewing them.

Our focus has been on the main areas we consider will go towards providing you with a comprehensive view of the state of well-being in your area, ultimately equipping you with a good, clear understanding of the sort of priorities you as a PSB can target your collective efforts to best effect on in your well-being plan. These are the second round of assessments and it is hoped that there will be lessons learned from the first iteration, building on what happened previously.

We have structured our response to the consultation on your assessment in the same way as in 2017 which is as follows:

- **General comments** providing an overview of thoughts on the assessment;
- More **specific comments** on the way in which the analysis has been undertaken and presented and the way in which the statutory requirements have been met;
- A **final summary table** which identifies the areas we would suggest could benefit from further development. We are adopting a consistent approach to these matters which have been categorised as follows:
  - **Category A** – these are significant issues which we would hope would be addressed prior to publication of the well-being assessment. They might relate, for example, to compliance with the statutory requirements or a fundamental issue with the quality of the analysis
  - **Category B** – these are matters which are important and would support a better informed well-being plan and we would hope could be addressed alongside the development of the plan
  - **Category C** – these are matters which would strengthen the assessment but could be addressed over time.

We will be using the same approach in responding to each of the assessments.

## **Overall Thoughts**

This assessment demonstrates the commitment Carmarthenshire PSB has made to embrace the challenge of assessing well-being in the area. It engages well with most of the key areas identified in the statutory and non-statutory guidance and demonstrates good use of a range of evidence to support analysis.

Our evaluation identifies some areas for further development which, if addressed could strengthen the assessment. As an example, we would suggest including a specific section outlining the methodological approaches adopted, and providing more detail on these, which would add a greater level of robustness to the engagement process. In addition, it would also be useful to include a discussion on how the community areas have been decided upon and considered as part of the assessment (see relevant paragraph for more detail). We feel that further understanding at a more local level would benefit the assessment as a whole.

## **Comments on particular aspects of the Assessment**

### **Statutory Requirements**

The assessment refers to the relevant National Indicators and associated local indicators for the New Beginnings life stage, Adulthood life stage and Ageing Well life stage.

The PSB have chosen six community areas based on Upper Super Output Areas, allowing the PSB to build statistical information around these areas. The data is presented for the six areas throughout the assessment and, helpfully, comparisons are drawn between them,

However, we have a couple of queries on the approach that has been chosen to identify these. Firstly, we question whether this goes down to enough detail given that it is a USOA. Do they represent local communities within Carmarthenshire or are they too large? Would MSOA be more appropriate? A further understanding at a more local level might draw out the diversity of the area and enhance the ability to robustly assess the differences or similarities within Carmarthenshire.

The other point is that the communities are not given names, and therefore it is more difficult to identify these as real, cohesive communities. The assessment doesn't give much detail on the characteristics of the areas. Adding names and descriptions of the areas could make it easier for the reader to understand the characteristics of the communities and the status of well-being in those areas.

The following assessments and reviews do not immediately appear to have been used which the Act specifies the board must take into account when preparing the well-being assessment:

- UK Climate Change Risk Assessment;
- Sufficiency of Nursery education provision review;
- Crime and Disorder Reduction Plans;
- Combating Substance Misuse strategic assessment;
- Strategic Assessment relating to the Reduction of Reoffending.

## **Structure and Format**

The assessment has a clear and logical structure. Opening sections clearly set the scene for the assessment. There is a good initial summary which is effectively structured into four different life stages, as it was in the first assessment and this approach comes across as effective.

In the initial summary of themes under the four life stages, it is useful to note in the introductory paragraph of this section that the key themes are drawn from all of the evidence collected as part of the assessment.

Use of the PSB Futures Impact/Certainty Matrix is very effective and clearly sets out issues to be monitored, issues that require further research, and issues that are critical and need to be prioritised.

We would also suggest that the assessment would benefit from a more consistent approach to the presentation of data and overall format, for example:

- When presenting numbers in table format, we would recommend using right alignment rather than central alignment to make it easier to read and compare numbers;
- Figures / tables should be numbered and include titles, labels and sources, and should also be explained and cross-referenced in the main text;
- We would suggest choosing one chart type (i.e. line or bar chart) when both fields are continuous or discontinuous data (see Figures 5 and 6, for example).

## **Engagement**

The assessment demonstrates meaningful engagement, involvement and collaboration and uses the evidence from it to good effect. It is clear that evidence has been gathered using various methods (surveys, group discussions) and is presented and used to good effect. However, the assessment lacks a specific section outlining the methodological approaches adopted and providing more detail on these which would be beneficial.

## **Balance and Comprehensiveness**

The 'life course' model is helpful in terms of breaking down all of the information and ensuring that the

needs of younger and older people are considered. However, more consideration could be given to how socio-economic factors can be more effectively considered and discussed throughout the assessment. As an example, the assessment would be strengthened if it considered the impact of factors such as socio-economic disadvantage, racial diversity, disability and so on under each of the policy areas covered. Acknowledging these considerations through the assessment would deliver a richer level of understanding and help to ensure that efforts to actively tackle disadvantage are being maximised.

It would be useful to include a closing summary bringing together key themes / findings / priorities from each of the individual life stage chapters.

It is a strength that the assessment acknowledges and provides an overview of the range of cross-boundary and regional issues and challenges impacting on the county and the wider west Wales and mid Wales regions.

There is very little reference to Brexit and the impact that this will have on the area, both now and in the future. There could also be a greater emphasis placed on culture and the arts.

The WCPP reports that were produced [Well-being briefings for Public Services Boards | WCPP](#) could be helpful for both cultural and Brexit/covid aspects. This could help to add value where there are known gaps.

## **Reflective and Critical Approach**

It is helpful that gaps and limitations in the data and engagement are acknowledged in the main report, e.g. the impact of Covid not only on well-being but also on the quality of the data (recognising where it may not be accurate).

## **Quality of Analytical Approach**

The assessment draws on a broad range of quantitative and qualitative data and sources to build a rich picture of well-being across the county and to some extent within its communities (although as mentioned previously we wonder whether these might benefit from being more local).

Evidence has been demonstrated of the extent of the use of existing sources of data and insights to build the assessment. Overall sources are well-referenced throughout the report, with the exception of some parts of the analysis where the source of the data has not been included (see Youth section on p.43 onwards). There is also a need to ensure that the final version includes a reference section for further information.

The assessment's research methodology is briefly mentioned in individual chapters under 'Engagement responses', but this makes it difficult to get a sense of the overall methodological approach adopted. We



would suggest including a separate section (either as a stand-alone chapter or annex) to provide some background and an explanation of the engagement processes, along with a summary of the process of collecting, synthesising and analysing data and any limitations. The next steps section at the end includes a helpful overview of data limitations/gaps.

Overall, the assessment provides a clear picture of priorities that may link through to the plan.

## **Future Trends**

The assessment has utilised future trends and scenarios and considered their implications. The PSB Futures Impact/Certainty Matrix is effective and clearly sets out issues to be monitored, issues that require further research, and issues that are critical and need to be prioritised.

The way the assessment is presented makes it clear what the key priorities are across the different life stages.

## **Feedback from other policy areas**

Based on the feedback we have received from policy specialists across the Welsh Government, there are some very specific areas which we highlight for your consideration. For example:

- There does not appear to be evidence of engagement with representatives of childcare providers via their third sector organisations. This could support an understanding of issues in early development, particularly as a result of covid.
- The focus of the engagement to date in term of young people, seems to have been around children of school age. Expect that Carms will address the importance of drawing on the voice of those children who are 0-4yrs. One way to do this would be to link up with their PSB Pathfinder Coordinators - who will have been working on mapping and scoping their Early Years Systems and will have a wealth of information to draw upon which could help this process.
- The focus on domestic violence is welcome, but we would encourage the PSB to focus on the broader definition of Violence Against Women, Domestic Abuse and Sexual Violence as defined in Welsh law – this includes broader factors such as coercive control.

Areas for development

<b>Category A</b>
<b>Category B</b>  Community Areas (see ‘Statutory Requirements’)  Methodological Approach (see ‘Engagement’)  Consideration of statutory reviews and assessments (see ‘Statutory Requirements’)  Formatting of Tables (see ‘Structure and Format’)  Reference section  A final chapter to bring together key themes / findings / priorities from each of the individual life stage chapters (see ‘Balance and Comprehensiveness’)  Brexit  More work on cultural aspects (see under ‘Balance and Comprehensiveness’)  Future Trends could be strengthened (see paragraph).
<b>Category C</b>

#### 1: Summary

- A clear, well presented well-being assessment demonstrating the commitment Carmarthenshire PSB has made to assessing well-being in its area.
- Structured in relation to stages of life, from 'new beginnings' to 'ageing well', which works well, is user-friendly and a helpful structure for encouraging inter-generational thinking.
- Regional collaboration a strong, positive feature of the work carried out.
- An honest appraisal of data and information, clarity on the information you have and don't have, and regular reflection.
- Good use and mixture of types of data and information (quantitative and qualitative), with information and feedback from your engagement work incorporated throughout.
- Some good examples of best practice, including the table outlining how the PSB have applied the 5 ways of working and the use of the impact / certainty matrix.
- Section 3 highlights some areas that if further developed, would help to strengthen the assessment. These relate to: future trends, involvement, making connections between issues, the Welsh Language and maximising contribution to Wales' well-being goals.
- Section 3 also outlines other (desirable) areas for consideration within the assessment.

#### 2: Evidence of good practice in the well-being assessment

##### Process and methodology

It's positive to see the PSB's collaborative work, locally and regionally to produce the assessment, sharing resources, expertise, data gathering and capacity. From this, you've identified 13 key regional well-being themes and identified cross-boundary well-being issues such as climate change, child poverty and housing affordability.

There is honest appraisal of the data shared throughout the assessment. For example, you state the number of children living in workless households has seen significant annual reductions in recent years, and the county is below the Welsh average of 13.5% (at 8.8%). And yet you (correctly) point out that while this is a positive trend, it should not be treated in isolation to the fact more children are living in poverty within your county, regionally and nationally in Wales.

You have engaged with a wide range of people and clearly drawn information from both quantitative and qualitative sources through the report. For example, on childhood obesity, the comparison of regional data on child engagement with sport is supplemented with qualitative views from children.

The table outlining how the PSB have applied the 5 ways of working is very helpful. For example, under 'Long-term' your examples include 'Futures thinking questions included in the survey' and 'Consideration and analysis of future trends information where available'.

The use of the impact / certainty matrix is a strength, enabling you to provide an indicative assessment of the main themes you have identified. It's also helpful to see assessment of your current performance

against Wales' national well-being indicators to help provide further insight into levels of well-being in your county. It's also helpful to see these included in each of the chapters.

There is honest reflection about the impact of Covid on the assessment, and how the PSB has sought to reference specific impacts of the pandemic separately (where possible), and recognition of the impacts of Covid as a data gap. You also note caution if information isn't up to date or pre-dates COVID-19, such as with some of your figures on demographics.

The assessment explores some interconnections between issues. For example, the 'New Beginnings' chapter identifies the importance of addressing social and economic inequality but also environmental inequality. There is also cross referencing with some of the issues presented between chapters, e.g. noting wildfires as a problem in both your community safety and environment chapters, and cross-referencing between the two.

The structure of the 'Ageing well' chapter works well, set out against the World Health Organisation framework of 8 domains to assist in the creation of age friendly communities. This demonstrates an approach that aligns with the statutory requirements and incorporates research frameworks from wider studies on well-being.

## Content

Highlighting the key issues up-front in the report is useful for readers and wider stakeholders who would want to understand the headlines. The topics and issues are explained clearly throughout, meaning the information and narrative is clear, accessible and easy to understand.

The 'Engagement Response' sections at the end of each sub-chapter are a useful way of ensuring resident voices are promoted throughout the report - these strengthen the overall narrative.

You demonstrate a good understanding of what data you have, and what data you don't have. There are a number of occasions in the assessment where it states a topic is 'an area we would like to research further.' It's helpful to see these highlighted under your 'next steps' section as fuel poverty, adult obesity, domestic abuse, and housing / homelessness.

It's positive to see 6,436 students (67%) across 12 schools in your county taking part in a School Health Research Network (SHRN) survey in 2017-18. Analysis and comparison with the results from the more recent September 2021 survey will be important, when available.

We welcome the reflection on some of your data and statistics in relation to the first well-being assessment. For example, despite the high number of households continuing to live in poverty, you noted this has reduced by 2% since the last Well-being Assessment.

The number of school leavers (1.8%) recorded as NEET is now half since the last assessment (3.4%). While still just above the Welsh average, you note this significant reduction could be attributed to the Youth Engagement and Progression Framework which focuses on early identification and targeted support. You also state the number of children looked after by the local authority in Carmarthenshire is the

lowest in Wales, a result of your continued focus on preventative work, with robust systems in place to keep children safe in the home. These are good [examples of preventative work in the area](#).

The ReConnecting project, through the 50+ Leadership Group, is clearly valued by members of the Carmarthenshire Disability Partnership, and highlighted the importance of arts and culture during the pandemic, and how access to digital opportunities supported mental health and well-being.

### 3: Areas that could be further developed

#### Important areas for consideration

Building on the extensive work already undertaken for your well-being assessment, below are areas we consider to be important for your consideration. If developed further, they would help strengthen the assessment overall.

#### Building on your use of future trends information

It is good to see several references to the recently published Future Trends Report throughout the document. You have used the information to supplement local data and/or add some wider analysis, e.g.: *'Data presented in the Future Trends Report detail that by 2050 we are forecasted to see average summer temperatures rise by 1.34°C. This could cause an increase in rain by 5% throughout the year, concentrated more in winter as summers experience longer periods of drought.'*

To build on this, the assessment should also consider what the implications of the trends you highlight could be for your area. Using the example above, which areas and populations would be most vulnerable in Carmarthenshire to increased rainfall and/or drought? What could the potential impact be on homes, livelihoods or health and well-being? Are there implications for specific groups and communities?

Our recent report with Public Health Wales '[Inequality in a future Wales](#)' highlights that climate change could increase inequalities if the impacts on different groups in society are not factored in. To explore examples like this more fully, we would therefore encourage you to involve the people and communities who may be most affected, to ensure their voices are being heard. A better understanding of their concerns and priorities for action will help you plan your next steps.

Your assessment also references the links between future trends and inequalities in relation to work, noting: *'This shows a concerning trend that being in work does not necessarily pull households out of poverty.'* Along with climate change, the '[Inequality in a future Wales](#)' report also [looks at inequality in relation to trends on the future of work and demographic change, relevant to other areas of your assessment](#). Full consideration of the potential implications for inequality is necessary when making decisions to tackle future trends.

As discussed in our recent meeting, it can also be helpful to consider the impact of future trends in the short-term (3-5 years), medium term (10 years or so), and longer-term (up to the 25 years, a 'generation', as required by the Act). This can help you identify immediate risks or opportunities, and highlight the longer-term impacts that should shape those decisions. When thinking and acting for the long-term, *how* you do something is just as important as *what* you do.

We would welcome evidence that you have considered and prioritised the future trends most relevant to your area. You may find the impact / certainty matrix to be a useful tool here - we note you have already used it to assess the main themes in your assessment. Exploring two or three of the future trends you identify as significant for your area in more detail would strengthen the assessment overall. The PSB could also undertake this work as part of its preparation for the well-being plan and the setting of objectives/steps.

### **Your work on involvement**

The regional approach you've adopted includes your work on engagement, where you established an engagement group and survey sub-group. The assessment states a 'Regional Engagement and Consultation Framework' was produced, and is available on the PSBs website.

In our meeting on 17<sup>th</sup> January 2022, we highlighted that we were unable to locate the framework on your webpage and noted from you that a 'technical background document' is being produced, detailing your consultation and involvement work. We look forward to seeing both documents.

From the information you have presented, it's clear you have engaged with a wide range of people. For example, your work with service users and providers from the Armed Forces community who shared their concerns on mental health and the impact the pandemic has had on their educational and training opportunities. And your focus groups held with Black, Asian and Minority Ethnic communities; EU (non-Welsh) citizens, rural and isolated communities, first language Welsh speakers, Gypsy / Traveller Communities, Syrian Refugees, LGBTQ+ people, disabled people and/or people with health conditions and young people.

It's good to see a wide range of methods, tools and approaches taken to your work on involvement. For example, you met virtually with seven local schools, with conversations structured around happiness, things that were important to them and their hopes for the future. These were clearly important discussions and revealed some telling feedback. This also links to the views and information captured in the 'Carmarthenshire Youth Council' in autumn 2020, where concerns included lack of suitable job opportunities, lack of affordable housing, training/skills, the environment and mental health.

It is reassuring to see your honest reflection on the '*voices which aren't currently being heard as part of the assessment*' as an area for improvement, and your intent to increase efforts to engage with these groups. Building on this, you could consider incorporating some lived experience into designing your well-being plan, enabling residents in Carmarthenshire to tell their story more fully.

Finally, you state '*This represents the beginning of an ongoing conversation about well-being in Carmarthenshire*' which is great to hear as the PSB shifts its focus from assessment to plan/objectives. Using and adopting strong, innovative involvement techniques that go beyond engagement and move more towards co-production will be important for PSBs in Wales.

### **Making the connections between the issues, data and information**

The assessment identifies some connections between issues, a benefit of structuring the assessment against age. For example, the report links mental well-being and ACEs with the ability to develop

relationships, cultural connections and sporting participation. And the 'New Beginnings' chapter identifies the importance of addressing social, economic and environmental inequality.

To highlight one example from the quantitative and qualitative information presented, there are clear links and connections between transport infrastructure, children's play, access to green space, physical activity and mental health, and reducing emissions.

As you state: *'One of the key ways to tackle levels of obesity in children is encouraging them to engage in physical activity'*, and yet road traffic is highlighted as the main barrier to children playing and hanging out by parents of year 5 and year 8 pupils. This also relates to your points on obesity and the mental health of children and young people. And, your comment that encouraging the use of the cleanest modes of transport, active travel and the creation of urban green space is *'likely to be key in reducing emissions in the future.'*

In moving from well-being assessment to plan, one of the key considerations that will help the PSB prioritise its objectives and steps will be identifying connections like these, that cut across the four dimensions of well-being.

### **Welsh language**

Your county has the most Welsh speakers compared to the rest of Wales, and you note the ability to speak Welsh is associated with higher subjective well-being. Despite this, you highlight a stark decline in the number of Welsh speakers in the county. For example, from 50.3% in 2001 to 43.9% in 2011. The assessment also highlights the challenges around Welsh-medium childcare settings, where numbers/places have decreased.

Building on the information set out, it would be helpful to include further analysis of what this data means for your area (now and in the longer-term), in conjunction with the national vision of 'Cymraeg 2050' to increase both the use of Welsh and number of Welsh speakers. Referencing any work that has been undertaken to better understand the reasons for the decline in your area would also be useful.

In moving to setting objectives and steps within your well-being plan, clear links should be made to Carmarthenshire's Welsh in Education Strategic Plan (WESP) and the local authority promotion strategy. Members of your Welsh Language Strategic Forum highlighted the importance of the relationship between the economy and the Welsh language, and connections could also be made here with your local skills providers.

### **Maximising the PSB's contribution to Wales' well-being goals**

Understanding the full definition of Wales' well-being goals can help ensure the assessment is considering the wide range of topics and themes of well-being within your area.

The table below sets out areas that could be explored further within the assessment, and/or taken into consideration for the well-being plan. It is appreciated that it may not be possible for all the information below to be fully considered / incorporated in your assessment. Instead, you may wish to choose some areas to compliment the extensive work you have already undertaken:



Equality and intersectionality	<p>Equality has been considered through the assessment. Building on your positive engagement work, the assessment could acknowledge how intersectionality affects people in Carmarthenshire, e.g. what is it like to be young and LGBTQ+ in Carmarthenshire? Ethnicity and gender-based oppression can also result in significant health inequalities. We also recommend ensuring all ‘protected characteristics’ outlined in the Equality Act are considered within the assessment.</p> <p>An ageing population will have implications on equality in your area, and disrupt how health and social care, employment and education, and pensions operate. These systems will need to adapt if they are to function in the long-term. Our <a href="#">‘Inequality in a future Wales’</a> report explores future trends in relation to demographic change, the future of work and climate change, and is a helpful resource for considering the potential implications for inequality in these areas.</p>
Skills for the future	<p>It’s good to see feedback through your engagement work on the importance of digital skills, and you have shared concerns on the continuing trend of young people moving out.</p> <p>We encourage you to consider the skills needed for the future, how they relate to your area, and the significance they may hold in respect of other areas of well-being. For example, the skills needed to transition to a low carbon economy. Summary analysis of our recent report is <a href="#">here</a>. It finds that across Wales there are significant skills gaps in green industries which must be addressed.</p>
Brexit and agriculture	<p><a href="#">Could be considered further</a> given agriculture is main land use in Carmarthenshire, in conjunction with potential implications of the <a href="#">Sustainable Farming Scheme (SFS)</a>. WCPP’s briefing: <i>‘The impacts of Covid-19 and Brexit on well-being’</i> is a helpful resource. Issues relating to sustainable land management skills (see our report linked above) are also relevant <a href="#">here</a>.</p>
Net Zero Wales and the Climate Change Risk Assessment (CCRA)	<p>Welcome the information presented on the environment. Consideration should be given to what <a href="#">Wales’ decarbonisation pathway</a> means for your area, and the <a href="#">Climate Change Risk Assessment (CCRA3) summary for Wales</a> is also a key document outlining the key risks and opportunities for Wales, not currently referenced.</p>
Llwybr Newydd: Wales’s Transport Strategy	<p>Consideration of the three headline priorities and sustainable transport hierarchy within <a href="#">Llwybr Newydd</a> (the Wales Transport Strategy 2021), and progress/challenges in your area.</p>
Regional Skills Partnership	<p>Not clear if the links have been made with your local Regional Skills Partnerships. Your assessment will be a significant resource</p>

	for them. Similarly, their strategies and priorities will be key for your PSB. Please also see above points on skills.
<b>South West Wales Regional Economic Framework</b>	Recently <a href="#">published</a> in December 2021, an important resource for your PSB.
<b>The foundational economy</b>	And links to <a href="#">the Foundational Economy Challenge Fund</a> .
<b>Circular economy and consumption</b>	Referenced lightly in your waste sub-chapter, but could further explore what Wales' <a href="#">strategy for a circular economy</a> means for your area, e.g. helping communities share items, food waste, electric fleet etc. PSBs should be seeking ways to understand how a circular economy approach can help them meet a number of well-being priorities.
<b>Fair and local procurement</b>	Not explored in the assessment, but a key lever for change. Some analysis of your local economy/supply chains would strengthen the assessment.
<b>Tourism</b>	An important area that could be explored further, which links to your work with business, the environment and cultural/natural heritage.

### Other areas for consideration (desirable)

These are areas you might wish to amend / update to strengthen the assessment overall:

#### Environmental and cultural well-being reflected across age groups

There is occasional disparity between the extent to which the four dimensions of well-being are explored. For example, social and economic wellbeing are covered comprehensively across all four chapters, while environmental well-being is predominantly covered in 'Aging Well' and 'Adulthood', and cultural well-being in Adulthood.

Building on the information already set out, such as your section on 'play', are there any opportunities for you to further consider environmental and cultural well-being among young people in Carmarthenshire? The engagement with schools and young people suggests these are very important areas for them, and additional insight [would help strengthen the assessment](#).

#### Collaboration

Building on the collaborative approach taken to developing the assessment in the region, it would be beneficial if the assessment identified who all the partners were and how the collaboration was managed. This information would help for future learning, as cross-sector collaboration is a challenging but often effective means of delivering social change.

## Stakeholder list

It would be useful for future learning (internal and external to the PSB) if a list of stakeholders engaged with is included in your technical background document.

## Reflection on progress

It's positive to see some examples where you have compared progress with your first well-being assessment. The inclusion of further examples would be beneficial, if possible.

## Breakdown of the PSB area and 6 local communities

While trends are generally considered at the local authority level, some findings are then broken down by town, community area and ward. Going further, it would be helpful to see some deeper analysis of the community areas compared against each other. For example, the section on house prices could explore why increases in house prices have occurred, and why they are different in some areas than others (e.g. proximity to the coast, second homes / tourism, or transport links etc). It would also be useful, for example, to see how some elements of well-being might differ for those nearer to the coast and those more inland; or towns in comparison to more rural areas.

## Volunteering, inter-generational activities and knowledge sharing

Currently, 33.7% of Carmarthenshire adults volunteer and the links to well-being are clear. There are clear messages from your survey with older people that there is a desire to share knowledge and experience, providing opportunities for intergenerational connectivity, building community cohesion and improving well-being. This appears to be an important area for your county and the PSB could consider its role more fully in this area if it's not already.

## Fly-tipping

A significant concern for the area, with the total number of recorded instances being the second highest in Wales. It's also opposite to the trends seen in your neighbouring counties of Ceredigion and Pembrokeshire, where they have seen a significant decrease in fly tipping instances. It would be helpful to know if any specific work, studies or action is being undertaken to help address this issue?

## Case studies

Welcome your suggestion that case studies will be added to the Assessment.

## Terminology

We encourage you to use the term 'seldom heard voices' or 'need to reach' as opposed to 'hard to reach' groups. And, the use of the term 'declined' in relation to progress against the national indicators suggests the percentage has got smaller, whereas it tends to show the situation has actually worsened, e.g. for loneliness (p87). Suggest considering revising this terminology.

## Mobility

On page 85, there is no information under the header 'mobility'.

## 4: Resources to help inform your next steps

Below are resources that can help inform your next steps, as you move from well-being assessment to well-being plan:

- Chapter 4 of the Future Generations Report: '[Setting Good Well-being Objectives](#)'
- The '[Future Generations Framework for Projects](#)'
- [Case studies](#) of how the Act is being implemented on the ground in Wales
- Office of the Future Generations Commissioner for Wales: [Resources](#)

# Carmarthenshire Well-being Assessment

## Data sources and availability

Data in this document have been primarily collected from **Stats Wales**, the **National Survey for Wales** and **Office for National Statistics**. Data relating to the Welsh National Well-being Indicators are also available from the Welsh Government.

Many indicators and other data available at a national level are available at different geographical levels, including at a local authority level. The table below summarises the data that have been drawn on or consulted in preparing this Well-being Assessment, with an indication of their geographical breakdown, how they have been presented in the document and how often they are updated. The datasets are presented by Key Themes and in the order in which they are referenced in the Assessment.



## Introduction – The Impact of COVID-19

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Impact of COVID-19	<a href="#">Hywel Dda Director of Public Health Annual Report</a>	Regional and local authority	2021	-	Annual report
Coronavirus and the social impacts on disabled people	<a href="#">ONS</a>	National	2020-21	-	Ad hoc
Marmot's COVID-19 Review	<a href="#">The Health Foundation</a>	National	2020	-	Ad hoc
Short and long-term impact of COVID-19	<a href="#">Rising to the Triple Challenge of Brexit, COVID-19 and Climate Change for health, well-being and equity in Wales</a>	National	2020	-	Ad hoc
How access to care and overall health and well-being had been affected by the pandemic	<a href="#">Building a Healthier Future after COVID</a>	Regional	2021	-	Ad hoc

## Carmarthenshire Context

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Mid-year population estimates	<a href="#">Office for National Statistics (ONS)</a>	National and local authority	2020, 2021	-	Annual
Population projection	<a href="#">Stats Wales</a>	National and local authority	2028	-	Annual
Migration	<a href="#">Stats Wales – Internal Migration</a> <a href="#">Stats Wales – International Migration</a>	National and local authority	2020	-	Annual
Welsh speakers	<a href="#">Office for National Statistics (ONS) (Census 2011)</a>	National and local authority	2011	-	Every 10 years
Ethnicity	<a href="#">Office for National Statistics (ONS) Census 2011</a>	National and local authority	2011	-	Every 10 years
EU Settlement Scheme	<a href="#">UK Government</a>	National and local authority	June 2021	-	Quarterly
Living in Poverty	<a href="#">CACI Paycheck</a>	National and local authority	2020	-	Annual purchased data
Material deprivation	<a href="#">Stats Wales</a>	National and local authority	2019	-	Ad hoc
Welsh Index of Multiple Deprivation (WIMD)	<a href="#">Welsh Government</a>	National and local authority	2019	Figure 3 Table 1	Every 5 years
Population in Life Stages	<a href="#">Office for National Statistics (ONS)</a>	National and local authority	2020	Figure 4 Table 2	Annual
National Well-being Indicators	<a href="#">Welsh Government</a>	National and some at local authority	2021	-	Annual



## New Beginnings

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Low Birth Weight	<a href="#">Stats Wales</a>	National and local authority	2015-2020	Figure 5	Annual
Immunisation rates for children aged 4 and under	<a href="#">Public Health Wales</a>	National and local authority	2015-2019	Figure 6	Annual
Breastfeeding	<a href="#">Stats Wales</a>	National and local authority	2004-2017	-	Annual
Flying Start attendance	<a href="#">Carmarthenshire County Council</a>	Local Authority	2019-20	-	Termly
Welsh Language and Culture	<a href="#">Wales Centre for Public Policy - Culture Briefing</a>	National	2021	-	Ad hoc
Childcare Sufficiency Assessment	<a href="#">Carmarthenshire Family Information Service</a>	Carmarthenshire	2017-2022	Table 3	Every 5 years
Life expectancy	<a href="#">Public Health Wales</a>	National and local authority	2017-2019	-	Ad hoc
Gap in life expectancy	<a href="#">Public Health Wales</a>	National and local authority	2015-2017	-	Ad hoc

## Childhood

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Annual School Census	<a href="#">Stats Wales</a>	National and local authority	2021	-	Annual
Welsh Language and Culture	<a href="#">Wales Centre for Public Policy - Culture Briefing</a>	National	2021	-	Ad hoc
Adverse Childhood Experiences	<a href="#">Public Health Wales</a>	National and local authority	2016	-	Ad hoc
Child social services	<a href="#">Stats Wales</a>	National and local authority	2021	-	Annual
Children in Need & Child Protection Register	<a href="#">Carmarthenshire County Council</a>	Local authority	2021	-	In-house data
Child Poverty	<a href="#">End Child Poverty</a>	National and local authority wards	2014-2020	Figure 7	Ad hoc
Children living in Workless Households	<a href="#">Stats Wales</a>	National and local authority	2014-2018	Figure 8	Annual
Future Trends Report	<a href="#">Future Trends: 2021   GOV.WALES</a>	National and local authority	2021 onwards	-	Every 5 years
Childcare Sufficiency Assessment	<a href="#">Carmarthenshire Family Information Service</a>	Carmarthenshire	2017-2022	-	Every 5 years
Play Sufficiency Assessment	<a href="#">Carmarthenshire Family Information Service</a>	Carmarthenshire	2016-2019	-	Every 3 years
Childhood obesity – Child measurement Programme	<a href="#">Public Health Wales</a>	National and local authority	2018/19	-	Annual
School Sports Survey	<a href="#">Sport Wales</a>	National and local authority	2018	-	Ad hoc
Average 'Capped 9' Score	<a href="#">Stats Wales</a>	National and local authority	2019/20	-	Annual

## Youth

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Examinations	<a href="#">Stats Wales</a> <a href="#">Carmarthenshire County Council</a>	National and local authority	2021	-	Annual In house data
Home Schooled	<a href="#">Stats Wales</a>	National and local authority	2020	-	Annual
Young people are in education, employment or training (NEET)	<a href="#">Careers Wales</a>	National and local authority by request	2020/21	-	Annual
School Health Research Network (SHRN)	<a href="#">National Data - School Health Research Network (shrn.org.uk)</a>	National and local authority	2021	-	Ad hoc Data per County / School by request
Substance misuse service	<a href="#">Area Planning Board</a>	Carmarthenshire	2020/21	-	Ad hoc data requested
Sex and Relationships	<a href="#">National Data - School Health Research Network (shrn.org.uk)</a>	National and local authority	2017/18	-	Ad hoc Data per County / School by request
Making connections	<a href="#">Carmarthenshire Family Information Service</a>	Carmarthenshire	2019	-	Every 5 years
Loneliness and Isolation	<a href="#">Wales Centre for Public Policy</a>	National	2021	-	Ad hoc
Young carers	<a href="#">Office for National Statistics (ONS) (Census 2011)</a>	National and local authority	2011	-	Every 10 years
Young carers	<a href="#">Carers Trust Crossroads service</a>	Carmarthenshire	2019 - 2021	-	Ad hoc data requested
Migration	<a href="#">Stats Wales</a>	National and local authority	2016-2020	Table 4	Annual
Mental Health	<a href="#">Children's Commissioner</a>	National	2021	-	Ad hoc

## Adulthood

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Well-being data	<a href="#">ONS</a>	National and local authority	2019/20	-	Annual
Brexit and Covid-19 Impact	<a href="#">WCPP Impacts of Covid-19 and Brexit on Well-being</a>	National	2021	-	Ad hoc
Annual household income	<a href="#">CACI Paycheck</a>	National and local authority	2020	-	Annual purchased data
Gross disposable income	<a href="#">Stats Wales</a>	National and local authority wards	2018	-	Annual
Most deprived areas Welsh Index of Multiple Deprivation (WIMD)	<a href="#">Welsh Government</a>	National and local authority wards	2019	Table 5	Every 5 years
Living in Poverty	<a href="#">CACI Paycheck</a>	National and local authority	2020	-	Annual purchased data
Living in relative income poverty	<a href="#">Welsh Government / Department for Work and Pensions</a>	National and local authority	2017 - 2020	-	Ad hoc
Employment sectors	<a href="#">Office for National Statistics</a>	National and local authority	March 2021	-	Quarterly
Business Register and Employment Survey (BRES)	<a href="#">Office for National Statistics</a>	National and local authority	2019	-	Annually
Annual Population Survey	<a href="#">Stats Wales</a>	National and local authority	2020	-	Annually
Employment Rates	<a href="#">Stats Wales</a>	National and local authority	March 2020 & March 2021	-	Quarterly
Employment Rates of disabled and non-disabled	<a href="#">Office for National Statistics</a>	National and local authority	2020	-	Quarterly
Working age population economically active	<a href="#">Welsh Government Office for National Statistics Future Trends: 2021</a>	National and local authority	2017 - 2020	-	Quarterly Every 5 years

## Adulthood continued

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Jobs created	<a href="#">Welsh Government Stats Wales</a>	National and local authority	2001 & 2018	-	Quarterly
Coronavirus Job Retention	<a href="#">Regional Learning &amp; Skills Partnership</a>		2021	-	Ad hoc
Brexit and Covid-19 Impact	<a href="#">WCPP Impacts of Covid-19 and Brexit on Well-being</a>	National	2021	-	Ad hoc
Claimant count	<a href="#">Stats Wales</a>	National and local authorities	Sept 2020 & Aug 2021	-	Monthly
Jobseekers' Allowance	<a href="#">Nomis</a>	LSOA Level	August 2021	-	Monthly
Well-being in work	<a href="#">Stats Wales</a>	National and local authority	2019/20	-	Annually
Qualifications	<a href="#">Stats Wales</a>	National and local authority	2015 & 2020	-	Annually
Lifestyle choices	<a href="#">Stats Wales</a>	National and local authority	2018/19 & 2019/20	-	Annually
Pharmaceutical Needs Assessment (Smoking and Obesity)	<a href="#">NHS Wales</a>	Hywel Dda Health Board area	2021 - 2026	-	Every 5 years
Part of a community	<a href="#">Stats Wales</a>	National and local authority	2020/21	-	Annually
Hate Crime	<a href="#">Victim Support</a>	National and local authority wards	2020/2021	Figure 10	Ad hoc data requested
Crime Rates	<a href="#">Dyfed Powys Police</a>	National and local authority	2020/2021	Table 6	Ad hoc data requested
Domestic abuse	<a href="#">Dyfed Powys Police</a>	Carmarthenshire	1/11/20-31/10/21		Ad hoc data requested
Feeling safe	<a href="#">Stats Wales</a>	National and local authority	2016/17 & 2018/19	-	Every 3 years
Fire incidents	<a href="#">Mid and West Wales Fire and Rescue Service</a>	Local authority	2016/17 - 2020/21	Table 7	Ad hoc data requested

## Adulthood continued

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Road traffic accidents	<a href="#">Stats Wales</a>	National and local authority	2020/21	-	Annually
Average house price	<a href="#">HM Land Registry - GOV.UK</a>	National and down to individual properties	2018 & 2021	-	Monthly
Second Homes	<a href="#">Office of National Statistics</a>	National and local authority electoral wards	August 2021		Ad hoc
Homelessness	<a href="#">Stats Wales</a>	National and local authority	2019/20	-	Annually
Cultural activities Arts, museums and heritage	<a href="#">Wales Centre for Public Policy</a> <a href="#">Stats Wales</a> <a href="#">National Survey for Wales</a>	National and local authority	2019/20	-	Ad hoc Annually
Welsh Language	<a href="#">Stats Wales Census 2011</a>	National and local authority wards	2011	-	Every 10 years
	<a href="#">National Survey for Wales</a>		2019/20		Annually
	<a href="#">Future Trends: 2021</a>		2021		Every 5 years
	<a href="#">Wales Centre for Public Policy</a>				Ad hoc
Mental Health admissions	<a href="#">Stats Wales</a>	Health Board	2019/20	-	Annually
Mental Well-being scale	<a href="#">National Survey for Wales</a>	National and local authority	2016-7 & 2018/19	Table 8 Figure 12	Ad hoc
Suicides	<a href="#">Office for National Statistics</a>	National and local authority	2002 - 2019	Figure 13	Annually
Carers	<a href="#">2011 Census</a>	National and local authority	2011	-	Every 10 years
Carers – Local support service	<a href="#">Wales Centre for Public Policy</a>	National	2021	-	Ad hoc
Climate Change Risk	<a href="#">The UK Climate Risk Independent Assessment (CCRA3) Summary for Wales</a>	National	2021	-	Every 5 years
State of Natural Resources Report	<a href="#">Natural Resources Wales</a>	-	2020	-	Ad hoc

## Adulthood continued

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Implications of Brexit	<a href="#">Wales Centre for Public Policy</a>	National	2021	-	Ad hoc
Wildfires	<a href="#">Mid and West Wales Fire and Rescue Service</a>	Local authority	2016/17 - 2020/21	Figures 15 & 16	Ad hoc data requested
Flooding	<a href="#">Stats Wales</a>	National and local authority	2019	-	Annual
Waterways	<a href="#">Natural Resources Wales</a>	-	2020	-	Ad hoc
Waste	<a href="#">Stats Wales</a>	National and local authority	2020	Figure 17	
Ecosystem Resilience	<a href="#">Natural Resources Wales</a>	-	2020	-	Ad hoc
Climate Change	<a href="#">Natural Resources Wales</a>	-	2020	-	Ad hoc
National Well-being Indicators	<a href="#">Welsh Government</a>	National and some at local authority	2021	-	Annual



## Ageing Well

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Population projections	<a href="#">Stats Wales</a>	National and local authority	2018 - 2043	Table 9	Annual
Future Trends Report	<a href="#">Welsh Government</a>	National and local authority	2021 onwards	-	Every 5 years
Census 2011	<a href="#">Office for National Statistics</a>	National and local authority	2011	-	Every 10 years
Life expectancy	<a href="#">Public Health Wales</a>	National and local authority	2017-2019	-	Ad hoc
Deaths and causes	<a href="#">Office for National Statistics</a>	National and Local Authority	2015-2019	Figure 18	Annual
Older Adults in good health	<a href="#">Stats Wales</a>	National and Local Authority	2019-20	-	Annual
Transport	<a href="#">2011 Census</a>	National and Local Authority	2011	-	Every 10 years
Housing stock suitability	<a href="#">Stats Wales</a>	National and Local Authority	2014-15		Ad hoc
Loneliness	<a href="#">Stats Wales</a>	National and local authority	2019/20	-	Bi-annual
Loneliness and Isolation	<a href="#">Wales Centre for Public Policy</a>	National	2021		Ad hoc
Volunteers	<a href="#">Stats Wales</a>	National and local authority	2020-21	-	Annual
Employment rate by age	<a href="#">Stats Wales</a>	National and local authority	2017 - 2021	Figure 19	Annual
Dementia Summary	<a href="#">West Wales Care Partnership Population Needs Assessment</a>	Hywel Dda University Health Board	2021	-	Every 5 years

## Ageing Well continued

Data	Source	Breakdown	Time period	Breakdown presented in assessment?	Release frequency
Dementia projected figures	<a href="#">West Wales Care Partnership</a>	National and local authority	2020 onwards	Figure 21	Ad hoc
Deaths and Causes	<a href="#">NOMIS - ONS</a>	National and local authority	2013-2020	Figure 22	Annual
Life expectancy	<a href="#">Public Health Wales</a>	National and local authority	2017-2019	-	Ad hoc
Pharmaceutical Needs Assessment	<a href="#">NHS Wales</a>	Hywel Dda Health Board area	2021 - 2026	-	Every 5 years
National Well-being Indicators	<a href="#">Welsh Government</a>	National and some at local authority	2021	-	Annual



<b>Dyddiad y Cyfarfod / Date of Meeting: 14.01.2019</b>	
<b>Rhif yr Eitem / Item Number: 3</b>	
<b>Teitl / Title: Cynnig Adeiladu Cyfoeth Cymunedol / Community Wealth Building Proposal</b>	
<p><b>I ystyried a sylwi ar y materion canlynol:</b></p> <ol style="list-style-type: none"> <li><b>Sicrhau Cefnogaeth:</b> Cyflwyno'r cyfle i'r BGC er mwyn sefydlu â oes diddordeb mewn edrych i'r posibilrwydd o ystyried y gwaith hwn yn Sir Gâr.</li> <li><b>Sefydlu Gweithgor:</b> Os oes cefnogaeth gan y BGC, mae'r Grŵp Gweithredu Pobl a Llefydd Llewyrchus mewn sefyllfa dda i gefnogi'r gwaith o adnabod arferion da cyfredol o fewn neu rhwng sefydliadau, ac adnabod meysydd lle gellir datblygu cyfleoedd ac arferion.</li> <li><b>Datblygu Cynllun Gweithredu:</b> Bydd angen i'r Grŵp Gweithredu gomisiynu darn o waith (o bosib yn cael ei arwain gan CLES) er mwyn i aelodau'r BGC i ymweld ag arfer da ar draws y DU, adolygu arferion presennol y BGC a chyfleoedd i'r dyfodol ac i ddatblygu cynllun gwaith Adeiladu Cyfoeth Cymunedol a fydd yn edrych i weithio gydag aelodau'r BGC i ymgorffori egwyddorion Cyfoeth Cymunedol o fewn pob sefydliad.</li> </ol> <p><b>To consider and comment on the following issues:</b></p> <ol style="list-style-type: none"> <li><b>Secure Support:</b> Present the opportunity to the PSB to establish if there is an appetite to investigate this movement within Carmarthenshire.</li> <li><b>Establish Working Group:</b> If PSB support is secured, the Prosperous People and Places Delivery Group are well placed to support work to identify current good practices within or between the organisations, and identify areas where opportunities and working practices could be developed.</li> <li><b>Develop Action Plan:</b> The Delivery Group will need to commission a piece of work (possibly led by CLES) for members of the PSB to visit best practice across the UK, review PSB current practices and future opportunities and develop a CWB action plan that will look to work with the PSB members to embed the principles of CWB into each of the organisations.</li> </ol>	
<b>I Drafor</b> <b>For Discussion</b>	<b>A oes angen penderfyniad: Oes</b> <b>Decision required: Yes</b>
<p><b>Cynigwyd gan / Proposed by:</b></p> <p>Stuart Walters, Rheolwr Datblygu Economaidd, Cyngor Sir Gâr / Economic Development Manager, Carmarthenshire County Council</p>	

## Community Wealth Building

### Background

Carmarthenshire County Council wishes to explore the possibility of pursuing a Community Wealth Building approach to regenerating the local economy, in tandem with key partners in the Public Services Board (PSB). There are a number of examples across the UK where Community Wealth Building (CWB) has been established and the positive effects on the local economy have been profound.

At its core stands a recognition that places already have wealth at their disposal, due to the financial, physical and social assets of local institutions and people. The work and skill is in analysing this wealth, and harnessing it for deeper economic, social and environmental benefit.

Community Wealth Building is built upon four main principles namely:

1. Workforce
  - Ensuring payment of Living Wage
  - Ensuring availability of Apprenticeships (through local SMEs)
  - Ensuring career pathways and progression
  - Supporting skills development through the supply chain
2. Supply Chains / Procurement
  - Setting targets for local / regional procurement
  - Setting targets for SME procurement
  - Ensuring procurement spend is retained locally
  - Use procurement to build capacity in the local supply chain
  - Identify gaps in local supply chain that could be filled
3. Land, Property and Assets
  - Pension funds and their investment locally
  - Use of publicly owned property
  - Bringing disused property back into use
  - Development of community banks and utilities
4. Ownership
  - Presence of co-ops and worker owned business
  - Community ownership of public assets
  - Development of community energy (or other utility) suppliers
  - Supporting worker buyouts of existing enterprise.

Work is currently ongoing in a number of these areas but each are arguably being conducted in isolation and are not packaged under a clear partnership arrangement. It is suggested that greater local economic impact is achieved when the interventions exist together and form part of a co-ordinated plan, and this is something that may be worth considering in Carmarthenshire.

### **External Expertise and Support**

The [Centre for Local Economic Strategies](#) (CLES) are an independent “think and do tank” that look to realise progressive economics for people and place. They strive to achieve social justice, good local economies and effective public services for everyone, everywhere.

CLES have been working with Preston and six anchor institutions to demonstrate what can be achieved if they adopt the principles of CWB. CLES have worked with the stakeholders to embed CWB in their vision, strategic policy and day to day practices. In particular, CLES have supported a wider programme of Local Wealth Building within Preston, CLES has analysed the procurement spend of six anchor institutions, and the resultant impact of behaviour change around procurement is clear. The proportion of procurement spend, in Preston, of the six anchor institutions has increased from 5% to 18% over the last five financial years, with £74M more now spent with Preston organisations. The proportion of procurement spend in wider Lancashire has increased from 39% to 79%, with £199M more now spent with Lancashire based organisations. This evidence clearly portrays local economic benefits for Preston and Lancashire as a result of adopting a more progressive approach.

### **Next Steps & Recommendations**

In order to further understand the CWB principles and to clearly see the benefits that such an initiative can offer Carmarthenshire, the following recommendations are to be considered:

**Recommendation 1 - Secure Support:** Present the opportunity to the PSB to establish if there is an appetite to investigate this movement within Carmarthenshire.

**Recommendation 2 - Establish Working Group:** If PSB support is secured, the Prosperous People and Places Delivery Group are well placed to support work to identify current good practices within or between the organisations, and identify areas where opportunities and working practices could be developed.

**Recommendation 3 - Develop Action Plan:** The Delivery Group will need to commission a piece of work (possibly led by CLES) for members of the PSB to visit best practice across the UK, review PSB current practices and future opportunities and develop a CWB action plan that will look to work with the PSB members to embed the principles of CWB into each of the organisations.

# Carmarthenshire

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## Environment and Climate Change Analysis

# Environment and Natural Resources in Carmarthenshire

Carmarthenshire is celebrated for its natural environment, including magnificent coastal sand dunes, quiet estuaries, steep wooded valleys and rugged uplands. The County has a rich network of ‘designated’ (protected) sites; protected at a national or international level, these include our Special Protection Areas and Ramsar sites, our National Nature Reserves, and Sites of Special Scientific Interest. We also have nature reserves (often managed by wildlife organisations or the Council) and country parks. Natural Resources Wales are a government sponsored body, they are responsible for looking after natural resources and what they provide for Wales: to help reduce the risk to people and properties of flooding and pollution; to look after special places for well-being, wildlife and timber; and to work with others to help them to manage the resources sustainably. Areas of focus for Natural Resources Wales in the South West Region, which includes Carmarthenshire are:

South West Area Statement	Link to Well-being Goals
Ensuring sustainable land management	<a href="#">A Globally Responsible Wales</a> <a href="#">A Prosperous Wales</a> <a href="#">A Resilient Wales</a>
Reversing the decline of, and enhancing, biodiversity	<a href="#">A Globally Responsible Wales</a> <a href="#">A Prosperous Wales</a> <a href="#">A Resilient Wales</a>
Reducing health inequalities	<a href="#">A Healthier Wales</a> <a href="#">A More Equal Wales</a> <a href="#">A Wales of Cohesive Communities</a>
Cross-cutting theme: Mitigating and adapting to a changing climate	<a href="#">A Globally Responsible Wales</a> <a href="#">A Prosperous Wales</a> <a href="#">A More Equal Wales</a>

Marine Area Statement	Link to Well-being Goals
Building Resilience of marine ecosystems	<a href="#">A Globally Responsible Wales</a> <a href="#">A Resilient Wales</a> <a href="#">A Prosperous Wales</a>
Nature-based solutions and adaptations at the coast	<a href="#">A Globally Responsible Wales</a> <a href="#">A Resilient Wales</a> <a href="#">A Prosperous Wales</a>
Making the most of marine planning	<a href="#">A Globally Responsible Wales</a> <a href="#">A Resilient Wales</a>



NRW published the second State of Natural Resources Report (SoNaRR2020) last year, in this they assess to what extent Wales is achieving the Sustainable Management of Natural Resources (SMNR). Figure 1 details the four long term aims of the SMNR and how they are interlinked. SoNaRR2020 concludes that Wales – and by extension all Local Authorities– are not yet meeting the four long-term aims of SMNR.

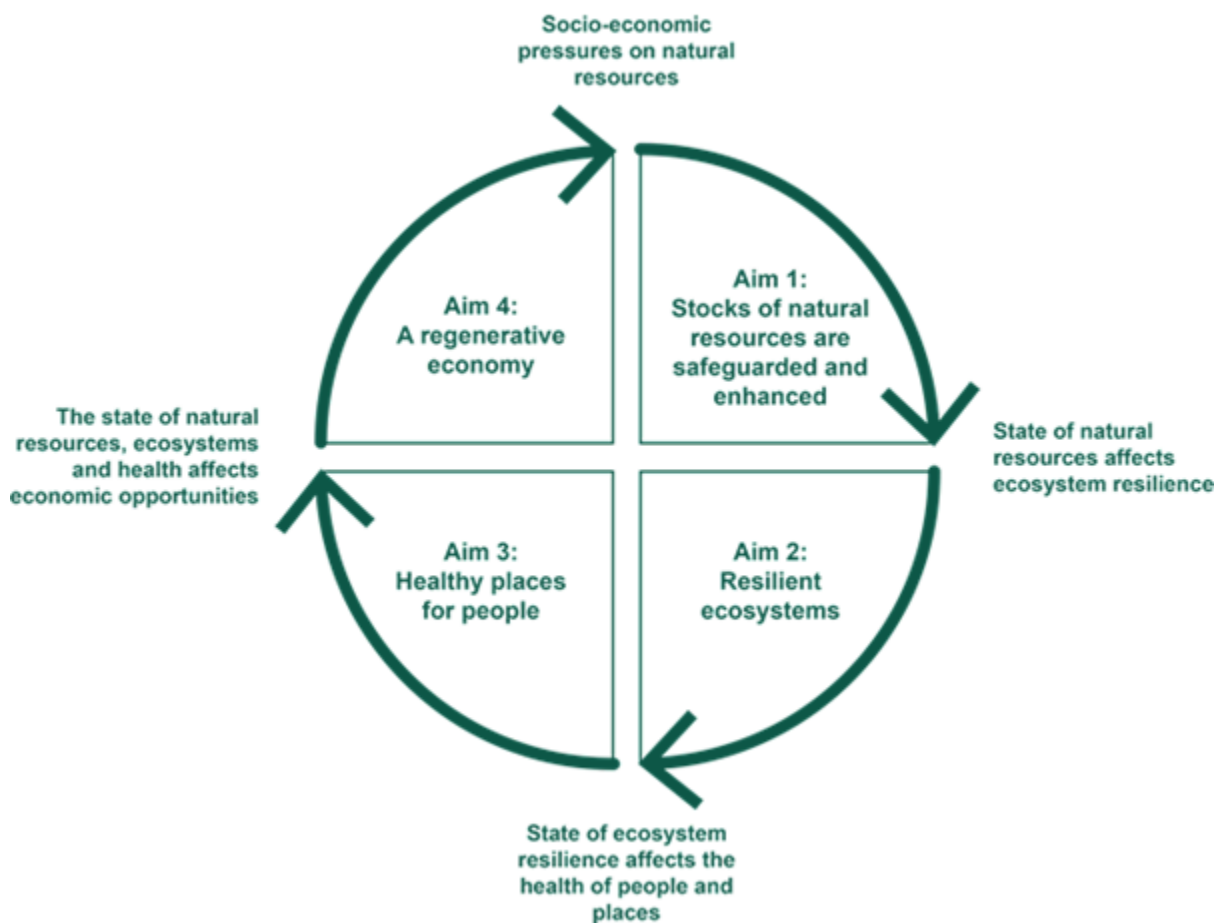


Figure 1 The four aims and the linkages of sustainable management of natural resources.

To make Wales's use of natural resources more sustainable, we need transformational change to our:

- **Food** – The global food system has a significant impact on the environment. Land use is identified by the UN IPBES report (2019) as one of the big drivers of the nature emergency. Emissions of pollutants, depletion of resources, biodiversity loss and ecosystem degradation are consequences of the current food system in Wales and beyond.

- **Energy** - The global energy system is one of the main drivers of the climate emergency. Wales's current energy production and consumption creates many pressures for ecosystems and public health here and across the planet. Wales needs to increase its use of renewable and sustainable energy sources, reducing the current dependence on harmful fossil fuels.
- **Transport** - The transport system has an impact on ecosystems and health. Urban transport contributes to carbon emissions, air and water pollution, noise pollution and the social and economic effects of congestion or lack of transport opportunities.

## Environmental Well-being

The natural environment is a huge part of what makes our county such a special place to live and work, it is our most precious inheritance but addressing the climate and nature emergencies presents us with one of the greatest challenges of our time. Both climate crisis and loss of biodiversity are interwoven challenges which cannot be solved in isolation. Climate change places our habitats and wildlife at risk, but if helped to recover, healthy natural habitats can store carbon, reduce flood risk, help prevent coastal erosion, improve people's health and wellbeing, as well as maintain healthy soils, clean water and the pollinators needed for our crops – and therefore sustain us.

Natural resources are essential for the air we breathe, the water we drink and the food we eat. They give us energy, prosperity and security; they protect us and make us healthier and our lives better.

The way we interact with our Natural Resources is vital to the social, economic and cultural well-being of people living in Carmarthenshire today and the generations to come. We need to manage our natural resources sustainably because natural resources that are healthy and thriving are also healthier for people, their communities and for the economy.

Natural Resources are defined by the Environment Act 2016 as:

- Animals, plants and other organisms
- Air, water and soil
- Minerals
- Geological features and processes
- Physiographical features
- Climatic features and processes

# Natural Environment

## Land Use

Managing land sustainably can deliver a range of environmental and wellbeing benefits including; reducing flood risk, improving recreation opportunities, improving ecological diversity, improving water and air quality while producing sustainable high quality local food.

## Soil

Soil is an incredibly valuable and finite natural resource. It:

- Supports food production
- Stores and filters water, supporting crops and potentially helping to reduce flood and drought risks and protect water quality
- As the largest store of organic carbon on our planet, soils are important for regulating the climate and for climate change
- Provides a habitat for a vast array of organisms with 25% of all known species residing in soils. It further supports biodiversity by allowing plants to grow and habitats to develop in different soil types.

Across Wales there has been a decline in the organic matter, plant and animal life living in the soil, leading to a reduced quality and function. The majority of carbon in the terrestrial environment is stored in soils rather than vegetation. Soil erosion is being made worse by the change of land use and inappropriate land management. The most immediate pressure on the current pattern of land use is the uncertainty posed by Brexit. Soils in the built environment can provide the same range of services as in any other environment, but soil can also be degraded and destroyed by construction of buildings and infrastructure. Undamaged soils and Sustainable Drainage Schemes (SuDs) schemes are important to reduce flooding, improve water quality, mitigate habitat loss and provide more outdoor recreation and education opportunities.

Managing soils sustainably is becoming ever more important because society exerts pressure on soils. These pressures include climate change, land use change and land management which lead more directly to threats like pollution, sealing by infrastructure, soil compaction and erosion. The biggest threat to soils is climate change. Soils with high organic content and with good soil structure will be more resilient and therefore better able to retain and store more water for plant growth.

Extreme weather events such as more intense rainfall, prolonged periods of dry and cold weather, and more extreme and frequent flooding events are likely to increase in future

due to climate change. More intense rainfall increases the challenge of preventing soil erosion and run-off emphasising the importance of appropriate soil husbandry and land management to prevent an increased risk of flooding, pollution and the risk of landslides.

Agriculture is a dominant land use in Carmarthenshire. Sustainable land management is hugely important for farmers, the environment, the local economy, our culture and communities. Intensive agricultural practices can damage soil structure (e.g through compaction, the creation of fine seed beds or reducing the levels of organic matter and biological activity), which may then contribute to water pollution from soils/sediments and nutrients. This also has a negative impact on the ecological status of rivers, coastal and estuarial waters in the county.

## Tree Cover

The presence of trees is vital to communities, they improve air quality, store carbon,

provide habitats and improve the well-being of people.

Regionally, Carmarthenshire has the most tree cover at 17%, with Ceredigion and Pembrokeshire having 15% and 10% respectively. In our county we have the an asset in Brechfa forest which provides not only value in terms of the research carried out at the site but also for recreational activities.

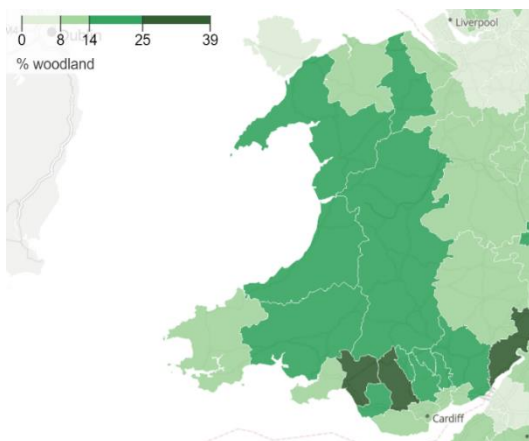


Figure 2: Woodland as a percentage of area, local authority districts, UK, 2019

Some urban areas, in particularly Llanelli, could benefit from greater tree cover. Llanelli suffers from issues around water management that greater tree cover would help resolve. When considering tree planting it is important to right trees in the right place for the right reasons

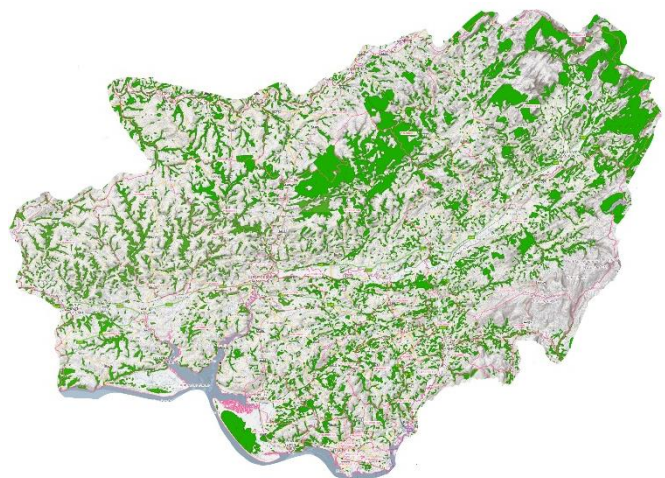


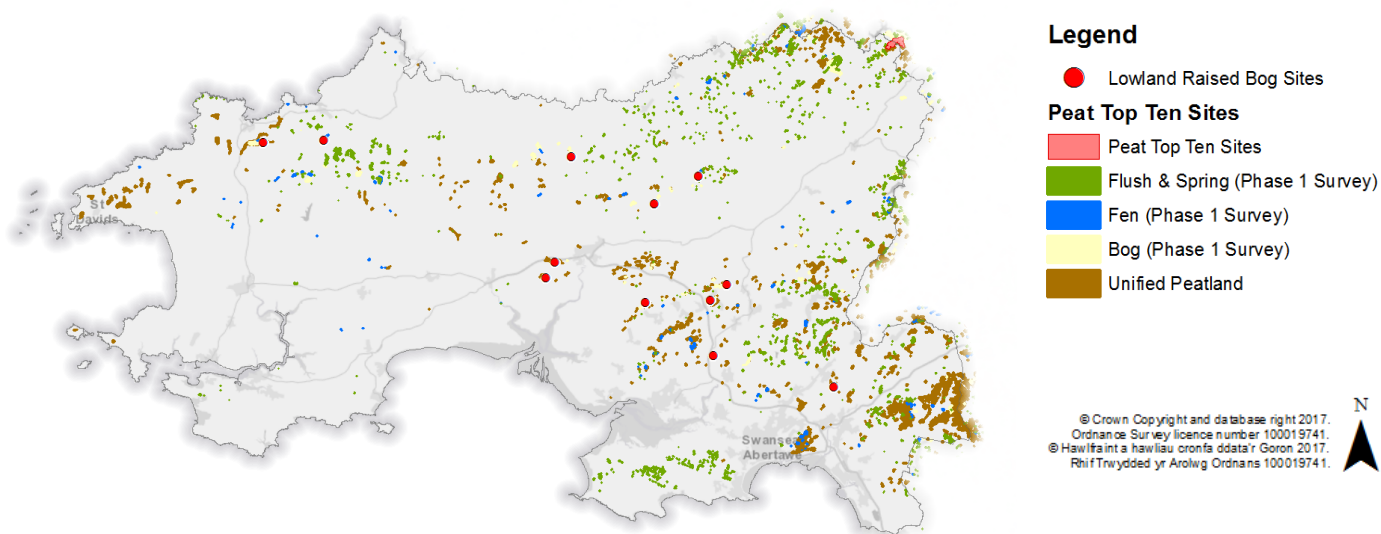
Figure 3: Location of trees in Carmarthenshire, taken from the [National Forest Inventory](#)

## Hedges and Edges

Species-rich hedgerows with mature hedgerow trees are also a significant landscape and historic feature across much of the county. They can be important habitats for butterflies, moths, birds and small mammals. They are important cultural features in the landscape. Hedgerows act as windbreaks, help prevent soil loss, reduce flooding and link habitats. However, the current condition of hedgerows in the county is very variable - some have been restored/replanted in recent years, but others have been removed or continue to decline through lack of appropriate management. Today we also see the impact of ash dieback disease on our hedgerow trees.

## Bogs and Peatlands

The extent of bog habitats has also shown a significant decline through time. Bog habitats are now scarce in the county, isolated within the wider agricultural landscape. They have been drained, planted on or lost to development. The Carmarthenshire Bogs Project has been working to restore six sites with lowland raised bog habitat, the council is working to restore the bog at Llyn Llech Owain country park and the Wildlife Trust of South and West Wales manage important sites at Carmel and Cors Goch, near Carmarthen.



## Air Quality

Clean air is a critical natural resource and is essential in protecting not only human health, but also Wales's natural and built environment. Air pollution affects both urban and rural areas. No levels of air pollution are 'safe'. Although air pollution from industry and transport has declined in recent decades, nitrogen-containing air pollutants continue to cause significant environmental harm where previous emissions of sulphur caused widespread acidification of water resources and damaged trees and forest soils.



Air quality monitoring in Wales is primarily undertaken by Local Authorities and, through several national networks, managed by the Welsh Government.

Poor air quality in the UK is estimated to cause 40,000 early deaths annually (Air Quality Expert Group, 2020), with 2,000 deaths in Wales alone, which amounts to 6% of total deaths (Public Health Wales, 2016) This was demonstrated during the COVID-19 pandemic where lockdown restrictions affected energy use, emissions and some air pollutants across the UK. Initial assessments suggest a reduction in nitrogen oxide (NO<sub>x</sub>), including NO<sub>2</sub> emissions in urban areas during lockdowns, as a result of lower traffic volumes (Clean Air Advisory Panel, 2020). This and the associated reduction in traffic noise is likely to have had a positive impact on well-being. A growing body of evidence indicates that the impact of air pollution goes beyond physical health and can impact on human well-being due to people's personal connections to the richness of their natural environment.

The effects of air pollution disproportionately affect those in deprived areas (SoNaRR2020 Aim 3 p16).

## Particulate Matter

Particulate matter (PM) consists of a mixture of solid particles and liquid droplets found in the air. A primary PM is directly emitted from source, a secondary PM can form in the atmosphere due to chemical reactions between pollutant gases. Overall figures for the region are lower than World Health Organisation (WHO) guidelines. Non-exhaust road transport emissions, domestic and industrial emissions contribute to the local peaks in urban areas. Domestic wood and coal burning also make a significant contribution. The size of the PM and length of exposure are key factors in the potential of adverse health conditions and determine where the impact will be on the body. Small particles less than 2.5µm in diameter pose the greatest problems because they can get deep into the lungs and bloodstream leading to respiratory problems. When exposure to PM reduces lung function, it also reduces the ability of people to access nature and benefit from it; as a result, this also reduces their quality of life. There is extensive evidence to show that long term exposure to PM increases mortality and morbidity from cardiovascular and respiratory diseases. PM has also been classified as carcinogenic to humans and causing lung cancer.

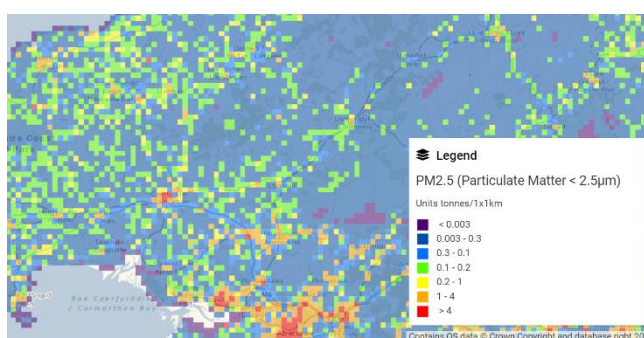
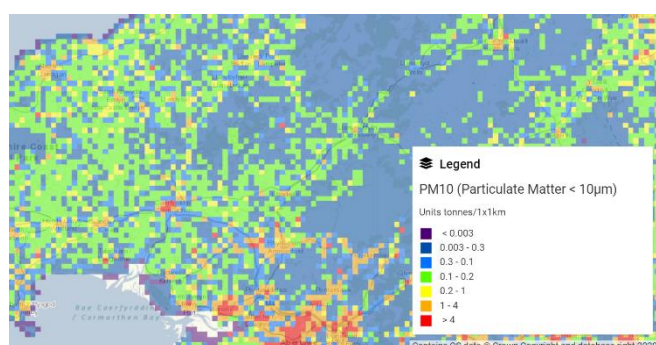


Figure 5: Particulate matter under 10 µm - take from National Atmospheric Emissions Inventory

Figure 4: Particulate matter under 2.5 µm - take from National Atmospheric Emissions Inventory

### Air Quality Management Areas

Local authorities are responsible to declare Air Quality Management Areas (AQMA) if national air quality objectives are not likely to be met. Across the region (Carmarthenshire, Ceredigion and Pembrokeshire) there are five active AQMAs: three in Carmarthenshire, none in Ceredigion and two in Pembrokeshire (see Table 1).

Local Authority	AQMA Name	Pollutants	Date Declared
<a href="#">Carmarthenshire County Council</a>	<a href="#">Llandeilo AQMA</a>	Nitrogen dioxide NO <sub>2</sub>	11/11/2011
<a href="#">Carmarthenshire County Council</a>	<a href="#">Llanelli AQMA</a>	Nitrogen dioxide NO <sub>2</sub>	02/08/2016
<a href="#">Carmarthenshire County Council</a>	<a href="#">Carmarthen AQMA</a>	Nitrogen dioxide NO <sub>2</sub>	02/08/2016
<a href="#">Pembrokeshire Council</a>	<a href="#">AQMA No. 1 2012</a>	Nitrogen dioxide NO <sub>2</sub>	06/07/2012
<a href="#">Pembrokeshire Council</a>	<a href="#">AQMA No. 2 2012</a>	Nitrogen dioxide NO <sub>2</sub>	06/07/2012

Table 1 AQMAs in the Carmarthenshire, Ceredigion and Pembrokeshire region



## Ammonia

Nitrogen is an important nutrient for plant growth and food production but excess can be emitted to the air as ammonia ( $\text{NH}_3$ ) from agriculture and waste management and re-deposited onto soils and plants, and into freshwater bodies. The impact of nitrogen, in particular ammonia pollution, is significant with 88% of sensitive habitats being damaged by high concentrations of nitrogen. More than half of Wales now experiences ammonia concentrations that are too high for lichen- and bryophyte-rich ecosystems to function properly; these include ancient woodland, bog, heathland and acid grassland (See Figure 6). In Wales, emissions of ammonia

were estimated at 25kt in 2012,

with agriculture contributing 85% of the total, and 52% of agricultural emissions

derived from cattle manure management alone. Concentrations are likely to increase unless measures to control agricultural emissions are implemented. Ammonia emissions can transform in the atmosphere and contribute to increased levels of particulate matter and ozone causing harm to human health. Agriculturally-dominated and sparsely populated counties like Pembrokeshire, Carmarthenshire and Ceredigion have an important role to play – and arguably a responsibility for – mitigating any negative impacts of agricultural emission on the wellbeing of people across the country. A key concern identified in SoNaRR 2020 “are the localised impacts of new ammonia sources associated with the rapid expansion of intensive poultry developments”. (Aazem and Bareham, 2015 cited in SoNaRR 2020).

## Actions Going Forward

Measures to combat air pollution, for example GI, can help transform urban and rural spaces by improving enjoyment and promoting positive behavioural changes. In addition, the cultural services imparted by ecosystems often depend on nitrogen-sensitive biodiversity, for example, in flower-rich meadows or lichen-draped woodlands.

The Welsh Government is committed to building healthier communities and better environments. Clean air has a central role in creating the right conditions for better health, well-being and greater physical activity in Wales. In September 2017, the Welsh Government published its national strategy, Prosperity for All, which sets out a cross-

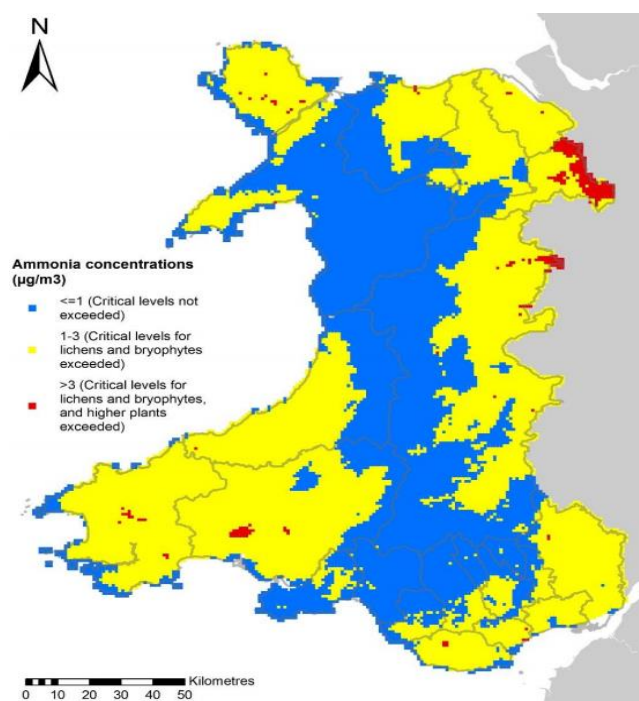


Figure 6: Ammonia concentrations across Wales

government commitment to reducing emissions and delivering vital improvements in air quality through planning, infrastructure, regulation, and health communication measures.

The existing vegetation in Wales takes up a significant amount of air pollutants. Restoring land cover and changing land use practice to maximise the regulating provision of the ecosystems can further reduce air pollutants. Studies have shown that this approach could be more beneficial than traditional abatement technologies and can be especially effective in combination.

Encouraging the use of the cleanest modes of transport for freight and passengers, active travel and the creation of urban green space, are likely to be key in reducing emissions in the future.

Expansion of the air quality monitoring network in Wales, in both the urban and rural environment would help strengthen our evidence and reliance on computer modelling, to better understand the scale and impact of key pollutants such as ammonia on the environment. Better data sharing as a result of new legislation, especially within the agricultural sector, will also allow us to target our interventions and policy to ensure pollution can be minimised.

### Wildfires

Wildfires continue to be a problem across Wales with 15,576 grassfires between 2015 – 2020. In the same period there were 4947 grassfires in the Mid and West Wales Fire and Rescue service area.

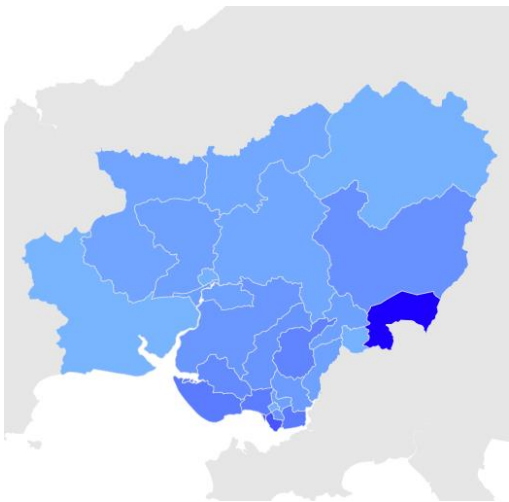


Figure 8: Deliberate grass, woodland and crop fires recorded by MSAO 2016-21

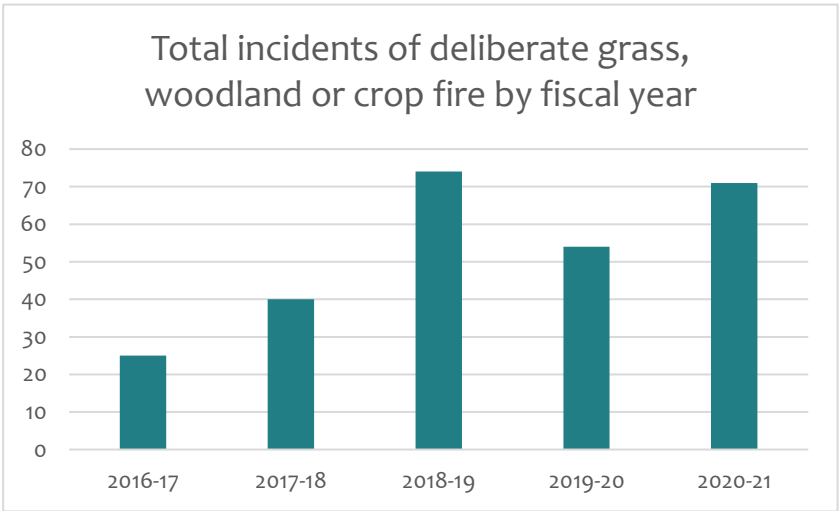


Figure 7: Deliberate grass fires reported my Mid and West Wales Fire and Rescue Service

In Carmarthenshire the areas most affected by deliberate wildfires are: Brynaman, Y Garnant & Glanaman, Llanelli South and Bynea & Llwynhendy. These are shown in blue on the graph of Carmarthenshire in Figure 8. Incidents of wildfires in our county have been more or less steady over the past five years.

The environmental harm caused by arson is significant, it can damage or destroy:

- Habitats, vulnerable plants, wildlife and grazing.
- Properties and historic features.
- Alter the physical structure, composition and hydrology of the soil.
- Affect water quality.
- Affect Air quality and potentially cause traffic accidents.

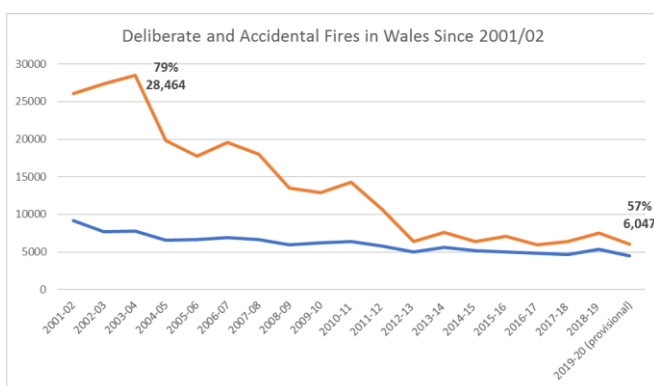


Figure 9: Long term trend of grass fires in Wales

Smoke from wildfires carries small particulates that pose a danger to human health, as detailed above. To combat the setting of deliberate wildfires in Wales an all Wales task force has been created, Operation Dawns Glow. When looking at the all Wales figures from 2001/2 there has been a significant improvement in both deliberate and accidental grassfires.

## Flood Risk

Flooding cause's significant damage and distress to those who live in areas affected. Floods are one of the most common environmental emergencies; with widespread and long-lasting health, environmental and financial impacts affecting homes and businesses and can significantly disrupt the normal functioning of whole communities. From a health perspective, quite often the worst affected are the most vulnerable in society.

Just over 15,000 properties in Carmarthenshire are currently at some level of flood risk from river or surface water flooding or coastal inundation. 9713 properties are at low risk, 2292 at medium risk and 3151 at high risk. Climate change will increase the number of properties, infrastructure and key services at risk of flooding. Places which do not currently flood will become at risk of flooding and those already known to be at risk will see the level of that risk become greater.

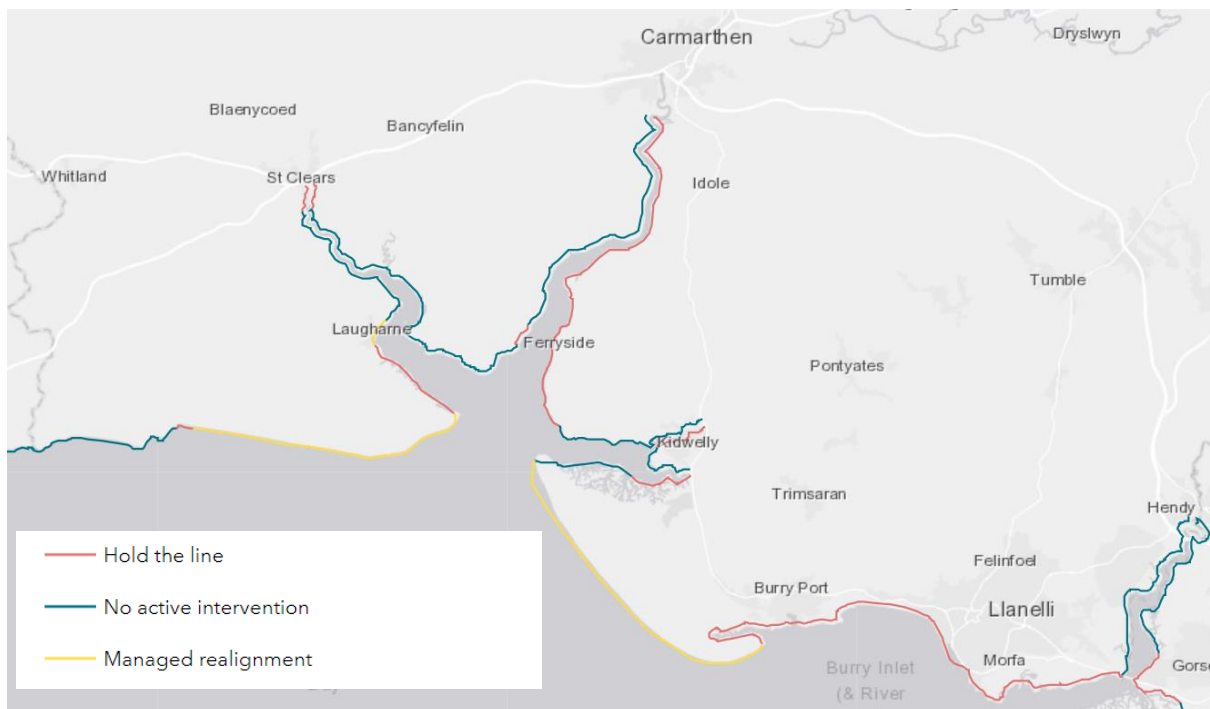
Extreme weather events will become more common; events such as the 2020 storms will increase the level and frequency of flooding. Three key climate change impacts relative to flood risk are extreme rainfall events, river flood flows and sea level rise.

NRW Communities at Risk Register (CaRR) identifies the 5 Carmarthenshire communities most at risk (i.e. combined tidal, pluvial and fluvial scores). Llanelli is considered a ‘Significant Flood Risk Area’ at a Wales scale i.e. it falls within the top 33 communities at risk in Wales.

CaRR ‘community’ name	Top 5 communities Max score ranking (undefended) (CaRR 2019)
Llanelli	1
Ammanford	2
Ferryside	3
Llwynhendy	4
Dafen	5

### Shoreline Management

Shoreline management deals with coastal erosion, designating areas that require intervention to either hold the current shoreline, reshape the coastline or areas where no intervention is required. Managing coastal erosion will play a significant role in areas at flood risk from the sea.



## Water Quality and Health

Our rivers, lakes, groundwater, estuaries, coasts and seas provide us with important natural benefits, many of which contribute to the well-being of local communities and the wider population. These benefits include:

- Providing clean fresh water for people to drink, for industry and for agriculture
- Clean rivers and seas for recreation, relaxation and enjoyment
- Income generation from business and industry, tourism, energy production, angling and commercial sea and shell fisheries
- Supporting resilient terrestrial and marine ecosystems and habitats
- Providing seafood (fish and shellfish) and for crop growth

The county has a rich and intricate network of rivers and streams ranging from narrow, deeply incised upland streams to the more gentle lowland meandering sections of the river Tywi. This range of freshwater habitats supports plants and animals (flora and fauna) characteristic of these habitats, and the network of watercourses acts as a corridor for wildlife movement throughout the county, linking wetland sites and bringing wildlife into the heart of our urban centres. The wildlife value of the county's rivers is recognised at a European and national level through the designation of the Tywi and Teifi, together with the Taf, Gwendraeth and Loughor

estuaries, as Sites of Special Scientific Interest (SSSIs) and Special Areas of Conservation (SACs).

By working together to improve and maintain the management and quality of our water resources we can deliver benefits for the environment, the local economy, health and quality of life

The waterways in Carmarthenshire being impacted by several significant risks. The water quality is being affected by pollution from nitrates, phosphorus and sediments from agriculture and sewage. Changes to river channels and banks pose barriers to fish, river structures and disruption of natural habitats. Invasive species are widespread, including Japanese knotweed and Himalayan balsam. There is an increasing demand for water.

To assess Water Framework Directive (WFD) compliance, NRW assess the condition of water bodies through monitoring, which produces an overall classification. The current classification or status for each water body is shown

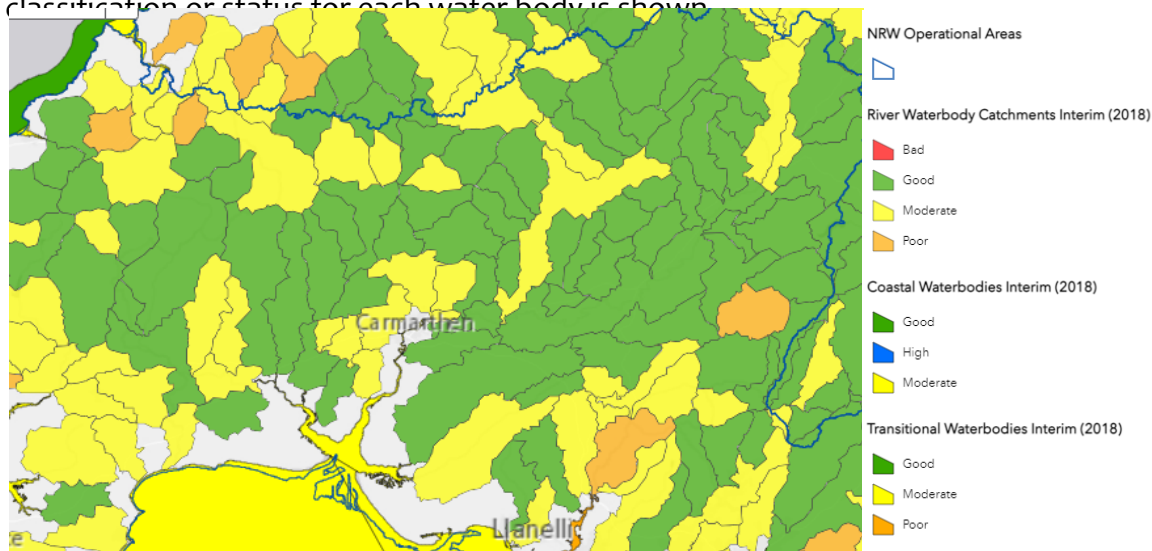


Figure 10: Classification of water bodies in Carmarthenshire taken from [Water Watch Wales](#)

## Bathing Waters

In Carmarthenshire we are lucky to be able to swim and enjoy recreation in some of the cleanest waters in the UK. This is similar for our neighbours in Ceredigion and Pembrokeshire. We have two designated bathing waters in Carmarthenshire, at Pembrey and Pendine, both have which have achieved excellent status. To ensure that we maintain the quality of the assets in our county it is important to monitor the impact of pressures on the water quality. These main pressures experienced in Carmarthenshire are: the impact of tourism, out-dated sewage systems and impacts from agriculture.

## Pollution Incidents

Between 2016-2020 there were 507 proven incidents of environmental pollution in Carmarthenshire. 86% were low impact events and 14% were high impact. Agriculture is the primary cause of environmental pollution, contributing to 135 of the total; followed by oils and fuels, contributing to a further 67 events.

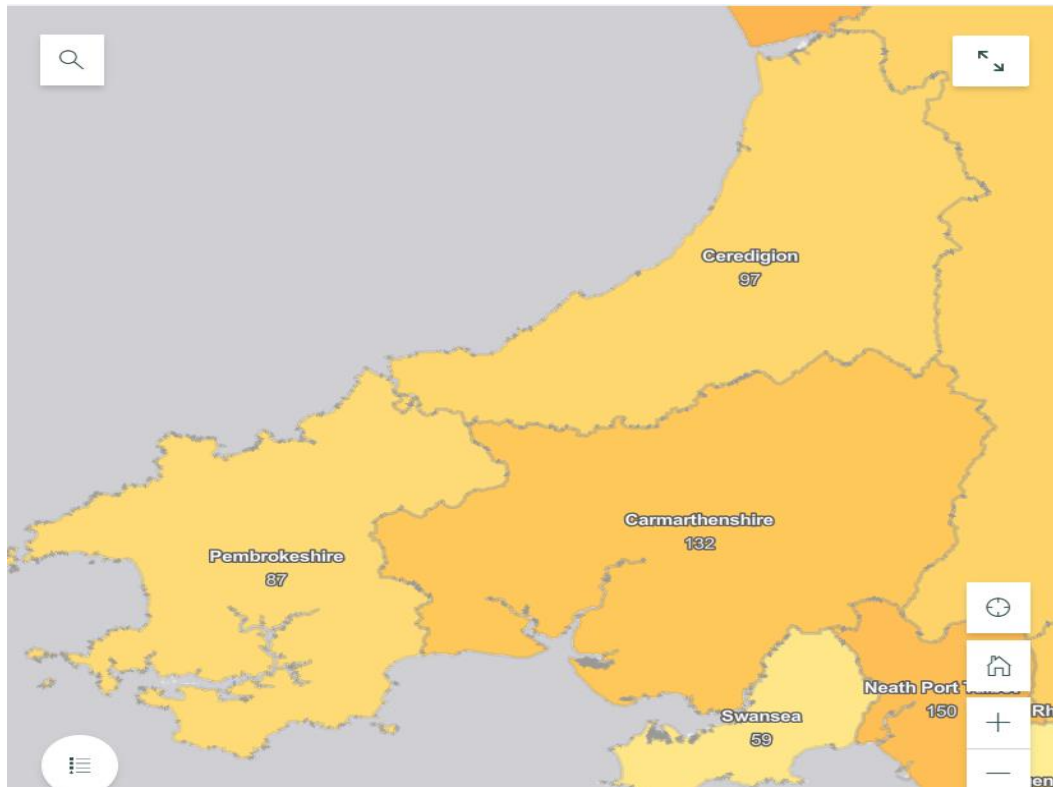
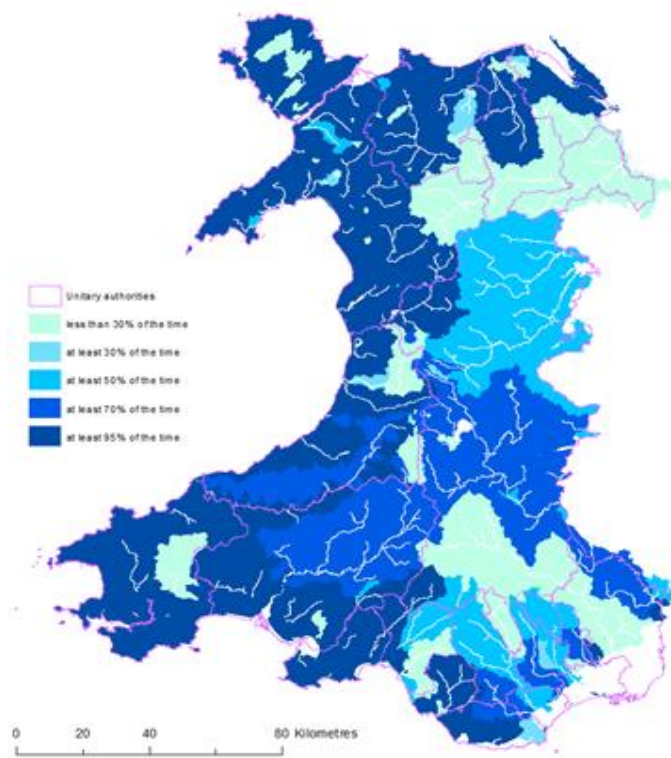


Figure 11: Number of confirmed environmental pollution incidents, taken from the [Wales Environment Pollution Incidents Interactive Map](#)

## Water resources





The demand for water must be balanced with the importance of protecting water resources for a healthy environment. Water is taken from rivers in Carmarthenshire for public water supply, agriculture, industry, power generation and amenity uses. 90% of the water taken in Carmarthenshire is for public water supply. River flows in the Tywi are influenced by the operation of Llyn Brianne reservoir which is in the upper catchment. Water is not directly abstracted from the reservoir but is instead released to

augment flows in the Tywi for abstraction for public water supply further downstream. The River Tywi is a designated SAC and so affords a high level of environmental protection, ensuring adequate flows must be maintained.

Demand for water is increasing as the local population increases and tourism numbers increase. The impacts of COVID led to an even greater increase in tourist numbers but whether this increase will continue in future is unknown. Water resources will come under increased pressure in the future, impacting the ecosystems, people and businesses which rely upon them.

## Waste + Recycling

Living in a 'disposable' society where waste is continually generated increases pressure on the use of our natural resources. Once waste is generated it requires treatment at facilities that require land, consume energy and water and produce emissions to the environment. If waste is not handled and treated properly it can be harmful to ecosystems, biodiversity and the well-being of the population.

Wales is transitioning to a high recycling nation which is a necessary component of a circular and regenerative economy. However, more needs to be done to prevent waste from being generated if we are to achieve zero waste and one planet living. The pace of becoming a high recycling nation must be matched with the provision of suitable waste

facilities and end markets for materials, particularly for material streams that are currently difficult to recycle.

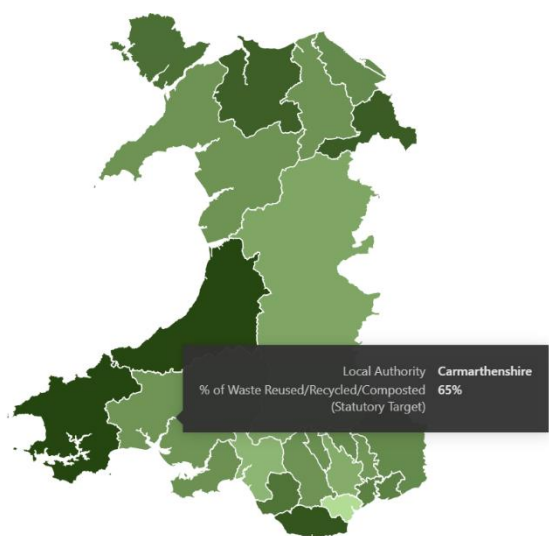


Figure 12: Percent of all waste recycled, taken from [Powys Data](#)

Residents in our county have contributed to an excellent level of recycling, at 65% of waste. This figure can still be improved, with an aim to reach a similar level of neighbouring counties in our region.

Fly tipping occurs at a significant level, with the total number of recorded events being the second highest in Wales, only after Cardiff. Fly tipping has seen a large rise in recent years, after previously reducing up to 2016, the figure has now quadrupled. Whereas other areas in our region have significantly reduced.

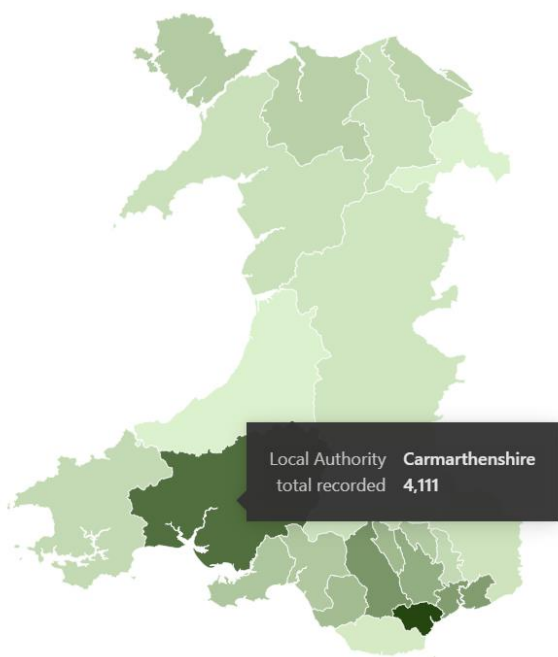


Figure 13: Incidents of fly tipping, taken from [Powys Data](#)

## Ecosystem Resilience

Ecosystem resilience is the capacity of ecosystems to deal with disturbances, either by resisting them, recovering from them, or adapting to them, whilst retaining their ability

to deliver services and benefits now and in the future. Disturbances include (but are not limited to): habitat and species loss and deterioration; climate change; pollution and invasive non-native species.

Healthy and resilient ecosystems that are resistant to threats and disturbances provide benefits including:

- Clean air and water
- Provision of food
- Ability to adapt to climate change and extreme weather events e.g. flood prevention
- Store carbon ('green' and 'blue') to mitigate the impacts of climate change
- Protected habitats, biodiversity and landscapes for their intrinsic value and associated improved health and well-being
- Economic from tourism, recreation and enjoyment of landscapes and iconic species such as seabirds and seals

Work that can be done to improve the ecosystem resilience in our county starts with the development of an understanding of value of the natural environment and recognise biodiversity as an asset. Biodiversity underpins the social and economic systems we rely on in Wales and despite a more integrated policy framework, we struggle to find ways to measure it as an economic asset. Clear information is needed to show where declines in biodiversity and other natural resources are leading to impacts on wellbeing. Developing this understanding and bringing that understanding into decision making will be a critical step in building future ecosystem resilience.

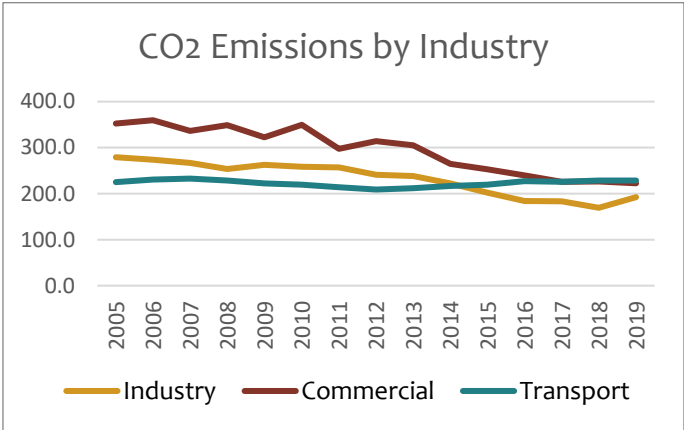
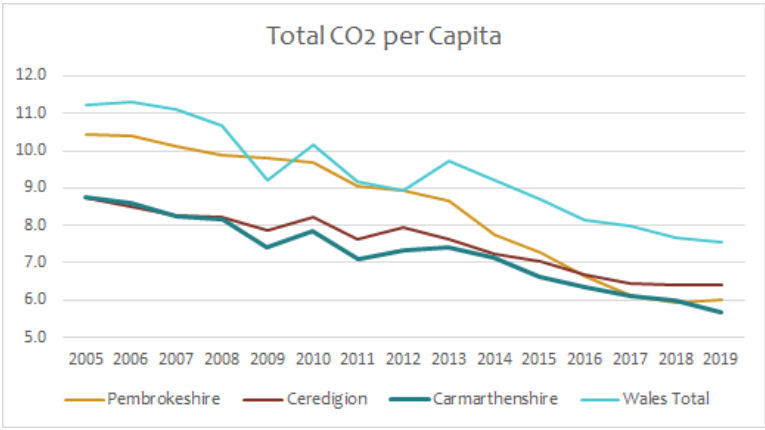
## Climate Change

There is clear evidence of climate change in Wales, e.g. increase in mean daily temperatures, reduction in air frosts, and increase in storm events. This is predicted to have a range of impacts on habitats and species including a decline in native species, changes in migration patterns and increases in invasive species. In addition, the State of Natural Resources Report identified the potential for increased coastal erosion, affecting beaches, intertidal areas and other coastal features – this could have a significant impact along our extensive coastline. Any climate change policies need to be integrated with policies for biodiversity. A climate emergency is a biodiversity emergency. Climate change mitigations can exacerbate the biodiversity crisis so there is always a need for them to be considered together.

Further emphasis should be given to the role of nature recovery in both mitigating and adapting to climate change, recognising the significance of these two interrelated challenges. By putting nature into recovery, we can tackle climate change. Thriving habitats can safely lock up vast amounts of carbon, while providing other vital benefits that help us adapt to our future climate, such as flood prevention, clean water and improved health and wellbeing.

## Carbon Dioxide

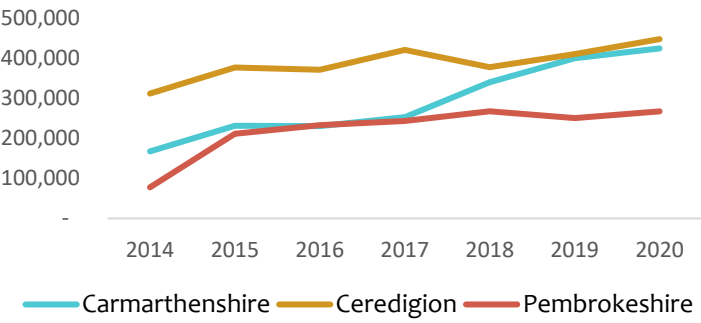
Carbon dioxide emissions do not directly pose the same health risks as other gases, such as carbon monoxide. However, impacts of high carbon dioxide emissions are felt globally through climate change; in turn creating a large impact on the health and well-being of people.



The CO2 emissions per capita in Carmarthenshire are reducing, following the same pattern as seen in Ceredigion, Pembrokeshire and across Wales. Overall emissions across the three sectors, commercial, transport and industry are in decline. Emissions from transport has the commercial sector are now producing around equal emissions after a slight increase in the emissions from transport across the county.

# Renewable Energy Generation

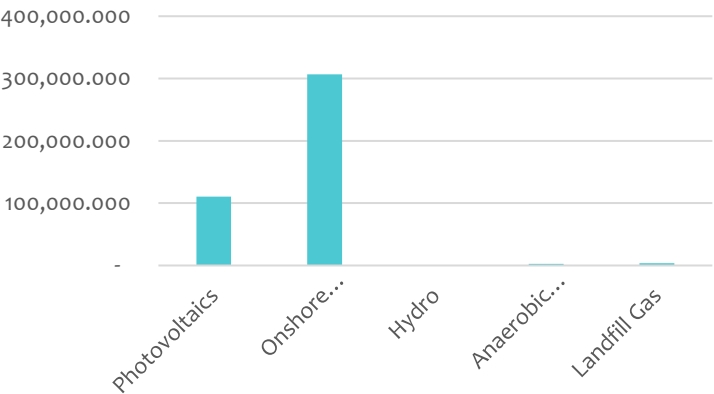
TOTAL RENEWABLE ELECTRICITY GENERATION (MWh)



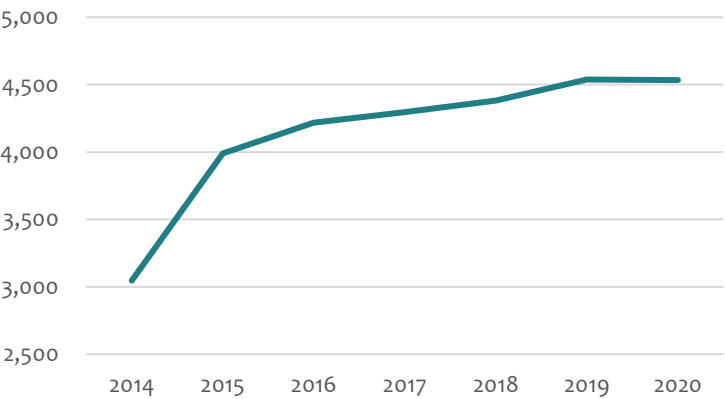
The capacity and generation of renewable electricity has been increasing in Carmarthenshire, the wider region, and across Wales in recent years.

As of 2020 there were 4534 renewable energy sites in Carmarthenshire, a significant increase from the 3046 sites present in 2014. Of these, onshore wind farms generated the most electricity in 2020, followed by photovoltaics.

Renewable Electricity Generated (MWh) in 2020



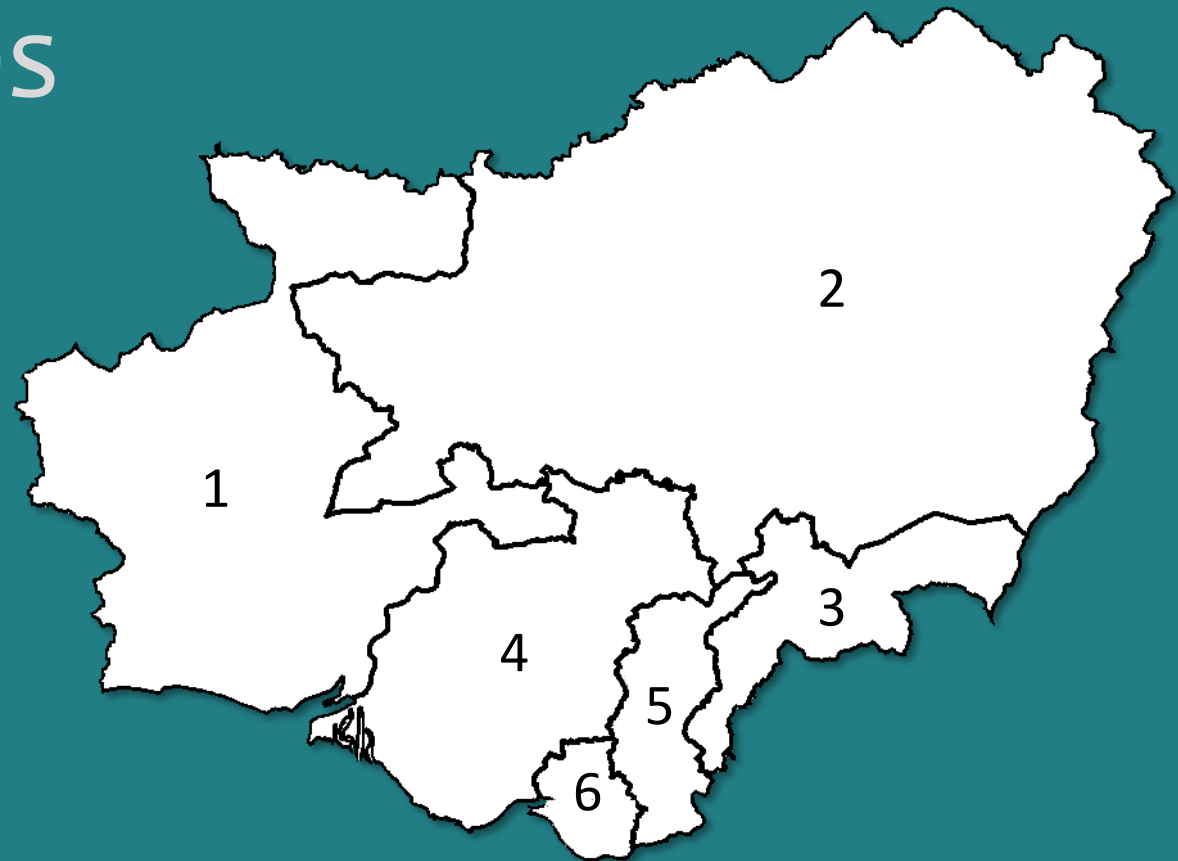
Total Renewable Energy Sites



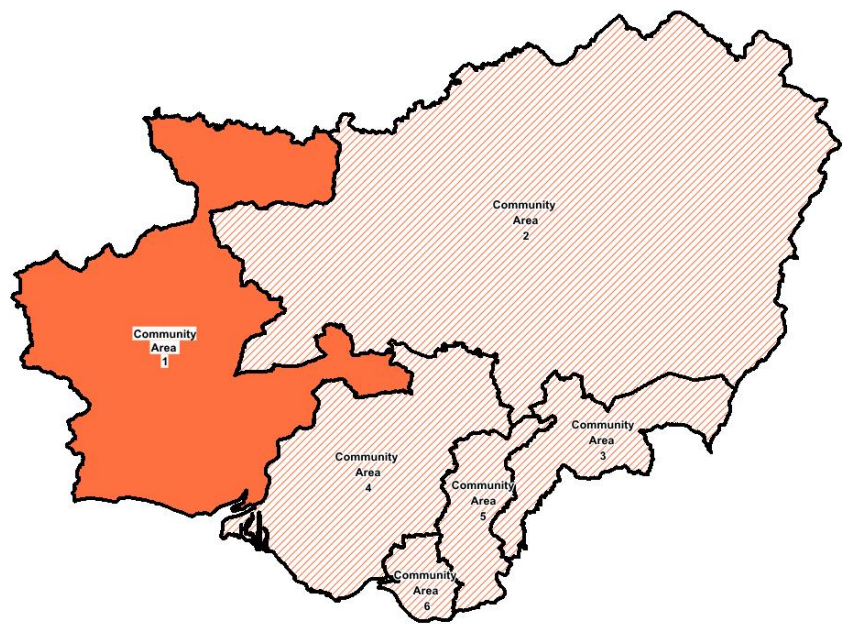
# Carmarthenshire

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## Community Area Well-being Profiles



# COMMUNITY AREA 1



## Key Headlines:

- Levels of poverty are high.
- House prices are higher than the county and national averages.
- The retail sector is the largest employer.
- The percentage of homes without central heating are high in some wards.

A total of 120 responses received for Community Area 1 from the online survey consisting of the following age groups:

Under 16 (no responses)	Aged 55-64 (29 responses)
Aged 17-24 (no responses)	Aged 65-74 (27 responses)
Aged 25-34 (7 responses)	Aged 75-84 (13 responses)
Aged 35-44 (12 responses)	Aged 86+ (3 responses)
Aged 45-54 (27 responses)	Prefer not to say (2 responses)

The Well-being of Future Generations Act was introduced in April 2016 with the intention to create the Wales we want for now and in the future. Within this Act, Public Services Boards (PSBs) were created to encourage co-production and joined up working from public bodies, to improve the social, economic, environmental, and cultural well-being in their area.

This community area profile details the information that we have about Community Area 1. It also breaks down the priorities that residents felt were important from our engagement with Carmarthenshire residents in the run up to the creation of the Local Well-being Assessment.

Community Area 1 has a population of 32,054 residents. The area consists of 4 MSOA geographies covering the below localities.

MSOA 003	Cenarth, Llangelier and Trelech
MSOA 007	Carmarthen Town North
MSOA 008	Carmarthen Town South and Llangunnor
MSOA 027	Llanboidy, Llansteffan and Laugharne Township



## Population

According to CACI Paycheck data there are 14,111 households<sup>1</sup> in *Community Area 1*. The 2020 Mid-Year Population estimate states there are 32,054 residents<sup>2</sup> living in Community Area 1.

*Source: 1- CACI Paycheck 2020 2-ONS MYE 2020*

Across Carmarthenshire 1.9% of residents identify themselves as non-white, in Community Area 1 this is higher than the county average at 2.2%. Both figures are below the Welsh figure of 4.4%.

When considering where residents in Community Area 1 were born 69% were born in Wales and 4.4% born outside of the UK. The rest comprise of those born in other countries within the UK.

*Source: 2011 Census*

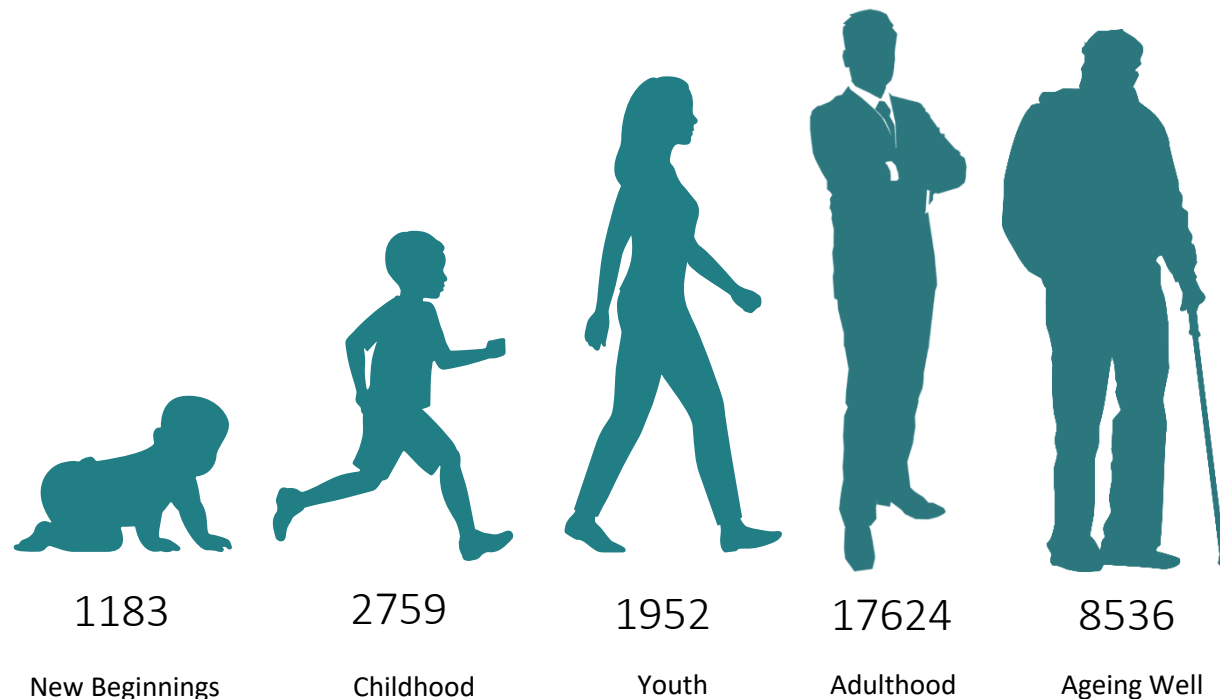
24% of residents in Community Area 1 reported having a disability or life limiting illness in the 2011 Census. Less than the average of 24% in Equal to the Carmarthenshire figure but slightly higher than the national average of 23%.

*Source: 2011 Census*

### Household composition:

Total Households	13,635	
All households with dependent children	3,442	25.2%
All households aged 65+	3,594	26.4%
Average Household size (persons)	2.4	

*Source: Census 2011*



*Mid-Year Population Estimates 2020.*

## Housing

In Community Area 1 the average House price is **£195,688**. This is more than the average across the county and Wales, £185,431 and £183,129 respectively.

*Source: ONS March 2021*

Across Wales and Carmarthenshire, the percentage of homes without central heating stands at 2.3%. In Community Area 1 this is higher, with an average of 3.8%. The area where this is most prevalent is the wards of Trelech (8.4%) and Llanboidy (8.3%).

*Source: 2011 Census*

## Economy

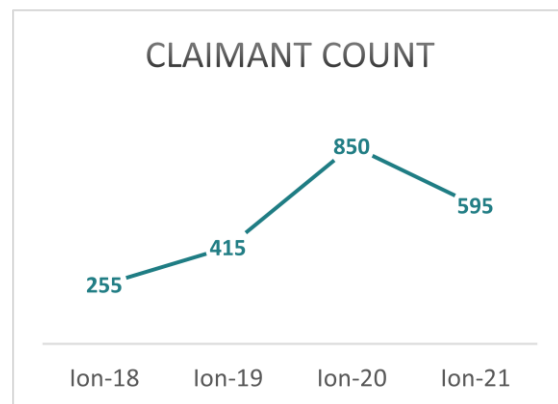
**32.9%** of households in this community area are classed as **'living in poverty'**<sup>1</sup> varying from 24.8% in Llansteffan to 39.4% in Carmarthen Town South. This is below the Carmarthenshire average of 33.8% and the same as the Welsh average of 32.9%.

The median income in *Community Area 1* is **£27,197**.

*CACI Paycheck 2020*

### Claimant Count

The number of people claiming Job Seeker's Allowance rose as expected in 2020, now coming back down to pre-pandemic levels.



*Source: ONS*

The majority of residents in Community Area 1 are economically active.<sup>1</sup> The most recent Local Authority data shows that this is less than the figures for Carmarthenshire (71.8%) and Wales as a whole (76%).<sup>2</sup>

Economically Active	15,179	66.6%
Economically Inactive	7,603	33.4%

*Source: 1 - Census 2011, 2 - ONS Annual Population Survey*

Wholesale and retail are the largest sector of employment in Community Area 1, this echoes the picture across Carmarthenshire and Wales. The top five areas of employment are in the following industries:

Wholesale & Retail	17%
Human, Health & Social Work	16%
Construction	10%
Education	9%
Public Administration & Defence	8%

*Source: Census 2011*

### No Qualifications:

Just over a quarter (25.9%) of residents aged 16 and over have no qualifications. (Carmarthenshire 26.8% / Wales 25.9%)<sup>1</sup>. This includes the retired population, the percentage of the working age population in Carmarthenshire with no qualifications is 17.46%.<sup>2</sup>

*Source: 1-Census 2011 2-WIMD 2014*

## Cymraeg

Welsh speaking rates across Community Area 1 are similar to that across the county. This is substantially higher than the national average of 18.7%.

### Welsh Language skills:

	CA 1		Carms	
Can speak Welsh	13,201	43.5%	78,048	43.9%
No skills in Welsh	13,007	42.9%	74,355	41.9%

*Source: Census 2011*

### Survey Responses for Community Area 1

When asked what three things are most valued about in relation to County's vibrant community and thriving Welsh language we received 116 responses, the highest responses were:

Locally produced food	54% (63)
Heritage / history	47% (55)
Being able to use the Welsh language	43% (50)

*Source: Regional Well-being Survey 2021*

<sup>1</sup>(An average household income of 60% below the GB median income of £33,278 @ 2020)

<sup>2</sup>(Gross household income from all sources including earnings, benefits and investments)

## Health

A Middle Layer Super Output Area ([MSOA](#)) is a geographic area that can vary in size because they are intended to have roughly equal amounts of people – on average 7500 residents or 4000 households.

The below table shows the rates for the Health domains at MSOA level for Community Area 1. This area consists of the below geographies:

**MSOA 003** – Cenarth, Llangeler and Trelech

**MSOA 007** – Carmarthen Town North

**MSOA 008** – Carmarthen Town South and Llangunnor

**MSOA 027** – Llanboidy, Llansteffan, Laugharne Township, St. Clears and Whitland

As can be seen from the table, MSOA 007 has the highest rates for GP recorded chronic conditions, limiting long-term illness, GP recorded mental health condition, low birth weight and children aged 4-5 who are obese. MSOA 008 has the highest rate for limiting long-term illness and premature death and MSOA 027 has the highest rate for cancer incidence.

WIMD 2019 Health Domains	MSOA 003	MSOA 007	MSOA 008	MSOA 027
GP-recorded chronic condition (rate per 100)	12.9	<b>14.6</b>	13.4	12.9
Limiting long-term illness (rate per 100)	21.6	<b>21.8</b>	<b>21.8</b>	20.3
Premature death (rate per 100,000)	286.3	387.6	<b>471.3</b>	331.8
GP-recorded mental health condition (rate per 100)	19	<b>25.3</b>	23.8	18.6
Cancer incidence (rate per 100,000)	573	597.9	579.6	<b>621</b>
Low birth weight (live single births less than 2.5kg) (%)	4.9	<b>6</b>	4.7	4.7
Children aged 4-5 who are obese (%)	7.5	<b>11.7</b>	11.4	10.4

*Red and bold indicate the highest figures per category.*

## Community Well-being



In Community Area 1 there are 3 libraries and 13 parks and playgrounds. They are distributed across the areas with highest populations.

	CA1	Carms
Parks	13	139
Libraries	3	16

Source: CCC

The number of parks and playgrounds is the second lowest in Carmarthenshire. The number of libraries is similar to that across the county.



## Survey Responses for Community Area 1

When asked what three things are most valued about their local environment, we received 120 responses, these were the highest responses:

Access to nature and green spaces	71% (85)
Clean air	44% (53)
Wildlife	41% (49)

When asked what three things are most valued about the community that they lived in we received 120 responses, the highest responses were:

Feeling safe in my community	65% (78)
Feeling safe in my home	62% (74)
People in my local area treating each other with respect	53% (63)

Source: Regional Well-being Survey 2021

## Safety

There were **2,003** recorded crime instances in this Community area during 2020/21 with 805 (40%) of these being violence against the person, followed by 236 public order offences and 207 Arson & criminal damage instances.

Source: Crime Volumes 2020-21 Dyfed Powys Police

16% of crimes provided by DPP in Carmarthenshire in 2020-21 took place in community area 1. The majority of these crimes were Violence Against the Person, accounting for 40% of recorded crimes.

Source: Crime Volumes 2020-21 Dyfed Powys Police

## Survey Responses for Community Area 1

When asked what three things are most valued about living in a society which strives to be equal for all, we received 118 responses, the highest responses were:

Being accepted for who I am	47% (56)
What I choose to do not being determined by my age, sex, gender, race, background, belief and whether I am/am not disabled	47% (55)
Living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief of disability/non disability	46% (54)

Source: Regional Well-being Survey 2021

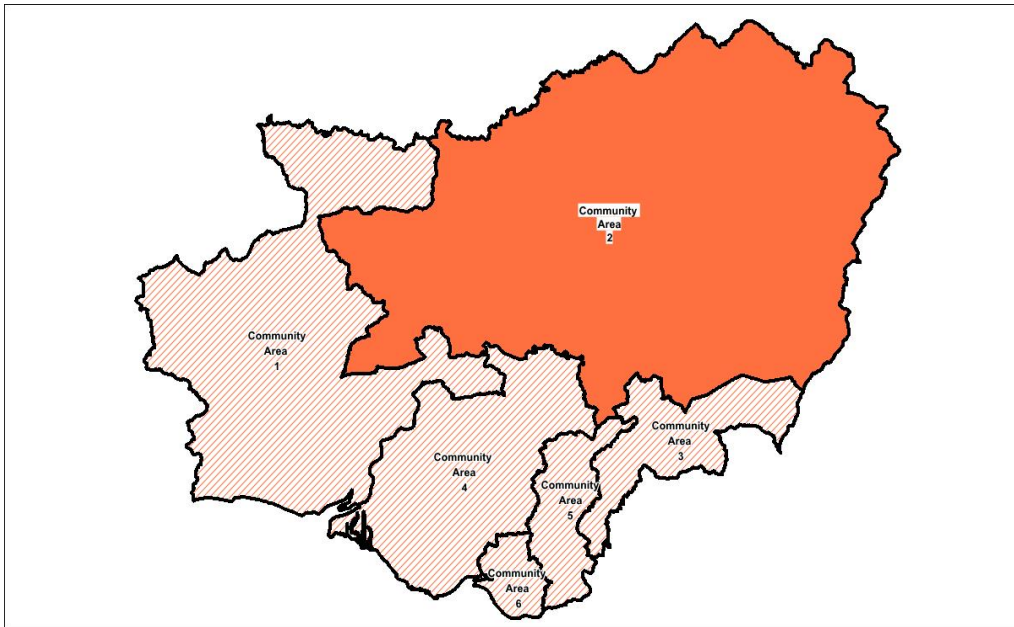
When asked what three things are most valued for a prosperous community, we received 120 responses, the highest responses were:

Good transport network meets the needs of rural non-rural areas	52% (62)
A stable income	48% (57)
Affordable housing opportunities	36% (43)
Greener economy & Affordable housing	36% (43)

Source: Regional Well-being Survey 2021



# COMMUNITY AREA 2



## Key Headlines:

- Rates of poverty vary significantly across the area.
- House prices are higher than the county and national averages.
- The retail sector is the largest employer.
- The percentage of homes without central heating are high in some wards.

A total of 132 responses received for Community Area 2 from the online survey consisting of the following age groups:

Under 16 (no responses)	Aged 55-64 (36 responses)
Aged 17-24 (2 responses)	Aged 65-74 (22 responses)
Aged 25-34 (12 responses)	Aged 75-84 (8 responses)
Aged 35-44 (25 responses)	Aged 86+ (5 responses)
Aged 45-54 (22 responses)	Prefer not to say (no responses)

The Well-being of Future Generations Act was introduced in April 2016 with the intention to create the Wales we want for now and in the future. Within this Act, Public Services Boards (PSBs) were created to encourage co-production and joined up working from public bodies, to improve the social, economic, environmental, and cultural well-being in their area.

This community area profile details the information that we have about Community Area 2. It also breaks down the priorities that residents felt were important from our engagement with Carmarthenshire residents in the run up to the creation of the Local Well-being Assessment.

Community Area 2 has a population of 33,840 residents. The area consists of 5 MSOA geographies covering the below localities.

MSOA 001	Llanfihangel-ar-Arth and Llanybydder
MSOA 002	Cynwyl Gaeo, Cilycwm and Llandovery
MSOA 004	Llandeilo, Llangadog and Manordeilo & Salem
MSOA 005	Abergwili, Llanegwad and Llanfihangel Aberbythych
MSOA 006	Carmarthen Town West and Cynwyl Elfed

## Population

According to CACI paycheck data there are 14,406 households<sup>1</sup> in *Community Area 2*. The 2020 Mid-Year Population estimate states there are 33,840 residents<sup>2</sup> living in *Community Area 2*.

*Source: 1- CACI Paycheck 2020 2-ONS MYE 2020*

Across Carmarthenshire 1.9% of residents identify themselves as non-white, in *Community Area 2* this is lower than the county average at 1.7%. Both figures are below the Welsh figure of 4.4%.

When considering where residents in *Community Area 2* were born 67% were born in Wales and 4.4% born outside of the UK. The rest comprise of those born in other countries within the UK.

*Source: 2011 Census*

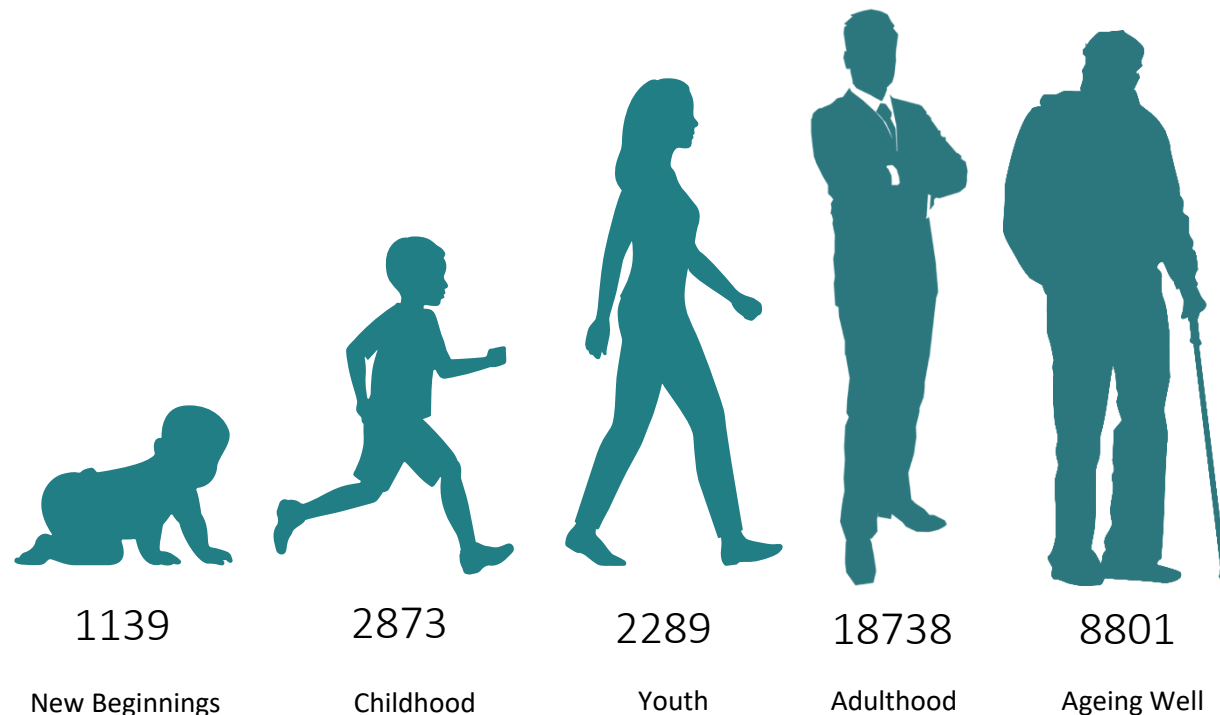
22% of residents in *Community Area 2* reported having a disability or life limiting illness in the 2011 Census. Less than the average of 24% across Carmarthenshire and slightly lower than the national average of 23%.

*Source: 2011 Census*

### Household composition:

Total Households	13,999	
All households with dependent children	3,717	26.6%
All households aged 65+	3,634	26.0%
Average Household size (persons)	2.4	

*Source: Census 2011*



*Mid-Year Population Estimates 2020.*

## Housing

In *Community Area 2* the average House price is **£201,199**. This is more than the average across the county and Wales, £185,431 and £183,129 respectively.

*Source: ONS March 2021*

Across Wales and Carmarthenshire, the percentage of homes without central heating stands at 2.3%. In *Community Area 2* this is higher, with an average of 4%. The area where this is most prevalent is the wards of Llandovery, Llandeilo and Cilcwm at 5.2%

*Source: 2011 Census*

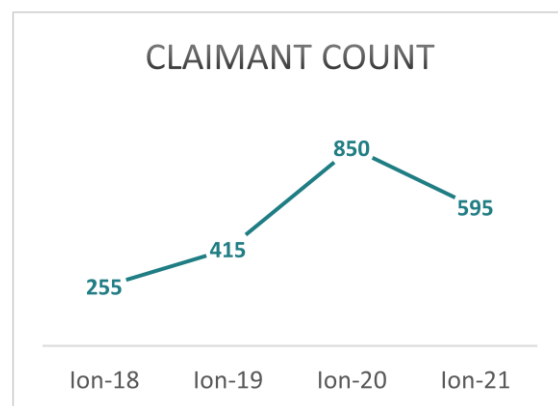
## Economy

**30%** of households in this community area are classed as **'living in poverty'**<sup>1</sup> varying from 23.2% in Manordeilo and Salem to 36% in Llanybydder. The average for Community Area 2 is below the Carmarthenshire average of 33.8% and the Welsh average of 32.9%.

The median income in *Community Area 2* is **£31,455**.

### Claimant Count

The number of people claiming Job Seeker's Allowance rose as expected in 2020, now coming back down to pre-pandemic levels.



Source: ONS

The majority of residents in Community Area 2 are economically active.<sup>1</sup> The most recent Local Authority data shows that this is less than the figures for Carmarthenshire (71.8%) and Wales as a whole (76%).<sup>2</sup>

Economically Active	16,371	67.1%
Economically Inactive	8,023	32.9%

Source: 1 - Census 2011, 2 - ONS Annual Population Survey

Wholesale and retail is the largest sector of employment in Community Area 2, this echoes the picture across Carmarthenshire and Wales. The top five areas of employment are in the following industries:

Wholesale & Retail	15%
Human, Health & Social Work	14%
Education	11%
Agriculture, Forestry & Fishing	10%
Construction	9%

Source: Census 2011

### No Qualifications:

Just under a quarter (24%) of residents aged 16 and over have no qualifications. (Carmarthenshire 26.8% / Wales 25.9%)<sup>1</sup>. This includes the retired population, the percentage of the working age population in Carmarthenshire with no qualifications is 17.46%.<sup>2</sup>

Source: 1-Census 2011 2-WIMD 2014

## Cymraeg

Welsh speaking rates across Community Area 2 are similar to that across the county. This is substantially higher than the national average of 18.7%.

### Welsh Language skills:

	CA 2		Carms	
Can speak Welsh	16,103	49.6%	78,048	43.9%
No skills in Welsh	12,480	38.5%	74,355	41.9%

Source: Census 2011

### Survey Responses for Community Area 2

When asked what three things are most valued about in relation to County's vibrant community and thriving Welsh language we received 125 responses, the highest responses were:

Locally produced food	59% (74)
Being able to use the Welsh language	52% (65)
Local Festivals/Events	43% (54)

Source: Regional Well-being Survey 2021

<sup>1</sup>(An average household income of 60% below the GB median income of £33,278 @ 2020)

<sup>2</sup>(Gross household income from all sources including earnings, benefits and investments)



## Health

A Middle Layer Super Output Area (**MSOA**) is a geographic area that can vary in size because they are intended to have roughly equal amounts of people – on average 7500 residents or 4000 households.

The below table shows the rates for the Health domains at MSOA level for Community Area 2. This area consists of the below geographies:

**MSOA 001** – Llanfihangel-ar-Arth and Llanybydder

**MSOA 002** – Cynwyl Gaeo, Cilycwm and Llandovery

**MSOA 004** – Llandeilo, Llangadog and Manordeilo & Salem

**MSOA 005** – Abergwili, Llanegwad, Llanfihangel Aberbythych

**MSOA 006** - Carmarthen Town West and Cynwyl Elfed

As can be seen from the table, MSOA 001 has the highest rates for GP recorded chronic conditions, Limiting long-term illness, and premature death. MSOA 004 has the highest rate for cancer incidence and children aged 4-5 who are obese and MSOA 006 has the highest rate for GP recorded mental health condition and low birth weight.

WIMD 2019 Health Domains	MSOA 001	MSOA 002	MSOA 004	MSOA 005	MSOA 006
GP-recorded chronic condition (rate per 100)	<b>13.4</b>	11.3	11.7	11.2	13.1
Limiting long-term illness (rate per 100)	<b>21.3</b>	20.1	19.5	19	20.3
Premature death (rate per 100,000)	<b>333.9</b>	323.7	285.2	289.2	318
GP-recorded mental health condition (rate per 100)	19.1	16.8	16.1	16.1	<b>20.9</b>
Cancer incidence (rate per 100,000)	506	560.7	<b>592.4</b>	584	556.5
Low birth weight (live single births less than 2.5kg) (%)	5.4	5	5	3.5	<b>5.7</b>
Children aged 4-5 who are obese (%)	11.3	11.1	<b>12.4</b>	10.5	11.3

*Red and bold indicate the highest figures per category.*

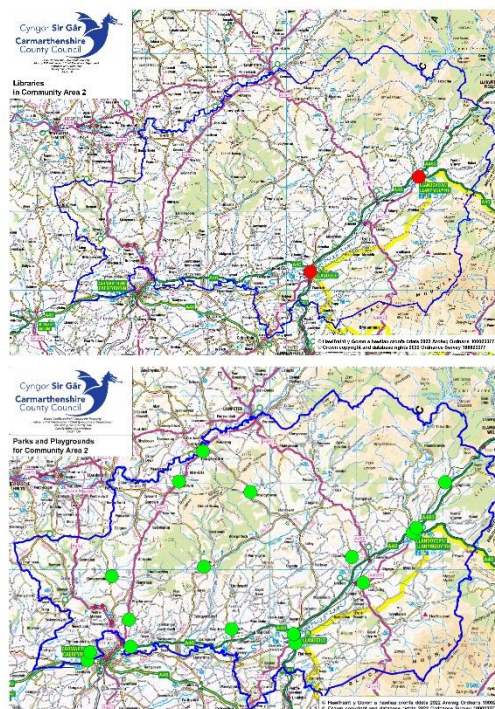
## Community Well-being

In Community Area 1 there are 2 libraries and 18 parks and playgrounds. They are distributed across the areas with highest populations.

	CA2	Carms
Parks	18	139
Libraries	2	16

Source: CCC

The number of parks and playgrounds is one of the lowest in Carmarthenshire. The number of libraires is similar to that across the county.



### Survey Responses for Community Area 2

When asked what three things are most valued about their local environment we received 132 responses, these were the highest responses:

Access to nature and green spaces	73% (97)
Clean air	48% (63)
Landscape and Views	47% (62)

When asked what three things are most valued about the community that they lived in, we received 130 responses, the highest responses were:

Feeling safe in my community	63% (84)
Feeling safe in my home	61% (79)
People in my local area treating each other with respect	57% (74)

Source: Regional Well-being Survey 2021

## Safety

There were **1,262** recorded crime instances in this Community area during 2020/21 with 601 (48%) of these being violence against the person, followed by 143 Arson & criminal damage and 139 Theft instances.

Source: Crime Volumes 2020-21 Dyfed Powys Police

10% of crimes provided by DPP in Carmarthenshire in 2020-21 took place in community area 2. The majority of these crimes were Violence Against the Person, accounting for 48% of recorded crimes.

Source: Crime Volumes 2020-21 Dyfed Powys Police

### Survey Responses for Community Area 2

When asked what three things are most valued about living in a society which strives to be equal for all, we received 130 responses, the highest responses were:

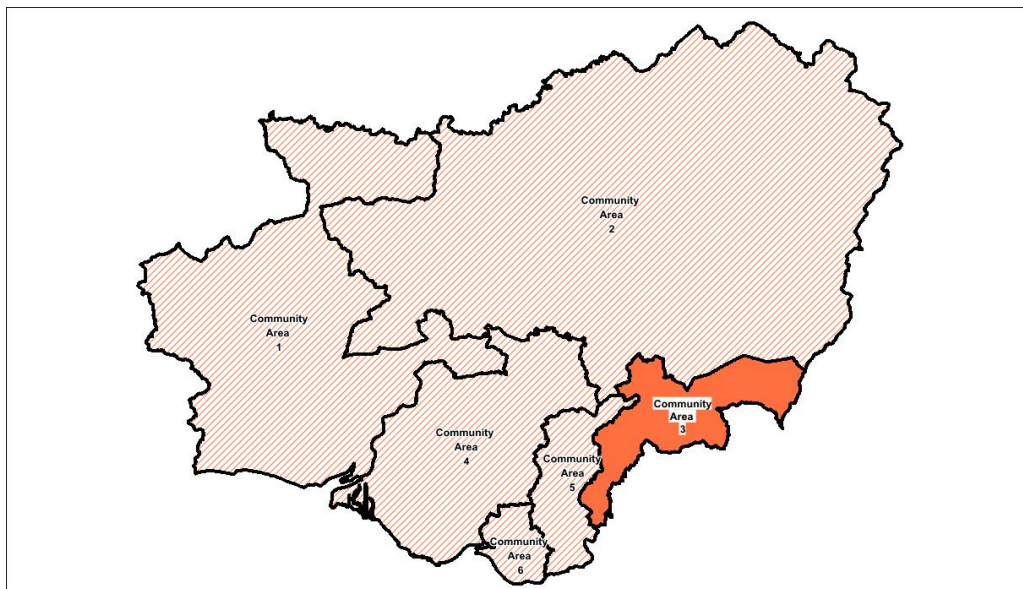
Being accepted for who I am	45% (59)
Living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief of disability/non disability	43% (56)
Being able to express myself freely	39% (51)

When asked what three things are most valued for a prosperous community, we received 133 responses, the highest responses were:

Good transport network meets the needs of rural non-rural areas	47% (63)
A stable income	45% (60)
Affordable housing opportunities	43% (57)

Source: Regional Well-being Survey 2021

# COMMUNITY AREA 3



## Key Headlines:

- Levels of poverty are high.
- House prices are lower than the county and national averages.
- The retail sector is the largest employer.
- Access to nature and green spaces was the highest value asset in the area.

A total of 74 responses received for Community Area 3 from the online survey consisting of the following age groups:

Under 16 (no responses)	Aged 55-64 (20 responses)
Aged 17-24 (3 responses)	Aged 65-74 (10 responses)
Aged 25-34 (2 responses)	Aged 75-84 (7 responses)
Aged 35-44 (8 responses)	Aged 86+ (6 responses)
Aged 45-54 (14 responses)	Prefer not to say (4 responses)

The Well-being of Future Generations Act was introduced in April 2016 with the intention to create the Wales we want for now and in the future. Within this Act, Public Services Boards (PSBs) were created to encourage co-production and joined up working from public bodies, to improve the social, economic, environmental, and cultural well-being in their area.

This community area profile details the information that we have about Community Area 3. It also breaks down the priorities that residents felt were important from our engagement with Carmarthenshire residents in the run up to the creation of the Local Well-being Assessment.

Community Area 3 has a population of 30,108 residents. The area consists of 4 MSOA geographies covering the below localities.

MSOA 010	Garnant, Glanamman and Cwarter Bach
MSOA 011	Llandybie and Saron
MSOA 013	Ammanford, Betws and Pontamman
MSOA 017	Hendy and Tycroes

## Population

According to CACI Paycheck data there are 13,096 households<sup>1</sup> in *Community Area 3*. The 2020 Mid-Year Population estimate states there are 30,108 residents<sup>2</sup> living in Community Area 3.

*Source: 1- CACI Paycheck 2020 2-ONS MYE 2020*

Across Carmarthenshire 1.9% of residents identify themselves as non-white, in Community Area 3 this is slightly lower than the county average at 1.5%. Both figures are below the Welsh figure of 4.4%.

When considering where residents in Community Area 3 were born 80% were born in Wales and 2.6% born outside of the UK. The rest comprise of those born in other countries within the UK.

*Source: 2011 Census*

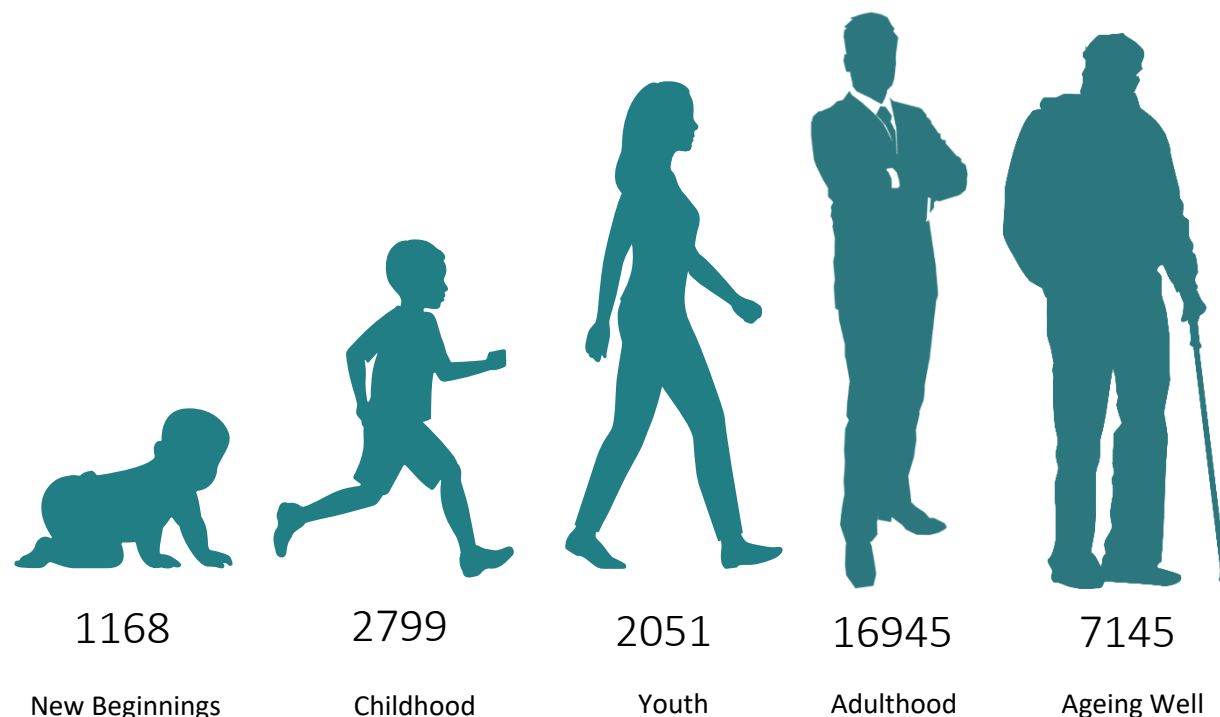
27% of residents in Community Area 3 reported having a disability or life limiting illness in the 2011 Census. Higher than the average of 24% across Carmarthenshire and the national average of 23%.

*Source: 2011 Census*

### Household composition:

Total Households	12,349	
All households with dependent children	3,534	28.6%
All households aged 65+	3,020	24.5%
Average Household size (persons)	2.4	

*Source: Census 2011*



*Mid-Year Population Estimates 2020.*

## Housing

In Community Area 3 the average House price is **£142,113**. This is lower than the average across the county and Wales, £185,431 and £183,129 respectively.

*Source: ONS March 2021*

Across Wales and Carmarthenshire, the percentage of homes without central heating stands at 2.3%. In Community Area 3 this is lower, with an average of 1.9%. The area where this is most prevalent is the ward of Hendy (1.8%).

*Source: 2011 Census*

## Economy

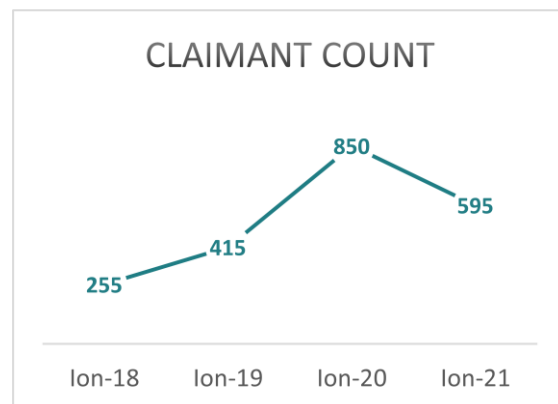
**34%** of households in this community area are classed as **'living in poverty'**<sup>1</sup> varying from 29% in Tycroes to 42.4% in Ammanford. This is above the Carmarthenshire average of 33.8% and the same as the Welsh average of 32.9%.

The median income in *Community Area 3* is **£23,989**.

*CACI Paycheck 2020*

### Claimant Count

The number of people claiming Job Seeker's Allowance rose as expected in 2020, now coming back down to pre-pandemic levels.



*Source: ONS*

The majority of residents in Community Area 3 are economically active.<sup>1</sup> The most recent Local Authority data shows that this is less than the figures for Carmarthenshire (71.8%) and Wales as a whole (76%).<sup>2</sup>

<b>Economically Active</b>	<b>13,172</b>	<b>66.6%</b>
<b>Economically Inactive</b>	<b>7,553</b>	<b>36.4%</b>

*Source: 1 - Census 2011, 2 - ONS Annual Population Survey*

Wholesale and retail is the largest sector of employment in Community Area 3, this echoes the picture across Carmarthenshire and Wales. The top five areas of employment are in the following industries:

<b>Wholesale &amp; Retail</b>	<b>16%</b>
<b>Human, Health &amp; Social Work</b>	<b>15%</b>
<b>Education</b>	<b>11%</b>
<b>Public Administrations &amp; Defence</b>	<b>11%</b>
<b>Manufacturing</b>	<b>10%</b>

*Source: Census 2011*

### No Qualifications:

Just over a quarter (26.7%) of residents aged 16 and over have no qualifications. (Carmarthenshire 26.8% / Wales 25.9%)<sup>1</sup>. This includes the retired population, the percentage of the working age population in Carmarthenshire with no qualifications is 17.46%.<sup>2</sup>

*Source: 1-Census 2011 2-WIMD 2014*

## Cymraeg

Welsh speaking rates across Community Area 3 are similar to that across the county. This is substantially higher than the national average of 18.7%.

### Welsh Language skills:

	<b>CA 3</b>		<b>Carms</b>	
<b>Can speak Welsh</b>	15,174	54.5%	78,048	43.9%
<b>No skills in Welsh</b>	8,630	42.9%	74,355	31.0%

*Source: Census 2011*

### Survey Responses for Community Area 3

When asked what three things are most valued about in relation to County's vibrant community and thriving Welsh language we received 68 responses, the highest responses were:

<b>Heritage/history</b>	<b>51% (35)</b>
<b>Locally produced food</b>	<b>50% (34)</b>
<b>Local festivals/events</b>	<b>41% (28)</b>

*Source: Regional Well-being Survey 2021*

<sup>1</sup>(An average household income of 60% below the GB median income of £33,278 @ 2020)

<sup>2</sup> (Gross household income from all sources including earnings, benefits and investments)



## Health

A Middle Layer Super Output Area ([MSOA](#)) is a geographic area that can vary in size because they are intended to have roughly equal amounts of people – on average 7500 residents or 4000 households.

The below table shows the rates for the Health domains at MSOA level for Community Area 3. This area consists of the below geographies:

**MSOA 010** – Garnant, Glamamman and Cwarter Bach

**MSOA 011** – Llandybie and Saron

**MSOA 013** – Ammanford, Betws and Pontamman

**MSOA 017** – Hendy and Tycroes

As can be seen from the table, MSOA 010 has the highest rates for GP recorded chronic conditions, Limiting long-term illness, cancer incidence and low birth weight. MSOA 013 has the highest rate for premature death and GP recorded Mental health condition and MSOA 017 has the highest rate for children aged 4-5 who are obese.

WIMD 2019 Health Domains	MSOA 010	MSOA 011	MSOA 013	MSOA 017
GP-recorded chronic condition (rate per 100)	<b>14.9</b>	14	13.6	13.2
Limiting long-term illness (rate per 100)	<b>28.3</b>	24.6	25.6	22.5
Premature death (rate per 100,000)	403.8	401.4	<b>409.5</b>	333
GP-recorded mental health condition (rate per 100)	18.6	20.3	<b>20.8</b>	19
Cancer incidence (rate per 100,000)	<b>681.7</b>	587.7	624.6	564.2
Low birth weight (live single births less than 2.5kg) (%)	<b>6.7</b>	4.8	5	4.9
Children aged 4-5 who are obese (%)	14	11.6	12	<b>14.5</b>

*Red and bold indicate the highest figures per category.*

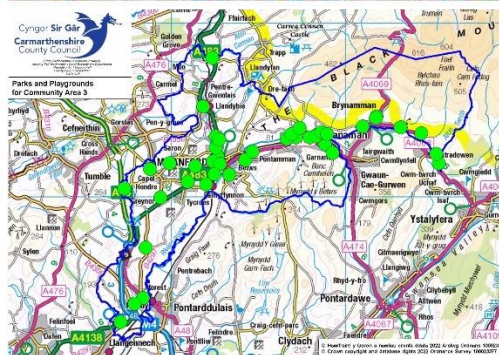
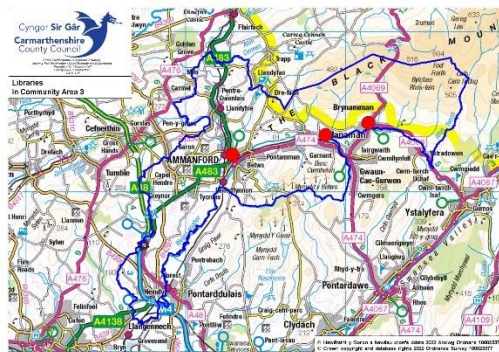
## Community Well-being

In Community Area 3 there are 3 libraries and 40 parks and playgrounds. They are distributed across the areas with highest populations.

	CA3	Carms
Parks	40	139
Libraries	3	16

Source: CCC

The number of parks and playgrounds is the highest in Carmarthenshire. The number of libraries is similar to that across the county.



### Survey Responses for Community Area 3

When asked what three things are most valued about their local environment we received 72 responses, these were the highest responses:

Access to nature and green spaces	75% (54)
Landscape & Views	50% (36)
Clean Air	46% (33)

When asked what three things are most valued about the community that they lived in, we received 71 responses, the highest responses were:

People in my local area treating each other with respect	76% (54)
Feeling safe in my home	69% (49)
Feeling safe in my community	58% (41)

Source: Regional Well-being Survey 2021

## Safety

There were **1,799** recorded crime instances in this Community area during 2020/21 with 829 (46%) of these being violence against the person, followed by 217 arson & criminal damage offences and 188 public order offences.

15% of crimes provided by DPP in Carmarthenshire in 2020-21 took place in community area 3. The majority of these crimes were Violence Against the Person, accounting for 46% of recorded crimes.

Source: Crime Volumes 2020-21 Dyfed Powys Police

### Survey Responses for Community Area 3

When asked what three things are most valued about living in a society which strives to be equal for all, we received 71 responses, the highest responses were:

What I choose to do not being determined by my age, sex, gender, race, background, belief and whether I am/am not disabled	45% (32)
Living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief of disability/non disability	39% (28)
Begin able to express myself freely	37% (27)

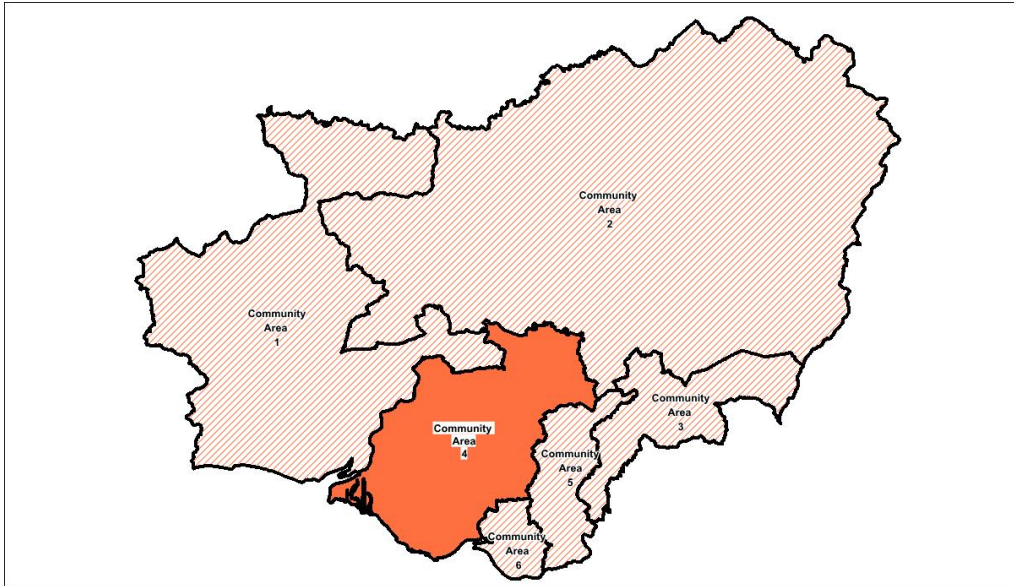
When asked what three things are most valued for a prosperous community, we received 74 responses, the highest responses were:

Good transport network meets the needs of rural non-rural areas	50% (37)
A stable income	50% (37)
Affordable housing opportunities	39% (29)
Stable Employment	32% (24)

Source: Regional Well-being Survey 2021



# COMMUNITY AREA 4



The Well-being of Future Generations Act was introduced in April 2016 with the intention to create the Wales we want for now and in the future. Within this Act, Public Services Boards (PSBs) were created to encourage co-production and joined up working from public bodies, to improve the social, economic, environmental, and cultural well-being in their area.

This community area profile details the information that we have about Community Area 4. It also breaks down the priorities that residents felt were important from our engagement with Carmarthenshire residents in the run up to the creation of the Local Well-being Assessment.

## Key Headlines:

- Levels of poverty vary greatly within the area.
- House prices are lower than the county and national averages.
- The retail sector is the largest employer.
- The rate of uneconomically active residents in the area is higher than most.

A total of 140 responses received for Community Area 4 from the online survey consisting of the following age groups:

Under 16 (no responses)	Aged 55-64 (35 responses)
Aged 17-24 (1 response)	Aged 65-74 (34 responses)
Aged 25-34 (3 responses)	Aged 75-84 (14 responses)
Aged 35-44 (18 responses)	Aged 86+ (7 responses)
Aged 45-54 (27 responses)	Prefer not to say (1 response)

Community Area 4 has a population of 32,742 residents. The areas consists of 4 MSOA geographies covering the below localities.

MSOA 012	Llangydeyrn, Llanddarog and St. Ishmael
MSOA 016	Glyn, Gorslas and Pontyberem
MSOA 018	Trimsaran and Kidwelly
MSOA 021	Burry Port and Pembrey

## Population

According to CACI pacheck data there are 13,153 households<sup>1</sup> in *Community Area 4*. The 2020 Mid Year Population estimate states there are 32,742 residents<sup>2</sup> living in Community Area 4.

*Source: 1- CACI Paycheck 2020 2-ONS MYE 2020*

Across Carmarthenshire 1.9% of residents identify themselves as non-white, in Community Area 4 this is lower than the county average at 1%. Both figures are below the Welsh figure of 4.4%.

When considering where residents in Community Area 4 were born 77% were born in Wales and 2.5% born outside of the UK. The rest comprise of those born in other countries within the UK.

*Source: 2011 Census*

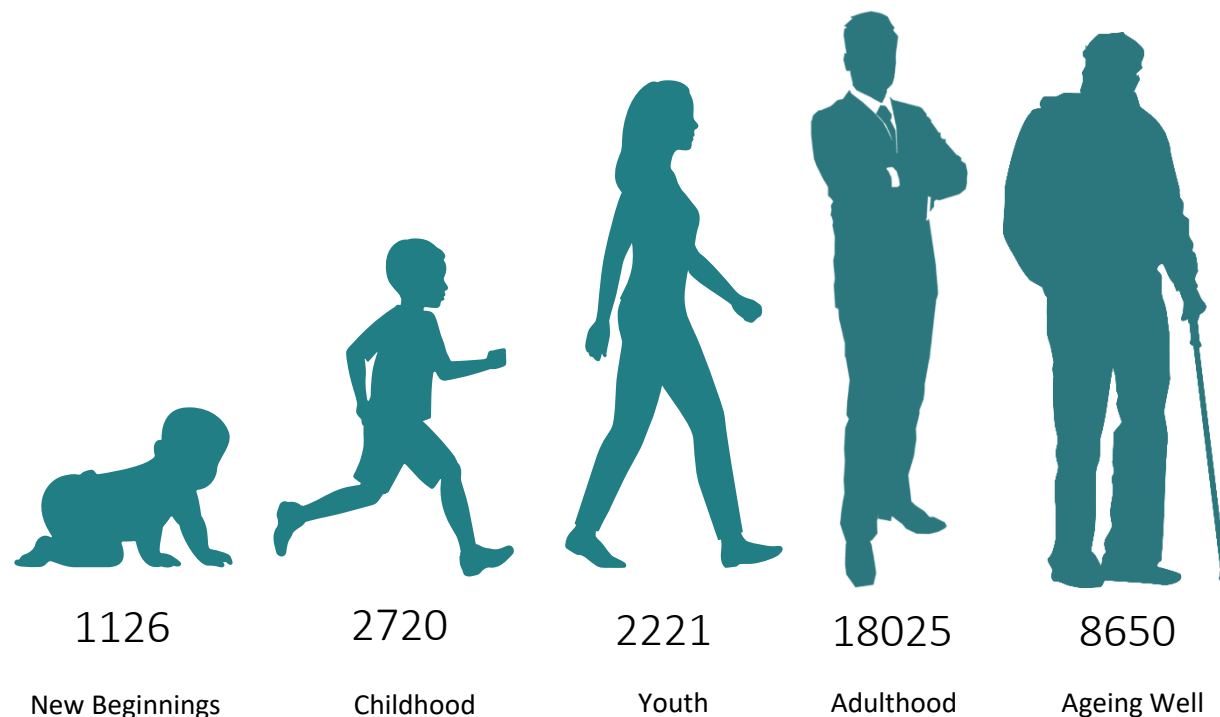
27.9% of residents in Community Area 4 reported having a disability or life limiting illness in the 2011 Census. Higher than the average of 24% across Carmarthenshire and the national average of 23%.

*Source: 2011 Census*

### Household composition:

Total Households	13,552	
All households with dependent children	3,574	26.4%
All households aged 65+	3,761	27.8%
Average Household size (persons)	2.4	

*Source: Census 2011*



*Mid-Year Population Estimates 2020.*

## Housing

In Community Area 4 the average House price is **£158,118**. This is less than the average across the county and Wales, £185,431 and £183,129 respectively.

*Source: ONS March 2021*

Across Wales and Carmarthenshire, the percentage of homes without central heating stands at 2.3%. In Community Area 4 this is lower, with an average of 1.9%. The area where this is most prevalent is the ward of Llanddarog (2.8%).

*Source: 2011 Census*

## Economy

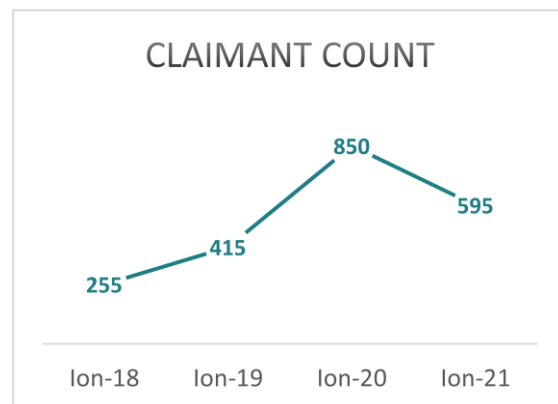
**32.9%** of households in this community area are classed as **'living in poverty'**<sup>1</sup> varying from 23.2% in Llanddarog to 38.8% in Trimsaran. This is below the Carmarthenshire average of 33.8% and the same as the Welsh average of 32.9%.

The median income in *Community Area 4* is **£24,408**.

*CACI Paycheck 2020*

### Claimant Count

The number of people claiming Job Seeker's Allowance rose as expected in 2020, now coming back down to pre-pandemic levels.



*Source: ONS*

The majority of residents in Community Area 4 are economically active.<sup>1</sup> The most recent Local Authority data shows that this is less than the figures for Carmarthenshire (71.8%) and Wales as a whole (76%).<sup>2</sup>

<b>Economically Active</b>	<b>15,179</b>	<b>62.4%</b>
<b>Economically Inactive</b>	<b>8,579</b>	<b>37.6%</b>

*Source: 1 - Census 2011, 2 - ONS Annual Population Survey*

Wholesale and retail is the largest sector of employment in Community Area 4, this echoes the picture across Carmarthenshire and Wales. The top five areas of employment are in the following industries:

<b>Wholesale &amp; Retail</b>	<b>17%</b>
<b>Human, Health &amp; Social Work</b>	<b>16%</b>
<b>Education</b>	<b>11%</b>
<b>Construction</b>	<b>10%</b>
<b>Public Administration &amp; Defence</b>	<b>10%</b>

*Source: Census 2011*

### No Qualifications:

Just over a quarter (26.6%) of residents aged 16 and over have no qualifications. (Carmarthenshire 26.8% / Wales 25.9%)<sup>1</sup>. This includes the retired population, the percentage of the working age population in Carmarthenshire with no qualifications is 17.46%.<sup>2</sup>

*Source: 1-Census 2011 2-WIMD 2014*

## Cymraeg

Welsh speaking rates across Community Area 4 are similar to that across the county. This is substantially higher than the national average of 18.7%.

### Welsh Language skills:

	<b>CA 4</b>		<b>Carms</b>	
<b>Can speak Welsh</b>	15,074	49.6%	78,048	43.9%
<b>No skills in Welsh</b>	11,131	36.6%	74,355	41.9%

*Source: Census 2011*

### Survey Responses for Community Area 4

When asked what three things are most valued about in relation to County's vibrant community and thriving Welsh language, we received 129 responses, the highest responses were:

<b>Being able to use the Welsh language</b>	<b>53% (69)</b>
<b>Locally produced food</b>	<b>50% (64)</b>
<b>Heritage/history</b>	<b>37% (48)</b>

*Source: Regional Well-being Survey 2021*

<sup>1</sup>(An average household income of 60% below the GB median income of £33,278 @ 2020)

<sup>2</sup> (Gross household income from all sources including earnings, benefits and investments)

## Health

A Middle Layer Super Output Area ([MSOA](#)) is a geographic area that can vary in size because they are intended to have roughly equal amounts of people – on average 7500 residents or 4000 households.

The below table shows the rates for the Health domains at MSOA level for Community Area 4. This area consists of the below geographies:

**MSOA 012** – Llangyndeyrn, Llanddarog and St. Ishmael

**MSOA 016** – Glyn, Gorslas and Pontyberem

**MSOA 018** – Trimsaran and Kidwelly

**MSOA 021** – Burry Port and Pembrey

As can be seen from the table, MSOA 012 has the highest for low birth weight, MSOA 018 has highest rate for GP recorded chronic condition, Limiting long-term illness, Premature deaths, GP recorded mental health condition and cancer incidence. MSOA 021 has highest rate for children aged 4-5 who are obese.

WIMD 2019 Health Domains	MSOA 012	MSOA 016	MSOA 018	MSOA 021
GP-recorded chronic condition (rate per 100)	13.6	14	<b>15.4</b>	13.5
Limiting long-term illness (rate per 100)	22.1	24.7	<b>28.7</b>	25.1
Premature death (rate per 100,000)	332.3	351.4	<b>376.1</b>	342.3
GP-recorded mental health condition (rate per 100)	18.3	18.6	<b>20.5</b>	16.2
Cancer incidence (rate per 100,000)	568.7	576.7	<b>662.6</b>	645.1
Low birth weight (live single births less than 2.5kg) (%)	<b>6.1</b>	4.1	4.1	4.2
Children aged 4-5 who are obese (%)	9.7	10.8	11.9	<b>12.2</b>

*Red and bold indicate the highest figures per category.*



## Community Well-being



In Community Area 4 there are 5 libraries and 35 parks and playgrounds. They are distributed across the areas with highest populations.

	CA4	Carms
<b>Parks</b>	35	139
<b>Libraries</b>	5	16

Source: CCC

The number of parks and playgrounds is the second highest in Carmarthenshire. The number of libraries is the highest in the county.



### Survey Responses for Community Area 4

When asked what three things are most valued about their local environment, we received 139 responses, these were the highest responses:

<b>Access to nature and green spaces</b>	<b>66% (92)</b>
<b>Clean air</b>	<b>55% (76)</b>
<b>Wildlife</b>	<b>40% (55)</b>

When asked what three things are most valued about the community that they lived in, we received 128 responses, the highest responses were:

<b>Feeling safe in my home</b>	<b>70% (90)</b>
<b>Feeling safe in my community</b>	<b>63% (81)</b>
<b>People in my local area treating each other with respect</b>	<b>59% (76)</b>

Source: Regional Well-being Survey 2021

## Safety

There were **1,581** recorded crime instances in this Community area during 2020/21 with 836 (53%) of these being violence against the person, followed by 174 Arson & criminal damage instances and 157 public order offences.

13% of crimes provided by DPP in Carmarthenshire in 2020-21 took place in community area 4. The majority of these crimes were Violence Against the Person, accounting for 53% of recorded crimes.

Source: Crime Volumes 2020-21 Dyfed Powys Police

### Survey Responses for Community Area 4

When asked what three things are most valued about living in a society which strives to be equal for all, we received 137 responses, the highest responses were:

<b>Living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief of disability/non disability</b>	<b>53% (72)</b>
<b>Being accepted for who I am</b>	<b>41% (56)</b>
<b>What I choose to do not being determined by my age, sex, gender, race, background, belief and whether I am/am not disabled</b>	<b>36% (49)</b>

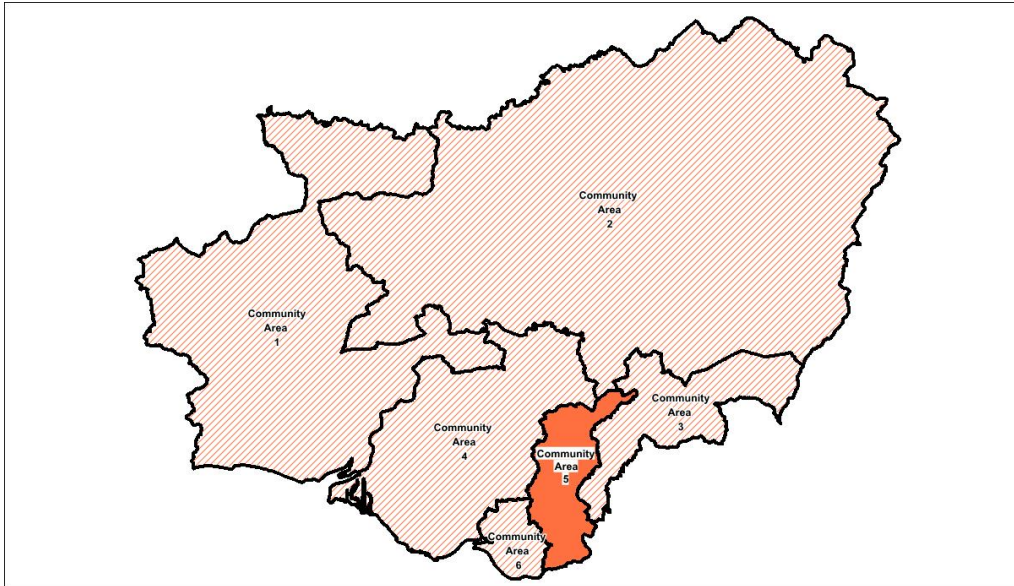
Source: Regional Well-being Survey 2021

When asked what three things are most valued for a prosperous community, we received 138 responses, the highest responses were:

<b>Good transport network meets the needs of rural non-rural areas</b>	<b>56% (77)</b>
<b>A stable income</b>	<b>46% (64)</b>
<b>Affordable housing opportunities</b>	<b>35% (49)</b>

Source: Regional Well-being Survey 2021

# COMMUNITY AREA 5



## Key Headlines:

- Levels of poverty are extremely varied across the area.
- House prices are lower than the county and national averages.
- The retail sector is the largest employer.
- Access to nature and green spaces was the highest valued asset in the area.

A total of 70 responses received for Community Area 5 from the online survey consisting of the following age groups:

Under 16 (no responses)	Aged 55-64 (20 responses)
Aged 17-24 (no responses)	Aged 65-74 (8 responses)
Aged 25-34 (7 responses)	Aged 75-84 (4 responses)
Aged 35-44 (9 responses)	Aged 86+ (no responses)
Aged 45-54 (22 responses)	Prefer not to say (no responses)

The Well-being of Future Generations Act was introduced in April 2016 with the intention to create the Wales we want for now and in the future. Within this Act, Public Services Boards (PSBs) were created to encourage co-production and joined up working from public bodies, to improve the social, economic, environmental, and cultural well-being in their area.

This community area profile details the information that we have about Community Area 5. It also breaks down the priorities that residents felt were important from our engagement with Carmarthenshire residents in the run up to the creation of the Local Well-being Assessment.

Community Area 5 has a population of 30,923 residents. The area consists of 4 MSOA geographies covering the below localities.

MSOA 015	Llannon and Penygroes
MSOA 019	Llangennech and Swiss Valley
MSOA 020	Dafen and Felinfoel
MSOA 025	Bynea and Llwynhendy

## Population

According to CACI Paycheck data there are 12,979 households<sup>1</sup> in *Community Area 5*. The 2020 Mid-Year Population estimate states there are 30,923 residents<sup>2</sup> living in Community Area 5.

*Source: 1- CACI Paycheck 2020 2-ONS MYE 2020*

Across Carmarthenshire 1.9% of residents identify themselves as non-white, in Community Area 5 this is higher than the county average at 2.4%. Both figures are below the Welsh figure of 4.4%.

When considering where residents in Community Area 5 were born 83% were born in Wales and 3.9% born outside of the UK. The rest comprise of those born in other countries within the UK.

*Source: 2011 Census*

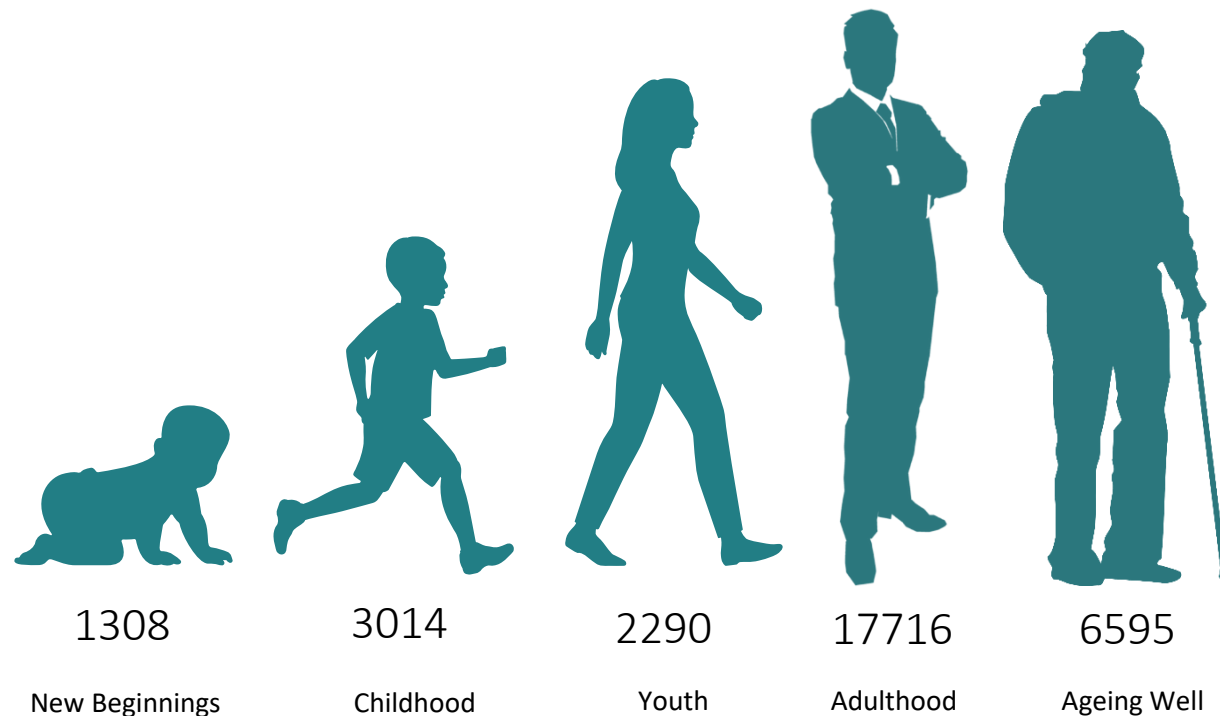
25.6% of residents in Community Area 5 reported having a disability or life limiting illness in the 2011 Census. Higher than the average of 24% across Carmarthenshire figure and the national average of 23%.

*Source: 2011 Census*

### Household composition:

Total Households	12,510	
All households with dependent children	3,913	31.3%
All households aged 65+	2,835	22.7%
Average Household size (persons)	2.4	

*Source: Census 2011*



*Mid-Year Population Estimates 2020.*

## Housing

In Community Area 5 the average House price is **£145,175**. This is lower than the average across the county and Wales, £185,431 and £183,129 respectively.

*Source: ONS March 2021*

Across Wales and Carmarthenshire, the percentage of homes without central heating stands at 2.3%. In Community Area 5 this is lower, with an average of 1.9%. The area where this is most prevalent in is the ward of Llannon (1.9%).

*Source: 2011 Census*



## Economy

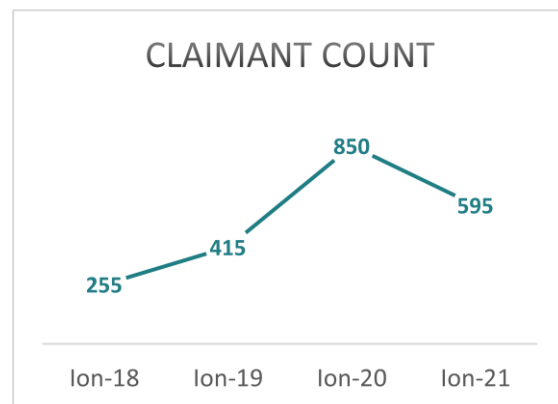
**33.8%** of households in this community area are classed as **'living in poverty'**<sup>1</sup> varying from 25.2% in Swiss Valley to 45.5% in Felinfoel. This is equal to the Carmarthenshire average of 33.8% and higher than the Welsh average of 32.9%.

The median income in *Community Area 5* is **£24,870**.

*CACI Paycheck 2020*

### Claimant Count

The number of people claiming Job Seeker's Allowance rose as expected in 2020, now coming back down to pre-pandemic levels.



*Source: ONS*

The majority of residents in Community Area 5 are economically active.<sup>1</sup> The most recent Local Authority data shows that this is less than the figures for Carmarthenshire (71.8%) and Wales as a whole (76%).<sup>2</sup>

<b>Economically Active</b>	<b>14,057</b>	<b>65.3%</b>
<b>Economically Inactive</b>	<b>7,479</b>	<b>34.7%</b>

*Source: 1 - Census 2011, 2 - ONS Annual Population Survey*

Wholesale and retail is the largest sector of employment in Community Area 5, this echoes the picture across Carmarthenshire and Wales. The top five areas of employment are in the following industries:

<b>Wholesale &amp; Retail</b>	<b>17%</b>
<b>Human, Health &amp; Social Work</b>	<b>16%</b>
<b>Manufacturing</b>	<b>11%</b>
<b>Education</b>	<b>11%</b>
<b>Public Administration &amp; Defence</b>	<b>10%</b>

*Source: Census 2011*

### No Qualifications:

Just over a quarter (28.2%) of residents aged 16 and over have no qualifications. (Carmarthenshire 26.8% / Wales 25.9%)<sup>1</sup>. This includes the retired population, the percentage of the working age population in Carmarthenshire with no qualifications is 17.46%.<sup>2</sup>

*Source: 1-Census 2011 2-WIMD 2014*

## Cymraeg

Welsh speaking rates across Community Area 5 are similar to that across the county. This is substantially higher than the national average of 18.7%.

### Welsh Language skills:

	<b>CA 5</b>		<b>Carms</b>	
<b>Can speak Welsh</b>	11,575	40.1%	78,048	43.9%
<b>No skills in Welsh</b>	12,944	44.9%	74,355	41.9%

*Source: Census 2011*

### Survey Responses for Community Area 5

When asked what three things are most valued about in relation to County's vibrant community and thriving Welsh language, we received 68 responses, the highest responses were:

<b>Locally produced food</b>	<b>60% (41)</b>
<b>Local Festivals/events</b>	<b>48% (33)</b>
<b>Heritage/history</b>	<b>44% (30)</b>

*Source: Regional Well-being Survey 2021*

<sup>1</sup>(An average household income of 60% below the GB median income of £33,278 @ 2020)

<sup>2</sup>(Gross household income from all sources including earnings, benefits and investments)

## Health

A Middle Layer Super Output Area ([MSOA](#)) is a geographic area that can vary in size because they are intended to have roughly equal amounts of people – on average 7500 residents or 4000 households.

The below table shows the rates for the Health domains at MSOA level for Community Area 5. This area consists of the below geographies:

**MSOA 015** – Llannon and Penygroes

**MSOA 019** – Llangennech and Swiss Valley

**MSOA 020** – Dafen and Felinfoel

**MSOA 025** – Bynea and Llwynhendy

As can be seen from the table, MSOA 015 has the highest for low birth weight, MSOA 019 has highest rate for children aged 4-5 who are obese, MSOA 020 has highest rate for Premature death and cancer incidence and MSOA 025 has highest rates for GP recorded chronic condition, Limiting long-term illness and GP recorded mental health condition.

WIMD 2019 Health Domains	MSOA 015	MSOA 019	MSOA 020	MSOA 025
GP-recorded chronic condition (rate per 100)	14.9	13.7	15.7	<b>17.9</b>
Limiting long-term illness (rate per 100)	25.5	23.2	27.2	<b>27.4</b>
Premature death (rate per 100,000)	336.6	319.3	<b>409.1</b>	393.8
GP-recorded mental health condition (rate per 100)	18.9	17	22.8	<b>23.7</b>
Cancer incidence (rate per 100,000)	615.2	597.7	<b>671.9</b>	614.2
Low birth weight (live single births less than 2.5kg) (%)	<b>7.3</b>	5.4	5.8	6
Children aged 4-5 who are obese (%)	13.5	<b>14.2</b>	14	13.9

*Red and bold indicate the highest figures per category.*

Community Well-being

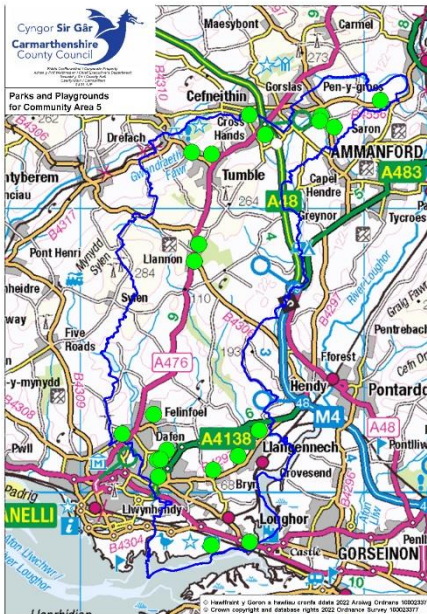


In Community Area 5 there are 2 libraries and 25 parks and playgrounds. They are distributed across the areas with highest populations.

	CA1	Carms
Parks	25	139
Libraries	2	16

**Source:** CCC

The number of parks and playgrounds is similar to that across Carmarthenshire. The number of libraires is the second lowest in the county.



## Survey Responses for Community Area 5

When asked what three things are most valued about their local environment, we received 71 responses, these were the highest responses:

Access to nature and green spaces	79% (56)
Clean air	46% (33)
(1) Wildlife (2) Landscape & views	35% (25)

When asked what three things are most valued about the community that they lived in, the highest responses were:

Feeling safe in my home	77% (54)
People in my local area treating each other with respect	76% (53)
Feeling safe in my community	64% (45)

**Source: Regional Well-being Survey 2021**

## Safety

There were **1,930** recorded crime instances in this Community area during 2020/21 with 805 (53%) of these being violence against the person, followed by 207 Arson and criminal damage offences and 287 Theft instances.

**Source: Crime Volumes 2020-21 Dyfed Powys Police**

16% of crimes provided by DPP in Carmarthenshire in 2020-21 took place in Community Area 5. The majority of these crimes were Violence Against the Person, accounting for 53% of recorded crimes.

**Source: Crime Volumes 2020-21 Dyfed Powys Police**

## Survey Responses for Community Area 5

When asked what three things are most valued about living in a society which strives to be equal for all, we received 67 responses, the highest responses were:

Being accepted for who I am	48% (32)
What I choose to do not being determined by my age, sex, gender, race, background, belief and whether I am/am not disabled	46% (31)
Living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief of disability/non disability	42% (28)

When asked what three things are most valued for a prosperous community, we received 69 responses, the highest responses were:

Good transport network meets the needs of rural non-rural areas	46% (32)
A stable income	46% (32)
Stable employment	38% (26)
Affordable housing opportunities	35% (24)

**Source: Regional Well-being Survey 2021**

# COMMUNITY AREA 6



The Well-being of Future Generations Act was introduced in April 2016 with the intention to create the Wales we want for now and in the future. Within this Act, Public Services Boards (PSBs) were created to encourage co-production and joined up working from public bodies, to improve the social, economic, environmental, and cultural well-being in their area.

This community area profile details the information that we have about Community Area 6. It also breaks down the priorities that residents felt were important from our engagement with Carmarthenshire residents in the run up to the creation of the Local Well-being Assessment.

## Key Headlines:

- Levels of poverty are high.
- House prices are significantly lower than the county and national averages.
- The retail sector is the largest employer.
- There are lower levels of economically active people than across the rest of Carmarthenshire.

A total of 66 responses received for Community Area 6 from the online survey consisting of the following age groups:

Under 16 (no responses)	Aged 55-64 (19 responses)
Aged 17-24 (1 response)	Aged 65-74 (15 responses)
Aged 25-34 (5 responses)	Aged 75-84 (5 responses)
Aged 35-44 (6 responses)	Aged 86+ (3 responses)
Aged 45-54 (12 responses)	Prefer not to say (no responses)

Community Area 6 has a population of 30,406 residents. The area consists of 4 MSOA geographies covering the below localities.

MSOA 022	Lliedi
MSOA 023	Elli and Hengoed
MSOA 024	Bigyn
MSOA 026	Glanymor and Tyisha



## Population

According to CACI Paycheck data there are 13,512 households<sup>1</sup> in *Community Area 6*. The 2020 Mid-Year Population estimate states there are 30,406 residents<sup>2</sup> living in Community Area 6.

*Source: 1- CACI Paycheck 2020 2-ONS MYE 2020*

Across Carmarthenshire 1.9% of residents identify themselves as non-white, in Community Area 6 this is higher than the county average at 2.5%. Both figures are below the Welsh figure of 4.4%.

When considering where residents in Community Area 6 were born 77.8% were born in Wales and 5.7% born outside of the UK. The rest comprise of those born in other countries within the UK.

*Source: 2011 Census*

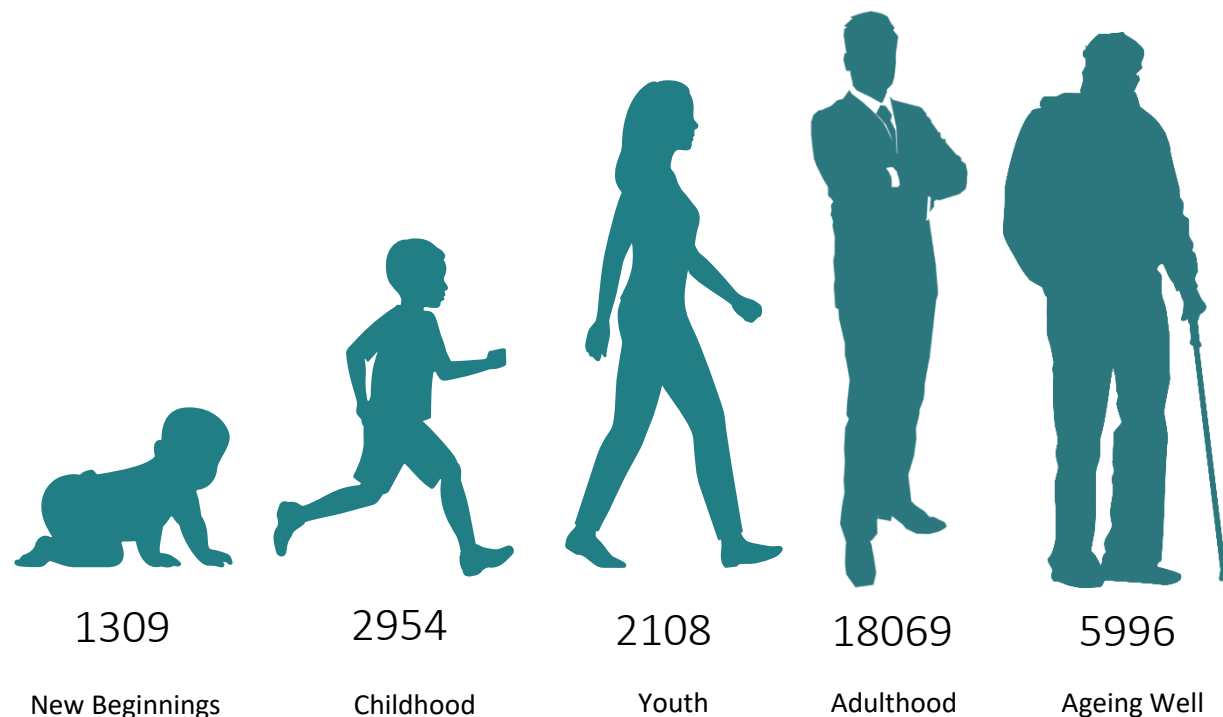
26.4% of residents in Community Area 6 reported having a disability or life limiting illness in the 2011 Census. Higher than the average of 24% across Carmarthenshire and the national average of 23%.

*Source: 2011 Census*

### Household composition:

Total Households	12,784	
All households with dependent children	3,653	28.6%
All households aged 65+	2,889	22.6%
Average Household size (persons)	2.4	

*Source: Census 2011*



*Mid-Year Population Estimates 2020.*

## Housing

In Community Area 6 the average House price is **£112,749**. This is much lower than the average across the county and Wales, £185,431 and £183,129 respectively.

*Source: ONS March 2021*

Across Wales and Carmarthenshire, the percentage of homes without central heating stands at 2.3%. In Community Area 6 this is lower, with an average of 1.5%. The area where this is most prevalent is the wards of Tyisha (2.3%).

*Source: 2011 Census*

## Economy

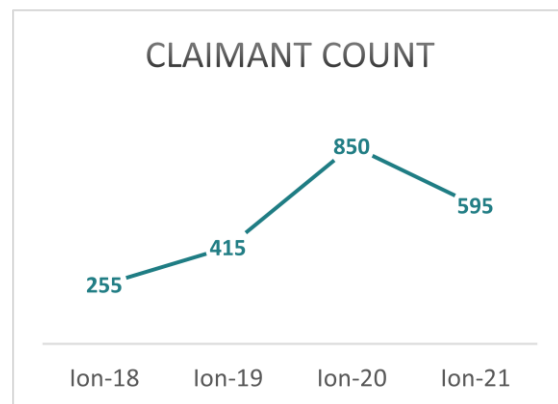
**39.5%** of households in this community area are classed as **'living in poverty'**<sup>1</sup> varying from 30.3% in Hengoed to 49.2% in Tyisha. This is higher than the Carmarthenshire average of 33.8% and the Welsh average of 32.9%.

The median income in *Community Area 6* is **£20,996**.

*CACI Paycheck 2020*

### Claimant Count

The number of people claiming Job Seeker's Allowance rose as expected in 2020, now coming back down to pre-pandemic levels.



*Source: ONS*

The majority of residents in Community Area 6 are economically active.<sup>1</sup> The most recent Local Authority data shows that this is less than the figures for Carmarthenshire (71.8%) and Wales as a whole (76%).<sup>2</sup>

<b>Economically Active</b>	<b>13,191</b>	<b>63.8%</b>
<b>Economically Inactive</b>	<b>7,476</b>	<b>36.2%</b>

*Source: 1 - Census 2011, 2 - ONS Annual Population Survey*

Wholesale and retail is the largest sector of employment in Community Area 1, this echoes the picture across Carmarthenshire and Wales. The top five areas of employment are in the following industries:

<b>Wholesale &amp; Retail</b>	<b>19%</b>
<b>Human, Health &amp; Social Work</b>	<b>16%</b>
<b>Manufacturing</b>	<b>12%</b>
<b>Education</b>	<b>9%</b>
<b>Public Administration &amp; Defence</b>	<b>9%</b>

*Source: Census 2011*

### No Qualifications:

Over a quarter (29.7%) of residents aged 16 and over have no qualifications. (Carmarthenshire 26.8% / Wales 25.9%)<sup>1</sup>. This includes the retired population, the percentage of the working age population in Carmarthenshire with no qualifications is 17.46%.<sup>2</sup>

*Source: 1-Census 2011 2-WIMD 2014*

## Cymraeg

Welsh speaking rates across Community Area 6 are lower than that across the county. This is higher than the national average of 18.7%.

### Welsh Language skills:

	CA 6		Carms	
<b>Can speak Welsh</b>	11,575	24.9%	78,048	43.9%
<b>No skills in Welsh</b>	12,944	58.2%	74,355	41.9%

*Source: Census 2011*

### Survey Responses for Community Area 6

When asked what three things are most valued about in relation to County's vibrant community and thriving Welsh language, we received 65 responses, the highest responses were:

<b>Locally produced food</b>	<b>61% (40)</b>
<b>Heritage / history</b>	<b>44% (29)</b>
<b>Local Festivals/events</b>	<b>38% (25)</b>

*Source: Regional Well-being Survey 2021*

<sup>1</sup>(An average household income of 60% below the GB median income of £33,278 @ 2020)

<sup>2</sup> (Gross household income from all sources including earnings, benefits and investments)

## Health

A Middle Layer Super Output Area ([MSOA](#)) is a geographic area that can vary in size because they are intended to have roughly equal amounts of people – on average 7500 residents or 4000 households.

The below table shows the rates for the Health domains at MSOA level for Community Area 5. This area consists of the below geographies:

**MSOA 022** – Lliedi

**MSOA 023** – Elli and Hengoed

**MSOA 024** – Bigyn

**MSOA 026** – Glanymor and Tyisha

As can be seen from the table, MSOA 023 has the highest for low birth weight and children aged 4-5 who are obese. MSOA 024 has highest rate for cancer incidence and MSOA 026 has highest rates for GP recorded chronic condition, Limiting long-term illness, Premature death and GP recorded mental health condition.

WIMD 2019 Health Domains	MSOA 022	MSOA 023	MSOA 024	MSOA 026
GP-recorded chronic condition (rate per 100)	14.9	13.7	15.6	<b>17.2</b>
Limiting long-term illness (rate per 100)	24.3	23.7	26.5	<b>29.3</b>
Premature death (rate per 100,000)	482.1	348.8	488	<b>530</b>
GP-recorded mental health condition (rate per 100)	22.9	21.1	23.6	<b>24.7</b>
Cancer incidence (rate per 100,000)	618	594.4	<b>643.3</b>	631.2
Low birth weight (live single births less than 2.5kg) (%)	5.6	<b>6.4</b>	5.4	6.3
Children aged 4-5 who are obese (%)	11.3	<b>18.9</b>	16.2	18.1

*Red and bold indicate the highest figures per category.*



## Community Well-being

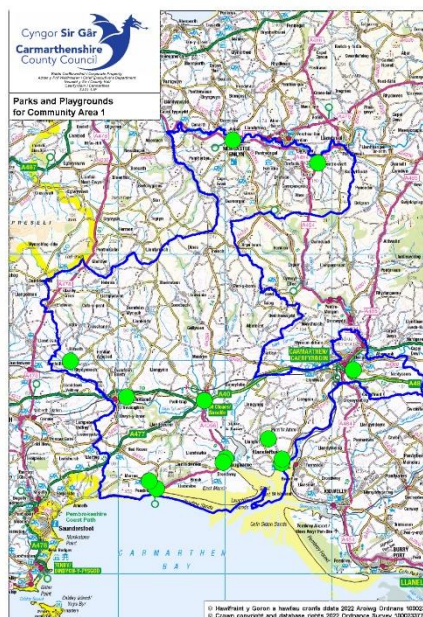


In Community Area 6 there is 1 library and 12 parks and playgrounds. They are distributed across the areas with highest populations.

	CA6	Carms
Parks	12	139
Libraries	1	16

Source: CCC

The number of parks and playgrounds is the lowest in Carmarthenshire. The number of libraries is also the lowest in the county.



## Survey Responses for Community Area 6

When asked what three things are most valued about their local environment, we received 65 responses, these were the highest responses:

Access to nature and green spaces	66% (43)
Beaches	55% (36)
Clean Air	41% (27)

When asked what three things are most valued about the community that they lived in, we received 64 responses, the highest responses were:

Feeling safe in my community	64% (41)
People in my local area treating each other with respect	61% (39)
Feeling safe at home	59% (38)

Source: Regional Well-being Survey 2021

## Safety

There were **3,610** recorded crime instances in this Community area during 2020/21 with 1,616 (45%) of these being violence against the person, followed by 464 Theft offences and 412 Arson & criminal damage instances.

Source: Crime Volumes 2020-21 Dyfed Powys Police

30% of crimes provided by DPP in Carmarthenshire in 2020-21 took place in community area 6. The majority of these crimes were Violence Against the Person, accounting for 45% of recorded crimes.

Source: Crime Volumes 2020-21 Dyfed Powys Police

## Survey Responses for Community Area 6

When asked what three things are most valued about living in a society which strives to be equal for all, we received 64 responses, the highest responses were:

Having the same rights as others who be me of different age, sex, gender, race, background, belief and whom may/may not be disabled	48% (31)
What I choose to do not being determined by my age, sex, gender, race, background, belief and whether I am/am not disabled	45% (29)
Being accepted for who I am	37% (24)

When asked what three things are most valued for a prosperous community, we received 138 responses, we received 65 responses, the highest responses were:

A stable income	46% (30)
Good transport network meets the needs of rural non-rural areas	38% (25)
Greener economy & Affordable housing	35% (23)

Source: Regional Well-being Survey 2021

# Carmarthenshire

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## Case Studies

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## Case study: Safe and Well Visits

### Background:

Mid and West Wales Fire and Rescue Service have carried out visits to people's homes for over 15 years and have now developed it to do more than look at fire risk within the property, which is why they are now called Safe and Well (SAW) visits rather than home fire safety checks.

In addition to fire safety information, staff will identify and provide guidance and signposting on the following areas

- Smoking cessation
- Home security
- Scamming
- Loneliness and isolation
- Falls
- Winter warmth / fuel poverty
- Living with dementia (see other case study)

These topics are in addition to other statutory duties to identify and report safeguarding issues and to ask and act on signs of Violence Against Women, Domestic Abuse and Sexual Violence (VAWDASV).

### Work undertaken:

As part of the expansion, all our staff have been trained to deliver messages and signposting to people on the above topics. Partnerships have been established with organisations who can provide additional support for those identified to need help.

This has been happening since 2017 although it has been evolving and changing right up to what it is today.

### Benefits:

The SAW visits are built on the principles of 'Making Every Contact Count' so that one agency can provide multiple safety messages or additional support as soon as it is identified. It ensures that safety messages and signposting are delivered promptly and saves another agency from having to attend a property to deliver their own safety messages.

### Lessons/Best Practice:

- It has allowed staff to deliver a better level of service to people they meet.
- It increases staff awareness of issues that need to be identified outside of the fire safety arena.
- It encourages closer working with partner agencies so that staff deliver accurate and up to date information.
- It opens additional referral routes for staff when they identify issues.

## Case study – The Early Years Integration Team

### Background:

The Early Years Integration Team was created in 2020 in response to the Welsh Government Early Years Transformation Programme. It is a joint project between Hywel Dda UHB and Carmarthenshire County Council, based in the rural Gwendraeth Valley.

The team aims to:

- Support parents to give their children the best start in life.
- Strengthen the community by supporting families to be confident and able to access support when wanted or needed.
- Create family support opportunities by identifying gaps then devising groups, activities, or one-to-one support at home
- Work in partnership with health, local authority, third sector and voluntary services
- Reduce health inequalities
- Support and enhance local Health Visiting and Midwifery services
- Devise and test new ways of supporting families
- Build resilience in families

### What parents say:

"Before we contacted you we were exhausted, fed up, miserable, we were arguing constantly. We didn't know how to make our daughter sleep in her bed or stop the awful tantrums. You came and gave us very simple instructions to master bedtime. Now we are getting time together as a couple and having tantrum free days because everyone is rested. We can't thank you enough."

"The best thing I ever did was call, we were in a dark place before we saw the leaflet come through the door. You have been helpful, and we are over the moon. Thank you."

"I think that you coming to the house has helped me realise that the boys are very small and that they don't know how to express themselves, so they get angry and frustrated. I try better to understand what they're trying to say and that has made things much easier."

"Since starting Amser Canu he has started to sing and remember entire songs by himself, unprompted!"



“I was very alone because of covid. I couldn’t see my family for help, but you came and helped me understand about his development and I am now more patient.

“We always had a chat at the beginning and end, it was lovely just to see new mums.”

### Lessons:

- Parents want support but do not always know how to access it
- Information and accessible support facilitate resilience in families
- Health staff are essential to working collaboratively across health, third sector, local authority and voluntary agencies
- Informing parents means informing universal health services so that they can effectively signpost or refer families
- Partnership working is a cost-effective way to support families
- Communication is key
- Professional relationships must be proactively constructed and maintained for effective partnership working.

# Case study: Coping with an Unprecedented Demand for Wellbeing Support

## Background:

Prior to the pandemic, the learner Wellbeing Support services at Coleg Sir Gar were operating at full capacity, offering mental health and general wellbeing support via mentoring and counselling services. On average, four hundred students per academic year received these services, mostly on a first come first served basis.

During the first period of lockdown the demands on these services escalated sharply,

## Work undertaken:

A triage support system was introduced to cope with the increase, with a new referral and assessment process. All learners referred into the system were contacted and supported in some capacity, not held on a waiting list.

The learning support team created an 'at-risk' register and prioritised these learners for support. These were identified by known risk of self-harm, unsafe behaviours, substance misuse, unhealthy relationships, homelessness or unstable home environments.

As well as the traditional 1:1 support offered, new services were introduced such as group work, regular text communication service, recommended online resources and live online workshops, covering relevant topics including anxiety, resilience and coping with lockdown.

Emphasis was also placed on engaging learners in non-academic activity. Social groups were encouraged where students could get together in a relaxed online environment. This continued post-lockdown and is run 'face to face' (restrictions allowing).

## Benefits:

The new approach enabled significantly higher numbers of learners to engage with the services. By June 2020, over 1000 learners had engaged with these options.

The new triaging approach has helped reduce delays and minimise waiting lists. In addition, the clear prioritisation of 'at-risk' learners has resulted in an average of 88% of this cohort of learners being supported intensively on a weekly basis.

The new process has further standardised and professionalised the ‘triage process’. In addition, a trained assessment officer with a clinical background has been recruited into the team.

### Lessons/Best Practice:

Record numbers of students continue to be supported, and each are assessed three times per academic year to gauge their progress. This also ensures that the support teams allocate the right support at the right time. Links with other partners such as schools, social services and local authorities have also improved.

This new process was recognised by Estyn, the inspection body for quality and standards in education and training in Wales, as best practice. It featured in their thematic report, ‘The work of further education, work-based learning and adult learning in the community providers during the COVID-19 pandemic’ in March 2021.

## Case study: Momentum Course

### Background:

Mid and West Wales Fire and Rescue Service has been fortunate to receive additional funding from Welsh Government to run courses aimed at supporting people who have been subject to domestic abuse. The funding currently allows us to run one course a year and for the first time, the course has been run in Carmarthenshire - in Carmarthen in January / February 2022.

### Work undertaken:

The Momentum course is aimed at families who have experienced domestic abuse. The aim of the course is to provide the whole family with 2 hours per week over 6 weeks of activities designed to boost their self-confidence, self-esteem and in the process share their experiences and learn from each other. The course is facilitated by MAWWFRS staff and volunteers and has activities for both the mums and children of all ages and activities and creche facilities are provided to allow the mums to take a full part in their own activities without worrying where their children are. Food is also provided for all attendees.

Activities have included: -

- Stained glass workshop
- Pamper evening
- Ladder climbing / Fire service related activities
- Visit by FRS search and rescue dog
- Cake decorating
- Candle making
- Jewellery making

### Benefits:

We have found the benefits to be wide ranging. From additional disclosures from all family members as they feel that they are in a safe space through to seeing all family members grow in confidence as they achieve success. For some it is the feeling of security and a meal for all the family at least once a week. Following one of the courses

run in a different county the participants set up a What's app group and continue to meet regularly.

### Lessons/Best Practice:

- The need for creche facilities is a must if the mums are to be able to take full part in the activities.
- Having trained staff available who can deal with any additional disclosures (parents and children) and be able to link the person into additional services.
- Understanding that people will be at different stages of their journey out of domestic abuse, and that some will talk openly about their experiences whilst others will not – either is fine.
- Being clear that it is not a counselling or therapy service. It is an activity-based course where they can get a chance to do something different.

## Case study: Safer Streets

### Background:

Multi-agency work was enhanced in 2020 to address crime and disorder issues in Tyisha, as part of the ambitious collaborative 'Transforming Tyisha' project to regenerate the area through increasing community safety, developing housing and community facilities and improving the environment. This followed engagement with the local community to identify residents' key concerns and issues.

### Work undertaken:

Funding has provided staffing resources to address specific problems, environmental improvements and provide crime prevention equipment. This includes Home Office 'Safer Streets' funding, secured by the Police and Crime Commissioner, working with partners including the County and Town Councils. The aim is to make residents feel safer and reduce acquisitive crime in Glanymor, Tyisha and Elli.

These areas have a high proportion of acquisitive crime, including house/shed burglary, theft, robbery, bike and vehicle theft and vehicle crime.

An Environmental Visual Audit made recommendations relating to the structure, surveillance, maintenance and physical improvements to deter crime. From this, Neighbourhood Policing Teams (NPT) worked collaboratively with partners to deliver a high visibility campaign offering Crime Reduction Kits to all homes. These included marking valuable items with DNA making it identifiable to the specific address and owner. Door locks, outdoor sensor lighting and gate/shed locks were also provided. Vulnerable residents were referred to specialist Crime Prevention Officers for additional support and advice.

Community Wardens have been employed on the Carmarthenshire County Council's Transforming Tyisha project, using County Council and Safer Streets funding. This role has helped to provide crime prevention, use tools to combat anti-social behaviour and restore safety and reassurance to the community. The officers have had a successful Closure Order for a serious anti-social behaviour case, fixed penalty notices for fly tipping and reinvigorated local Neighbourhood Watch schemes.

## Benefits:

Engagement with local communities has helped reassure local communities about public safety, tackle crime and protect residents by reducing opportunities to become victims of crime. This has included offering crime prevention advice and safeguarding equipment.

It also enabled the police to gather intelligence to better understand local residents' concerns and issues. This has then informed the work of the police in targeting resources and problem solving.

Far more collaborative working has progressed with partners including Dyed Drug and Alcohol Service and the Fire and Rescue.

Crime prevention kits were provided to over 800 properties.

## Lessons/Best Practice:

Approximately 400 properties declined the crime prevention kits. It is also known that many of the property marking kits have not been used.

NPT officers have now received additional training for better delivery which will be of benefit when further areas are ready to receive the kits.



## Case study: Vaccine Equity in Hywel Dda

### Background:

Equity in immunisation reduces the risk of vaccine preventable diseases among vulnerable individuals and communities who are at a higher risk of poor health outcomes from contracting the disease. Reducing inequity in immunisation is an important part in supporting communities to achieve their full health potential regardless of geography, demographic, social or economic status

The coronavirus pandemic has highlighted a gap in the uptake of the COVID-19 vaccine especially in those groups that have been disproportionately affected by the pandemic, for example, those from ethnic minority backgrounds and those at socio-economic disadvantage living in communities with high deprivation or social exclusion including the homeless, those with mental ill health and those from traveller communities.

The reasons for this inequity are multifaceted, however, understanding the root causes and developing targeted services to meet the needs of those that are unvaccinated or under-vaccinated is a fundamental part of the work delivered by the Hywel Dda multiagency Vaccine Equity Group.

### Work undertaken:

- Employed Community Outreach Workers to engage with minority communities on health and social issues through building trust and raising awareness of the services available to them.
- Use the Mobile Vaccination Vehicle (MVV) to run pop-up vaccine clinics in areas of socio-economic deprivation, traveller sites, rural communities and at colleges/universities and workplaces.
- Sharing links to FAQs and information on the vaccine in Easy-Read, languages other than Welsh or English, BSL videos and information produced by homeless and learning disability groups
- Providing direct translation and interpretation support
- Targeted project to reach unpaid carers.
- Adapted delivery model at Mass Vaccination Centres to allow certain groups to access the centre at specific times so that additional support could be provided. This included providing additional support to pregnant women who could directly access the duty Midwife.

## Benefits:

- Increase in uptake of COVID-19 vaccine in target groups
- Early set up of the equity group with multiple agencies and organisations in attendance was a significant step in improving and ensuring implementation of the vaccine equity agenda.
- Partnership working through the MVV has been extremely beneficial and successful and will be used for future campaigns.
- Provision of timely information and data
- On-line meetings have meant that people are able to join for an hour on a regular basis which has improved representation from across different target groups. This has enabled better sharing of information, a greater ability to discuss problems, compare experiences and provide solutions. Those in the group gained confidence in talking to others about the vaccine and dispelling misinformation.

## Lessons/Best Practice:

The relationships built within the Vaccine Equity Group will have benefits in other areas too especially in establishing a process and pathway for future collaboration. This group will be used to ensure equitable access to the COVID-19 booster and will also support the influenza vaccination programme. It also has the potential to be a very useful forum for discussing and improving access to other health care services in future.

## Case study: Use of Volunteers

### Background:

New volunteering roles have been introduced by the Mid and West Wales Fire and Rescue Service to respond to the pandemic - Vaccination roll out volunteer / Safe and well check volunteer

### Work undertaken:

Ten volunteers have supported the pop-up vaccination units which MAWWFRS provided to Hywel Dda. Our volunteers, as well as two of our engagement vehicles, were utilised by the Health Board to reach people in these communities that could not make it to the vaccination centres. One engagement vehicle was used as an area to administer the vaccination, while the other was used for people to sit in and wait for their vaccination.

Our volunteers engaged with members of the public to ensure they knew where to go, checked on their well-being and provided them with fire safety advice, offering them a safe and well check. These volunteers worked alongside ten Fire and Rescue Service staff.

In order to backfill the roles of some of the Fire and Rescue staff who were helping with the vaccination rollout, we also had 3 volunteers help our community safety team in the community carrying out safe and well checks. They have provided members of the public with safety advice and fitted alarms with our personnel.

This support has been provided by volunteers from 1 July 2021 to the present day.

### Benefits:

The benefits for the volunteer have been to be part of the team or as we say “our fire family”. They have gained experience and confidence with engaging with a varied audience and have made connections with partner agencies.

The benefits to us as a service have been that we have been able to support Hywel Dda Health Board with less resources, freeing up other members of staff to carry out their normal duties. The volunteers have enabled our personnel to carry out checks in two's, helping with lone working. Our volunteers have also signposted us to their networks to help more people in our community who would benefit from a safe and well check.

### Lessons/Best Practice:

It has shown how beneficial volunteering can be for all involved and from this trial in Carmarthen we will be expanding this in 2022 to all divisions. The enhanced partnership working has identified further opportunities to assist with the vaccination programme going forward.

We are considering the increased use of volunteers in our service in the future.

## Case study: Dementia Support – Herbert Protocol / Message in a bottle

### Background:

Mid and West Wales Fire and Rescue Service (MAWWFRS) has identified that our staff provide home safety visits to many elderly people who are living with dementia and wanted to support them and their families to live better lives.

### Work undertaken:

For the last four years, MAWWFRS has worked in partnership with the Lions club to make use of their ‘message in a bottle’ scheme encouraging people to keep personal and medical details in their fridge for emergency services to find if needed. Staff will set it up where they find a need.

We have also combined this with the Police ‘Herbert Protocol’ for people living with dementia. The Herbert protocol is a questionnaire that can be completed by the FRS with the person living with dementia and their family or support worker / carer. It is also placed in the fridge and identifies any locations that the person may have historical links with as well as a description, a recent photograph and other pieces of information that may be of use to the police should they be called upon to search for the person living with dementia if they leave the property.

Completing the Herbert protocol allows the police to gather essential information to inform the search in a timely manner without having to overly question distressed family members who may be upset. It is particularly useful if the partner is also showing signs of short-term memory loss.

Emergency services are therefore able to easily access the information without having to rely on the distressed family members from finding where they may have placed the completed forms.

### Benefits:

It allows police to carry out a more targeted search for the missing person and the Herbert protocol has been proven to significantly reduce the time a person is missing and therefore reduces the scale of any associated health issues such as hypothermia.

### Lessons/Best Practice:

Completing the forms with the family, carers etc in a safe and comfortable way ensures that the information can be accurately gathered and provided reassurance to the family that any searches for the person living with dementia will be more successful.



# **CEREDIGION** **ASSESSMENT OF** **LOCAL WELL-BEING**

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**Ceredigion Public Services Board**

**2022**





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**Status:** Final

**Approved by PSB:** 07/03/2022

**Publication date:** 30/04/2022

*(Front cover has been designed using resources from Freepik.com)*

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# INTRODUCTION

All Public Services Boards (PSBs) are required to produce an Assessment of Local Well-being once every five years under the Well-being of Future Generations (Wales) Act 2015. This is the second Assessment produced by the Ceredigion PSB since the introduction of the Act. Its purpose is to gain a comprehensive picture of the state of well-being of Ceredigion's local people and communities, considered across the four pillars of well-being - economic, environmental, social and cultural factors. This includes identifying the assets, challenges and opportunities that Ceredigion's citizens face.

The Assessment is informed by data, research and evidence gathering, from listening to people and stakeholders, and through consideration of future trends and the things which we can realistically project might happen tomorrow which we need to start planning for today. The Assessment is used as the evidence base for the Local Well-being Plan, and as such is an important document for the Ceredigion PSB in determining what it will do over the next 5 years to improve the well-being of people and communities in the county.

The Local Well-being Plan will set out how we will improve the well-being of Ceredigion and its communities against seven national well-being goals over the next 5 years. PSB's are required to set these objectives in a way that accords with the sustainable development principle. Therefore, producing a robust and accurate assessment of well-being, which places the residents of Ceredigion at the forefront, is critical.

Like the first round of Assessments in 2017, the Assessment has been produced through a collaborative approach at both a local and regional level, working closely with colleagues in Carmarthenshire and Pembrokeshire PSB's in the planning and preparatory stages to share expertise, avoid duplication and adopt a standardised approach across the region. The regional Public Services Board/Regional Partnership Board Lead Officers Group ("PSB/RPB Network") coordinated this work on behalf of the Public Services Boards in the region.

We reflected on the feedback from the original assessment in 2017, and adjusted our approach slightly. While the overall structure of using the five 'Life-Stages' approach was maintained, we focused on strengthening the interpretation of what the evidence was telling us, analysing the issues identified and projecting ahead to identify possible future trends. The aim of these amendments were to produce an Assessment that reflects the very essence of the Act, i.e. that is comprehensive and truly reflects the situation in Ceredigion with regard to well-being, that is informative in driving the development of the Local Well-being Plan, and will continue to provide insight to all who need to investigate well-being in Ceredigion over the next five years.

Further detail on the approach to the Assessment and the next steps following its publication, can be found in the 'Methodology' and 'Next Steps' sections.

# WHAT DO WE KNOW ABOUT WELL-BEING IN CEREDIGION?

Our assessment has told us a great deal about the social, economic, cultural and environmental well-being of people and communities in Ceredigion. Here are the key conclusions, both assets and challenges, from each of the five life stages. The conclusions drawn are based on all of the evidence collected during the Assessment, both quantitative and qualitative, and were formed over the course of the data analysis, engagement and writing stages of the Assessment. They are included here to provide a summary of the main findings and themes identified during the Assessment.

## New Beginnings



- The **cost of living** is increasing and there is a strong link between poverty and longer-term health.
- It is essential that mothers are able to access the correct support that they need for their health and mental well-being and can recognise **perinatal mental health conditions**.
- Aberystwyth South is the only area in Ceredigion with a higher percentage of **low birth weights** than the national average.
- **Childhood immunisation** uptake in Ceredigion remains positive, however, further work is required to reach the 95% uptake target, set by the Welsh Government.
- Mothers in Ceredigion are significantly more likely than the national average to **breastfeed** their babies at 10 days following birth, and the rate of those breastfeeding who live in the Flying Start areas of Ceredigion is the highest in Wales.
- Ensuring that parents have **adequate paid leave** for the birth of a child is important for the well-being of both the infant and the parents.
- Low socio-economic status can affect **parental self-esteem**, self-confidence and the quality of parenting. Average incomes in Ceredigion are lower and therefore the cost of raising children is challenging for some parents. Cardigan & Aberporth is the community area with the highest proportion of its population in income deprivation at 19%.
- Flying Start provides **childcare** of the highest quality and has been highly effective in Ceredigion for families in our most deprived areas.
- There is demand for **Childcare provision** in Ceredigion particularly in the north, mid and south areas of the County, particularly Welsh medium.
- Ensuring that **Welsh speakers** pass on the language to the next generation, and that children have opportunities to **socialise in the language of their local area** is beneficial to their well-being and the promotion of the Welsh language.

## Childhood



- **Childhood obesity** has decreased in Ceredigion and the county has the highest proportion of children taking part in sport outside of school across Wales. However, **secondary age children** are less likely to undertake at least three occasions of activity per week, and increasing **participation of females in sport**, particularly since the COVID-19 pandemic, has been recognised as a national issue by Sport Wales.
- **Child poverty** in Ceredigion is higher than average and has seen the second highest increase nationally since



2014/15. In Ceredigion 3,459 children are living in poverty. This is key a **regional issue** affecting Carmarthenshire and Pembrokeshire as well.

- The data available suggest that **in-work poverty** is increasing and remains a key challenge for households, particularly in Aberystwyth North, Cardigan & Aberporth and Aberystwyth South.
- The Ceredigion **education system** is recognised one of the strongest in Wales and one of the County's primary assets. The additional **life-skills of Welsh medium education** are wide-reaching to all aspects of well-being.
- The gap between the **top GCSE results** of pupils from deprived backgrounds and those from non-deprived backgrounds has widened.
- To meet the needs of families, **childcare providers** will need to consider adapting their provision to meet the changing needs and more flexible working patterns in the future.
- Attitudes of children towards **outdoor play** in Ceredigion are positive. The provision of outdoor play areas and encouragement of children to take part in outdoor activities is essential during the short term recovery period from COVID-19.
- Our engagement with younger people highlighted their **desire for more play areas and recreational facilities** in Ceredigion.
- Children feel connected to their **local natural environment** and recognise the importance of protecting the environment for theirs and future generations. **Climate change** was recognised by children as the biggest challenge being faced currently, more than twice as great as any other threat.
- Further research is needed to understand the full impact of the **COVID-19 pandemic** and associated isolation on the **well-being of children** within the different communities of Ceredigion.

## Youth



- Ceredigion has long been an **exporter of its younger population** to other parts of the UK in search of education, career and social opportunities and higher salaries. The impact is more than just economic - it has longer-term implications for culture, language and the demographics of the Welsh heartlands.
- Younger people in Ceredigion identify **connectivity, employment opportunities** and **affordability of housing** as key to making a difference to their future.
- The **student population** is integral to the County's economy, but the number of students has been decreasing since 2014/15.
- The rate of **under 18 conceptions** per 1,000 females in Ceredigion is much lower than the national average, and has been gradually declining since 2014.
- Continuing to upgrade **digital infrastructure** facilities and investment in **public transport** will enable young people to stay connected and improve well-being.
- It is essential that younger people can **access mental health support** and the COVID-19 pandemic has likely exacerbated many mental health issues in young people.
- **Environmental awareness** and concerns over protecting the environment continues to grow amongst our younger population. Young people were most concerned about fly-tipping and the loss of green spaces.
- The top three things that young people wanted to be put in place to **improve the environment**, was for recycling to be made easier, better routes connecting towns/villages and affordable transport.
- Despite the low crime figures in Ceredigion, **feeling safe** features prominently in the well-being survey and stakeholder events. When considering the future, younger people were concerned the most about prejudice and community resources being closed down.
- While there have been concerns that the **Welsh language** is being spoken less outside of educational settings in general daily life, our survey results indicate a **strong connection** to **Welsh language and culture** amongst younger people, and an equally strong desire to actively maintain that for future generations.
- **Housing affordability** remains a key driver in the well-being of future generations in Ceredigion.
- The COVID-19 pandemic has highlighted the way in which younger people have been **disproportionately affected**.



- The mismatch between **jobs and skills** in the County, in sectors where there may be a skills gap or skills shortage will be a key challenge for the local economy.

## Adulthood



### CULTURE

- The number of people attending or participating in **arts, culture or heritage** activities is declining in Ceredigion. Despite the decline in visitor numbers, our Well-being Survey demonstrates that people value the role that arts and culture plays in their lives.
- The decline in **Welsh speakers** presents one of the most significant challenges to the socio-cultural and economic landscape in Ceredigion. Opportunities to learn Welsh or improve existing Welsh skills are essential, as are the ongoing initiatives to promote the use of the Welsh language

### SOCIAL

- Ceredigion residents are the most **satisfied with their local area** as a place to live across Wales. However, just under 1/5th of residents feel that they can **influence decisions**. More needs to be done to work co-productively with communities to ensure their **voices are heard**.
- **Poverty** remains one of the biggest challenges for the County. Low earnings and incomes, affordable childcare, Universal Credit reduction and high housing costs/ housing affordability are the drivers of poverty in Ceredigion.
- **Reducing inequalities** in the County, particularly in the environment, health, housing, transport and educational attainment are important.
- Encouragingly, the number of alleged victims of **emotional and psychological abuse** and **domestic abuse** has decreased in Ceredigion since 2016-17. However, **violence against the person** incidents are increasing.
- **Hate crime** incidents have increased across the Dyfed-Powys region during 2020-21, which may partly explain the decline in perceptions of safety.
- To enable a well-connected Ceredigion, greater **public transport availability**, better **digital connectivity** and shorter distances to **access services** is required. We must ensure that certain groups are not disproportionately affected by these challenges and that the infrastructure can support and adapt to the new ways of working.

### ENVIRONMENTAL

- Access to **nature and green spaces** emerged as the key priority during our engagement with the general public on the environment. Further work is required to encourage and enable people, without a private outdoor space, or through lack of transport or disability to access public green space in their communities.
- The **Climate and Nature Emergencies** combined are the greatest challenges of our time. Rising temperatures, flooding, coastal erosion, ash dieback, increase in ammonia air pollutions and phosphate levels, and biodiversity loss are the key challenges that Ceredigion faces now and in the future. Ynys Las and Borth are particularly at threat from rising sea levels and coastal erosion.
- The declaration of the **Climate Emergency** and **Nature Emergency** is a significant positive step that underlines the urgency with which we must tackle the problem our County and the world faces.
- **Decarbonisation** will be challenging and requires careful consideration as to how its implemented
- **Phosphate pollution** is a critical environmental issue with potentially damaging knock-on economic and social impacts. The current impasse on certain developments creates a fundamental challenge in addressing the County's housing crisis.
- Future policies and land management practices will need to change in order to **mitigate environmental damage** and **support future food security and nutrition**.
- Coastal and fluvial **flooding** and subsequent **coastal erosion** threaten our communities and environment.
- Ceredigion's **air quality is very good**.
- Additional support for first time buyers, better quality and more **affordable housing** and an increase in **better paid jobs** will be required in the future in order to make buying or renting a home more affordable for local

people in Ceredigion.

## HEALTH

- It is likely that the number of **unpaid carers** will increase in the future. Continued recognition of the vital role played by unpaid carers and effective support services to prevent carers from reaching crisis point will be needed.
- **Smoking rates** and **alcohol consumption** in Ceredigion will need to be carefully monitored to ensure that they do not deteriorate long-term following the pandemic.
- The COVID-19 pandemic is likely to have affected the **well-being and mental health** of residents in Ceredigion, who already have the 5th lowest score for mental well-being across Wales.
- The eleven health priority areas outlined in the West Wales **Population Assessment** requires careful consideration.
- Specific adult health priorities of reducing **obesity**, tackling **diabetes** and **long COVID**.
- Better **quality** of, and **access to health care services** was one of the most important things identified by survey respondents to maintain their physical and mental well-being.
- Greater **availability** of, and **access to, affordable leisure services** in Ceredigion was also key to improving the **physical and/or mental well-being** of our survey respondents over the next ten years.

## ECONOMY

- Ceredigion has some of the best business **survival rates** across Wales, the workforce has much **higher than average skills and qualifications**, the **economy has grown** at a faster rate than the Wales average over the last five years.
- Ceredigion's residents have a strong desire to **support local businesses** and **buy local produce**.
- **Renewable energy production** is an important part of the green economy in Ceredigion.
- The key challenges facing the local economy are to attract **new businesses** and **grow existing businesses**, create more and **higher paid job opportunities**, provide **opportunities for younger people to remain in the County**, and **increase average earnings** of the County in comparison to Wales as a whole.
- **Work-life balance** featured prominently in our Well-being Survey. Mental health and well-being support and flexibility of working will need to continue in order to build resilience within the workforce and improve well-being.

## BREXIT & COVID-19

- Brexit, Covid-19 and Climate Change threaten **food security** in Ceredigion with certain groups at greater risk
- Continue to monitor the **impacts of Brexit** to inform Well-being in Ceredigion
- There is a need to monitor the **impacts of the COVID-19** on the economy to support the recovery and provide insight into future trends.

## Older People

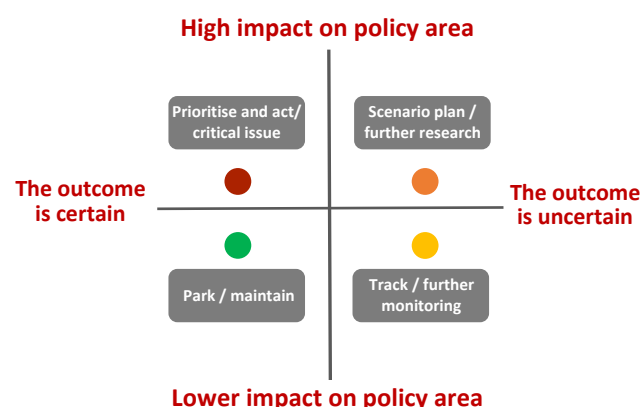


- Creating the conditions for Ceredigion's older residents to use their skills, knowledge and experience to help others in the community and remain **actively engaged in the economy**.
- Our Well-being Survey and stakeholder events highlight that provision of opportunities to **volunteer**, be **active in the local community** and keep in touch with others are all essential in achieving a healthier and cohesive Ceredigion, now and in the future.
- In the future, greater provision of **Housing for Older People**, Housing with Care and Nursing Care is required in the County, in order to meet the needs of the older people's preferences to stay independent and live in their home.
- The cost of **residential and nursing care** is expensive, financial support is provided to those under the £50,000 threshold. Further data is needed at a local level to understand the proportion of self-funders across Ceredigion who would typically pay £33,500 - £37,000 annually.

- The number of people aged 65+ in Ceredigion with **dementia** is expected to increase significantly, which is a key local and regional issue for West Wales as higher levels of support will be needed.
- Ceredigion has an **ageing population**. It is expected that this will put a **significant strain on our public services** (particularly our local health and care service) and on our **local labour market**.
- Not having **access to healthcare** or other support was the single most important thing identified by Ceredigion respondents aged 65+, when looking ahead at how to maintain their physical and mental well-being over the next ten years.
- Buildings without **level access** and lack of **disabled parking** were identified as particular barriers to accessing venues and services by Ceredigion's disabled residents.
- The lack of **adequate public transport** was also high on the list of factors that determines well-being.
- For many, the high costs make it impossible for people to be **cared for in a home**, without financial support. This highlights the specific problem faced by people living in poverty in Ceredigion when needing care.

# WHAT HAVE WE LEARNT FROM THE ASSESSMENT?

We have used the *PSB Futures Impact/Certainty Matrix* to provide an indicative assessment of the main themes identified in the Assessment. The aim is to provide context to the findings by providing an initial assessment based on the core data set and the engagement conducted during the summer of 2021. The matrix assesses the themes according to the level of **priority** and their **certainty** of happening, as defined in the sample to the right.



## Indicative Assessment of Main Themes

Description	Park or Maintain	Track/ Further monitoring	Scenario plan/ Further research	Prioritise/ Critical issue for area
<b>NEW BEGINNINGS</b>				
<b>Cost of living</b> is increasing				●
The need for access to <b>perinatal mental health</b> support			●	
<b>Low birth weights</b> better than average, except in Aberystwyth South	●			
Further work on <b>childhood immunisation</b> uptake is required to reach government target			●	
<b>Breastfeeding rates</b> in Ceredigion are higher than the national average	●			
<b>Adequate paid leave</b> is important for the well-being of both the infant and the parents		●		
<b>Average earnings and incomes</b> are below average				●
<b>Flying Start</b> has been highly effective in Ceredigion for families in our most deprived areas	●			
There is demand for <b>Childcare provision</b> in Ceredigion, particularly Welsh medium		●		
Ensuring children have the opportunities to socialise in the <b>language of their local area</b>			●	
<b>CHILDHOOD</b>				
<b>Childhood obesity</b> decreasing and better than average		●		
Children's <b>mental health</b> following Covid-19				●
Children <b>taking part in sport</b> outside of school is the highest across Wales	●			
Secondary age children are less likely to undertake at least <b>three occasions of activity</b> per week			●	
Participation of <b>females in sport</b> needs increasing			●	
<b>Child poverty</b> higher than average and increasing over the last five years				●

<b>In-work poverty</b> increasing and remains a key issue				●
Ceredigion <b>education system</b> is a primary asset in Ceredigion				●
<b>Welsh medium education</b> is an asset to Ceredigion's pupils	●			
<b>Gap between the top GCSE</b> results of pupils from deprived backgrounds and those from non-deprived backgrounds has widened			●	
<b>Childcare provision</b> will need to adapt to more flexible working patterns in the future			●	
Positive attitudes of children towards <b>outdoor play</b>	●			
Younger people would like more <b>play areas and recreational facilities</b>			●	
Children feel connected to the <b>natural environment</b> and very aware of the need to <b>protect the environment</b>				●
<b>Climate change</b> was identified by children as the single biggest challenge being faced currently				●
<b>Impact of COVID-19</b> on the well-being of children not fully understood			●	

## YOUTH

<b>Outward migration</b> of young people				●
Younger people in Ceredigion identify <b>connectivity, employment opportunities</b> and <b>affordability of housing</b> as key to making a difference to their future				●
The <b>student population</b> of the county has been decreasing since 2014/15			●	
The need to upgrade <b>digital infrastructure</b> facilities and investment in <b>public transport</b> will enable young people to stay connected and improve well-being				●
<b>Under 18 conceptions</b> in Ceredigion is much lower than the national average and decreasing	●			
Young people need access to <b>mental health support</b>		●		
<b>Environmental awareness</b> and concerns over protecting the environment continues to grow				●
Young people were most concerned about <b>fly-tipping</b> and the <b>loss of green spaces</b>				●
The top three things that young people wanted to be put in place to <b>improve the environment</b> , was for recycling to be made easier, better routes connecting towns/villages and affordable transport				●
<b>Feeling safe</b> features prominently in The Well-being Survey and stakeholder events			●	
Younger people are most concerned by <b>Prejudice</b> and <b>Community resources being closed down</b>			●	
There is a <b>strong connection</b> to Welsh <b>language and culture</b> amongst younger people	●			
<b>Housing affordability</b> remains a key driver in the well-being of future generations in Ceredigion				●
Younger people have been <b>disproportionately affected</b> by the COVID-19 pandemic			●	

Mismatch between <b>jobs and skills</b> in the county, in sectors where there may be a shortage will be a key challenge for the local economy				●
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## ADULTHOOD

### CULTURE

Attendance or participating in <b>arts, culture or heritage activities</b> is declining in Ceredigion			●	
Ceredigion residents value the role that <b>arts and culture</b> plays in their lives and well-being	●			
Opportunities to learn Welsh or improve existing Welsh skills are essential, as are the ongoing initiatives to promote the use of the <b>Welsh language</b>				●

### SOCIAL

Ceredigion residents are the most <b>satisfied with their local area</b> as a place to live in Wales	●			
Only 1/5th of residents feel that they can <b>influence decisions</b>			●	
<b>Poverty</b> remains one of the biggest challenges for the county				●
<b>Reducing inequalities</b> in the County, particularly in the environment, health, housing, transport and educational attainment				●
Victims of <b>emotional and psychological abuse and domestic abuse</b> has decreased in Ceredigion				●
<b>Violence against the person</b> incidents are increasing			●	
To enable a <b>well-connected Ceredigion</b> , greater public transport availability, better digital connectivity and shorter distances to access services is required			●	
Preventing the ' <b>digital divide</b> '			●	
Improvements to the <b>transport network</b> are needed and work towards the three priorities in the Wales Transport Strategy 2021			●	

### ENVIRONMENTAL

The <b>Climate and Nature Emergencies</b> combined are the greatest challenges of our time.				●
The declaration of the <b>Climate Emergency and Nature Emergency</b> is a significant positive step in tackling the problem	●			
<b>Decarbonisation</b> will be challenging and requires careful consideration as to how its implemented				●
The exceeded <b>phosphate pollution</b> limits in parts of the River Teifi is a major environmental concern and will have a significant impact on housing developments across the county				●
Future policies and land management practices will need to change in order to <b>mitigate environmental damages</b> and <b>support future food security</b> and <b>nutrition</b>				●
Coastal and fluvial <b>flooding</b> and subsequent <b>coastal erosion</b> threaten our communities and environment				●
Ceredigion's <b>air quality</b> is very good	●			
Additional support for first time buyers, better quality housing and more affordable <b>housing</b> are needed				●

HEALTH				
The number of <b>unpaid carers</b> will likely increase in the future and will require support			●	
<b>Smoking rates</b> and <b>alcohol consumption</b> in Ceredigion will need to be carefully monitored to ensure that they do not deteriorate long-term following the COVID-19 pandemic		●		
The COVID-19 pandemic is likely to have affected the well-being and <b>mental health</b> of residents in Ceredigion			●	
The eleven health priority areas outlined in the West Wales <b>Population Assessment</b> requires careful consideration				●
Specific adult health priorities of reducing <b>obesity</b> , tackling <b>diabetes</b> and <b>long COVID</b>				●
Better <b>quality</b> of, and <b>access to health care services</b> was one of the most important things identified by survey respondents to maintain their physical and mental well-being				●
Greater <b>availability</b> of, and <b>access to, affordable leisure services</b> in Ceredigion was key to improving the physical and mental well-being of our survey respondents			●	
ECONOMY				
Ceredigion has some of the best business <b>survival rates</b> across Wales, the workforce has much <b>higher than average skills and qualifications</b> , the <b>economy has grown</b> at a faster rate than the Wales average over the last five years	●			
Ceredigion's residents have a strong desire to <b>support local businesses</b> and <b>buy local produce</b>	●			
<b>Renewable energy production</b> is an important part of the green economy in Ceredigion	●			
The key challenges facing the local economy are to attract <b>new businesses</b> and <b>grow existing businesses</b> , create more and <b>higher paid job opportunities</b> , provide <b>opportunities for younger people to remain in the county</b> , and <b>increase average earnings</b> of the County in comparison to Wales as a whole				●
The need for greater <b>work-life balance</b> and <b>flexible working</b> in the future		●		
BREXIT & COVID-19				
Brexit, Covid-19 and Climate Change threaten <b>food security</b> in Ceredigion with certain groups at greater risk			●	
Continue to monitor the <b>impacts of Brexit</b> to inform Well-being in Ceredigion				●
There is a need to monitor the <b>impacts of the COVID-19</b> on the economy to support the recovery and provide insight into future trends.		●		
OLDER PEOPLE				
Opportunities for older residents to remain <b>actively engaged in the economy</b>			●	
Opportunities to volunteer and be <b>active in the local community</b>			●	



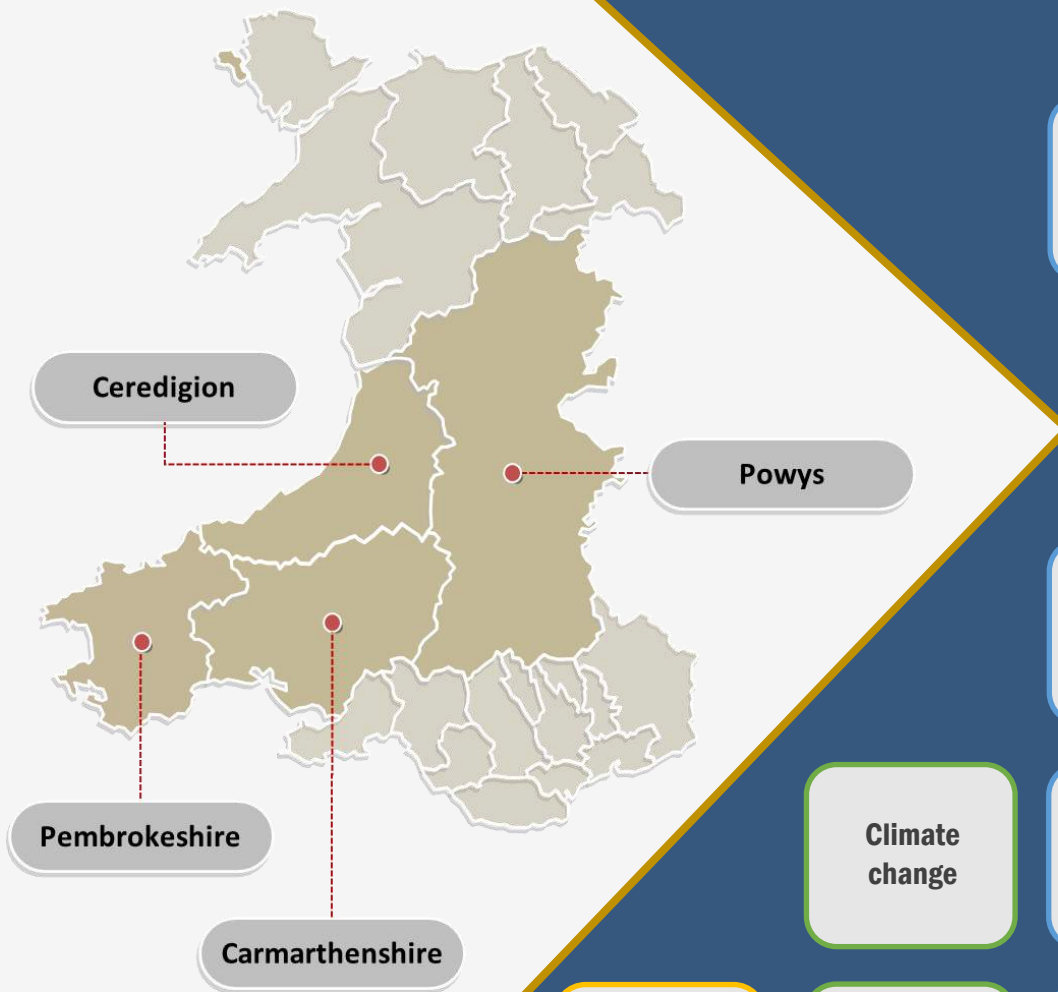
A higher level of provision will be needed in <b>Housing for Older People</b> , Housing with Care and Nursing Care in the county				
The <b>cost of residential and nursing care</b> is expensive				
<b>Increase in dementia</b> in Ceredigion				
<b>Access to healthcare or other support</b> was the single most important thing identified by older people to maintain their physical and mental well-being over the next ten years				
Buildings without <b>level access</b> and lack of <b>disabled parking</b> were identified as particular barriers to accessing venues and services by Ceredigion’s disabled residents				
The lack of adequate <b>public transport</b> was also high on the list of factors that determines well-being for many disabled people.				
For many, the high costs make it impossible for people to be <b>cared for in a home</b> , without financial support				
Ceredigion’s <b>ageing population</b> will place a significant strain on our <b>local health service</b> and on our <b>local labour market</b>				

# KEY REGIONAL WELL-BEING THEMES

The collaborative work we have undertaken during the production of this assessment with regional partners has given rise to a number of cross-boundary or regional issues affecting the whole of the West Wales or Mid-Wales Regions. Ceredigion has regional partners in both **West** and **Mid Wales** - Carmarthenshire and Pembrokeshire in the West and Powys in the Mid Wales region.

The Regional Data Group, responsible for the analysis and writing of this round of assessments, has identified the following key regional themes based on the data available, the results of the regional well-being survey and the findings of the stakeholder events conducted during the summer of 2021. The aim is to help clarify the collective challenges we face now and in the future.

## The West Wales and Mid Wales Regions



Population Change

Poverty and In-Work Poverty

Increase in Child Poverty

Affordable Housing

Lower than average earnings

Climate change

Increase in Dementia

Rising living costs

Decrease in participation in arts, culture or heritage activities

Loss of biodiversity

Increased demand and strain on local health services

Affordable & Accessible Childcare

Opportunities to use, and promotion of, Welsh Language

Renewable energy capacity

Cultural Well-being

Environmental Well-being

Social Well-being

Economic Well-being

# FUTURE TRENDS AFFECTING CEREDIGION

The Well-being of Future Generations Act (2015) requires us to look at the longer term trends in well-being that will affect future generations in Ceredigion. Throughout this Assessment we have described both the recent trends and suggest how possible future trends may look based on the intelligence available to us currently. The following lists some of the more certain and quantifiable trends particularly relevant to Ceredigion, all of which align with the national drivers of change or 'megatrends' identified in the Future Trends Wales Report 2021.

The overall population of Ceredigion is projected to decrease over the next 25 years, including a continuation of trends that have seen the working age population decrease and the outward migration of young people to other parts of Wales and the UK. At the same time the population is ageing. The impacts of these changes will be far reaching, affecting the economic, social, environmental and cultural well-being of the county. For example, affecting the ability of the workforce to meet the skills demands of the local economy, and in protecting the strong cultural traditions of the County.

Climate change remains the most critical challenge of our time and for future generations. This Assessment shows the value that local people place on their local environment and the crucial role it plays in their well-being, but coordinated action needs to be taken now to protect the environment and mitigate the impacts on both the environment and the biodiversity around us.

Working patterns are changing and have been brought to the fore during COVID-19. There is a need for more flexible working to support the existing workforce and to help others into the workforce in the future, such as flexible hours, locations of work and greater flexibility around childcare. We know the value of being in-work and its impact on well-being, and these trends may point to ways of creating employment opportunities and fill skills gaps identified in the local economy.

Our reliance on digital communications continues to grow particularly following the COVID-19 pandemic, and these trends are set to continue. This Assessment demonstrates the importance of fast and reliable broadband and mobile services for businesses, communities and individuals alike. Improving digital connectivity in Ceredigion will be essential to provide the infrastructure required for the future.

There is a strong connection with language and culture in Ceredigion and the provision of opportunities for people to learn and improve their Welsh language skills will be essential to expanding it for future generations.

**POPULATION  
CHANGE**

**CLIMATE  
CHANGE**

**FUTURE OF  
WORK**

**DIGITAL  
CONNECTIVITY**

**LANGUAGE &  
CULTURE**



*Ceredigion*

## LINKS TO THE NATIONAL DRIVERS OF CHANGE OR 'MEGATRENDS'

- **Population change and language & culture** ► 'People and populations'
- **Future of work** ► 'Inequalities and opportunities'
- **Climate change** ► 'Planetary health and limits'
- **Digital connectivity** ► 'Technology evolution'



# BACKGROUND



# Background

*In this chapter: The Well-being of Future Generations Act, The Public Services Board, The Sustainable Development Principle, The Five Ways of Working, About the Assessment of Local Well-being, Approach to the Assessment of Local Well-being*

## 1.1 The Well-being of Future Generations (Wales) Act 2015

The Well-being of Future Generations (Wales) Act 2015 (WFG Act) requires each Public Services Board (PSB) to prepare and publish an Assessment of the state of economic, social, environmental, and cultural well-being in its area no later than a year before it publishes its Local Well-being Plan. The Act identifies seven well-being goals which provide the vision and ambitions for the Wales We Want for today and in the future, and recognises the importance of collaboration between bodies in achieving them (Figure 1.1).

Figure 1.1: The Seven National Well-being Goals



Source: Welsh Government

- A PROSPEROUS WALES**  
An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.
- A RESILIENT WALES**  
A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).

- **A HEALTHIER WALES** —————  
A society in which people’s physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
- **A MORE EQUAL WALES** —————  
A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).
- **A WALES OF COHESIVE COMMUNITIES** —————  
Attractive, viable, safe and well-connected communities.
- **A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE** —————  
A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.
- **A GLOBALLY RESPONSIBLE WALES** —————  
A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

## 1.2 The Public Services Board

The Act established Public Services Boards (PSBs) in each local authority area. The purpose of the PSB is to improve the economic, social, environmental and cultural well-being of the area by contributing to the achievement of the national well-being goals. The Ceredigion PSB is comprised of senior representatives from the following organisations who have worked together to develop this assessment and improve our understanding of our communities:

### STATUTORY MEMBER ORGANISATIONS

- Ceredigion County Council
- Natural Resources Wales
- Hywel Dda University Health Board
- Mid and West Wales Fire & Rescue Service

### INVITED PARTICIPANT ORGANISATIONS

- Welsh Government
- Dyfed Powys Police & Crime Commissioner
- Dyfed Powys Probation Service
- Public Health Wales
- Aberystwyth University
- Coleg Ceredigion
- One Voice Wales
- Dyfed Powys Police
- Wales Community Rehabilitation Company
- Department for Work and Pensions
- University of Wales Trinity St David
- National Library of Wales
- Ceredigion Association of Voluntary Organisations

## 1.3 The Sustainable Development Principle

In Wales, sustainable development is the central organising principle that shapes what it does and how it works. The Well-being of Future Generations Act (Wales) 2015 places a duty on the PSB to utilise the sustainable development principle in planning and delivery of the well-being objectives. This means that the body must strive to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.



Sustainable development can mean different things to different people. Welsh Government defines sustainable development as:

*“The process of improving the economic, social, environmental and cultural well-being of Wales by taking action in accordance with the sustainable development principle, aimed at achieving the well-being goals”*

- Well-being of Future Generations Act (Wales) 2015, Section 2

The Well-being of Future Generations (Wales) Act 2015 was published just ahead of the United Nations Sustainable Development Goals (SDGs) which 196 countries are signed up to deliver by 2030. These 17 goals address the global challenges we face, including poverty, inequality, climate change, environmental degradation, peace and justice. The Well-being of Future Generations (Wales) Act 2015 is one of the most comprehensive pieces of legislation promising to deliver the SDGs. It articulates and translates the 17 SDGs into the 7 National Well-being Goals for Wales. Therefore, the statutory role of the PSB’s in delivering the Assessments of Local Well-being and Local Well-being Plans in accordance with the sustainable development principle is important on a local, national, and international scale.

**Figure 1.2: The relationship between the United Nations Sustainable Development Goals (SDGs) and the Well-being of Future Generations (Wales) Act 2015 National Well-being Goals**



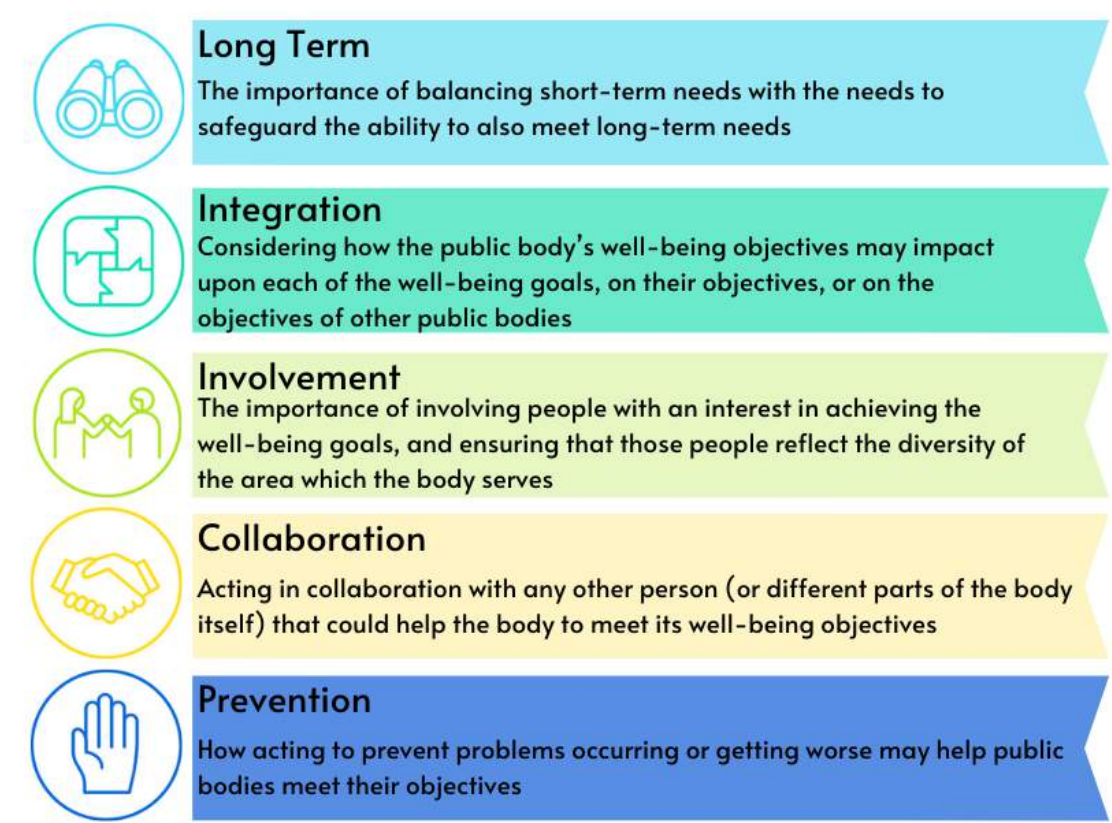
Source: Adapted from Public Health Wales (2019)



### 1.4 The Five Ways of Working

To help us to apply the sustainable development principle to our planning and decision-making, the WFG Act requires public bodies to evidence the “Five Ways of Working”, displayed in Figure 1.3. These ways of working, help us to work better together as one public service in order to address the challenges we face as a county, whether it is to reduce poverty, improve inequality, create a low carbon economy or contribute to viable, safe and well-connected communities.

Figure 1.3: The Five Ways of Working under the Well-being of Future Generations Act (Wales) 2015



Source: Future Generations Commissioner for Wales

### 1.5 About the Assessment of Local Well-being

Ceredigion Public Services Board has produced this Assessment of Local Well-being. The purpose of the Assessment is to gain a comprehensive picture of the state of well-being of Ceredigion’s local people and communities, now and for the future. The Assessment seeks to capture a broad spectrum of economic, social, environmental and cultural factors that affect people’s daily lives. This includes identifying the strengths, assets, challenges and opportunities that Ceredigion’s citizens face.

The purpose of this Assessment is to be used as the evidence-base to set the objectives in the Local Well-being Plan. The Plan will set out how we will improve the well-being of Ceredigion and its communities against seven national well-being goals over the next 5 years. PSB’s are required to set these objectives in a way that accords with the sustainable development principle. Therefore, producing a robust and accurate assessment of well-being, which places the residents of Ceredigion at the forefront, is critical. Figure 1.4 displays the PSB’s planning cycle under the WFG Act (2015).

Figure 1.4: The Well-being of Future Generations (Wales) Act 2015 Planning Cycle



Source: Ceredigion Public Services Board

1.6 Approach to the Assessment of Local Well-being

Like the first round of Assessments in 2017, the 2022 Assessment has been produced through a collaborative approach at both a local and regional level, working closely with colleagues in Carmarthenshire and Pembrokeshire PSB’s in the planning and preparatory stages to share expertise avoid duplication and adopt a standardised approach across the region. The regional Public Services Board/Regional Partnership Board Lead Officers Group (“PSB/RPB Network”) coordinated this work on behalf of the Public Services Boards in the region.

Production of the Assessment was split into four main phases – Preparation, Data Analysis, Engagement and Writing, outlined in Table 1.1. Overall, the work in producing the Assessment was coordinated and monitored by the PSB/RPB Network, which consists of the PSB Partnership Lead Officers across the region, along with representatives from Hywel Dda University Health Board and the West Wales Care Partnership.

The PSB/RPB Network set up a series of sub-groups to support each phase of the Assessment by bringing together the relevant officers responsible to share insight and skills. The membership of the sub-groups differed depending on the phase being undertaken, although there was some overlap between them. From August 2021, the Regional Well-being Coordinator chaired the three sub-groups and coordinated the

production of each phase across the region, with the overall aim of producing the draft Assessments by November 2021 and the Final Assessments by March 2022.

**Table 1.1: The Four Phases of Production of the Assessment of Local Well-being**

Date	Phase	Supporting Group	Membership of the Group
<b>March – May 2021</b>	<b>Preparation</b> – plan overall approach to conducting the Assessment and assign responsibilities	PSB/RPB Network	Partnership leads across the three PSBs, along with representatives of Hywel Dda UHB and West Wales Care Partnership.
<b>May – November 2021</b>	<b>Data Analysis</b> – sourcing data, conducting desktop analysis, sharing insights and identifying local/regional trends	Data Group	Data leads across the three Local Authorities
<b>May – October 2021</b>	<b>Engagement</b> – agree overall approach to engagement, design and run Regional Well-being Survey, organise and run stakeholder events, run schools survey.	Engagement Group	Engagement leads from the three Local Authorities and from Hywel Dda UHB
<b>September – November 2021</b>	<b>Writing</b> – writing up the findings of the data analysis and engagement and producing the draft Assessment of Local Well-being.	Writers Group	Writers from the three Local Authorities

## Data

A wide range of data, both quantitative and qualitative was used in the production of the Assessment, and was identified from a variety of sources. As a starting point, the Well-being of Future Generations (Wales) Act 2015 identifies nine statutory documents that must inform the production of the Assessment, and these are listed below and in further detail in Appendix 4. The importance of considering the statutory documents are self-evident and these became available at different times during 2021. They are:

- Future Trends Report Wales 2021
- Evidence for the third UK Climate Change Risk Assessment (CCRA3): Summary for Wales 2021
- Ceredigion Childcare Sufficiency Assessment 2017-2022 & Draft Childcare Sufficiency Assessment 2022-27
- Ceredigion Play Sufficiency Assessment 2019 & Draft Play Sufficiency Assessment 2022
- West Wales Population Assessment 2017 & West Wales Population Assessment 2022 (West Wales Care Partnership)
- Dyfed-Powys Police and Crime Commissioner: Police and Crime Plan 2017-22
- Alcohol and Drug Misuse Desktop Health Needs Assessment 2019
- Natural Resources Wales Area Assessment for Ceredigion and Mid-Wales
- HM Prisons and Probation Service Reducing Reoffending Plan

As a starting point for researching well-being further in each area, Data Cymru provide a 'Core Data Set' to all Public Services Boards. This contains a series of 104 key measures and other quantitative data across the four pillars of well-being – economic, social, environmental and cultural. This is supplemented with a 'Data Catalogue', which points Public Services Boards to other useful data sources. All of these have been heavily used in the production of the Ceredigion Assessment of Local Well-being and a full list of documents used can be found at Appendix 4. The Core Data Set and Data Catalogue are part of a package of support to PSB's in conducting their Assessments.

However, this is only intended to be the starting point and PSBs are free to use any of other relevant sources to inform their Assessments. To supplement the core data in Ceredigion, a series of workshops were run with PSB partners between May and June 2021 discussing the key well-being themes and requesting any relevant data sources to be considered in the Assessment. The workshops were run on:

Date	Workshop
26 <sup>th</sup> May 2021	Enterprise and Innovation Project Group
7 <sup>th</sup> June 2021	Colocation and Integration of Frontline Services Group
8 <sup>th</sup> June 2021	Resilience Training Project Group
18 <sup>th</sup> June 2021	Understanding Our Communities Project Group
29 <sup>th</sup> June 2021	Climate Change and Natural Resources Project Group
June 2021	Social and Green Solutions for Health (This group was temporarily on-hold during the COVID-19 pandemic period, and as a result communication was distributed via email)

During the Analysis and Writing stages, the Regional Data group brought together the researchers and authors undertaking the Assessment, along with the Regional Well-being Coordinator. In this round of Assessments, the Local Authorities in each area, Ceredigion, Carmarthenshire and Pembrokeshire County Councils were tasked with producing the Assessments across the West Wales region.

The Regional Data Group was a sub-group of the PSB/RPB Network, and was directly responsible to them. Working collaboratively in this way provided the opportunity share insights into data sources and data quality, adopt a broadly standardised approach to the Assessments across the region, and identify gaps in data. Where appropriate, gaps in regional data were followed up by the Regional Well-being Coordinator, and local needs were followed up either by the Regional Coordinator or by Assessment Leads in each PSB.

In addition to the desktop analysis undertaken, a series of engagement activities were run during the summer and autumn of 2021 to record the views of citizens and explore some of these issues in more detail. The engagement activities were developed based on the views of PSB partners at workshops held in May and June 2021. In order to capture this qualitative data, a Regional Well-being Survey was conducted between August and October 2021, a series stakeholder engagement events for residents and community groups were run between July and October, a Well-being Schools Survey was conducted and the newly launched “Dweud eich Dweud / Have Your Say Ceredigion Ceredigion” was used as an additional method for Ceredigion’s citizens to share their views. Further details of the stakeholder events can be found at Appendix 3. The Assessment was ‘engagement led’ to ensure that the views of our citizens were the main drivers for producing the document, placing them at the heart of the next Well-being Plan.

### Known Limitations

It is recognised that there are limitations to the Assessment and the research conducted. The most pressing of these was the impact of the COVID-19 pandemic, particularly on the engagement during the summer/autumn of 2021. The engagement undertaken in support of Ceredigion’s first Assessment in 2017 was acknowledged as being a strength, largely due to the breadth of events attended in person. However, the COVID-19 pandemic resulted in many events in 2021 being cancelled, while those groups that were meeting had to do so virtually, making it more difficult to record the quantity and the quality of conversation around well-being than would have been liked. This is recognised as a limitation across all Assessment this time.

Given the breadth of the Assessment and the variety of themes discussed, it is also recognised that there are gaps in our understanding of these themes where further data and research is required. We have identified these in Appendix 5. As part of the ongoing work around Well-being, the Ceredigion Public

Services Board will ensure that the Assessment is updated, enhanced and data gaps filled, in order to continually improve and share our understanding of well-being in Ceredigion. Some of these gaps may be areas where the PSB wishes to conduct or commission further work over the lifespan of the next Local Well-being Plan 2022 – 2027.

There are of course limitations to the size of the Assessment. While the Assessment is meant to be broad in its outlook and bring together all of the relevant well-being themes, it will never be a substitute for detailed research on a specific subject. As a result, part of the ongoing work around well-being will include launching the “Gorwel” well-being platform to provide a central repository for the county and the region to store and analyse well-being data, both quantitative and qualitative. Further details on the approach to the Assessment and the specific steps undertaken can be found in the following ‘Methodology’ chapter.



# METHODOLOGY



# How did we undertake the Assessment?

***In this chapter:** A Regional Approach, Role of the Third Sector, How the Assessment has been structured, Gathering Data and Evidence, the Impact of COVID-19, Engagement and Consultation, Applying the Sustainable Development Principle, the Seven National Well-being Goals.*

## 2.1 A Regional Approach

Partners on the Ceredigion PSB have worked collaboratively at both a local and regional level to produce this assessment. At a regional level, Ceredigion, Carmarthenshire and Pembrokeshire PSB's have worked in partnership to plan and deliver the assessments. This approach was taken in order to share resources, expertise and reduce the duplication of work across the three PSBs.

The existing "Public Services Board/Regional Partnerships Board Network", consisting of representatives from the three PSBs and the RPB, oversaw the delivery of the assessments. Under this network, three regional working groups and a sub-group were set up at different stages of the assessments' delivery to lead on specific elements of work:

- Joint Methodology Sub Group
- Regional Engagement Group & Survey Sub-Group
- Regional Data / Writing Group

Working in this way ensured that the assessments production was collaborative (between public sector partners and the third sector) in terms of data provision, analysis and interpretation.

A **Regional Framework Methodology** was developed, highlighting how we undertook the assessments regionally and the ways in which the well-being themes for each PSB area were identified. Please refer to Appendix 1 for further information.

A **Regional Engagement and Consultation Framework** was produced which outlines how we conducted the engagement and consultation on the assessment at a regional level. Please refer to Appendix 10 for further information.

Ceredigion County Council has led on the production of the Assessment on behalf of the Ceredigion PSB. The role of the Council was to coordinate all steps in the process – the engagement, the situation and response analysis and the writing, and this approach was also adopted regionally in Carmarthenshire and Pembrokeshire.

The following section will briefly explain how our assessment was undertaken and the methods used to gather data and evidence (both qualitative and quantitative). For further information on the research approach, the data collection and data analysis methods used by Ceredigion PSB to conduct this assessment, please refer to the **Joint Regional Methodology** in Appendix 1. The gaps in data and knowledge highlighted during the Assessment are listed in Appendix 5.

## 2.2 Role of the Third Sector

Our thriving and active third sector is one of Ceredigion's key assets. The many charities, voluntary groups, community organisations and social enterprises deliver essential services to Ceredigion residents to improve people's well-being and contribute to economic growth, whether these are in childcare, training leisure or business support to name just a few. We all recognise the vital role it plays in supporting



communities at a local level, and they will play an important role in the ongoing dialogue with the communities of Ceredigion as we move from Assessment to Local Well-being Plan.

The Ceredigion Association of Voluntary Organisations (CAVO) (who promote and support voluntary community action throughout Ceredigion) have been instrumental in the production of this Assessment. CAVO chair the ‘Understanding Our Communities’ PSB Sub Group and have provided vital local and community based data which has helped enrich and complement the findings. They have also played an essential role in advertising the engagement campaign through their extensive networks and organising and running the stakeholder events. This has been fundamental to our engagement with the harder-to-reach groups within Ceredigion.

2.3 How is the Assessment structured?

We have considered how best to present the data in this well-being assessment in order to ensure that it can be used effectively by the PSB to develop the Local Well-being Plan, and to ensure that the document is user friendly and a source of useful information for anyone wanting to know about well-being in Ceredigion.

i. Life Stages

The three PSB’s adopted the ‘Life Stages’ approach to assess the state of well-being and provide structure to the assessment. This approach provides a unique insight into the differences and similarities in experiences of well-being throughout a person's life. The assessment is structured under these five life stages, namely, New Beginnings, Childhood, Youth, Adulthood, Older People (see Figure 2.1), and providing consistency with the last round of Assessments published in 2017.

Figure 2.1: The Life Stages Approach adopted by the West Wales Public Services Boards



Source: Ceredigion Public Services Board

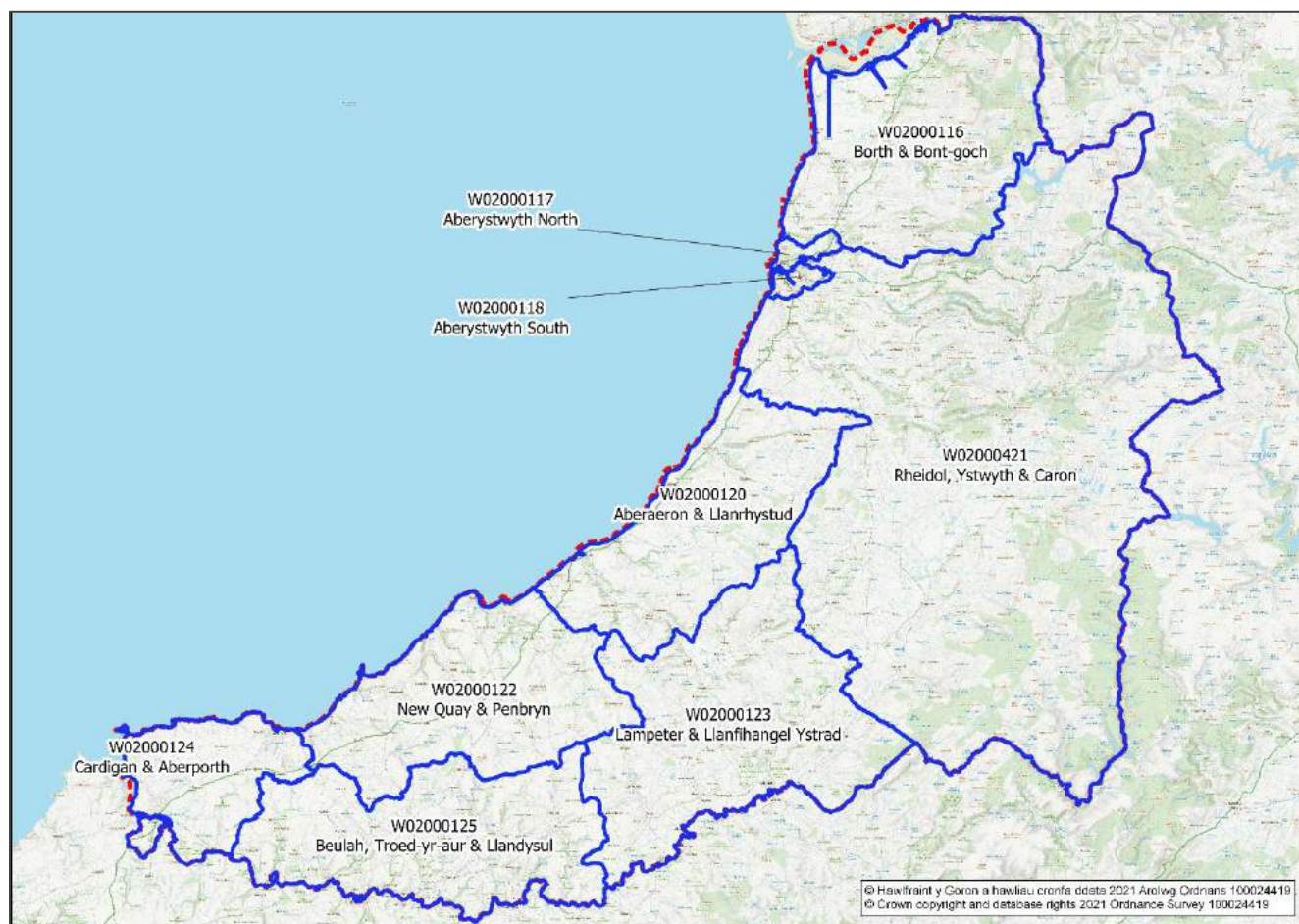
This approach enabled the integration of cross-cutting themes, for example, in considering the relationship between deprivation, housing quality and health. These stages are broad and indicative stages and not everyone’s experience will fall neatly into these age groups, but they help us understand the different facets of well-being in Ceredigion.

ii. The Communities of Ceredigion

Ceredigion’s communities and neighbourhoods have been shaped by our unique landscape and rich social history. This Assessment is based on the County as a whole, and on nine specific geographical areas within

Ceredigion, known as our community areas. The community areas are based on Middle Super Output Areas (MSOAs), and will allow us, where it adds value, to present comparable statistical information to a lower geographical level and reflect the economic, social and cultural differences across the county. Figure 2.2 displays the location and boundaries of the nine community areas of Ceredigion. To support the Assessment, a profile of each area has been created and are included at Appendix 8. The community areas are made up of smaller geographical areas such as Lower Super Output Areas (LSOAs), and where the data is available, the assessment considers these smaller areas as part of its analysis.

**Figure 2.2: The 9 Community Areas of Ceredigion based on the 9 MSA Geography**



Source: Ceredigion Public Services Board

## 2.4 Gathering data and evidence

Ceredigion, Carmarthenshire and Pembrokeshire's PSBs worked together on a desktop data gathering exercise to understand well-being in the three local areas. A wide range of local, regional and national sources were considered. Ceredigion also held virtual workshops with PSB partners to obtain local level data and insights for the situation and response analysis, to help validate data and themes. This included an Enterprise and Innovation Project Group workshop with representatives from the private sector, to gain their unique views on well-being in the workplace and the local economy. The data review exercise helped to build an understanding of the area's context, challenges and priorities to be considered as part of the situation and response analysis. It also began to highlight the areas we needed to prioritise in the Assessment and which were included as part of our futures thinking.

By working collaboratively across the West Wales region, we were also able to identify cross-boundary well-being issues across the three PSB areas, such as climate change, child poverty and housing affordability. The identification of these regional issues will support regional well-being planning across West Wales following publication of the assessments in 2022.

It is important to note that survey and consultation ‘fatigue’ was identified as a concern during this round of assessments, and therefore, we made sure to make use of existing consultations and primary data already collected by some of our partners (see Appendix 4 for the list of data sources used in the Assessment).

## 2.5 The Impact of COVID-19

The COVID-19 health pandemic has had an impact on the production of the Assessment of Local Well-being, and in particular the ability to assess well-being. The pandemic has raised some new issues relating to well-being and brought some existing issues to the fore. For example, the claimant count in Ceredigion increased by 108% between March and April 2020 as a result of the nationwide lockdowns and the closure of whole sectors in the local economy.

In assessing well-being, there is a trade-off between the short-term COVID-19 impact and the longer-term future trends that existed prior the pandemic. To help to counter the skewing of trends towards the immediate COVID-19 response, the Assessment draws reference to the specific impacts of the pandemic separately, where known. At the time of writing, we are still learning about the impacts, which presents one of the largest data gaps in the Assessment as noted in Appendix 5. In addition, an assessment of the impact and timescales has been provided in the “Indicative Assessment of Main Themes” summary to support the PSB in identifying the opportunities and priorities to improve well-being.

The COVID-19 Pandemic has both created new inequalities and exacerbated existing ones. The **Inequality Wales Report**<sup>1</sup> highlights that those who were living in poor health, poverty or in marginalised communities have been hardest hit by the pandemic. In addition, amid the spiralling inequalities, COVID-19 has highlighted the huge evidence gap in the data collection on protected characteristics.

The findings from The Well-being Survey will provide a starting point to bridge the evidence gap, by breaking down the results by protected characteristic. This will provide an overview of the level of representation by protected characteristic, to see whether the sample mirrors the resident population. It will also enable a greater understanding of the concerns and priorities of these groups, where inequalities exist and where cases of intersectionality are present within the population. *Refer to Appendix 11 – Assessment of Local Well-being Engagement Report to view the full breakdown of survey respondents by protected characteristics.*

Moving forward, we need to ensure that we continue to record robust data to monitor equalities in Ceredigion through our engagement platforms (Gorwel and Have Your Say) to build on the current information. Ensuring that we capture the voices of the people and communities most affected by the trends set out in the Assessment, will aid a better understanding of what our priorities should be, as we move from Assessment to Plan.

Whilst the impacts of the pandemic are mainly negative, the recovery period from COVID-19 also provides opportunities to build the Ceredigion we want in the future. It could, for example, be the catalyst for a paradigm shift in thinking towards tackling some of the challenges facing future generations, build greater resilience and better support well-being in the future. As noted by the Wales Centre for Public Policy report on COVID-19 and Brexit, “Interventions to support jobs and stimulate growth in local economies could also have wider social, cultural and environmental well-being effects.”<sup>2</sup>

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<sup>1</sup> D MacBride-Stewart, S. and Dr Parken, A. (2021). Inequalities in a Future Wales: Areas for action in work, climate and demographic change – Full Report. [Online]. Available at: [Future Trends and Inequalities in Wales \(futuregenerations.wales\)](https://futuregenerations.wales/) (Accessed: 07.02.2021).

<sup>2</sup> “Briefing on well-being and the impact of Covid-19 and Brexit”. Canolfan Polisi Cyhoeddus Cymru / Wales Centre for Public Policy. Cardiff, 2021. 30.

## 2.6 Engagement and Consultation

The Assessment was 'engagement led' to ensure that the views of our citizens were the main drivers for producing the document, placing them at the heart of the next Local Well-being Plan. In preparing for the engagement, workshops were held with regional PSB partners in May and June 2021 to explore their ideas on how the engagement should be conducted in this round of assessments and on the actual content of the Well-being Survey and stakeholder events. These workshops were undertaken at the outset of the Assessment to bring all partners together to develop an agreed approach to conducting the engagement. This cross-sector collaboration allowed a more coordinated approach to conducting the engagement, not only sharing expertise but also scheduling the engagement to avoid clashes and identifying how best to engagement during the COVID-19 pandemic. A full list of partners involved is shown in Table 2.1.

**Table 2.1: Regional Partners**

Aberystwyth University	Natural Resources Wales
Carmarthenshire County Council	NHS Wales
Ceredigion Association of Voluntary Organisations	One Voice Wales
Ceredigion County Council	Pembrokeshire Association of Voluntary Services
Coleg Ceredigion	Pembrokeshire Coast National Park Authority
Department for Work and Pensions	Pembrokeshire College
Dyfed-Powys Police	Pembrokeshire County Council
Dyfed-Powys Police and Crime Commissioner	Planned
HM Prison and Probation Service	Port of Milford Haven
Hywel Dda University Health Board	University of Wales Trinity Saint David
Mid and West Wales Fire Services	West Wales Care Partnership
National Library of Wales	

The collaboration was managed by the PSB/RPB Network, which consists of the lead PSB and RPB Officers across the region and who oversaw the production of the 2022 assessments. There were specific sub-groups of the PSB/RPB Network to manage each phase of the Assessment, including one specifically for engagement, and each of these groups were responsible to the Network. From August 2021, the Regional Well-being Coordinator was appointed and took over the responsibility of running and coordinating the work of the sub-groups.

The engagement activities were developed based on the views of the regional PSB partners, some examples of which were the desire to include more open-ended questions in the Well-being Survey, run the Well-being Survey in September after the summer holidays and conduct a School Survey to record responses from younger people.

### Engagement and consultation will be carried out over two steps:

- 1. Initial engagement** – this was carried out in order to inform the writing of the first draft of the Assessment of Local Well-being. This stage took place from June - October 2021.
- 2. Consultation on the draft assessment** – a consultation exercise will take place on the draft assessment during the winter of 2021/22.





We designed a **Well-being Survey** in collaboration with the three PSB areas through holding a series of several workshops with the Regional Survey Sub-Group. The survey was open to all members of the public for 9 weeks (Aug-Oct 2021). The survey was themed around the seven National Well-being Goals and asked respondents views on their personal well-being and well-being in Ceredigion as a county. The survey collected a mix of qualitative and quantitative data. Over 400 individuals from Ceredigion responded to the Well-being Survey.

Online submissions were encouraged; however, paper surveys were made available on a request basis. The survey was available in Welsh, English, Polish, Romanian and Arabic. An Easy Read version of the survey was also offered and for those who could not complete a paper or online version, a telephone service was available on request. By providing these formats we ensured that everyone had the opportunity to take part whilst we remained under COVID-19 restrictions.



**Virtual Stakeholder Events** were held to capture views on well-being from individuals, groups and organisations in an open and friendly environment. In particular, the stakeholder events targeted groups of people who were seldom heard, those with protected characteristics and people who may suffer socio-economic disadvantage. 17 Virtual Stakeholder events were held in total. (A full list of the organisations consulted and the stakeholder events conducted is contained in Appendices 2 and 3).

A regional stakeholder toolkit was developed so that PSB partners and third sector organisations could facilitate their own stakeholder events. The toolkit included, ice-breaker examples, online polls, virtual whiteboards and a factsheet (providing headline data on what we know currently about well-being in Ceredigion).



We ran a **School Survey** to capture the views and voices of Ceredigion's younger population. We engaged with primary and secondary school pupils and asked them key questions on personal well-being, what matters to them and what concerns them about the future. There were 212 responses to the survey.



Ceredigion's citizens were invited to share their views through our Engagement HQ software, a web-based engagement platform called "**Dweud eich Dweud / Have Your Say Ceredigion Ceredigion**", launched in August 2021. This platform provided new and innovative ways for residents to get involved and share their views on well-being. We received a further 34 comments via this method.

## 2.7 How have we have applied the sustainable development principle?

To help us apply the sustainable development principle to our planning and decision-making, we have adhered to the five-ways of working throughout the delivery of this assessment. Figure 2.3 provides examples of how we have worked towards the longer-term, acted to prevent problems occurring or getting worse, considered how the well-being themes identified in the Assessment may impact on the well-being goals, acted in collaboration with partners, and involved people with an interest in achieving the well-being goals. This model will continue to shape the well-being process beyond the production of the Assessment.

**Figure 2.3: How the Sustainable Development Principle has been applied during the development of the Ceredigion Assessment of Local Well-being**

<div>Long-term</div> <div></div>	<ul style="list-style-type: none"><li>• <b>Continuation of the PSB/RPB Network and Operational Groups</b></li><li>• <b>Development of “Have Your Say Ceredigion”</b> – provides the opportunity for future concerns and the longer-term needs of citizens to be raised.</li><li>• <b>Development of “Gorwel”</b> – helps bridge the data gaps over the medium and longer-term. Whilst also enabling the Assessment to be updated as new information and statistics are made available.</li><li>• <b>Horizon Scanning Training</b> – aided a better understanding around the future and explored factors that could give rise to possible future characteristics and events.</li><li>• <b>Futures thinking questions included in the survey-</b> based on each of the 7 National Well-being Goals.</li></ul>
<div>Prevention</div> <div></div>	<ul style="list-style-type: none"><li>• <b>Assessment highlights areas where preventative work can be undertaken</b> – demographic change, child poverty, housing affordability and responding to climate change for example, these will be investigated further in the development of the Local Well-being Plan.</li><li>• <b>Partnership working between the three PSBs</b> – sharing resources and expertise to avoid duplication and regional issues. Regional data gathering exercise to minimise data gaps.</li></ul>
<div>Integration</div> <div></div>	<ul style="list-style-type: none"><li>• <b>Ceredigion PSB Project Groups structured around the 6 Ceredigion well-being objectives in its Local Well-being Plan.</b> Each of the objectives support the delivery of the 7 National Well-being Goals.</li><li>• <b>Life Stages Model utilised in the Assessment</b> – this approach recognises the interrelationships between the well-being goals and themes, for example, in considering the relationship between deprivation, housing quality and health.</li></ul>
<div>Collaboration</div> <div></div>	<ul style="list-style-type: none"><li>• <b>Assessment undertaken in collaboration with a wide range of PSB partners (local and regional), third sector organisations and private sector organizations.</b> For example:<ul style="list-style-type: none"><li>- Conducted workshops with regional PSB partners to determine how to undertake the engagement for the Assessment along with the content of the Well-being Survey and stakeholder events.</li><li>- Worked as a West Wales Cluster to deliver the Assessment under the PSB/RPB Network.</li><li>- Developed a Well-being Survey and Regional Stakeholder toolkit.</li><li>- Close collaboration with Hywel Dda University Health Board and West Wales Care Partnership, particularly during engagement campaign to ensure the Assessment aligned with the Population Assessment.</li><li>- Regional Well-being Co-ordinator Officer employed to oversee the delivery of the assessments and ensure consistency in our approach.</li></ul></li></ul>

## Involvement



- Involving citizens, businesses and stakeholders through our engagement exercises has been extensive and represents the beginning of an ongoing conversation about well-being in Ceredigion:
- Several opportunities for the general public to express their views and attitudes on well-being in Ceredigion. More than 600 residents and stakeholders have been involved in the process.
- Involving and engaging with hard-to-reach groups and those with protected characteristics through mapping exercise and virtual stakeholder events.

Source: Ceredigion Public Services Board

## 2.8 The Assessment and the Seven National Well-being Goals

Throughout the Assessment, references are made to how the assets and challenges identified impact on the delivery of the seven National Well-being Goals. The following table indicates which of the seven well-being goals each theme covered in this Assessment supports.

**Table 2.2: The Assessment and the Seven National Well-being Goals**

		Prosperous	Resilient	Healthier	More Equal	Cohesive	Culture	Global
Chapter / Theme		Well-being Goal						
<b>New Beginnings</b>								
1	Parental Health			●	●	●		
2	Parental Preparedness			●	●	●	●	
3	Relationships			●	●	●		
4	Financial Considerations			●	●			
5	Welsh Language and Culture	●		●		●	●	●
<b>Childhood</b>								
6	Children's Physical Health			●	●			
7	Children's Mental Health			●	●			
8	Child Poverty		●	●	●			
9	Time On-line and Well-being Outcomes			●		●		●
10	A Rich and Rounded Education	●	●		●	●	●	●
11	Childcare Sufficiency	●	●		●			
12	Adverse Childhood Experiences	●	●		●	●		
13	Play and Well-being Outcomes			●	●	●	●	
14	Social Isolation		●	●				
<b>Youth</b>								
15	Demographic Trends	●			●	●	●	●
16	Students	●		●	●			
17	First Independence		●	●	●			
18	Youth Mental Health			●	●	●		
19	Staying Connected	●		●	●	●	●	●
20	Environmental Awareness		●	●		●		●
21	Feeling Safe			●	●	●		



22	Welsh Language and Culture	●		●		●	●	●	
23	Employment and Affordable Housing	●	●		●	●			
24	Starting Work	●	●		●	●			
<b>Adulthood</b>									
25	Nurturing Creativity				●	●	●		
26	Community Cohesion			●	●	●	●		
27	Well-Connected Communities	●		●	●	●	●	●	
28	Digital Connectivity			●	●	●	●		
29	Thriving Welsh Linguistic community	●	●	●	●	●	●	●	
30	Natural Environment		●	●		●			●
31	Environmental Issues		●	●		●			●
31	Starting a Family			●		●	●		
32	Violence Against Women and Domestic Abuse			●	●	●			
33	Caring and Responsibilities	●		●	●				
34	Healthy Behaviours and Adult Health			●	●				
35	Job, Career and the Economy	●		●		●			
36	In-Work Poverty	●	●	●	●	●			
37	Workplace Well-being	●		●	●	●	●		
<b>Older People</b>									
38	Continuing to Work	●			●				
39	A Suitable Home		●	●	●	●	●		
40	Maintaining Independence			●	●	●	●		
41	Needing Help			●	●	●			
42	Staying Connected		●	●	●	●	●		
43	At the End			●	●	●	●		

<b>Prosperous</b>	<b>Resilient</b>	<b>Healthier</b>	<b>More Equal</b>	<b>Cohesive</b>	<b>Culture</b>	<b>Global</b>
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Source: Ceredigion Public Services Board

# CEREDIGION CONTEXT







**In this chapter:** Geography, Population, Natural Environment, People and the Environment, Economy, Brexit, Connectivity, Welsh Language and Culture, Equality, Diversity and Inclusion

## 3.1 Geography

Ceredigion covers an area of 1,900km<sup>2</sup> and is mostly made-up of agricultural land, moorland and forestry, with the upland areas to the east forming a significant portion of the Cambrian Mountains.

There are six main towns in Ceredigion that are located on the coast or in river valley locations. The towns are Aberystwyth, Cardigan, Lampeter, Aberaeron, Llandysul and Tregaron. Table 3.1 shows each town's population, according to the 2011 Census, the Census data is the latest official figures.

**Table 3.1 Population of Ceredigion's Towns**

Town	Census 2011 Population	2019 Population Estimate (using LSOA boundaries)	Trend
Aberystwyth	18,749	10,756	▼ 7,993
Cardigan	5,301	4,217	▼ 1,084
Lampeter	2,970	2,926	▼ 44
Aberaeron	1,422	1,331	▼ 91
Llandysul	1,484	1,384	▼ 100
Tregaron	1,213	1,228	▲ 15

Source: Census 2011 & ONS Mid-Year Population Estimates 2020

Ceredigion has one of the largest accumulative road lengths in Wales at 2,265km in total. Around 51.5% of roads in Ceredigion are B and C roads (1,167km), which are classed as minor roads. There are two primary roads within the county: the A487 that runs from Machynlleth through Aberystwyth to Cardigan and on to Fishguard; and the A44 that runs east from Aberystwyth to the English Midlands, meeting the A470 north-south Wales route at Llangurig and from there the Severn valley at Caersws. The A486/A484 route from Synod Inn through Llandysul to Carmarthen is also considered to be a strategic route linking south Ceredigion with South West Wales and the A40/M4 route. In addition, there is a network of A class roads connecting the coastal towns and routes with inland settlements in the Teifi valley. An extensive network of minor roads connects the smaller settlements and is especially extensive in areas of scattered hamlets and villages in southern Ceredigion.

The southern county border is largely formed by the Teifi River and there is easy communication across the boundary with Carmarthenshire and Pembrokeshire especially at the river crossing towns of Lampeter, Llandysul, Newcastle Emlyn and Cardigan. There are stronger commuter flows across these borders than there are between Ceredigion and Powys. Residents in the Teifi valley and north Pembrokeshire tend to use these valley towns as their main service centres regardless of the administrative area boundary. Furthermore, much of southern Ceredigion looks towards Carmarthenshire rather than Aberystwyth as the main regional retail and service centre.

Public transport, namely bus services are very limited across the county especially for the more rural areas. Buses that run throughout the day service the main towns, but these services travel mostly to and from the more urban areas of the County. Access to a car is therefore a necessity for rural residents, which accounts for a high level of car ownership (89% of rural households), even though this is a significant additional household expense.

There is only one rail line in Ceredigion, which links Aberystwyth directly to Birmingham via Shrewsbury and to the Cambrian Coastline north from Machynlleth. According to the Office of Road and Rail, Aberystwyth Train Station

received just over 309,000 entries and exits in the year 2018/19 and Borth Train Station received just over 61,000 entries and exits. The beginning of 2021 saw Ceredigion’s third train station being opened in Bow Street, to the north of Aberystwyth. The Bow Street station aims to make it easier for residents to access employment, education, training, health and other services, by connecting Bow Street with the rest of the County.

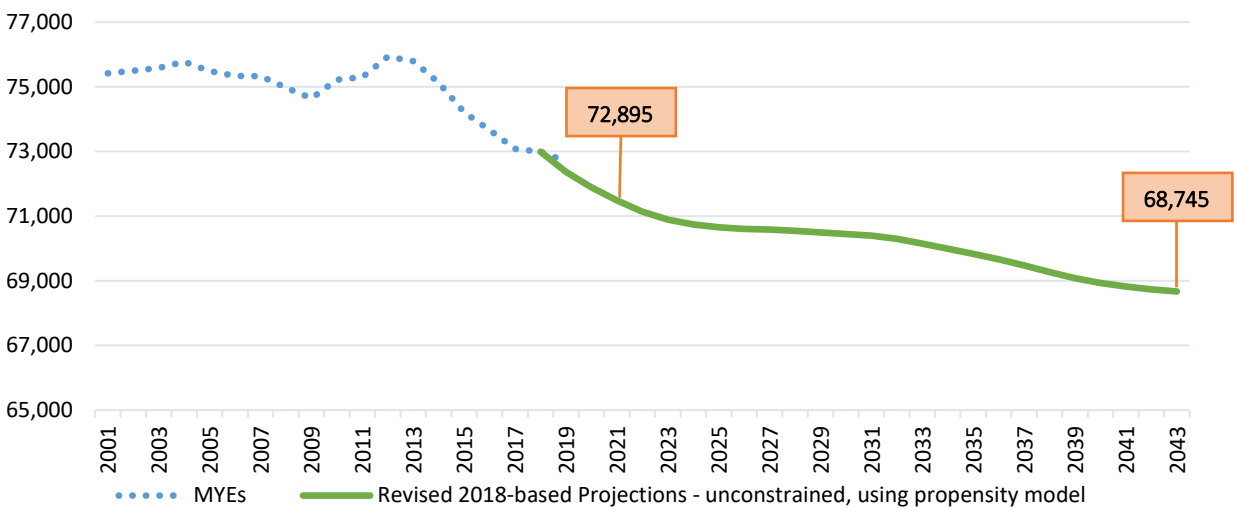
However, the rail line in Ceredigion does not run to the south; for example, taking a train from Aberystwyth to Carmarthen would take over 6 hours and would mean firstly travelling North to Shrewsbury and then to Southeast Wales, eventually linking up with the Carmarthen line. By car this journey would take just under 1 hour 30 minutes.

### 3.2 Population

The latest Welsh Government figures estimates Ceredigion’s population to be 72,895 (2021), which is the fourth lowest in Wales. Ceredigion has experienced a fluctuating population since 2001 and it is estimated to have reduced in each year since its population peaked at 75,900 in mid-2012. The number of deaths has consistently exceeded the number of births each year, although there have been some years of population growth as a consequence of net inward migration (for example, during 2009-2012). Since 2013, there has been a net outward migration, which has resulted in population decline.

The latest Welsh Government projections displayed in Figure 3.1 suggests that the population of Ceredigion will continue to decline over the next 25 years, from 72,895 in 2021 to 68,745 in 2043, a 6% decrease and an estimated reduction of approximately 4,150 people. Out of the twenty two local authorities in Wales, Ceredigion is predicted to have the greatest percentage decrease in population during 2018-2043.

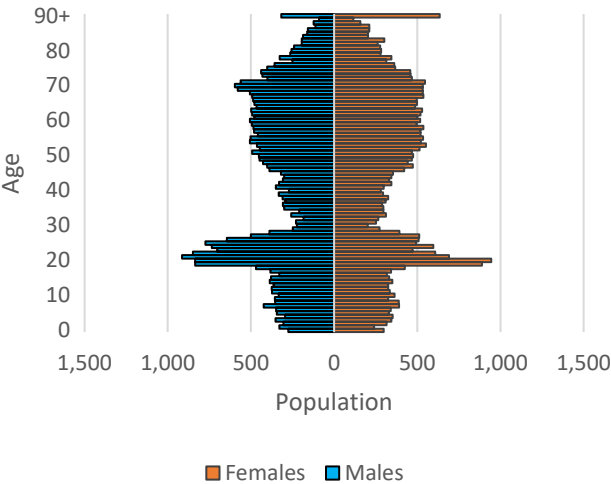
**Figure 3.1: Population Trends - Ceredigion (2001-2043)**



Source: Welsh Government, Local Authority Mid-Year Population Estimates and 2018-based Local Authority Population Projections.

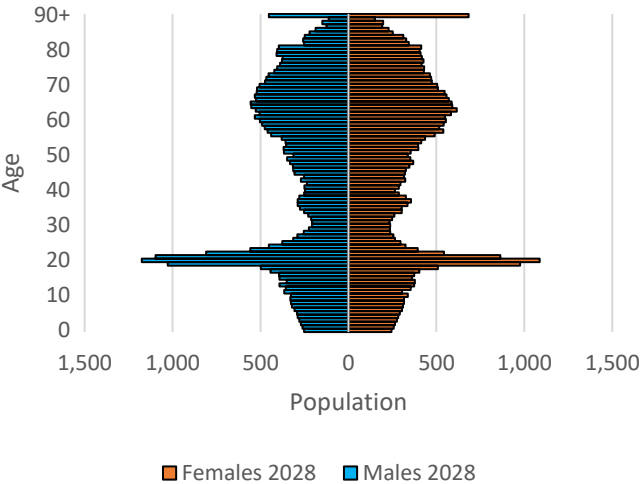
Although the population is set to decline, Ceredigion’s older population (65+) is expected to grow significantly over the next 20 years (by 23.7% or +4,305 people), whilst the working age population (16-64) and children (0-15) are expected to decrease. The largest projected increase within the 65+ age group will be those aged 75-84. These demographic changes are being driven by an increase in life expectancy, a stalling of fertility rates and the ageing of the 1960’s baby boomers. The changes in the population structure are highlighted in Figure 3.2 and Figure 3.3.

Figure 3.2 : Ceredigion population pyramid - 2018 estimate



Source: 2018 estimate: Office for National Statistics (2019)  
Mid- year population estimates

Figure 3.3: Ceredigion population pyramid - 2028 projection



Source: Welsh Government (2018) 2018-based population  
projections for local authorities in Wales

The population pyramids highlight that by 2028 the largest projected decreases in the working age group are those aged 22-28 and 45-54. This reduction is largely attributable to the internal (UK) out migration of these groups to different parts of the UK, which includes a large proportion of students in Ceredigion, who tend to leave the area after graduation to pursue employment and education opportunities outside of the County. These demographic changes have important consequences for the working age population, the resulting impact on the economy and specifically the funding for local public services. Furthermore, it is expected that the ageing population will place further strain on our local health and care services.

Although statistics from the Higher Education Statistics Agency have indicated that the number of students enrolling at Ceredigion Universities have been decreasing, the population projections (Figure 3.3) show that the number of people aged 19 to 21 years old will increase in Ceredigion by 2028. It is clear that 19 to 21 year olds will continue to be the most populated age cohort in Ceredigion in future, and this is still likely because of students, but this could also be an indication that less people will move away from Ceredigion after finishing school.

Average male and female life expectancy and healthy life expectancy in Ceredigion are among the highest in Wales. Ceredigion has the highest female average life expectancy in Wales (83.9 years), whilst the average male life expectancy is third highest (80.1 years). Similarly, Ceredigion has one of the highest average male (67.9 years) and female (69.7 years) healthy life expectancies across Wales, see Table 3.4.<sup>3</sup>

Figure 3.2: Life expectancy and healthy life expectancy in Ceredigion

	Life Expectancy		Healthy Life Expectancy	
	Male	Female	Male	Female
Ceredigion	80.1 years	83.9 years	67.9 years	69.7 years
Wales	78.3 years	82.3 years	65.3 years	66.7 years

Source: StatsWales

These life expectancy figures reflect the increase in the 65+ population, as shown in the population projections above. This said, a generally older population could put pressure on health and care services in future.

<sup>3</sup> StatsWales. Life expectancy and Healthy life expectancy at birth by Local Health Board and Local Authority. Online: <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/Life-Expectancy/lifeexpectancyandhealthylifeexpectancyatbirth-by-localhealthboard-localauthority> Retrieved: 18/02/2022.

### 3.3 Natural Environment

Ceredigion has a variety of natural landscapes and habitats: coastal cliffs and beaches, marshlands and open upland. The County's landscapes and natural environment are highly valued by local people, with 68% stating that 'nature and green spaces' was what they value the most in their local environment.<sup>4</sup>

Ceredigion has a high proportion of land recognised for its high environmental value through official designations, including two internationally important wetland areas (the Dyfi estuary and Cors Caron); 13 Special Areas of Conservation (SAC); around 100 Sites of Special Scientific Interest (SSSI's) seven National Nature Reserves and three local Nature Reserves. The Cambrian Mountains uplands are important for wildlife as are the wet 'rhos pastures'.

The three local nature reserves in Ceredigion are located near Aberystwyth, which is considered to be the main town of the County. Coed y Cwm, Pen Dinas & Tanybwllch and Parc Natur Penglais have all been designated as nature reserves because of their importance for wildlife value. In addition, these sites are appreciated because of their value to community and educational enjoyment.

Ceredigion is bordered by over 90km of coastline. Four sections of Ceredigion's coastline (around 35km) are designated as Heritage Coast. Our coasts and seas help to regulate water and air quality by trapping and degrading pollutants. The coastal waters support a rich fish and shellfish resource, attracting harbour porpoise and bottlenose dolphin. Cardigan Bay is also of international importance for its seal populations, reefs, offshore sandbanks and sea caves. Covering much of the marine area, the Cardigan Bay SAC is of primary importance for its resident population of bottlenose dolphins.

The rivers included in the Ceredigion catchment are the Rheidol, Ystwyth, Clarach, Aeron and Teifi rivers. Ceredigion's river catchment is varied and distinctive, with each river flowing through a variety of landscapes, before reaching the sea. The Teifi River is one of the longest rivers in Southwest Wales, at 122km long.

Ceredigion is covered by 173,689,773 square meters of woodland, this is around 15.3% of the County. Woodlands enable people to connect to the environment and experience wildlife.

Ceredigion also supports large areas of lowland and upland peatland, particularly Cors Caron and Cors Fochno SACs, the wider Dyfi Valley floodplain, the Cambrian Mountains and Mynydd Bach. Deep peat soils are important in helping prevent climate change as they take up and store atmospheric carbon and can also play an important role in water management, slowing down flood waters and naturally reducing flood-risk. By slowly releasing water during dry periods, peatland helps to reduce the impact of droughts on water supplies and on river and stream flows.

However, evidence shows that our natural environment continues to be put under pressure from a range of factors including climate change, new pests and diseases, pollution, overuse and development pressure: some of our best sites for wildlife are in poor condition; some of our rivers are not meeting European standards for water quality. In the lowlands, changes to agricultural and forestry practices have led to a decline in traditionally grazed semi-natural grassland, increased wetland drainage, overgrazing, and conifer planting on peatlands.

### 3.4 People and the Environment

Ceredigion provides many opportunities for its people to be close to the natural environment. Many people responding to The Well-being Survey identified 'wildlife' (46%), 'clean air' (42%) and 'landscape and views' (38%) as what they valued the most in the Ceredigion environment.<sup>5</sup>

The attractive landscapes and remote locations in Ceredigion form the basis of 'rural well-being' tourism, which draws in tourists to the area. As well as improving social interaction and cohesion, being close to the natural environment brings health and well-being benefits:

- Individual feelings of well-being from a connection to nature, a subjective response to being close to nature
- Health benefits from opportunities for physical recreation and exercise in nature

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<sup>4</sup> Regional Well-being Survey 2021.

<sup>5</sup> Ibid.

- Health benefits from a healthy environment, for example with good air and water quality, or the beneficial effects of exposure to nature
- Mental health benefits from exposure to natural environments such as the restorative effects of walking in the natural environment or observing wildlife

Although the environment has always been a valued feature of well-being, over the past few years protecting the environment has become much more important to people. The adverse effects of climate change on the environment are far more recognised and people seem to want to do more to protect our environment. In 2020 Ceredigion County Council declared a global climate emergency, prior to this the Council had also committed to being a net zero carbon council by 2030.

The desire to protect our environment is evident by looking at Ceredigion's annual reuse, recycle and composting rates. Ceredigion has the second highest annual reuse/recycling/composting rates at 71.6% in 2019-20, just 0.1% behind Pembrokeshire, which had the highest rate in Wales. Additionally, according to a study by the World Wildlife Fund for Nature and the University of York, Ceredigion has the lowest carbon footprint in the UK at just 10.8 carbon dioxide equivalent, and almost 10% of residents have solar panels installed on their homes.

Climate change increases the risk of flooding in Ceredigion. The consequences of flooding are not just financial - even modest flooding events can significantly damage the physical and mental well-being of the individuals for many years after the actual event. In 2019, around 1,741 properties were at risk of river flooding, 2,108 properties at risk of surface flooding and 838 properties were at risk of tidal flooding in Ceredigion. This amounting to 4,697 properties being at risk of some sort of flooding, equating to around 15% of properties in Ceredigion. Recent years have shown the effects of adverse weather, such as storm Dennis in early 2020 which caused flooding, landslides and disturbances due to high winds and heavy rainfall across the County and the nation.

Rurality is an important factor of life in Ceredigion - 59% (44,761) of the population live outside the main towns, either in the smaller towns or villages or in the open countryside. With rurality comes the benefits of access to, and enjoyment from, the natural environment, a theme that emerged consistently throughout our engagement. But with rurality also comes the challenges of providing and accessing services and longer travelling distances.

### 3.5 Economy

The economy of Ceredigion is fairly typical of that of many rural and coastal areas. A high proportion of jobs are in the tourism industry (12.9%), wholesale and retail (12.9%) and human health and social work activities (12.3%). Education is the largest sector in the county, employing around 4,300 people and accounting for around 13.9% of jobs in the county.

Unlike many rural areas, the county has two universities at Aberystwyth and the University of Wales Trinity St. David's Campus at Lampeter, and national institutions such as the National Library of Wales. The knowledge economy is strong in Ceredigion and it has a growing 'green economy' focusing on low carbon emissions, efficient use of resources and being socially inclusive.

Self-employment is an important element in the local economy, and Ceredigion often has the highest proportion of self-employed people nationally. Many are farmers with others working in a range of established small-scale enterprises such as building repair and maintenance. Around 14.9% of residents aged 16-64 are self-employed in Ceredigion which is higher than Wales' average of 8.9%, although this has been decreasing during 2021, possibly as a result of the COVID-19 pandemic.

The vast majority (99%) of enterprises in Ceredigion are 'micro' sized, i.e. up to 9 employees or 'small' (10 to 49 employees). Only 1% of enterprises in Ceredigion have fifty or more employees. Whilst this could suggest some enterprises are more risk averse than other areas, it could equally provide a reflection of the level of support and stability for new businesses in the County.

The latest Annual Survey of Hours and Earnings 2020 notes that average (median) annual earnings are over £1,637 lower in Ceredigion (£22,028) than the national average (£23,665), and with the exception of Powys, are also lower than the rest of mid and South West Wales.



Along with lower than average earnings, Ceredigion residents are also faced with higher than average house prices and rents. In April 2021, the average property price was £237,450 in Ceredigion, which is far higher than the national average of £185,041. The COVID-19 pandemic has had a major impact on the housing market and housing affordability locally. The increase in demand combined with the limited stock has caused a mini housing 'boom' in the County which has subsequently been felt across most of Wales. The increased opportunities for homeworking is one of the drivers behind the increase in demand, along with the pull of Ceredigion's unique natural environment.

However, the economy has several unique selling points that provide the platform to drive economic growth in the future. The survival rates of businesses in Ceredigion are consistently higher than average and some of the best in Wales, the level of skills and qualifications are much higher than average, and the economy has grown at a faster rate than across Wales over the last five years.

### 3.6 Brexit

In 2016 the UK voted to leave the European Union (EU). However, Ceredigion was one of the few counties in Wales that voted to remain in the EU, by a majority of 54.6%. Since the last Assessment of Local Well-being in 2017, the situation regarding Brexit has become clearer, as at January 2020, the UK legally left the EU with a withdrawal agreement in place.

The EU Settlement Scheme (EUSS) was introduced in 2019 by the Home Office to process the registration of EU citizens resident in the UK. The Scheme enabled EU citizens residing in the UK to continue living, working and studying in the UK. Applying for this scheme is vital for individuals and families, so that they can continue to access employment and services such as, healthcare and schools in the UK.

The delivery of the EUSS was facilitated online, it was anticipated that this would make it difficult for some residents to apply, particularly as the County has an ageing demographic (individuals within the older groups may lack digital skills), and certain areas have difficulty in accessing the internet. In August 2019, just 300 people in Ceredigion had successfully applied for settled status and it was established that further support was required locally. These measures were successful in enabling residents to apply as by March 2021, 2,380 people in Ceredigion had applied for the EUSS. It is estimated that this accounts for the majority of EU citizens in Ceredigion.

It is unclear what the implications of Brexit will be on Ceredigion's future, however, further discussion in the main body of the Assessment attempts to gain a better understanding. The vote to leave the EU provides the most immediate challenge for the local economy. It is expected that certain sectors from Ceredigion's economy will be particularly affected by decisions made in the next few years: agriculture, Higher Education (Aberystwyth and Lampeter Universities) and tourism.

### 3.7 Connectivity

Access to good quality broadband and mobile phone service is essential to 21<sup>st</sup> century living. From keeping in touch with family and friends, to accessing critical services such as online shopping and online medical consultations; broadband and mobile phone service can be an important determinant of well-being. In our Well-being Survey, 33% valued digital connectivity as one of the most important things for a prosperous community, which was the fourth most common response (refer to section 7.2 Well Connected Communities for further information).

Ceredigion is preconceived as having poor broadband and mobile phone coverage, partly due to its hilly topography which can affect the standard of services available. According to the National Survey for Wales, it was reported that 12% of households in Ceredigion do not have access to the internet.

The latest data from Ofcom challenges some of the preconceptions about digital connectivity in Ceredigion. Perhaps surprisingly, 20% of premises in Ceredigion receive Full Fibre Broadband (the fastest and most reliable broadband technology), which is higher than the Mid/South West Wales region (8.8%), the Wales average (7.5%) and the average for the UK as a whole (7.1%). Despite this, the overall proportion of premises in Ceredigion unable to receive 2, 5, 10 and 30Mbit/s broadband speeds remains higher than the rest of Mid and South West Wales, with the exception of neighbouring Powys. The evidence available from Ofcom suggests that the real challenge for Ceredigion

lies not in connecting Ceredigion, but in increasing existing connectivity through greater access to the faster broadband services.

A similar trend can be seen in mobile coverage. Data from Ofcom again shows a more positive picture of coverage in the county than initially expected. The main mobile phone service provider in Ceredigion, EE, shows that the majority of the county is “likely to have good coverage” of 4G. There are some pockets to the north and on the eastern border where usage “may experience some problems”. Similar to broadband technology, investment in mobile communications has also been developing in the county - new Base Transceiver Stations were installed by EE in 2018 to improve coverage in some in the known “not spot” areas, including Capel Dewi in the north and Pontsian in the south.

However, in comparison to other counties in the Mid and West Wales region, the availability of 3G and 4G services in Ceredigion remains low. 3G coverage of all operators reaches 80.2% of premises in Ceredigion, the lowest in the region, whilst the same is true of 4G coverage where 81.5% are covered. Across Wales as a whole, 94% of premises are covered by 3G services and 92% are covered by 4G.

Similar to broadband, the evidence provided by Ofcom suggests that the challenge in Ceredigion is continuing to extend coverage of the latest mobile technology. We know that building the physical infrastructure requires significant upfront and ongoing investment to maintain and upgrade. This is seen with power and road networks and the same is true for communications, satellite and high-power computing infrastructure. It is also crucial that regulatory drivers incentivise well-targeted investment.

### 3.8 Welsh Language and Culture

The Well-being Survey indicated that Welsh speaking is highly important for a sense of inclusion and identity, which can have positive well-being outcomes. Ceredigion is considered as being one of the heartlands of the Welsh language, despite a substantial student population.

Results from the 2011 Census showed that 47.3% of Ceredigion residents could speak the Welsh language. Ceredigion had the third highest percentage of Welsh speakers out of all other Welsh local authorities, with Gwynedd (64.3%) and Anglesey (56.1%) being in first and second place.

Further intelligence and studies around the Welsh language indicate that the percentage of Welsh language speakers in Ceredigion has been increasing. For example, the Annual Population Survey revealed that in 2014, 52.7% of Ceredigion’s population spoke Welsh, this increased to 59.2% in 2019 and has increased even further to 60.9% in the year ending September 2020. However, these figures should be treated with caution as the Annual Population Survey is a self-assessed survey.

Since the last Census in 2011, it is believed that attitudes towards the Welsh language have changed. More and more people are wanting to learn and speak the language across Wales. The Welsh Government have also introduced a strategy (Cymraeg 2050), which aims for Wales to have 1 million Welsh language speakers by the year 2050.

There are 43 schools in Ceredigion, a mixture of primary, secondary and through age schools. 37 of Ceredigion schools are Welsh medium schools, meaning that a majority of our younger population are learning the Welsh language from a young age.

Ceredigion is a County well known for its cultural and heritage sites. There are castles and museums situated across the County, and Aberystwyth is home to the National Library of Wales. These attractions draw many tourists to the area throughout the year, not only is this economically beneficial for Ceredigion, it is extremely important that people are educated on the history and culture of Wales. In our Well-being Survey, 40% of respondents valued Ceredigion’s heritage and history the most when considering their community’s vibrancy and thriving Welsh language, which was ranked third overall (after locally produced food and being able to speak the Welsh language).

The ancient Celtic heritage of Ceredigion and its landscape is explained in a variety of legends and folktales. The history of Wales can be visualised in Ceredigion by visiting hillforts and harbours, mines and mills, churches and chapels and towns and villages. Ceredigion has been put on the map by literature, TV and film across the years, for

example the TV programme *Hinterland* / *Y Gwyll* was filmed in Aberystwyth and north Ceredigion. Arts, music and performance have all been inspired by the character, landscapes, seascapes and wildlife of Ceredigion. Food culture is strong in Ceredigion, seafood from the Teifi Rivers and lamb from the Cambrian Mountains are just a few well-known local producers.

Results from the National Survey for Wales shows that during 2019/20, 66% participated or attended in arts, culture or heritage activities at least 3 times a year in Ceredigion. This is considerably lower than the national average of 70% attending arts, culture or heritage activities at least three times a year (see 4.1 Nurturing Creativity for further information).

### 3.9 Equality, Diversity and Inclusion

“A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio-economic circumstances)”<sup>6</sup>.

An equal society, where everyone is treated fairly is essential to well-being. As such, the Welsh Government have a stand-alone well-being goal on equality – ‘**A more Equal Wales**’. From the outset, it would seem that the population of Ceredigion is relatively less diverse than other parts of Wales. For example, the 2011 Census recorded that as little as 3.3% of Ceredigion’s population comprised of the Black, Asian and minority ethnic groups. However, analysing the data further highlights that the population of Ceredigion is both diverse and unique to the County (see Figure 3.3).

The most recent data, estimates the population of Ceredigion includes:

**Figure 3.3: Composition of Ceredigion’s population**

- 49.8% Male & 50.2% Female
- 14.7% under the age of 16
- 59.7% of working age (16-64)
- 25.6% pensionable age (65+)
- 59.7% can speak Welsh
- 96.7% from a white and 3.3% from a non-white background
- 5-7% from the Lesbian, Gay, Bisexual, Transgender and Queer (LGBTQ+) community
- 21.2% people with a limiting long term disability
- 11.4% provide unpaid care
- 57.9% were Christian, 2.5% were of other religion, 30.7% had no religion and 9% would prefer not to state their religion
- 10.9% earn less than £10,000 per year and 5.1% earn over £80,000 per year
- 5% living in lone parent households

*Source: ONS (2020) population estimates by local authority, based by 5 year age band; ONS (2021) Annual Population Survey; ONS (2011) 2011 Census – Ethnic group, local authorities in England and Wales: Table KS201EW; Stonewall Cymru; ONS (2011) 2011 Census – limiting long term illness or disability by local authority; ONS (2011) 2011 Census – provision of unpaid care by local authority; ONS (2011) 2011 Census – Welsh residents by religion and local authority. CACI (2021) Paycheck data. ONS (2011) 2011 Census – lone parent households.*

The **Ceredigion County Council Strategic Equality Plan 2020-24**, highlights that it is only when we consider the above image of Ceredigion, we can truly start to appreciate the diversity of our population and the need to get on well together with dignity and respect.

The **2010 Equality Act** made it illegal to discriminate those with protected characteristics. Protected Characteristics are characteristics where evidence shows there is still significant discrimination in employment, provision of goods and services and access to services such as health and education. These include:

<sup>6</sup> Well-being of Future Generations (Wales) (Act 2015).

- Age
- Disability
- Gender reassignment
- Religion or belief
- Sexual orientation
- Marriage and civil partnership
- Pregnancy and maternity
- Race
- Sex

Often it is the individuals and groups with protected characteristics who are at the greatest risk of discrimination and unfair treatment.<sup>7</sup> These challenges are exacerbated further when different forms of discrimination overlap (this is known as intersectionality). For example, someone may experience both racism and sexism in combination. The Well-being Assessment will draw on the lived experiences of Ceredigion residents who have suffered multi-dimensional inequality, to enable a better understanding of where intervention is required.

Inequalities in Ceredigion are multi-dimensional. Inequality is not just about income but includes a broad spectrum of factors. The Assessment explores inequalities between different demographic groups and communities in Ceredigion from a social, cultural, economic and environmental perspective. The following outlines the areas where inequality is experienced by individuals and groups in Ceredigion and its relationship with well-being (note: some of these inequalities could be included in more than one of the domains of well-being due to their intersecting nature). These are just some of the examples where inequalities are present, or might be present in the future in Ceredigion, but it is by no means a full account. Some inequalities remain hidden within data and are therefore difficult to identify.

### 1. Economic Well-being:

- **Housing inequalities** (refer to 6.1 Growing Independent; 7.4 Starting a Family; 8.2 A Suitable Home)
- **Employment inequalities** (refer to 7.2 Part of a Community – Thriving Welsh Linguistic Community; 7.7 Job, Career and the Economy)
- Inequalities in **accessing services** (refer to 7.2 Part of a Community – Well-connected communities)
- **Brexit** - inequalities (7.3 Close to Nature)
- Potential inequalities due to **decarbonisation** (7.3 Close to Nature)
- **Financial insecurity & income inequalities** (refer to 7.4 Starting a Family; 8.1 Working Well; 7.7 Job, Career and the Economy)

### 2. Social Well-being:

- **Health inequalities** (Physical and Mental) (4.1 Welcome to the World; 5.1 Growing up Healthy; 6.1 Growing Independent; 7.6 Health for the future)
- **Education inequalities** (refer to 5.2 Strong Foundations)
- **Victimisation** (refer to 7.2 Part of a Community)
- **Transport inequalities** (refer to 7.2 Part of a Community – Well-connected communities)
- **Digital inequalities** (refer to 7.2 Part of a Community – Well-connected communities; 8.1 Ageing Well)
- **Employment inequalities** (refer to 7.5 Caring and Responsibilities)
- Inequalities of **un-paid care** (refer to 8.1 Working Well)
- **Demographic changes** (refer to 8.1 Working Well)

### 3. Cultural inequalities

- **Crime inequalities** (Hate Crime, Violent Crime, Gender-based violence) (refer to 7.2 Part of a Community – Community cohesion)
- **Employment inequalities** (refer to 7.2 Part of a Community – Thriving Welsh Linguistic Community)
- Inequalities due to **Brexit** (7.2 Part of a Community – Community Cohesion)

<sup>7</sup> Welsh Government (2020) Strategic Equality Plan 2020-2024: Equality Aims, Objectives and Actions.

#### 4. Environmental inequalities

- **Climate change** inequalities (6.2 Out and About as Part of the Community)
- Potential inequalities due to **decarbonisation** ( refer to 7.3 Close to Nature – decarbonisation)
- Inequalities due to **food and nutrition security** (refer to 7.3 Close to Nature – Environmental Issues; 7.6 Health for the Future)
- Inequalities due to **flooding** (refer to 7.3 Close to Nature – Environmental Issues)
- Inequalities in **accessing green spaces** (refer to 7.3 Close to Nature – Natural Environment)
- **Land management** inequalities (refer to 7.3 Close to Nature)



# NEW BEGINNINGS







*In this chapter: Welcome to the World, First Years*

The Well-being of Future Generations Act (Wales) 2015, states that every child in Wales should have the best start in life. Families and parents strive to achieve this and we as a Public Services Board have a duty to provide support, information and the skills to enable this to be achieved. A good start in life, our family circumstances, the place where we were born and first days, weeks or months can all affect our well-being now and in the future. During 2019 there were 521 births in Ceredigion.

## 4.1 Welcome to the World

### Parental Health

In 2019 the fertility rate in Ceredigion was 1.49, this being lower than the national average of 1.54. Low fertility rates is one of the determining factors in Ceredigion's projected decrease in population over the next twenty-five years.

The number of annual births have been decreasing in Ceredigion and estimations show that the population will continue to decrease due to lower levels of birth and other socio-economic factors, such as adults concentrating more on their careers, or adults having fewer children later in life.

Additionally, the cost of living is increasing. Reports by the Child Poverty Action group suggests that the cost of raising a child across 18 years could be over £150,000 for a couple, and even more for a lone parent.<sup>8</sup> This will also be a determining factor in how many children parents choose to have. Improvement and better access to contraception is also having effects on fertility rates and unplanned pregnancies.

Before babies are born, factors can affect their life expectancy. The Pharmaceutical Needs Assessment states that mother's who are obese, smoke, take drugs or drink alcohol throughout pregnancy are increasing the risk of their child developing serious chronic conditions, affecting their quality of life and life expectancy.<sup>9</sup> All this can affect our well-being as a baby, but can also lead to well-being issues as we grow up.

It is very natural to experience a range of emotions during and after pregnancy. Sometimes these emotional feelings can be very difficult to cope with and can even begin to affect day-to-day lives. Studies suggest that at least 10% of women develop a mental illness during pregnancy or within the first year of childbirth.<sup>10</sup> Some examples of these include antenatal and postnatal depression, obsessive compulsive disorder, posttraumatic stress disorder and postpartum psychosis.<sup>11</sup> When the mental health of a parent is affected, it can lead to significant impacts on infant development.

Research indicates that women and their families' feel they lack knowledge around perinatal mental health conditions, and therefore often do not recognise symptoms, which can then lead to them worsening. Additionally, there is a stigma around perinatal mental health problems, which can put women off seeking help.<sup>12</sup>

Health Measures that can determine a parents and babies well-being post and pre-birth are listed in Table 4.1. Although these measures are not available by Local Authority, the Hywel Dda Health Board region, which includes Ceredigion, Carmarthenshire and Pembrokeshire, consistently perform better in all measures, compared to the Welsh average. For instance, the percentage of women who 'stopped smoking' during pregnancy is higher than the

<sup>8</sup> Hirsch D. (2020) Child Poverty Action Group. The cost of a child in 2020.

<sup>9</sup> Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment.

<sup>10</sup> Ibid.

<sup>11</sup> Ibid.

<sup>12</sup> Witcombe-Hayes, S with Jones, I., Gauci, P., Burns, J., Jones, S and O'Leary, S (2018) From bumps to babies: perinatal mental health care Wales. Cardiff: NSPCC, National Centre for Mental Health, Mind Cymru, Mental Health Foundation, Maternal Mental Health Everyone's Business.

Welsh average and the percentage of woman who a reported a mental health condition at initial assessment of pregnancy has consistently been lower than the Welsh average, since 2018.<sup>13</sup>

Additionally, it seems that Hywel Dda has been improving in all, except one of the below health measures since 2018. For example, the percentage of women who had an initial assessment carried out by 10 completed weeks of pregnancy has increased by 6.6% between 2018-20 and the percentage of women who recorded smoking at their initial pregnancy assessment has reduced by 0.6% between 2018-20. The anomaly here is the percentage of women who had a BMI of 30+ at their initial pregnancy assessment, this percentage has increased by 4.4% between 2018-20 and is clearly something to monitor over the coming years.<sup>14</sup>

**Table 4.1: Parental Health Measures**

	% of women who had an initial assessment carried out by 10 completed weeks of pregnancy		
	2018	2019	2020
<b>Hywel Dda</b>	<b>73.4</b>	<b>78.7</b>	<b>80.3</b>
Wales	73.1	72.3	76.0
	% of women who were recorded as smoking at initial assessment		
<b>Hywel Dda</b>	<b>16.6</b>	<b>16.9</b>	<b>16.0</b>
Wales	17.9	17.3	17.3
	% of women who 'stopped smoking' during pregnancy		
<b>Hywel Dda</b>	<b>23.3</b>	<b>22.1</b>	<b>27.7</b>
Wales	17.4	17.8	18.1
	% of women at initial assessment who had a BMI 30+		
<b>Hywel Dda</b>	<b>28.2</b>	<b>27.4</b>	<b>29.4</b>
Wales	28.0	28.2	29.2
	% of women at initial assessment who had reported a mental health condition		
<b>Hywel Dda</b>	<b>19.5</b>	<b>23.2</b>	<b>24.5</b>
Wales	24.3	25.1	27.1

Source: Welsh Government<sup>15</sup>

Flying Start is an organisation that provides a range of services that support families with children under the age of 4. The organisation has worked closely with the Midwifery Team to develop online classes, which are offered to families across Ceredigion. In the summer of 2021, the classes were extended to include a session from the Perinatal Mental Health Midwife, which was jointly funded by Hywel Dda University Health Board and through funding drawn down as part of the West Wales Care Partnerships Integrated Care Fund programme. This session was an introduction to mental health problems that many parents may face. It is essential that mothers are able to access the correct support that they need for their health and mental well-being.





There is also a strong link between poverty and longer-term health. A baby born into poverty is more likely to grow up with poorer health and well-being, and this is shown in the disparity between the healthy life expectancy in the most deprived areas of Ceredigion compared to the least deprived. For example, the gap in *healthy life expectancy* between the most and least deprived is higher for males (9.3 years) than females (6.7 years), see Table 4.2. Although these are both lower than the national average (18.7 years for males and 18.2 years for females), the gap between most and least deprived remains in Ceredigion.

<sup>13</sup> Welsh Government (2020) Maternity and birth statistics

<sup>14</sup> Ibid.

<sup>15</sup> Ibid.

Table 4.2: Average healthy life expectancy in Ceredigion

The average healthy life expectancy			
	Male 67.9 years	Female 69.7 years	
The gap between the most and least deprived areas			
	9.3 years	6.7 years	

Source: StatsWales

The percentage of low birth weight babies is one of the Welsh Governments National Indicators. Low birth weights can affect a baby’s health. The chances of developing serious health problems is increased if a baby is born at a low weight, for example very small babies can have trouble eating, gaining weight and fighting off infections. Encouragingly, Ceredigion performs well in this indicator, with low birth weights in Ceredigion remaining lower than the national average. In 2019 just 3.8% of live births were recorded as low birth weights, compared to 5.9% across Wales. Nationally, low birth weights are a concern as highlighted in the Well-being of Wales Report 2021, which shows that 2020 had not only seen an increase in the proportion of low birth weights, but was also the highest on record.<sup>16</sup>

Table 4.3 demonstrates the percentage of low birth weights by community area. Aberystwyth South is the only area in Ceredigion with a higher percentage of low birth weight than the national average, while the Borth & Bont-goch area has the lowest percentage.<sup>17</sup> Research shows that deprivation levels could be driving the disparity in low birth weights between community areas<sup>18</sup>, which impacts our progress towards achieving **An Equal Wales**.

Table 4.3: Low birth weight by Community Area in Ceredigion

Community Area	Low birth weight (live single births less than 2.5kg)
Borth & Bont-goch	3.1%
New Quay & Penbryn	3.5%
Aberaeron & Llanrhystud	4.3%
Rheidol, Ystwyth & Caron	4.7%
Lampeter & Llanfihangel Ystrad	5.2%
Beulah, Troed-yr-aur & Llandysul	5.2%
Cardigan & Aberporth	5.3%
Aberystwyth North	5.5%
Wales	5.5%
Aberystwyth South	5.9%

Source: WIMD, 2019

Parental Preparedness

As well as being healthy, parents also need to be prepared for parenthood. Studies highlight that **antenatal education** improves well-being outcomes and parent experiences of birth and parenthood.<sup>19</sup> Many different professionals and practitioners in Hywel Dda University Health Board (HDdUHB), Ceredigion County Council, and the third sector lead and provide preparation for parenthood programmes and activities for upcoming parents.

<sup>16</sup> “Well-being of Wales 2021”. Welsh Government. 30 September 2021. 6.  
<sup>17</sup> WIMD (2019) Low birth weight (live single births less than 2.5kg) (%).  
<sup>18</sup> Welsh Government (2021). Well-being of Wales 2021. [Online]. Available at: [Wellbeing of Wales: 2021 | GOV.WALES](#) (Accessed: 02.11.21).  
<sup>19</sup> Department of Health and Social Care (2012), ‘Preparation for birth and beyond: a resource pack for leaders of community groups and activities’. [Accessed Online]. Available at: [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/215386/dh\\_134728.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/215386/dh_134728.pdf)

Currently in Ceredigion, community midwives provide antenatal sessions to prospective parents. During the peak of the COVID-19 pandemic in 2020, Flying Start worked closely with the Midwifery Team to develop online antenatal classes, which were offered to families across Ceredigion.

However, during periods of high transmission, partners were not allowed to attend certain appointments nor were they allowed to be present during labour and birth. The impact this short-term change has had on parents' well-being and mental health in Ceredigion is unknown, however, it may have caused some level of distress and anxiety.

**Flying Start** provides childcare support, parenting support, early year's health service and early speech and language support to families with children under the age of 4, who live in the most deprived areas of Ceredigion. Ceredigion County Council staff, working across the different programmes, have developed a whole suite of support targeting well-being. Flying Start also runs a range of mother and baby groups, including baby massage for the parents, which aids bonding.

Flying Start has proved to be highly effective for families in our most deprived areas. During 2018-19, the uptake in Flying Start parenting courses was 93%, the highest uptake out of the 22 local authorities and significantly above the national average of 70%<sup>20</sup>. Furthermore, Flying Start has shown to combat certain inequalities between the less and more deprived areas in Ceredigion. For example, there were no differences between the percentage of children living in Flying Start and non-Flying Start areas who were fully immunised by their 4<sup>th</sup> birthday (89% in 2019-20).

**Immunisations** are one of the most effective ways to protect children against serious infectious diseases. During 2020-21, the uptake of scheduled immunisations<sup>21</sup> for children aged four in Ceredigion was similar to the national average (87.9% compared to 87.6%).<sup>22</sup> Figure 4.1 highlights that childhood immunisation uptake in Ceredigion is improving and remains positive. However, uptake has slightly declined from the year previous (91.0% in 2019-20 to 87.9% in 2020-21).<sup>23</sup> Further work is required to ensure that childhood immunisation uptakes in Ceredigion continue to increase and reach the 95% target Welsh Government has set (this is the level known to be necessary to prevent disease circulating within the community).

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<sup>20</sup> Welsh Government (2019) 'Flying Start Summary Statistics 2018-19'. [Accessed Online]. Available at: <https://gov.wales/sites/default/files/statistics-and-research/2019-07/flying-start-summary-statistics-april-2018-to-march-2019-279.pdf>

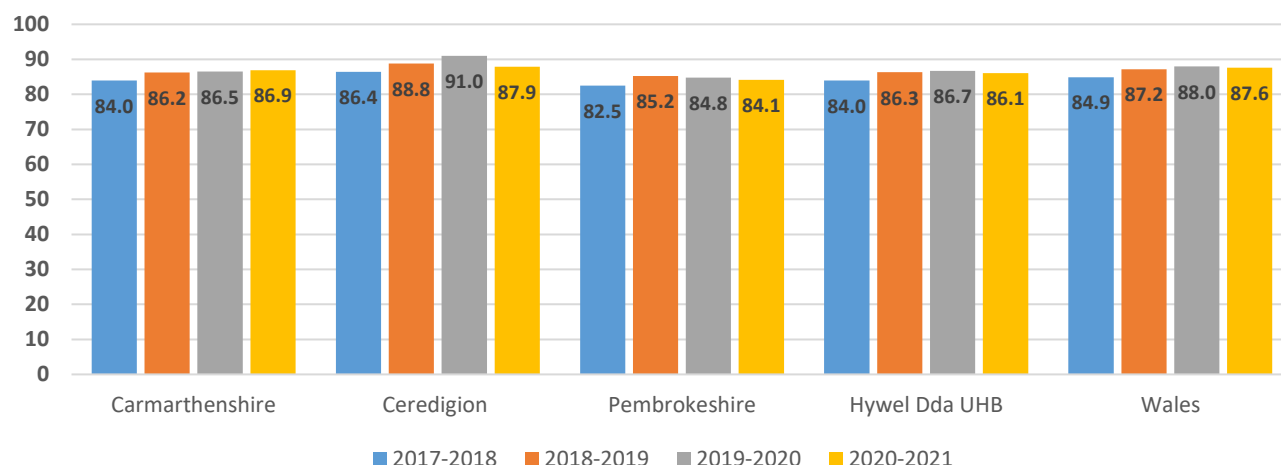
<sup>21</sup> Completed '4 in 1' pre-school booster, the Hib/MenC booster and second MMR dose by four years of age.

<sup>22</sup> Public Health Wales and NHS Wales (2021) Vaccine Uptake in Children in Wales COVER Report 2021: Data for the year ending 31<sup>st</sup> of March 2021. [Online]. Available at: [cover report Feb 95 \[WP\] \(wales.nhs.uk\)](https://www.wales.nhs.uk) (Accessed: 04.02.22)

<sup>23</sup> Ibid.

**Figure 4.1: Percentage of children reaching their 4th birthday and are up to date with all scheduled vaccines - Local authorities within Hywel Dda University Health Board and Welsh average (2017-2021)**

▼ Percentage



Source: PHW & NHW -Vaccine Uptake in Children in Wales COVER Annual Report 2018<sup>24</sup>, 2019<sup>25</sup>, 2020<sup>26</sup>, 2021<sup>27</sup>

It is too early to assess the impact of the COVID-19 pandemic on the uptake of childhood vaccinations over the short-term. General Practices (GPs) across Wales anticipated that a disruption to health services and the potential reluctance or inability of people to attend non-urgent health appointments could reduce uptake. Early indicators from the Vaccine Preventable Disease Programme suggests that uptakes have remained high across Wales.<sup>3</sup>

In order to progress towards the **Healthier Wales** and **More Equal Wales** National Well-being Goals and to achieve the 95% recommendation, improvements in uptake are required at a local and regional level.

Mothers in Ceredigion are significantly more likely to **breastfeed** their babies at 10 days following birth, than the Welsh average (50.2% compared to 35.2%).<sup>28</sup> Research by Public Health Wales, UNICEF, NHS and others found that breastfeeding is important for the health and development of babies and their mothers. For example, as reflected in the UK Government's Early Years Healthy Development Review Report<sup>29</sup>, breastfeeding reduces the risk of childhood obesity by up to 25%<sup>30</sup> and can reduce the risk of both ovarian and breast cancer in the mother.<sup>31</sup> The World Health Organisation (WHO) recommends exclusive breastfeeding for the first 6 months of life, followed by continued breastfeeding with complementary feeding up to two-years.

The Breastfeeding Network (a national network) has support groups across Ceredigion in Lampeter, Aberystwyth and Newcastle Emlyn. This network holds weekly groups for breastfeeding support and information which can make a big difference to the well-being of new mothers. There are also five Family Centres in Ceredigion situated in the main settlements, with many mother and baby groups located in the rural areas. Flying Start also offers support to families in the most deprived areas of Ceredigion on weaning, nutrition and infant feeding. This support is shown to

<sup>24</sup> Public Health Wales & NHS Wales (2018). Vaccine Uptake in Children in Wales COVER Annual Report 2018: Data for the year ending 31<sup>st</sup> March 2018.[Online]. Available at: [COVER20172018 v1b.pdf \(wales.nhs.uk\)](#) (Accessed: 04.02.22)

<sup>25</sup> Ibid.

<sup>26</sup> Ibid.

<sup>27</sup> Ibid.

<sup>28</sup> Public Health Wales (2018) Babies exclusively breastfed at 10 days following birth, 2018.

<sup>29</sup> HM Government (2021) The Best Start of Life: The Early Years Healthy Development Review Report. [online]. Available at: [The Best Start for Life - The Early Years Healthy Development Review Report \(publishing.service.gov.uk\)](#) (Accessed: 11.02.22).

<sup>30</sup> Collaborative Group on Hormonal Factors in Breast Cancer. (2002) Breast cancer and breastfeeding: collaborative reanalysis of individual data from 47 epidemiological studies in 30 countries, including 50302 women with breast cancer and 96973 women without the disease. *Lancet*. 360(9328), pp.187–195 [Online]. Available at: [Breast cancer and breastfeeding: collaborative reanalysis of individual data from 47 epidemiological studies in 30 countries, including 50302 women with breast cancer and 96973 women without the disease - PubMed \(nih.gov\)](#) (Accessed: 11.02.22)

<sup>31</sup> Rito A.I et al. (2019). Association between characteristics at birth, breastfeeding and obesity in 22 countries: the WHO European childhood obesity surveillance initiative. [Online]. Available at: [Association between Characteristics at Birth, Breastfeeding and Obesity in 22 Countries: The WHO European Childhood Obesity Surveillance Initiative – COSI 2015/2017 - FullText - Obesity Facts 2019, Vol. 12, No. 2 - Karger Publishers](#) (Accessed: 11.02.22).

be highly effective as the percentage of mothers living in Flying Start areas in Ceredigion breastfeeding at 10 days was the highest in Wales during 2019-20 (59%).<sup>32</sup>

Nationally, breastfeeding rates in Ceredigion fare very well, however, the UK has one of the lowest breastfeeding rates globally.<sup>33</sup> Recent trends highlight that breastfeeding rates in Ceredigion are slowly declining, down approximately 2 percentage points, from 51.8% in 2016, to 50.2% in 2018;<sup>34</sup> however, it is too early to say whether this trend will continue longer-term.

Ensuring that parents have adequate paid leave for the birth of a child is important for the well-being of both the infant and the parents. Studies show that adequate **maternal and paternal leave** can lead to lower infant mortality rates, health benefits for infants and parents, increased breastfeeding rates, increased childhood bonding and may also reduce gender inequality.<sup>35</sup>

In 2015, new rights to allow parents to share leave following the birth or adoption of their child came into effect in the UK. Evidence from HMRC highlights that as few as 2% of fathers or partners in the UK were in receipt of Shared Parental Leave (SPL) in 2020.<sup>36</sup> This exceptionally low figure could be due to the fact that the primary earner's income could fall significantly, with some estimates being as little as £600 a month<sup>37</sup>, and for many couples, this would make it impossible to support a family.

Data is lacking on the uptake rate of this scheme at a national and local level, however, it is believed to be low. In achieving a more equal and fairer Wales, parents regardless of gender will require the same opportunities to access suitable and adequate paid leave. Other opportunities exist in supporting parents during pregnancy and early years through the Welsh Governments commitment for 30% of the workforce to work at or near their home on a regular basis.

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<sup>32</sup> Welsh Government (2020) 'Flying Start: April 2019 to March 2020'. [Accessed Online]. Available at: <https://gov.wales/flying-start-april-2019-march-2020-html>

<sup>33</sup> Welsh Government (2019) 'All Wales Breastfeeding Five Year Action Plan', Available at: [https://gov.wales/sites/default/files/publications/2019-06/all-wales-breastfeeding-five-year-action-plan-july-2019\\_0.pdf](https://gov.wales/sites/default/files/publications/2019-06/all-wales-breastfeeding-five-year-action-plan-july-2019_0.pdf)

<sup>34</sup> Social Care Data Wales (2019). Conceptions, births and deaths. [Online]. Available at: [Table | Conceptions, births and deaths | Welsh community data | Themes | Home - Social Care Wales Data Observatory \(socialcaredata.wales\)](https://socialcaredata.wales/themes/home-social-care-wales-data-observatory) (Accessed: 23.02.22).

<sup>35</sup> Jody Heymann et al. (2017), 'Paid parental leave and family wellbeing in the sustainable development era'. [Accessed Online]. Available at: <https://publichealthreviews.biomedcentral.com/articles/10.1186/s40985-017-0067-2>

<sup>36</sup> UK Parliament (2021) 'Paternity Leave'. [Accessed Online]. Available at: <https://questions-statements.parliament.uk/written-questions/detail/2021-02-01/146798> (Accessed: 26.08.21)

<sup>37</sup> EMW (2020). 'Use of shared parental leave increased by 23% last year – but still only 13,100 couples used the scheme'. [Online]. Available at: [Use of shared parental leave increased by 23% last year – but still only 13,100 couples used the scheme \(emwllp.com\)](https://www.emwllp.com/use-of-shared-parental-leave-increased-by-23-percent-last-year-but-still-only-13100-couples-used-the-scheme) (Accessed: 26.08.21).



## Case Study ►

### Early Years Outcomes Data Dashboard

The Early Years Outcomes Framework sets out the outcomes that we want to achieve for all children aged 0-7 in Wales.

It supports the coordination of work of different departments and key stakeholders in relation to early years, helps identify where further improvements are needed, and supports planning and evaluation locally. The aim is that the framework will deliver improved outcomes for children in the early years in Wales.

Data plays a key role in the framework, and regionally partners across West Wales are in the process of developing a 'live' data dashboard to support the early years work. It will be structured across the six themes of the framework and include the population and performance measures.

The dashboard will allow for the ongoing monitoring and assessment of progress with the outcomes regionally and locally. By working collaboratively across the region, it will allow the sharing of expertise, removes duplication and facilitates greater collaboration on decision making.

There are two work streams currently in progress – one developing the measures to be included in the dashboard and the other focusing on the practicalities of delivering the regional dashboard. The aim is to deliver the dashboard during the spring of 2022.

## Relationships

A stable family is considered key to providing a supportive, nurturing and simulating environment for babies. Past research has identified that stable families have the greatest influence on child outcomes and general well-being.<sup>38</sup> The transition from being non-parents to parents can often be stressful and research suggests that having a child can negatively affect a couple's relationship and sometimes even result in separation.<sup>39</sup>

Staff across different programmes and agencies in Ceredigion have been receiving training in supporting healthy relationships. Additionally, Flying Start have offered additional courses at the end of their usual parental courses which educate parents on the importance on healthy relationships and how they can effect a child's development.

A family's stability can be affected by poverty, as social, economic and emotional aspects of life can all be affected by poverty and deprivation. Increased parental distress and relationship break-ups have been associated with economic hardship. Relationship breakdown has also been associated with a number of negative impacts on children including socio-economic disadvantage, lower educational achievement, behavioural problems and physical and mental health problems.<sup>40</sup>

Studies suggest that a third of children in single parent households are living in poverty and are more likely to be at risk of becoming homeless compared to couples with children. With increased pressures on single parent households, mental well-being and health can be affected, resulting in detrimental effects on a baby's well-being and outcomes.

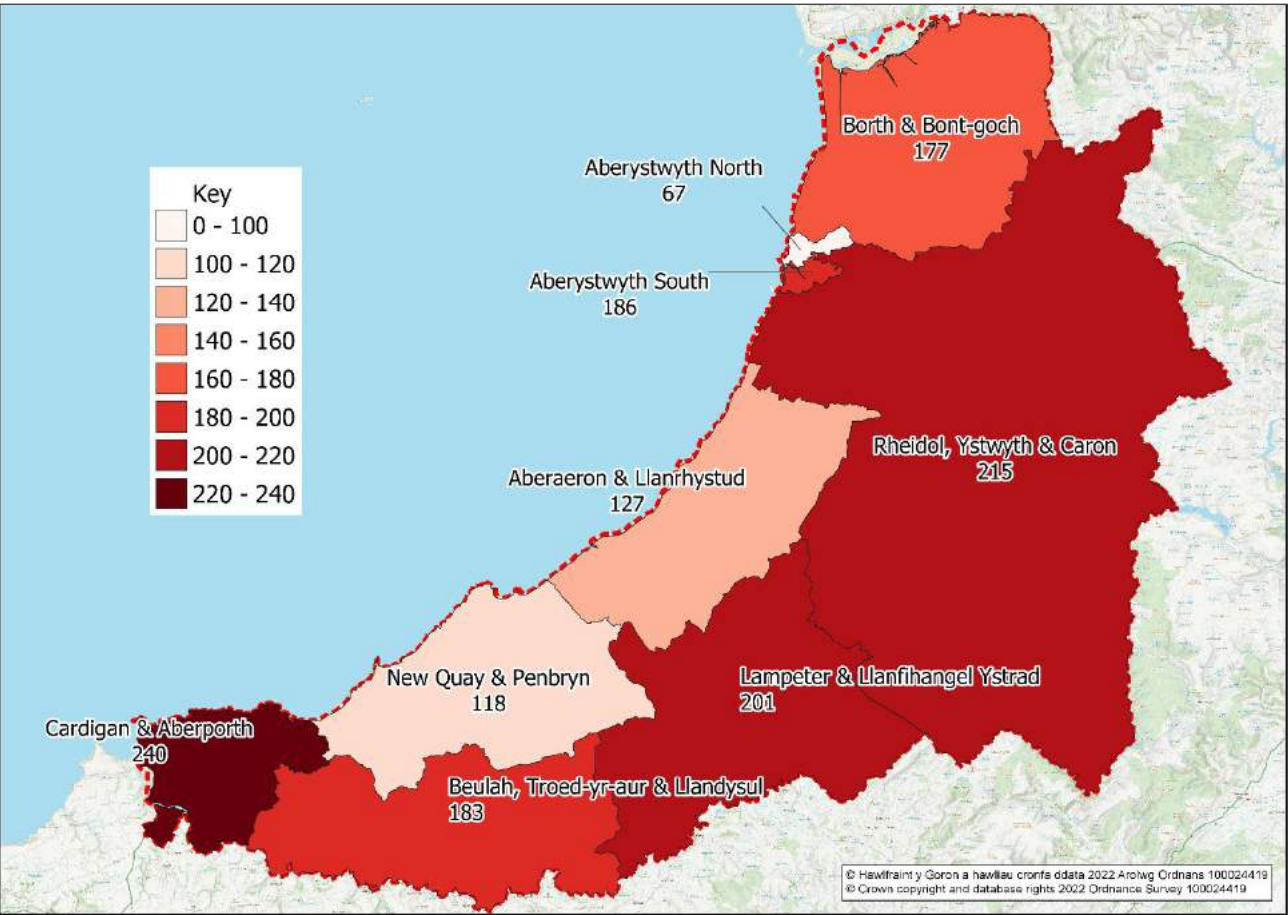
<sup>38</sup> Schoon I., Cheng H., Jones E., Maughan B. (2013) Wellbeing of Children: Early Influences.

<sup>39</sup> Doss D. (2009) The Effect on the Transition to parenthood on Relationship Quality: An Eight-Year Prospective Study.

<sup>40</sup> Welsh Government (2017). Parenting in Wales: Guidance on engagement and support.

According to the Census, there were 1,514 lone parent households with dependent children in Ceredigion in 2011. 86.3% of lone parents are female in Ceredigion, with 13.7% being male. The Cardigan & Aberporth area has the highest rate of lone parent households (240) and Aberystwyth North area has the lowest (67), see Figure 4.2.<sup>41</sup> Recent data collected from the Annual Population Survey revealed that there were around 1,300 lone parent households in Ceredigion (2015-17),<sup>42</sup> a slight decrease since the 2011 Census.

Figure 4.2: Number of lone parent households with dependent children by Community Area



Source: Census 2011

In the year ending March 2020, the Dyfed-Powys Police force area, (which includes Ceredigion, Powys, Pembrokeshire and Carmarthenshire), recorded 9,244 domestic abuse-related incidents and crimes.<sup>43</sup> Witnessing domestic abuse as a child can increase a child’s likelihood of showing violent behaviour later in life and increase the chances of poor mental health and well-being.

Case Study ►

“Mums Matter” is an early intervention service, offering a safe, supportive environment to meet with other mums with similar experiences. It is being launched across the Hywel Dda UHB region and is a service for new mothers struggling with mild to moderate mental health issues during the perinatal period across Carmarthenshire, Ceredigion and Pembrokeshire. This service has been trialled in other parts of the UK and Wales, with some parents describing it as ‘life changing’.

<sup>41</sup> Census (2011) Lone parent households.  
<sup>42</sup> Welsh Government (2018). Labour Market Statistics for Households, 2017/2018. Online: <https://gov.wales/sites/default/files/statistics-and-research/2019-12/181127-labour-market-statistics-households-2017-en.pdf> Retrieved: 06/10/2021.  
<sup>43</sup> ONS (2020) Domestic abuse in England and Wales. Online: <https://www.ons.gov.uk/peoplepopulationandcommunity/crimeandjustice/datasets/domesticabuseinenglandandwalesdatatool> Retrieved: 07/10/2021.

## 4.2 First Years

### Financial Considerations

Low socio-economic status can affect parental self-esteem, self-confidence and the quality of parenting. Average incomes in Ceredigion are lower and therefore the cost of raising children is challenging for some parents.

According to the Welsh Index of Multiple Deprivation (WIMD), the Cardigan & Aberporth area has the highest proportion of its population in income deprivation at 19%, which is higher than the national average (16%) and equates to 1,685 people. At the other end of the scale, Aberystwyth North has the lowest percentage, at 6% - see Table 4.4.

**Table 4.4: Percentage of people in Income Deprivation**

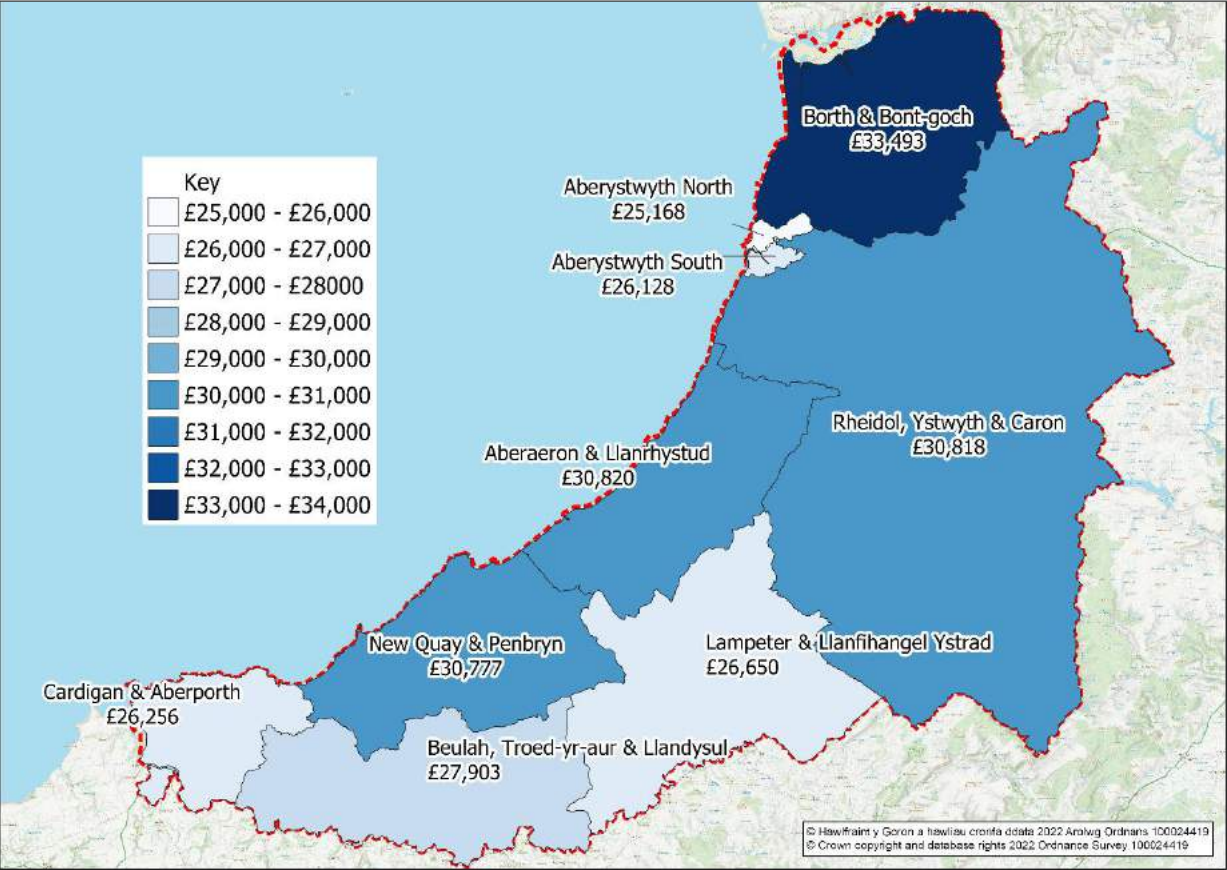
Community Area	People in Income Deprivation
Cardigan & Aberporth	19%
Beulah, Troed-yr-aur & Llandysul	14%
Aberystwyth South	13%
Lampeter & Llanfihangel Ystrad	12%
New Quay & Penbryn	12%
Aberaeron & Llanrhystud	11%
Rheidol, Ystwyth & Caron	10%
Borth & Bont-goch	10%
Aberystwyth North	6%

Source: Welsh Index of Multiple Deprivation, 2019

Median incomes in Ceredigion are £28,595, which is £404 below the national average for Wales and £4,529 below the UK. Income includes income from not only salaries but other sources such as pensions and other investments. There are also large differences between the different community areas of Ceredigion. Figure 4.3 shows that Borth & Bont-goch has the highest median income at £33,493, some £7,237 higher than Cardigan and Aberporth, and over £8,000 higher than Aberystwyth North (£25,168), although the latter area is where many of the Aberystwyth University students reside during term time and likely to skew the income figures downwards.<sup>44</sup>

<sup>44</sup> CACI Paycheck, 2020

Figure 4.3: Median Income in Ceredigion by Community Area



Source: CACI Paycheck, 2020

Having a baby is expensive. The Child Poverty Action group suggest that the cost of raising a child across 18 years could be over £150,000. This is around £8,333 a year<sup>45</sup> and amounts to 29.1% of income across Ceredigion, rising to 33.1% in Aberystwyth North where incomes are lowest in the County (Figure 4.4). These figures are before household bills and other expenditures are factored in.

Figure 4.4: Estimated percentage of median gross income spent on raising a child per year

Aberystwyth North	Ceredigion	Borth & Bont-goch
33.1%	29.1%	24.9%

Source: Child Poverty Action Group and CACI Paycheck, 2020

The changes in priorities that naturally arise from becoming parent can also have an impact on household incomes. Parents often decide to reduce their working hours, or move to part-time employment, while others have no choice in the matter and simply have to reduce working hours or cease working altogether.<sup>46</sup> The Parent Survey conducted in support the draft Childcare Sufficiency Assessment 2022-27 provides much evidence that many parents had to stop working due to the lack of suitable childcare in their area. In either scenario, household finances are placed under strain.

The high cost of childcare means changes to working patterns can make economic sense. The Childcare Survey 2022 noted that prices for childcare were on the rise in Wales - parents pay an average of £125 a week or over £6,500 a

<sup>45</sup> Hirsch D. (2020) Child Poverty Action Group. The cost of a child in 2020.  
<sup>46</sup> Lowth M., Jarivs S. (2017) Will having a child affect my career? Online: <https://patient.info/news-and-features/will-having-a-child-affect-my-career> Retrieved: 12/10/2021.

year for just a part time (25hours) nursery place in Wales for a child under two.<sup>47</sup> This is a sharp increase on the £115 in the previous year’s survey.<sup>48</sup> This is largely blamed on the increase in the cost of living and the economic impact of the COVID-19 pandemic,<sup>49</sup> however, there are other factors to consider such as rises in the National Minimum Wage, rises in overhead costs and a desire not to pass on costs to parents.

Flying Start provides childcare of the highest quality and has been highly effective in Ceredigion for families in our most deprived areas, which, according to WIMD 2019 is Cardigan & Aberporth.<sup>50</sup>

Welsh Language and Culture

**Early language acquisition** is very important. In a globalizing world, having a particular identity, such as being Welsh, can be both exciting and enriching. Research shows that Welsh language development in early years can encourage feelings of belonging and offer a path into new cultural and social opportunities such as literature, music, film and theatre later on in life.<sup>51</sup> Furthermore, ensuring that Welsh speakers pass the language down to the next generation and that children have the opportunities to socialise in the language of their local area is essential to the survival of the Welsh language.

There is a good amount of **Welsh-medium provision** available in the county for pre-school age children due to the number of ‘Cylchoedd Meithrin’ in operation. According to the Childcare Sufficiency Data 2022-27, there are 853 pre-school/nursery/’Cylch Meithrin’ places for 3 year olds in Ceredigion and 83% are in Welsh-medium settings (Table 4.5).<sup>52</sup>

Table 4.5: Foundation Phase Nursery provision (December 2021)

Delivery of Foundation Phase Nursery provision	Number of settings/schools	Number of spaces available	Number Welsh provision	Number Bilingual provision	% Welsh medium settings
Childcare settings	21	384	17	4	81%
Schools	14	469	12	2	86%
TOTAL	35	853	29	6	83%

Welsh-medium childcare is the most commonly used of all types of childcare in Ceredigion, this is highest for Sessional Day / Full Day Care through the ‘Cylchoedd Meithrin’. Some schools offer funded breakfast clubs which in turn offers an unregistered ‘care’ provision for parents. Families residing in the Flying Start areas in Ceredigion receive funded sessional childcare for 2-3 year olds. All of these placements are through the Welsh medium, including provision at ‘Ffrindiau Bach yr Eos’ (Penparcau/ Llwyn yr Eos – Aberystwyth), an area with one of the lowest proportions of Welsh speakers in the county. Table 4.6 provides a breakdown of the type of childcare used and the language medium in Ceredigion.

Table 4.6: Number of childcare providers by language of provision (December 2021)

	Welsh / Both	English	Total settings
Number of Sessional Day / Full Day Care providers	27	2	29
Number of Full Day Care Nurseries	5	1	6
Number of Childminders	23	22	45
Number of Out of School Care, Holiday Playscheme & Creche providers	11	0	11
TOTAL	66	25	91

<sup>47</sup> Coleman, L et al. “Childcare Survey 2022”. Coram Family and Childcare, 2022. 11.  
<sup>48</sup> Jarvie, M et al. “Childcare Survey 2021”. Coram Family and Childcare, 2022. 12.  
<sup>49</sup> “Coram Family and Childcare Survey 2022”. Coram Family and Childcare. Online: <https://www.coram.org.uk/resource/coram-family-and-childcare-survey-2022>. Retrieved: 31/03/2022.  
<sup>50</sup> WIMD (2019). Middle Layer Super Output Area (MSOA) Analysis. Online: <https://stats.wales.gov.wales/Catalogue/Community-Safety-and-Social-Inclusion/Welsh-Index-of-Multiple-Deprivation/WIMD-2019/middlelayersuperoutputareanalysis> Retrieved: 15/10/2021.  
<sup>51</sup> Welsh Government (2008). ‘Welsh Language Development’. [Online]. Available at: <https://hwb.gov.wales/api/storage/b4174a47-34fb-447d-8a11-46f21d12c804/welsh-language-development.pdf> (Accessed: 12.10.21).  
<sup>52</sup> Ceredigion County Council (2022). Draft ‘Childcare Sufficiency Assessment 2022-2027’.

There is demand for Childcare provision in Ceredigion particularly in the north, mid and south areas of the County, particularly Welsh medium. ***The Welsh in Education Language Strategic Plan (WESP) 2022-2032*** is currently in development and will look to address this issue to encourage more Welsh speaking childminders to the County.



## Summary of themes: New Beginnings



The **cost of living** is increasing and there is a strong link between poverty and longer-term health.

It is essential that mothers are able to access the correct support that they need for their health and mental well-being and can recognise **perinatal mental health conditions**.

Aberystwyth South is the only area in Ceredigion with a higher percentage of **low birth weights** than the national average.

Long-term trends in **childhood immunisation** uptake in Ceredigion are improving and remain positive.

Mothers in Ceredigion are significantly more likely to **breastfeed** their babies at 10 days following birth than the national average, and the rate of those breastfeeding who live in the Flying Start areas of Ceredigion is the highest in Wales.

Ensuring that parents **have adequate paid leave** for the birth of a child is important for the well-being of both the infant and the parents.

**Low socio-economic status** can affect parental self-esteem, self-confidence and the quality of parenting. **Average incomes** in Ceredigion are lower and therefore the **cost of raising children** are challenging for some parents. **Cardigan & Aberporth** is the community area with the highest proportion of its population in income deprivation at 19%.

Flying Start provides **childcare** of the highest quality and has been highly effective in Ceredigion for families in our most deprived areas.

There is demand for **Childcare provision** in Ceredigion particularly in the north, mid and south areas of the County, particularly Welsh medium.

Ensuring that Welsh speakers pass on the language down the generations and that children have the opportunities to socialise in the **language of their local area** is beneficial to well-being.

# CHILDHOOD







**In this chapter:** *Growing up Healthy, Strong Foundations, Adverse Childhood Experiences, Coming Together*

## 5.1 Growing Up Healthy

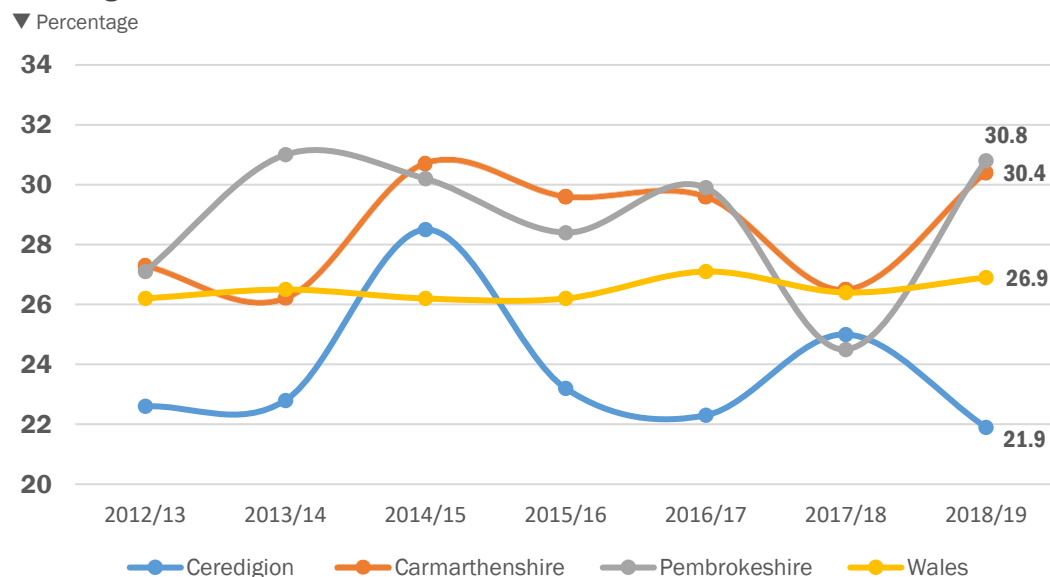
### Children's Physical Health

Overweight or obese children are far more likely to develop obesity or be overweight as adults, which can lead to further health implications, such as diabetes and heart disease. According to Hywel Dda University Health Board, 8 out of 10 obese teenagers go on to become obese adults.<sup>53</sup>

The latest data from the Child Measurement Programme (2018/19) shows that the proportion of children aged 4 to 5 that are overweight or obese has decreased from 28.5% during 2014/15 to 21.9% during 2018/19, which is lower than the national average for Wales at 26.9%.<sup>54</sup> The percentage of overweight or obese children in Ceredigion had increased slightly between 2012/13 and 2014/15, and were above the national average. However, the latest data (2018/19) shows that the levels are back to just below the 2012/13 levels. The neighbouring counties of Carmarthenshire and Pembrokeshire have almost always seen slightly higher numbers of overweight or obese children than Ceredigion (Figure 5.1).

Although there are positive signs indicating that the number of overweight or obese children are decreasing in Ceredigion, the issue remains a concern. Work must continue to reduce this figure even further and ensure that children and young people have the opportunity to improve their health and learn about healthy life style choices. Additionally, ensuring that adequate sporting facilities are available will also be beneficial.

**Figure 5.1: Percentage of Children aged 4 to 5 years who are overweight or obese**



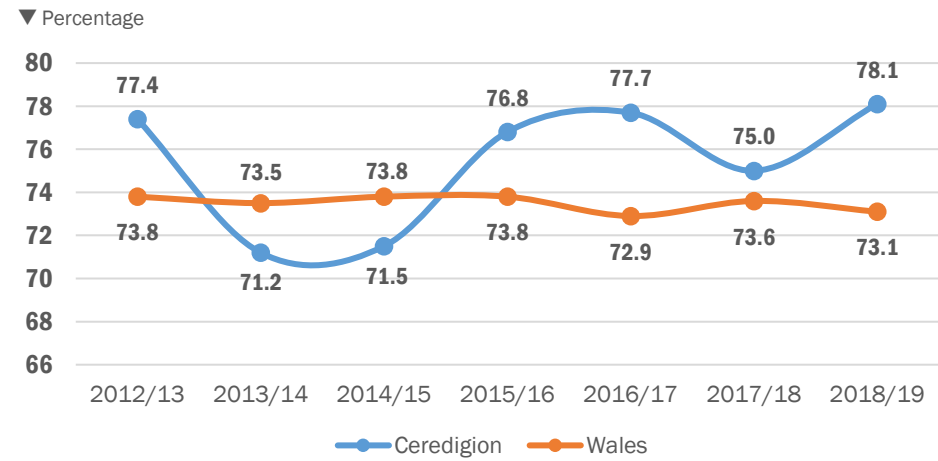
Source: Child Measurement Programme 2018/19

<sup>53</sup> Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment.

<sup>54</sup> Public Health Wales (2021). "Percentage of children, aged 4 to 5 years who are overweight or obese, trends over the previous 6 years in Ceredigion and Wales, Child Measurement Programme for Wales, 2012/13 - 2018/19" Child Measurement Programme. Online: [Child Measurement Programme 2018/19 \(shinyapps.io\)](https://shinyapps.io) Retrieved: 27/09/2021.

Children who are a healthy weight, are more likely to be fitter and healthier. Not only this, self-confidence is boosted and a healthy child is more likely to be able to concentrate and learn. These benefits all lead to more positive well-being and a lesser chance of developing complications later in life. In 2018/19, Ceredigion saw its highest percentage since 2012/13 of children aged 4 to 5 years who were a healthy weight or underweight (78.1%), much higher than the national average of 73.1%, see Figure 5.2.<sup>55</sup>

**Figure 5.2: % of Children aged 4 to 5 years who are a healthy weight or underweight**



Source: Child Measurement Programme, 2018/19

Exercise is important for our well-being. Physical activity has many benefits for children’s overall health and fitness and can improve a child’s mental health. Strengthening muscles and bones, developing coordination, elevating moods and improving energy levels are just a few of the benefits of children being physically active.<sup>56</sup>

Ensuing that children have proper access to green spaces or play spaces is fundamental for a child’s health and well-being. Fresh air has so many health and well-being benefits. See section 5.4 Play and Well-being Outcomes for further discussion of this.

In Ceredigion, 52.5% of school children participate in at least 3 sporting activities per week, this is higher than the Welsh average of 47.6%. Male children (54%) in Ceredigion are more likely to take part in 3 sporting occasions a week than female children (51.5%).<sup>57</sup> Increasing participation of females in sport, particularly since the COVID-19 pandemic, has been recognised as a national issue by Sport Wales.

The recent review of Ceredigion’s Sport and Recreation Activity Strategy also revealed that whilst Primary school age children are much more likely to undertake at least three occasions of activity peer week compared to the national average, secondary age children are slightly less likely to do so - 47% compared to 48% nationally.

Physical Education lessons in schools are mandatory and most children are encouraged to take part. According to Sport Wales, 87.8% of children in Ceredigion also take part in sport in other settings outside of school.<sup>58</sup> This is the highest proportion across Wales, and suggests that children in Ceredigion are committed to keeping active.

Another commonly used indicator for childhood health is the likelihood of tooth decay. Data from Public Health Wales showed that in 2015/16 children in Ceredigion were less likely to have decayed teeth at the age of 5 (0.8%) than the Welsh average (1.2%).<sup>59</sup> Tooth decay can be a sign of a diet high in sugars and starches or poor oral hygiene.

<sup>55</sup> Public Health Wales (2021). “Percentage of children, aged 4 to 5 years who are a healthy weight or underweight, trends over the previous 6 years in Betsi Cadwaladr UHB and Wales, Child Measurement Programme for Wales, 2012/13 - 2018/19” Child Measurement Programme. Online: [https://publichealthwales.shinyapps.io/cmp\\_2020\\_eng/#section-health-board-and-local-authority-1](https://publichealthwales.shinyapps.io/cmp_2020_eng/#section-health-board-and-local-authority-1) Retrieved: 27/09/2021.

<sup>56</sup> Early Years Resources (2019) The Importance of Physical Activity for Children.

<sup>57</sup> Sport Wales (2018) School Sport Survey 2018

<sup>58</sup> Ibid.

<sup>59</sup> “Decayed, missing or filled teeth” (2015/16) Public Health Wales. Online: [Workbook: PHOF 2017 LAHB - Charts \(tableau.com\)](#) Retrieved: 27/09/2021

As we get older the chances of experiencing tooth decay increases. Practicing good oral hygiene and having a balanced diet at a young age can increase the likelihood of having healthier teeth as adults.

Physical activity is just one way of improving a child's health and fitness. Ensuring that a child has a healthy and balanced diet is essential, not only can this help a child maintain a healthy weight, it can also reduce the likelihood of tooth decay. The Healthy Wales Strategy notes that work on improving health and well-being should start early, even pre-birth, and it is suggested that ensuring the school curriculum along with the existing Healthy Schools Programme helps build knowledge around healthy and active life choices.<sup>60</sup> Our health is of great importance throughout our life course, teaching our future generations about the importance of health and fitness will be essential to ensure that we are able to live long and happy lives.

## Children's Mental Health

Leading on from physical health, a child's mental health is critical to their well-being. A child's happiness, well-being and development, educational attainment and prospects of living a fulfilling and productive life, can also be affected by mental health issues. According to the School Health Research Network (SHRN)'s biennial Student Health and Well-being Survey, almost 1 in 5 (19%) of young people in Wales report very high levels of mental health symptoms.<sup>61</sup> There is a link between childhood mental health and mental health later in life. Research shows that experiencing mental health issues in childhood increases the chances of experiencing mental health issues as an adult.<sup>62</sup>

The number of children and young people (aged 10 to 18) receiving counselling in Ceredigion has fluctuated in recent years, with the latest data showing a slight decrease from 306 to 261 between 2018/19 and 2019/20.<sup>63</sup> However, it is very likely that the COVID-19 pandemic will have increased that number significantly during 2020/21, and possibly beyond as the impact of nationwide lockdowns, isolation and loss of in-person teaching and socialising will have taken their toll.

Like most conditions, getting help at the earliest opportunity for mental health conditions is important. Year 10 pupils (aged 14 to 15) are more likely to receive counselling than any other age group, whilst those in year 13 (aged 17 to 18) are the least likely.<sup>64</sup> The number of year 10 pupils receiving counselling has been largely similar over the past few years, while the number of year 13 pupils has been decreasing as shown in Figure 5.3.

Further insight from Ceredigion County Councils School Counselling Service Team, noted that the provision of school counselling is being met in schools. It was also noted that the numbers of children requiring and wanting counselling is rising and there are waiting lists in all schools, this is something seen across Wales. It is essential that all children have the opportunity to access their required counselling needs and Ceredigion's School Counselling Service hopes that future funding from Welsh Government will ensure the demand is met.

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<sup>60</sup> Welsh Government (2018) A Healthier Wales: Our Plan for Health and Social Care

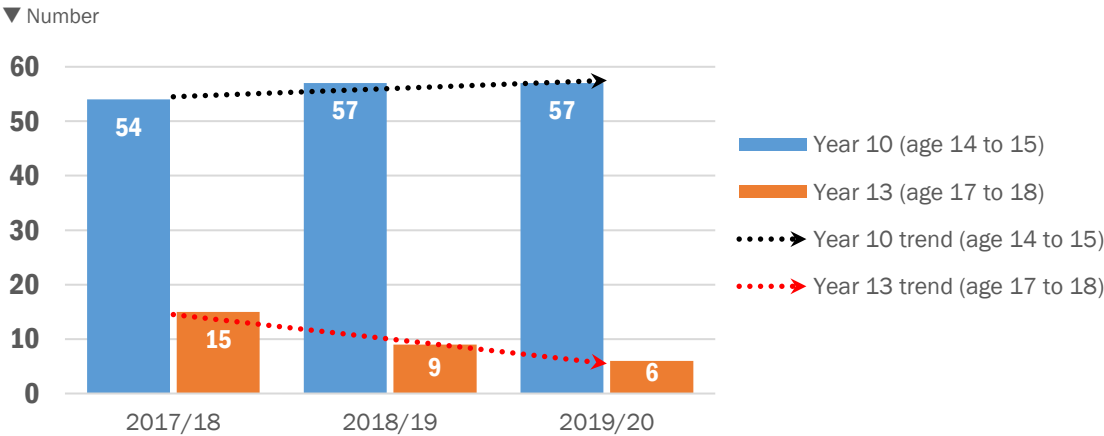
<sup>61</sup> Page N., Hewitt G., Young H., Moore G., Murphy S. (2021) Student Health and Wellbeing in Wales: Report of the 2019/20 School Health Research Network Student Health and Wellbeing Survey. Cardiff University, Cardiff, UK. 11.

<sup>62</sup> Mental Health Foundation. "Children and young people". Online: <https://www.mentalhealth.org.uk/a-to-z/c/children-and-young-people>. Retrieved: 27/09/2021.

<sup>63</sup> Stats Wales. "Number of children and young people who received counselling in Wales by School year age group, Year and Gender". Online: <https://stats.wales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Counselling-for-Children-and-Young-People/numberofchildrenandyoungpeoplewhoreceivedcounsellinginwales-by-schoolyearagegroup-year-gender> Retrieved: 27/09/2021

<sup>64</sup> Ibid.

Figure 5.3: Number of Pupils Receiving Counselling



Source: Stats Wales, 2019/20

Bullying is one example of something that can affect a child’s mental well-being and can lead to long-term conditions like anxiety and depression. The School Health Research Network (SHRN) collect data by local health board; their study in 2019/20 showed that 33% of school children in the Hywel Dda University Health Board region had been bullied at school in the “past couple of months” and that females were more likely (35%) to have been bullied than males (31%).<sup>65</sup>

In recent years, children’s use of the internet has come under scrutiny. Whilst the internet and social media has been beneficial in many ways, concerns such as cyberbullying are more common with increasing use of the internet amongst children at a younger age. Data from the SHRN for the Hywel Dda University Health Board region shows that 17% of participants said they had been cyberbullied in the “past couple of months”.<sup>66</sup> This is an increase of 7% since 2017/18<sup>67</sup>, suggesting that it is a growing concern across the region.

Children use the internet for a multitude of different reasons. Recently the number of educational resources available online have increased due to the COVID-19 pandemic, resulting in an increase in children and young people utilising the internet. A study showed that in the UK the prevalence of technology continues to increase with 5% of 5 to 7 year olds now having a smartphone, 37% having their own tablet and 4% of 5-7 year olds having social media accounts.<sup>68</sup>

Although children and young people are not considered to be at risk of developing serious health implications from the respiratory disease COVID-19, research has revealed that children’s behaviour has been impacted due to isolation and home confinement during the pandemic.<sup>69</sup> School closures, having to quarantine or isolate and general worries about the virus are all factors which are thought to have impacted the mental health of children and young people. Further research is ongoing as to the extent of these impacts, but it is predicted that they will be prevalent for some time to come. For this reason, we need to think creatively about the ways we can help children in terms of human relationships, medical and digital technology that can overcome mental health problems.

<sup>65</sup> Page N., Hewitt G., Young H., Moore G., Murphy S. (2021) Student Health and Wellbeing in Wales: Report of the 2019/20 School Health Research Network Student Health and Wellbeing Survey. Cardiff University, Cardiff, UK. 105.  
<sup>66</sup> Ibid.  
<sup>67</sup> Hewitt G., Anthony R., Moore G., Melendez-Torres G.J., Murphy S. (2019) Student Health and Wellbeing In Wales: Report of the 2017/18 Health Behaviour in School-aged Children Survey and School Health Research Network Student Health and Wellbeing Survey. Cardiff University, Cardiff, UK  
<sup>68</sup> Ofcom (2020) Children and parents: Media use and attitudes report 2019  
<sup>69</sup> Welsh Government (2020) Review of the impact of mass disruption on the wellbeing and mental health of children and young people



Case Study ►

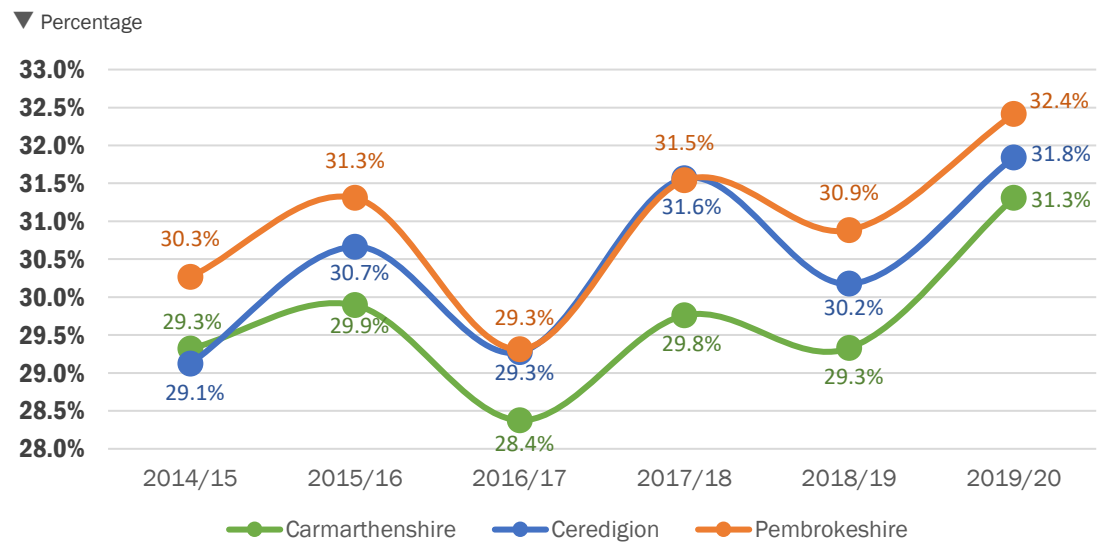
Counselling and Emotional Well-being Support

A new online counselling and emotional well-being support service for young people in mid-West Wales has been launched by HDdUHB. The Specialist Child and Adolescent Mental Health Service (S-CAMHS) has commissioned Kooth- an award winning online counselling service and is accredited by The British Association of Psychotherapy and Counselling. Young people aged 11-18 will be able to access online counselling through their mobile device, 365 days a year. They will be able to seek support or advice on any topic they wish, from coping with exam stress or bullying, seeking help for eating issues and body image, dealing with suicidal thoughts or handling sexual abuse.

Child Poverty

Children are the age group that are most at risk of living in poverty according to research by the Bevan Foundation. The socio-economic circumstances of children are a determining factor in their well-being and have a longer-term impact throughout their life. Recently published data by the End Child Poverty Coalition shows that 31.8% of children (or 3,459) are living in poverty in Ceredigion as at 2019/20. This is not only higher than average for Wales, but Ceredigion has also seen the second highest increase nationally at 2.7% points over the last five years. This is a regional trend across West Wales where all areas have seen an increase since 2015 and a particularly marked increase between 2018/19 and 2019/20 as shown in Figure 5.4.<sup>70</sup>

Figure 5.4: % of Children Living in Poverty 2014/15 to 2019/20



Source: End Child Poverty Coalition

Evidence shows that children from poorer backgrounds tend to have lower levels of educational attainment, and the uncertainty of their financial position has an impact on mental health, in addition to the stigma associated with living in poverty.<sup>71</sup>

<sup>70</sup> “Child poverty in your area 2014/15 – 2019/20”. End Child Poverty Coalition. Online: <http://www.endchildpoverty.org.uk/local-child-poverty-data-2014-15-2019-20/>. Retrieved: 25/09/2021.

<sup>71</sup> “In its efforts to end child poverty, the Welsh Government has designed a number of schemes to support families with their living costs, such as Free School Meals, the Pupil Development Grant – Access and Healthy Start Vouchers.” Bevan Foundation. Online: <https://www.bevanfoundation.org/resources/children-out-of-poverty/>. Retrieved: 25/09/2021.

However, the proportion of pupils eligible for Free School Meals in Ceredigion is second lowest nationally at 13.5% compared to 20.9% across Wales, although the actual take-up in pupil numbers has increased consistently over the last five years.<sup>72</sup> Furthermore, the proportion of children living in workless households is estimated to be 9.9%, which is noticeably lower than the national average for Wales (13.5%).<sup>73</sup> This, combined with the lower than average earnings across the County, suggest that in-work poverty is increasing and remains a key challenge for households. The areas affected the most in Ceredigion, and that have the largest proportion of households living in poverty, are Aberystwyth North, Cardigan & Aberporth and Aberystwyth South, as shown in Table 5.1.<sup>74</sup> Households living in poverty is defined as less than 60% of the Great Britain median income, which in 2020 was £19,967.

**Table 5.1: Percentage of households living in poverty by community area**

Community Area	% of households living in poverty (below 60% GB median income £19,967)
Aberystwyth North	37.8%
Cardigan & Aberporth	36.7%
Aberystwyth South	36.6%
Lampeter & Llanfihangel Ystrad	35.9%
Beulah, Troed-yr-aur & Llandysul	33.8%
Rheidol, Ystwyth & Caron	29.0%
Aberaeron & Llanrhystud	28.9%
New Quay & Penbryn	28.4%
Borth & Bont-goch	25.6%

Source: CACI Paycheck 2020

There are other factors at work of course, such as freezes to in-work benefits, increases in housing costs and more recently the COVID-19 pandemic, which is likely to have exacerbated some of this at least in the short term through its impact on many of the key employers in the tourism, food service and hospitality sectors, and the resulting impact on household finances through loss of income and/or employment. The Future Trends Report Wales 2021 expects the increase of deprivations brought about by COVID-19 to set global poverty levels back by 9.1 years. Addressing in-work poverty, and specifically the increase in child poverty, is clearly one of the biggest challenges facing the County if these trends are to be reversed and thus reduce the longer term impact on children.

### Time Online and Well-being Outcomes

Children’s use of digital technology has increased rapidly over the past decade, raising important questions around how the time spent on digitally mediated activities might affect children in positive or negative ways. In the last year, the use and dependence on technology has increased dramatically due to the COVID-19 pandemic. School classes and resources were moved almost entirely online into a virtual environment, and during periods of national lockdown, online entertainment was one of the few forms available to children and young people. “Screen time” is the amount of time spent using a device with a screen such as a smartphone, computer, television, or video game console

Very little local data is available on the use of technology in this way, but we do know nationally in Wales that there is some evidence that over-using screens can be damaging to health, for example by reducing physical activity levels, unhealthy eating habits and disruption of sleep patterns.<sup>75</sup> These concerns are shared with parents – a Welsh

<sup>72</sup> “Pupils eligible for free school meals by local authority, region and year” & “Number of pupils taking free school meals on census day by local authority, region and year”. StatsWales. Online. Available: <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Provision-of-Meals-and-Milk/pupilseligibleforfreeschoolmeals-by-localauthorityregion-year> a Retrieved: 25/09/2021.

<sup>73</sup> “Pupils eligible for free school meals by local authority, region and year” & “Number of pupils taking free school meals on census day by local authority, region and year”. StatsWales. Online. Available: <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Provision-of-Meals-and-Milk/pupilseligibleforfreeschoolmeals-by-localauthorityregion-year> a Retrieved: 25/09/2021.

<sup>74</sup> CACI Paycheck Directory MSOA. 2020.

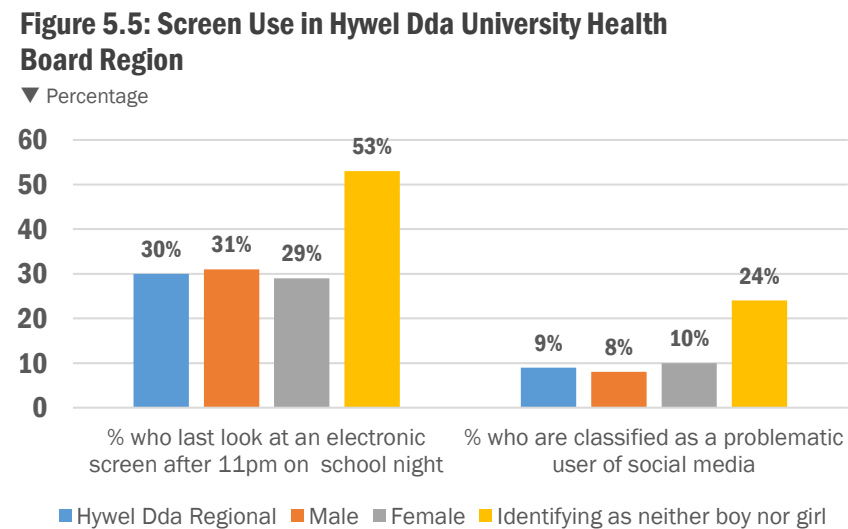
<sup>75</sup> “A family guide to talking about screen time”. Welsh Government. Online: <https://hwb.gov.wales/api/storage/7292d03c-5743-411b-bada-1592fa77155b/a-family-guide-to-talking-about-screen-time.pdf>. Retrieved: 06/10/2021.

Government survey revealed that parents with young children aged under five were concerned about their child’s use of technology.<sup>76</sup>

Research by OFCOM, the UK’s communications regulator, showed that parents in Wales are most likely to have concerns about their child’s time spent gaming in particular. This included concerns over the *content* of the games, *how much time* the child spends gaming, the pressures to make *in-game purchases*, the possibility of their child being *bullied*, and the *amount of advertising* in games.<sup>77</sup>

In the Hywel Dda University Health Board region, the proportion of children who reported last looking at an electronic screen after 11pm on a school night was 30%, very much in-line with the trends across Wales, although boys were more likely to do so than girls (31% compared to 29%). Those who identified as neither a boy nor a girl were much more likely to use screen time after 11pm, at 52%, which is also similar to the national trends. The likelihood of reporting screen use after 11pm on a school night increases with age and declining family affluence.<sup>78</sup>

Problematic social media use has been associated with lower adolescent well-being across countries, as well as greater risk of both cyber-bullying victimisation and perpetration. A problematic user of social media is defined as having scored 6 or higher on the Social Media Disorder Scale. In the Hywel Dda University Health Board region, 9% of children and young people are classified as a problematic user of social media, which is also in-line with the national average, although girls are more likely than boys to be classified as a problematic user (10% compared to 8%). Problematic social media use increases with age up until year 10, before falling in year 11. For those identifying as neither a boy nor a girl, this proportion increases to almost a quarter at 24%.<sup>79</sup> Figure 5.5 provides a comparison of these figures across the Hywel Dda University Health Board region.



Source: School Health Research Network Student Health and Well-being Survey 2019/20

The proliferation of new communication technologies such as smartphones and tablets, combined with social media platforms bring great opportunities for children and young people to keep in touch and relax, but at the same time bring new potential risks to their health and well-being. Further work will be needed to understand the immediate impacts arising from the COVID-19 pandemic and the longer-term impacts. Clearly achieving a healthy balance between learning and relaxing, and between screen time and non-screen time will be an important consideration for future generations in achieving a healthier Ceredigion and a healthier Wales. In particular, will be the need to tackle screen time activities that prevent children and young people from doing things that keep them healthy.

<sup>76</sup> “Creating a balance between ‘Family Time’ and ‘Screen Time’”. Welsh Government. Online: <https://gov.wales/parenting-give-it-time/guidance-and-advice/parenting-tips/creating-a-balance-between-family-time-and-screen-time>. Retrieved: 06/10/2021.

<sup>77</sup> “Children and parents: Media use and attitudes report 2019”. OFCOM. Online: [https://www.ofcom.org.uk/data/assets/pdf\\_file/0023/190616/children-media-use-attitudes-2019-report.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0023/190616/children-media-use-attitudes-2019-report.pdf). Retrieved: 06/10/2021. 24

<sup>78</sup> Page N., Hewitt G., Young H., Moore G., Murphy S. (2021) Student Health and Wellbeing in Wales: Report of the 2019/20 School Health Research Network Student Health and Wellbeing Survey. Cardiff University, Cardiff, UK. 98-99, 105.

<sup>79</sup> Ibid.

## 5.2 Strong Foundations

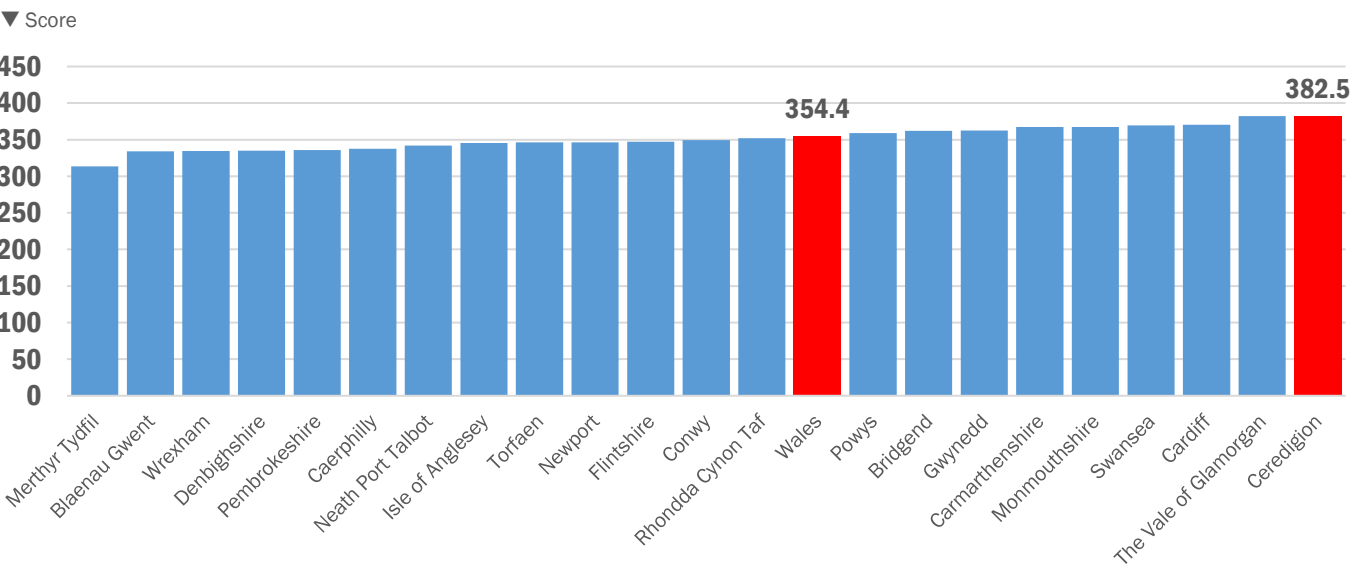
### A Rich and Rounded Education

As well as having a healthy start to life, building and maintaining strong foundations is crucial to a child’s development and future well-being. The Ceredigion education system is one of the strongest in Wales and one of the County’s primary assets. There is a mixture of primary, secondary and all-age schools across the County, with the majority ranked as ‘Good’ or ‘Excellent’ by Estyn, the education and training inspectorate for Wales. (“Good” = strong features, although minor aspects may require improvement; “Excellent” = very strong, sustained performance and practice).<sup>80</sup>

Being enrolled in a good school is considered essential for a child’s well-being and development, not only through supporting them educationally and through the provision of educational resources, but also emotionally, through building confidence and developing social skills with peers.<sup>81</sup>

Higher achievement in school can dramatically increase our chances of being able to enrol in University or College and determine our future career prospects. Since 2014/15 Ceredigion has consistently performed above average in educational attainment at all ages and qualification levels. In 2018/19 the capped 9 score was introduced for pupils as the new measure for GCSE performance, and in that year the County achieved the highest average capped 9 score points in Wales (382.5), much higher than the national average (354.4).<sup>82</sup>

**Figure 5.6: Capped 9 Point Score (2018/19)**



Source: Welsh Government, 2020

There are increasing pressures on the school curriculum in Wales, especially when considering that a new curriculum is to be introduced in 2022. According to the Arts Council for Wales, pressures on the core subjects of Welsh, mathematics, science and English are still increasing and it is likely that other ‘softer’ subjects, like drama and art will no longer be as popular in schools.<sup>83</sup> This could result in subjects like art or drama not being taught in schools due to low levels of uptake.

Children and young people from deprived backgrounds are more likely to lack the daily essentials of life, which unfortunately can affect their ability to learn or even attend school.<sup>84</sup> Fewer pupils in Ceredigion are eligible for Free Schools Meals compared to the national average; 11.4% of pupils aged 5 to 15 were eligible for free school meals in

<sup>80</sup> Estyn. Latest Inspection Reports. Online: [https://www.estyn.gov.wales/inspection-reports?f%5B0%5D=local\\_authority\\_lir%3A56](https://www.estyn.gov.wales/inspection-reports?f%5B0%5D=local_authority_lir%3A56) Retrieved: 05/20/2021.

<sup>81</sup> Estyn (2019) Pupils are happier and healthier when wellbeing is embedded in school life. Online: <https://www.estyn.gov.wales/news/pupils-are-happier-and-healthier-when-wellbeing-embedded-school-life> Retrieved: 05/10/2021.

<sup>82</sup> Welsh Government (2020) Examination results in schools in Wales, 2018/19.

<sup>83</sup> Arts Council of Wales (2018) Arts Council of Wales Corporate Plan 2018-2023.

<sup>84</sup> National Education Union & Child Poverty Action Group (2018) Child poverty and education: A survey of the experiences of NEU members

Ceredigion compared to 18.4% nationally (2019/20), and the take-up in Ceredigion has been increasing over the last five years.

Furthermore, in 2021, the gap between the top GCSE results of pupils from deprived backgrounds and those from non-deprived backgrounds had widened in Wales<sup>85</sup>, and this trend has also been seen locally. Whilst the overall results in Ceredigion remain higher than average, those eligible for Free School Meals in Ceredigion achieving Level 2 (GCSE at grade A\*–C or equivalent) was 31.5% in 2018/19 down from 34.9% in 2016/17, see Table 5.2.<sup>86</sup> Reversing this trend and reducing the disparity between educational attainment is inherently linked to levels of poverty and deprivation, and clearly remains a priority for the county if we are to create a more prosperous and more equal Ceredigion and Wales. Indeed, the Well-being of Wales Report for 2021 reveals that this is a national issue – it notes that whilst the qualification profile of working age people in Wales has been improving, children from deprived backgrounds still have poorer outcomes.<sup>87</sup>

**Table 5.2: Level 2 qualifications in Ceredigion**

	Eligible for FSM	Not Eligible for FSM	Difference
2016/17	34.9%	68.2%	33.3% pts
2017/18	33.3%	65.0%	31.7% pts
2018/19	31.5%	65.5%	34.0% pts

Source: StatsWales

In 2020/21 there was a school population of 9,305 (primary, middle and secondary schools) in Ceredigion.<sup>88</sup> Around 3,125 or 33.6% pupils in Ceredigion are considered to have special educational needs (SEN).<sup>89</sup> Having the right support in place to help children with special educational needs is vital. Ceredigion County Council’s schools are able to provide support for the majority of pupils with special educational needs, with a specific member of staff (SENCo) based in each school that co-ordinates this support.<sup>90</sup>

Ceredigion’s Youth Service also has designated Youth Workers at all Ceredigion Secondary Schools. The Youth Workers provide advice, guidance and monitoring for young people who require additional support.<sup>91</sup> An independent registered charity in Ceredigion, called Area 43, provides support and training to young people aged 16-25 and counselling services to those aged 10-30.<sup>92</sup>

The Welsh language is a central part of education in Ceredigion - of the 43 schools in the County 37 are Welsh medium or bilingual schools.<sup>93</sup> The number of pupils in years 1 to 11 taught Welsh as a first language has been increasing in recent years, reaching a peak of 5,483 in 2018/19 and although slightly lower in 2020/21 is reflective of the lower number of pupils in those years, see Figure 5.7.<sup>94</sup>

<sup>85</sup> BBC (2021) Wales’ GCSE gap widens for children from poorer backgrounds. Online: <https://www.bbc.co.uk/news/uk-wales-58189971> Retrieved: 06/10/2021.

<sup>86</sup> Stats Wales. Key Stage 4 Interim Measures by FSM, from 2018/19. Online: <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Examinations-and-Assessments/Key-Stage-4/interimexammeasuresforyear11pupils-by-fsmstatus> Retrieved: 06/10/2021.

<sup>87</sup> “Well-being of Wales 2021”. Welsh Government, 30 September 2021. 5.

<sup>88</sup> Stats Wales (2021) Number of pupils in primary, middle and secondary school classes by local authority and year group. Online: <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Classes/numberofpupilsinprimarymiddlesecondaryschoolclasses-by-localauthorityregion-yeargroup> Retrieved: 06/10/2021.

<sup>89</sup> Stats Wales (2021) Reports of Special Educational Needs (SEN) by local authority and type of need. Online: <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Special-Educational-Needs/reportsofspecialeducationalneeds-by-localauthority-typeofneed> Retrieved: 06/10/2021.

<sup>90</sup> Ceredigion County Council. Special Educational Need (SEN). Online: <https://www.ceredigion.gov.uk/resident/schools-education/special-educational-needs-sen/> Retrieved: 06/10/2021.

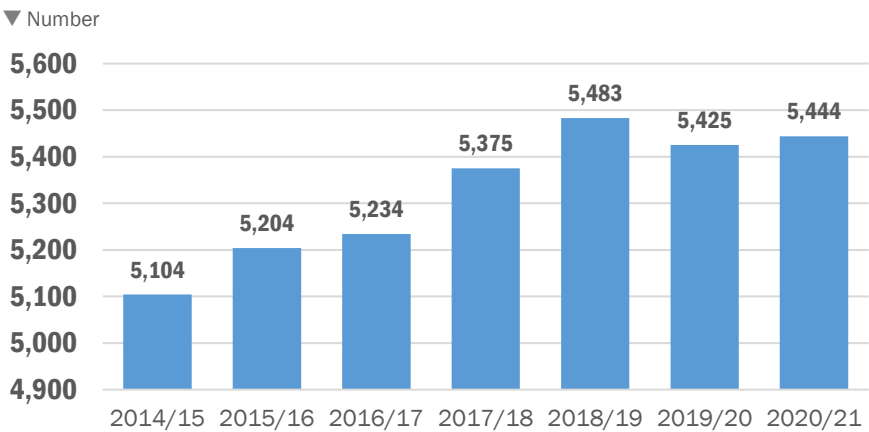
<sup>91</sup> Ceredigion Youth Services. Who are we and what do we offer? Online: <https://www.giceredigionys.co.uk/about/> Retrieved: 06/10/2021.

<sup>92</sup> Area 43. Online: <https://www.area43.co.uk/> Retrieved: 06/10/2021.

<sup>93</sup> Stats Wales (2021). Schools by local authority, region and Welsh medium type. Online: <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Welsh-Language/Schools-by-LocalAuthorityRegion-WelshMediumType> Retrieved: 06/10/2021.

<sup>94</sup> Stats Wales (2021). Pupils taught Welsh as a first language in primary, middle and secondary schools in year groups 1-11, by local authority, region and year. Online: <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Welsh-Language/pupilstaughtwelshprimarymiddlesecondaryschools-by-localauthorityregion-year> Retrieved: 06/10/2021.

**Figure 5.7: Pupils taught Welsh as first language in primary, middle and secondary schools in year groups 1-11**



Source: StatsWales

The additional life-skills of Welsh medium education are wide-reaching to all aspects of well-being. Apart from the cultural benefits of being part of Welsh-language communities and furthering Welsh culture, it also makes the change from primary to secondary education much easier and provides greater employment opportunities later in life.

The global pandemic COVID-19 has greatly affected education. Schools were closed for in-face teaching for a large part of 2020, with classes and work being moved online. Because of this, children are likely to have lost educational experiences, regressed in basic skills and seen an increase in mental distress.

Being away from school because of the COVID-19 pandemic has seriously affected children’s mental health. Home life can be difficult for some children and school for many can be a safe space, to get away from a difficult home life. There are concerns that home confinement because of the pandemic may have exacerbated already existing mental health issues.<sup>95</sup> As the Wales Centre for Public Policy notes, even the most sophisticated online learning platforms that were a substitute to face-to-face teaching, could not replace the support school environments provide.<sup>96</sup>

A survey conducted by the Children’s Commissioner for Wales, called the Coronavirus and Me survey showed that in May 2020, 39% of Ceredigion children aged 7-11, noted that they were worried ‘some of the time’.<sup>97</sup> The next survey conducted in January 2021 showed a slight increase in the number of children (aged 7-11) feeling worried ‘some of the time’ (41%), in Ceredigion.<sup>98</sup> Additionally, results from May 2020 showed that 40% of Ceredigion participants (aged 7-11) were sad ‘some of the time’,<sup>99</sup> by January 2021, this had also increased to 44%.<sup>100</sup>

This data could indicate that the mental health of children has deteriorated because of the COVID-19 pandemic, and more children experience feelings of sadness and worry. Not being able to learn in school has very likely had an impact on children’s mental health, especially when we consider the benefits of being in an educational setting. It is essential that further work continues to identify and support those who are suffering.

Deprived families were more likely to be negatively affected by the school closures for example learning online meant that all students needed access to either a computer or tablet, but 12% of households in Ceredigion do not have internet access. Funds were allocated by the Welsh Government to provide those who were digitally excluded to access online learning materials and classes. Reports suggest that those receiving free school meals, those from a

<sup>95</sup> Mental Health Foundation (2020) Impacts of lockdown on the mental health and wellbeing of children and young people

<sup>96</sup> Wales Centre for Public Policy (2021) The education response to Coronavirus: Implications for schools in Wales

<sup>97</sup> Children’s Commissioner for Wales’ Coronavirus and Me consultation 2020.

<sup>98</sup> Children’s Commissioner for Wales’ Coronavirus and Me consultation 2021.

<sup>99</sup> Children’s Commissioner for Wales’ Coronavirus and Me consultation 2020.

<sup>100</sup> Ibid.



single-parent household, those with less-educated parents and those with Black, Pakistani and Bangladeshi heritage spent less time on schoolwork at home than others during the school closures as a result of the pandemic.<sup>101</sup>

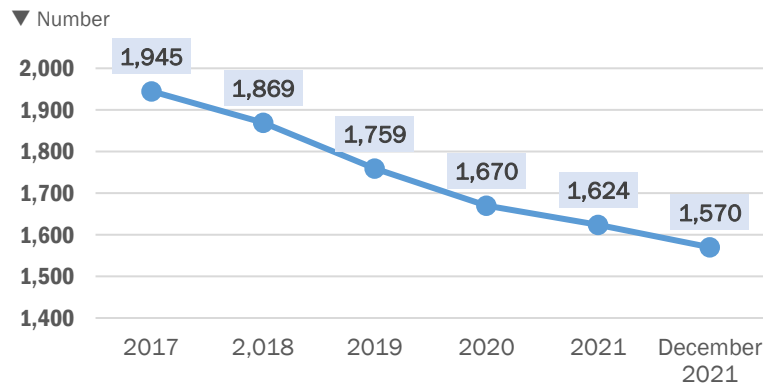
The pandemic has likely led to children losing basic educational and social skills, as well as setting them back because of the time lost. The Education Endowment Foundation has noted that school closures are likely to reverse the previous 9 years of progress made to reduce the learning gap between the most and least deprived.<sup>102</sup>

Childcare Sufficiency

**Accessible and affordable childcare** in early childhood is essential for both the well-being of the parents and the child. Access to childcare is critical from a social and economic stand point as it allows the parent to return to work, whilst also providing the foundation of education and early experiences for the child’s healthy development. Research shows that the early childhood period is extremely sensitive to outside influences, therefore positive caretaking relationships and enriched daily experiences set the grounds for a healthy and happy child.<sup>103</sup> Furthermore, knowing that your child is in safe hands results in a more productive working day for parents.

The number of **registered childcare places in Ceredigion continues to decline**. During the last year the number of registered childcare places declined from 1,670 in March 2020, to 1,570 in December 2021, a reduction of 6% (or 100 places)<sup>104</sup> due to the closure of a number of settings (Figure 5.8). The Childcare sector is in a fragile state due to staff recruitment, increasing qualifications demand, changes to regulations and parent working patterns, and financial sustainability. Staff morale is low due to lack of status of the profession compared to other early year’s professions. This is concerning, particularly if we are to ensure that parents in Ceredigion can access training, education or employment.

Figure 5.8: Number of registered childcare places based on CIW list (2017-2021)



Source: Ceredigion County Council (2021): Progress Report 2020-21

Full Day Nurseries are more expensive for full day care than Childminders, which is a trend that has reversed since the last Childcare Sufficiency Assessment in 2017. Day Nurseries have changed their pricing structure since the last Childcare Sufficiency Assessment was undertaken due to various services now provided by them, for example now offering flexible sessional or after school care. The Childcare Offer has also changed the pricing structure within most settings. There is a low take-up of the Offer locally by parents and further investigation is needed to ascertain whether this is because parents do reach the income threshold. Childminders are home based and self-employed, and generally do not employ assistants, therefore their overheads are significantly lower than Day Nurseries.

The 2022-27 Childcare Sufficiency Assessment reports on 91 registered providers providing 1,570 registered places, as shown in Table 5.3. Total Childcare paces have decreased over time due to reduced demand from parents and

<sup>101</sup> Wales Centre for Public Policy (2021) The education response to Coronavirus: Implications for schools in Wales  
<sup>102</sup> Education Endowment Foundation (2020), ‘Impact of school closures on the attainment gap: rapid evidence assessment’  
<sup>103</sup> National Scientific Council on the Developing Child. (2007). *The timing and quality of early experiences combine to shape brain architecture: Working paper No. 5*. [https://developingchild.harvard.edu/wp-content/uploads/2007/05/Timing\\_Quality\\_Early\\_Experiences-1.pdf](https://developingchild.harvard.edu/wp-content/uploads/2007/05/Timing_Quality_Early_Experiences-1.pdf). Accessed 4 Aug 2020.  
<sup>104</sup> Ceredigion County Council (2021). ‘Childcare Sufficiency Assessment: Progress Report – Year 4.’.

sustainability of the settings being unable to remain open for small numbers of children. Pre-pandemic, After School provision and Holiday Playschemes have had to compete with unregistered, cheaper after school sports activities being favoured by parents. These services did not have to conform to national minimum standards for adult to child ratios or childcare and play qualifications. The pandemic has also been detrimental to the out of school sector.

**Table 5.3: Number of settings and children registered in Ceredigion (December 2021)**

	Number of settings	Number of children currently registered to care for
Sessional Day Care	8	131
Sessional Full Day Care	21	456
Full Day Care Nursery	6	306
Childminder	45	351
Out of School Care	9	294
Creche and Holiday Playscheme	1	23
Creche	1	9
TOTAL	91	1,570

Source: Ceredigion County Council, Childcare Sufficiency Assessment 2022-27

As the number of births is continuing to decline in the county the **overall demand for childcare in Ceredigion is declining**. However, it is unlikely that the provision available is sufficient in meeting the needs of parents in all areas of Ceredigion. According to the latest draft of the Childcare Sufficiency Assessment 2022-27, the sector lacks Childminders in the main towns (particularly Welsh speaking Childminders), Full Day Care Nurseries in the south of the county, After School provision in the north and south of the county, and flexible childcare services and affordable childcare where parents need it. Childcare providers are reporting vacant places in some areas, especially in After School Care in the north of the County, whilst Childminders have waiting lists in some areas. There is insufficient supply for the demand of childcare for 0-2 year olds, and insufficient supply of After School care in the south of the county. Earnings also continue to be lower in Ceredigion than across Wales, which impacts parents’ ability to afford childcare provision as other bills and costs are prioritised. These concerns were reflected in our Well-being Survey, and also featured in the Carmarthenshire and Pembrokeshire surveys, indicating that childcare is an issue regionally (Table 5.4).

**Table 5.4: Well-being Survey comments in relation to childcare provision**

“More support, resources and funding is needed for childcare sectors/ settings”	“I need access to affordable childcare outside school hours. Alternatively, an option to reduce working hours.”
“To be able to improve my own physical and/or mental well-being I need access to more affordable childcare.”	“Available childcare (preferably affordable too, but let's just start with there being any at all!)”

Source: Ceredigion PSB Well-being Survey 2021

The Ceredigion childcare sector is currently experiencing a **staffing crisis**. As a result of additional funding made available for classroom assistants in schools, the childcare qualified staff are taking up employment within the schools as the benefits are better, such as better pay and longer holidays. Not only does this impact the number of staff available, but also the Welsh Education Strategic Plan as many Welsh speaking staff are leaving and moving to work in schools as well as moving jobs to completely different sectors resulting in the loss of qualified professionals. In addition, Childcare staff did not receive the £500 bonus that was given to health and social care staff as an appreciation for their support during the COVID-19 pandemic, leaving many feeling undervalued. Day nurseries, Cylchoedd Meithrin and After School Clubs are all reporting recruitment as an issue.<sup>105</sup>

<sup>105</sup> Ceredigion County Council (2021). ‘Childcare Sufficiency Assessment: Progress Report – Year 4.’.

The COVID-19 pandemic **altered the working patterns** of parents, and removed the safety net of schools and day care, which had a detrimental impact on the parent's ability to work or study. The reliance on non-formal childcare in Ceredigion increased, as some parents had to work from home, whilst others were furloughed or had lost their jobs.<sup>106</sup> Of particular concern was the lack of availability of childcare during the school holidays in Ceredigion during 2020-21. This left many parents reliant on family members for childcare, whilst others changed their working patterns altogether.

In light of the Welsh Government ambition of 30% of the Welsh workforce to work either from or near their home in the future, provision of childcare in the County will need to adapt to meet the changing needs and flexible working patterns in the future. Consultation has recently been completed with families for the next full 2022-27 Childcare Sufficiency Assessment, which shows that childcare is not flexible for working parents. However, the problem is that the demand for flexible provision is not sufficient to be sustainable, and the demand for flexible provision would need to be vocalised in order for childcare providers to initiate any change to their services. It should be recognised that some childminders do offer flexible provision based on individual parental needs.

The 2022-27 Childcare Sufficiency Assessment is currently in draft format and will be presented to Welsh Government at the end of June 2022. The findings will provide further insight into the needs for formal childcare in the future, whilst also taking into consideration the high reliance on non-formal childcare since the onset of the COVID-19 pandemic.

### 5.3 Adverse Childhood Experiences

As reflected in the last chapter, a strong foundation in the early years of childhood increases the probability of positive well-being outcomes. Conversely, **Adverse Childhood Experiences** (ACEs) are potentially distressing events that have negative and lasting effects on the health and well-being of children and young people. Experiencing an ACE as a child can negatively impact the child's physical and mental health, educational outcomes, relationships with others and economic prosperity.

There are a range of experiences that can be defined as an ACE, such as physical, emotional or sexual abuse of the child, parental separation, parental substance misuse, domestic violence, parental mental illness or imprisonment of a parent/guardian.

A study by Public Health Wales revealed that 47% of adults in Wales suffered at least 1 ACE in their childhood whilst 14% suffered 4 or more.<sup>107</sup> Other studies indicate that those experiencing ACEs are 4.7 times more likely to have **low mental well-being** and increased risk of developing a mental illness as an adult.<sup>108</sup> In particular, disadvantaged children and children growing up in poverty are more likely to experience multiple ACEs.<sup>109</sup>

Being exposed to an ACE can increase a child's likelihood of displaying concerning behaviours and effect how children regulate their emotions. This can lead to reduced self-control and difficulty with social interactions. Often, coping mechanisms are used such as drinking alcohol, smoking tobacco, taking drugs and even illegally offending. Starting to drink alcohol and smoking at a young age can increase the likelihood of developing addiction problems.

In Ceredigion, 8% of children aged 11 to 16 years old are 'using' alcohol, according to Public Health Wales. This is marginally higher than the national average of 7.9%, but slightly lower than Ceredigion's regional neighbours in Carmarthenshire and Pembrokeshire, both at 8.1%.<sup>110</sup> The percentage of children aged 11 to 16 years old who smoke is equal to the national average of 3.6% (2017/18). Carmarthenshire have lower rates than Ceredigion (2.8%) but Pembrokeshire have slightly higher rates (3.8%).<sup>111</sup>

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<sup>106</sup> Ibid.

<sup>107</sup> Public Health Wales (2016) Adverse Childhood Experiences and their association with chronic disease and health service use in the Welsh adult population.

<sup>108</sup> Hywel Dda University Health Board (2016/2017) Annual Report of the Director of Public Health.

<sup>109</sup> Public Health Wales (2016) Adverse Childhood Experiences and their association with chronic disease and health service use in the Welsh adult population.

<sup>110</sup> "Adolescents using alcohol" (2017/18) Public Health Wales. Online: <https://public.tableau.com/views/PHOF2017LAHB-Charts/UHB-LAChart-Table?:embed=y&:showVizHome=no> Retrieved: 27/09/2021.

<sup>111</sup> "Adolescents who smoke" (2017/18) Public Health Wales. Online: <https://public.tableau.com/views/PHOF2017LAHB-Charts/UHB-LAChart-Table?:embed=y&:showVizHome=no> Retrieved: 27/09/2021.

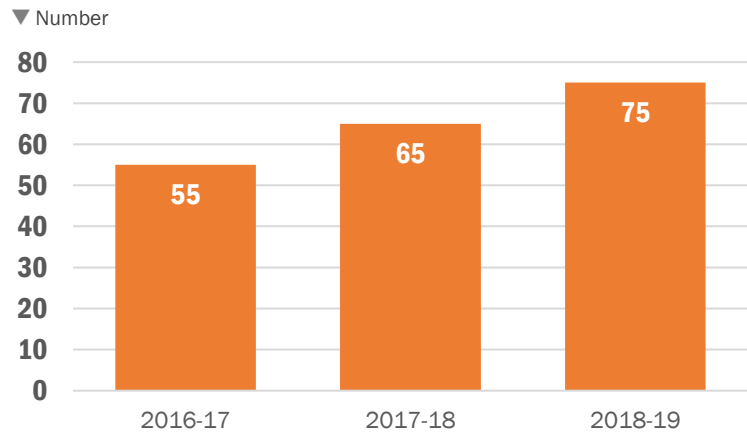
Experiencing an ACE can increase the likelihood of coming into contact with the criminal justice system. The number of offences committed by children in Ceredigion was 54 in 2019/20, the lowest number across Wales<sup>112</sup>. The most common offence groups noted were drugs (less serious category) where there were 11 offences and violence against the person (less serious category) where there were 12 offences.<sup>113</sup>

In some extreme cases ACEs can lead to the strongest official action, including taking children into care. Looked after children (LAC) are known as children in care; 75 children in Ceredigion were looked after in 2020. The number of LAC in Ceredigion has been gradually increasing since 2018 (60) and this number is likely to increase further due to the detrimental effects of the COVID-19 pandemic.<sup>114</sup>

The percentage of LAC that had 3 or more placements during 2020 (9%), has decreased slightly since the previous available data in 2018 (10%), and the Ceredigion statistics remain in line with the national average.<sup>115</sup> Although sometimes necessary, moving from one placement to another can make it difficult for a child to adapt and settle.

The number of children on the Child Protection Register has also been increasing since 2016-17 in Ceredigion. The latest figures show that in 2018-19 approximately 75 children were on the Child Protection Register, an increase of 20 children (Figure 5.9).<sup>116</sup> The child protection register includes all children in a local authority area who are suffering or likely to suffer significant harm and that are currently on a care and support protection plan. This is another area likely to be impacted by the COVID-19 pandemic and these numbers will most likely increase over the coming years.

**Figure 5.9: Number of Children on the Child Protection Register in Ceredigion**



Source: StatsWales

Children in need are defined by law as children under the age of 18 that need local authority services to achieve or maintain reasonable standards of health or development and/or services to prevent further harm to health or development and/or children who are disabled. The latest figures from 2016, showed that 465 children were in need in Ceredigion. The most likely cause of need in Ceredigion was due to abuse or neglect. This number has been increasing in Ceredigion, in 2013, 410 children were in need.<sup>117</sup>

<sup>112</sup> “Proven offences by children” (2019/20) Youth Justice Board.

<sup>113</sup> Ibid.

<sup>114</sup> “Children looked after at 31 March by local authority and location of placement” (2020) Stats Wales. Online: <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/Social-Services/Childrens-Services/Children-Looked-After/childrenlookedafterat31march-by-localauthority-locationofplacement> Retrieved: 27/09/2021.

<sup>115</sup> Ibid.

<sup>116</sup> “Children on child protection register by local authority, category of abuse and age group” (2018-19) Stats Wales. Online: <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/Social-Services/Childrens-Services/Service-Provision/childrenonchildprotectionregister-by-localauthority-categoryofabuse-agegroup> Retrieved: 27/09/2021.

<sup>117</sup> “Children in need by local authority and category of need” (2016) Stats Wales. Online: <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/Social-Services/Childrens-Services/Children-in-Need/childreninneed-by-localauthority-categoryofneed> Retrieved: 27/09/2021.

Minimising Adverse Childhood Experiences in Ceredigion clearly remains a priority for the county and for local services in supporting well-being and providing the best start in life. In particular, the increase seen in the number of children on the child protection register, looked after children and children in need is a concern.

Young carers provide unpaid care for a family member, friend or partner who is ill, frail, disabled or struggling with mental health, drug or alcohol issues. Research indicates that young carers often experience poor emotional or social problems, which can have detrimental effects on their livelihood and well-being.<sup>118</sup>

The West Wales Population Assessment published in 2017 estimated that there were 3,436 young carers/young adult carers (aged under 25) in the Hywel Dda University Health Board region. We know that between 2001 and 2011 there was a 7.6% increase in the number of young carers in Wales.<sup>119</sup> There is a need for more up to date data on young carers in the county to ensure that they can receive the level of support needed to counter some of these issues in future.

## 5.4 Coming Together

### Play and Well-being Outcomes

Play is an essential part of every child's development and providing opportunities to play can contribute to better health and well-being outcomes for children. The Welsh Government Play Policy (2002) recognises the role of play in healthy development:

*“Play encompasses children’s behaviour which is freely chosen, personally directed and intrinsically motivated. It is performed for no external goal or reward, and is a fundamental and integral part of healthy development – not only for individual children, but also for the society in which they live”<sup>120</sup>*

Play gives children freedom to use their imagination and have time away from adult agendas. Additionally, play can, to an extent, shield children from the negativities around poverty and develop resilience.<sup>121</sup>

Concerns around the mental and physical well-being of children and young people are increasing and there is growing evidence from health professionals and researchers that suggests that play can have a significant positive impact on a child's well-being.<sup>122</sup> Children face different pressures that previous generations may not have faced and can be exposed to adulthood at a younger age because of modern technology. Play can be a fun and relaxing way of relieving pressures or stresses and ultimately improve well-being.

Research shows that play, and specifically outdoor play, is very beneficial for children. Not only can play improve a child's physical health and fitness, it can also have an impact on a child's mental well-being. General health is benefited from being outdoors; fresh air can inhibit the spread of germs and promote healthy immune systems. Playgrounds specifically can enable a child to develop their motor skills and the derived social interaction with others helps to build confidence and social networks. For example, climbing can develop a child's strength, co-ordination, balance and risk-taking abilities, running and chasing games develop fitness, and fantasy play can enable children to make sense of difficult or distressing aspects of their lives.<sup>123</sup>

Children's connection to nature and the great outdoors is also considered essential for healthy development – for example, research by the Wales Biodiversity Partnership concludes that there are an array of health and social benefits to be derived - children are happier, healthier and more creative when they are connected to the natural world.<sup>124</sup> It is perhaps not surprising to learn that the majority (68.2%) of respondents to our Well-being Survey stated that “access to nature and green spaces” was what they valued most about their local environment, much higher than any other option.

<sup>118</sup> The Children's Society (2018) Young Carers Well-being

<sup>119</sup> West Wales Care Partnership (2017) West Wales Population Assessment.

<sup>120</sup> Welsh Government (2002) Welsh Assembly Government Play Policy

<sup>121</sup> Play Wales. Play and Deprivation. Online: <https://www.playwales.org.uk/eng/playdeprivation> Accessed: 17/01/2022

<sup>122</sup> Play Wales. Play and Health. Online: <https://www.playwales.org.uk/eng/playhealth> Accessed: 17/01/2022

<sup>123</sup> Ibid.

<sup>124</sup> “Introducing children to nature”. Wales Biodiversity Partnership. Online: <https://www.biodiversitywales.org.uk/Introducing-children-to-Nature>. Retrieved: 24/09/2021.

According to the latest Ceredigion Play Sufficiency Assessment (2019), there were 74 play spaces in the county. When considering that there are 151 towns and villages across Ceredigion, it is clear that not everyone has access to the green space required to maintain physical health and well-being. According to the last Play Sufficiency Assessment, there was room for improvement in the actual provision - 38% of children said that provision was good but could be even better, and 14% said it's ok, not good or rubbish and needs improvement. The next statutory Play Sufficiency Assessment is due to be submitted in June 2022 and will be informed by more recent views of children. It is anticipated that the experiences of the COVID-19 pandemic and its restrictions will have had an impact on opportunities for play.

A study by the Children's Commissioner for Wales, which was run during the first lockdown in May 2020 and also during the second lockdown in January 2021 called "Coronavirus and Me", shows Ceredigion children's perceptions of play during these times. These survey results are based on respondents aged 7-11.

In May 2020, to keep a healthy body and mind, outdoor exercise (92%) was the most popular answer, playing was still rated highly, but a little further down the list – playing with people in my home (69%) and playing with toys (65%).<sup>125</sup> By January 2021, outdoor exercise (82%) was still the most popular answer, but had reduced by 10%. Responses of play with people in my home (65%) and playing with toys (61%) had remained at similar rankings, but again had reduced slightly.<sup>126</sup> Over half of respondents in Ceredigion (57%) noted that they were playing more often since schools had closed in March 2020 due to the COVID-19 pandemic and less than a quarter (25%) were playing less often.<sup>127</sup>

However, by January 2021, these statistics had changed and according to results, children in Ceredigion were playing less often. Just 36% of respondents noted that they were playing more often and 31% said they were playing less often, an increase compared to the May 2020 results.<sup>128</sup>

In addition to the lack of provision in some rural locations, limited funding has been raised as a future challenge for the delivery and maintenance of play areas, as has transportation issues for parents from rural communities and those with children who are disabled or vulnerable in order to get to play and recreational opportunities. The written comments to our Well-being Survey also revealed a growing need for accessible play equipment to ensure play areas are inclusive for all children.

In the Give Us Support group, stakeholder event, which was facilitated by RAY Ceredigion, the concerns around sufficiency of play were reiterated. The young people that were part of this group noted that there were a lack of things to do in their area because there was no hall or park to meet other people and another noted that they did not feel part of their community because there was nothing to do. Additionally, these concerns were also mentioned in another stakeholder event with the Ceredigion Children and Young people Services Provider Forum. In this forum clear social and cultural issues were that there was a lack of play and leisure facilities for young people, which was preventing them from participating in arts and culture activities.

The latest Ceredigion Play Sufficiency Assessment (2019), shows that attitudes of children towards play in Ceredigion are largely positive - 95% said they always, or usually, feel safe when playing or hanging out, and 90% said they had loads of time, or just about enough time, for playing.

Although Ceredigion is a predominantly rural county with the second lowest population density in Wales, just 88% of properties have a private outdoor space (garden). This is lower than both Carmarthenshire (92%) and Pembrokeshire (90%) in the West Wales region, but also the second lowest nationally behind Cardiff (85%).<sup>129</sup>

Aberystwyth North has the lowest percentage of properties with a garden at 78%, which is mainly due to the larger number of flats and town houses located in the town centre of Aberystwyth that do not have their own private

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<sup>125</sup> Children's Commissioner for Wales' Coronavirus and Me Consultation 2020.

<sup>126</sup> Children's Commissioner for Wales' Coronavirus and Me Consultation 2021.

<sup>127</sup> Children's Commissioner for Wales' Coronavirus and Me Consultation 2020.

<sup>128</sup> Children's Commissioner for Wales' Coronavirus and Me Consultation 2021.

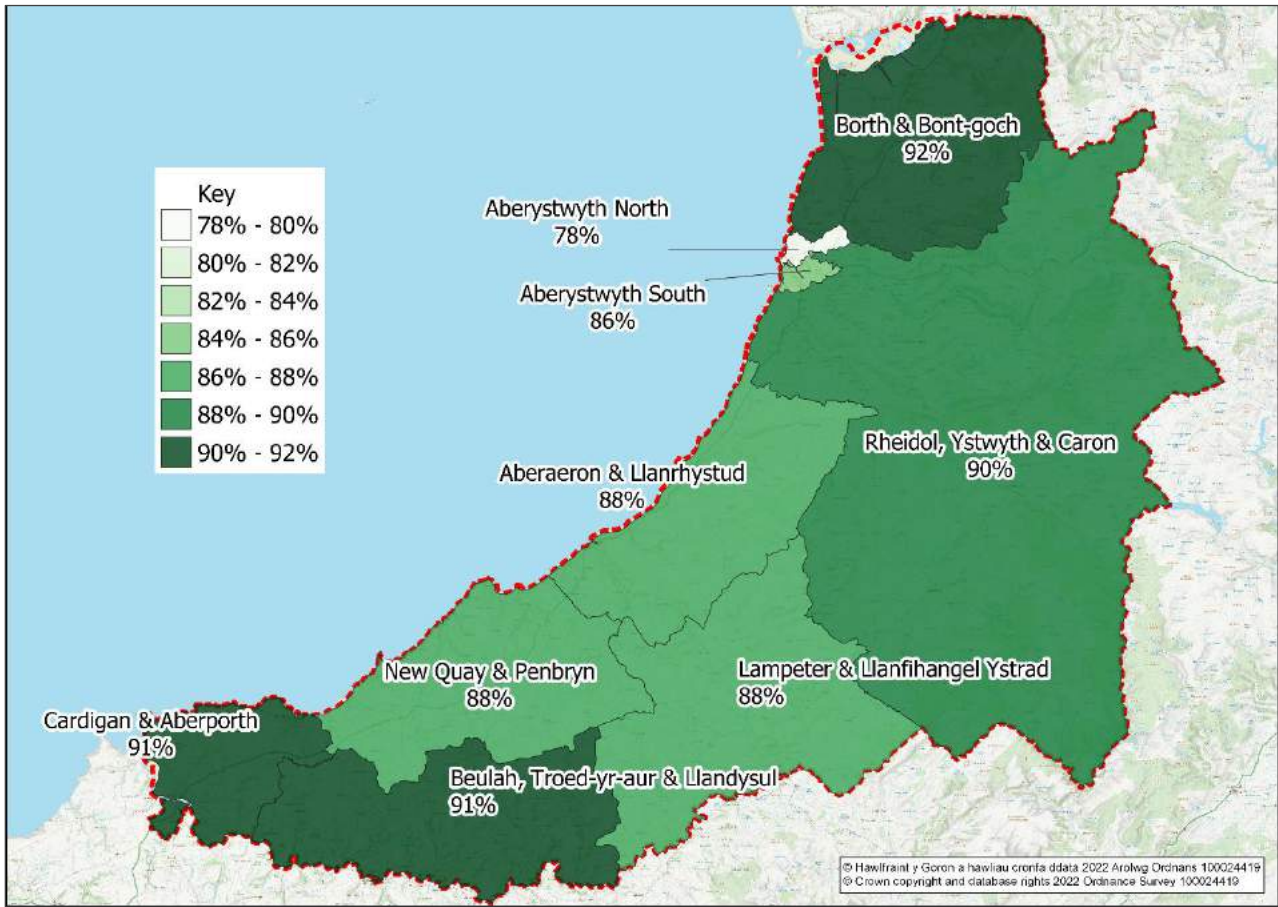
<sup>129</sup> "Access to gardens and public green space in Great Britain". Office for National Statistics. Available online:

<https://www.ons.gov.uk/economy/environmentalaccounts/datasets/accesstogardensandpublicgreenspaceingreatbritain>. Retrieved: 24/09/2021.



garden (Figure 5.10). Borth and Bont-goch has the highest percentage of properties with a garden at 92%. It is more likely that children from a deprived background live in homes without a garden, such as a flat.

Figure 5.10: Percentage of properties with private outdoor space in Ceredigion



Source: ONS Access to gardens and public green space in Great Britain

The nationwide ‘lockdowns’ during 2020/21 in response to the COVID-19 pandemic has raised the importance of play for children – many play areas and parks were closed to prevent the spread of the virus and for those without a garden playing outdoors was not only more difficult to do, but also difficult to do safely. Furthermore, travelling longer distances in order to play in a safe outdoor space meant that they are less likely to do so. A study involving Natural Resources Wales looking at why society needs nature, found that 6 in 10 children reported spending less time outdoors since the beginning of the pandemic.<sup>130</sup>

Play Wales identify that ‘play deprivation’ is a serious concern, and is the name given to the idea that not playing may deprive children of experiences that are essential to their development and result in those affected being both biologically and socially disabled.<sup>131</sup> The next Play Sufficiency Assessment, will be informed by more recent views of children and will provide insight into the impact of COVID-19 restrictions on play.

During the consultation period on the draft Assessment, the return of activities and clubs (such as, after school/holiday clubs, youth clubs and GCSE support clubs) emerged as being important to mitigate the negative impact of COVID-19. The provision of these activities are considered key in supporting children’s mental health, development and well-being in the wake of the pandemic.

Clearly, the provision and encouragement of children to take part in outdoor activities is essential during the short term recovery period, and for the longer term health of the nation. Whilst COVID-19 has had an impact on outdoor activities for children, the perceptions amongst younger people is positive – in our School’s Survey 21% said that the environment (green spaces and beaches) was the best thing about their community and 90% of pupils recognised that

<sup>130</sup> Armstrong, A., Brockett, B., Eustice, T., Lorentzon, A., O’Brien, L., Williams, S. (2021). “Why Society Needs Nature: Lessons from Research during Covid-19”. 7.  
<sup>131</sup> Brown, F. “Play deprivation: impact, consequences and the potential of playwork”. Play Wales & Welsh Government, 2013. 3-4.

the future of the environment is important, the latter being essential if future generations are to continue to tackle the environmental issues that will affect them.

## Social Isolation

Children in Ceredigion have experienced prolonged periods of **physical and social isolation** from their peers, teachers and extended families as a consequence of the national lockdowns and school closures during 2020-21. Schools play a fundamental role in children's development and well-being, particularly the environment and culture of the schools, opportunities for extra-curricular activities and spending time with their peers.<sup>132</sup> However, research shows that children who experience social isolation tend to have lower educational attainment and are more at risk of developing mental health problems in adulthood.<sup>133</sup>

The 'How Are You Doing in Wales' study run by Public Health Wales showed that as at October 2021 more than half of the respondents (66%) were worried about their child's well-being.<sup>134</sup> The relatively high level of concern amongst parents, even when Wales as a nation had moved out of lockdown and into tier zero, could be linked to fears as to whether their children would bounce back from falling behind academically, socially and emotionally and avoid the harmful longer-term impacts of the pandemic.

There is a legitimate reason for concern in Ceredigion, as the north of the County has seen a surge in children presenting to the General Practice with mental health issues in 2021.<sup>135</sup> It is likely that the COVID-19 Pandemic has negatively affected the well-being of children; isolation, fear, school closures, lack of socialization, bereavement or illness, are some of the impacts. However, it is also plausible that an increased awareness of mental health during the pandemic has led to more children who need help, being identified. The North Ceredigion Primary Care Cluster have forewarned a tsunami of children with mental health issues following the pandemic.<sup>136</sup> The North Ceredigion Cluster anticipate this increase as individuals delayed seeking help earlier during the pandemic, due to concerns of placing further strain on an over-stretched health service.<sup>137</sup>

Further research is needed to understand the full impact of the COVID-19 pandemic and associated isolation on the well-being of children within the different communities of Ceredigion. The longer term impacts of the pandemic are predicted to continue for years after the pandemic, and for that reason the development of children's mental health issues will need to be monitored closely in the coming years.

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<sup>132</sup> ONS (2020) 'Children's views on well-being and what makes a happy life, UK: 2020'. [Online]. Available at: [Children's views on well-being and what makes a happy life, UK: 2020](https://ons.gov.uk/peopleandplaces/populationandmigration/childrenandyoungpeople/articles/childrensviewsandwhatmakesahappyuk/2020). [Online]. Available at: [ons.gov.uk](https://ons.gov.uk/peopleandplaces/populationandmigration/childrenandyoungpeople/articles/childrensviewsandwhatmakesahappyuk/2020) (Accessed: 1/09/2021).

<sup>133</sup> National Institute for Health Research (2021). 'Lonely young people have an increased risk of mental health problems later: research suggests lockdown could have a long-term effect'. [Online]. Available at: [NIHR Evidence - Lonely young people have an increased risk of mental health problems years later: research suggests lockdown could have a long term effect - Informative and accessible health and care research](https://www.nihr.ac.uk/news/lonely-young-people-have-an-increased-risk-of-mental-health-problems-years-later-research-suggests-lockdown-could-have-a-long-term-effect/) (Accessed: 1/09/21).

<sup>133</sup> Bartley, M. Kumari, M. and Lacey, R. E. (2014). 'Social isolation in childhood and adult inflammation: Evidence from the National Child Development Study'. [Online]. Available at: [Social isolation in childhood and adult inflammation: Evidence from the National Child Development Study - ScienceDirect](https://www.sciencedirect.com/science/article/pii/S0926641014000611) (Accessed: 1/09/2021).

<sup>134</sup> "How are we doing in Wales?". October 2021. Public Health Wales. Online: <https://phw.nhs.wales/topics/latest-information-on-novel-coronavirus-covid-19/how-are-you-doing/how-are-we-doing-in-wales-reports/how-are-we-doing-in-wales-week-78-report/>

<sup>135</sup> Hywel Dda University Health Board (2021). *Mental health schemes supporting primary care services: 29 July 2021*. [Online]. Available at: [Mental health schemes supporting primary care services - Hywel Dda University Health Board \(nhs.wales\)](https://www.nhs.uk/mentalhealth/schemes-supporting-primary-care-services/)

<sup>136</sup> Ibid.

<sup>137</sup> Ibid.

## Summary of themes: **Childhood**



**Childhood obesity** has decreased in Ceredigion and the county has the highest proportion of children **taking part in sport** outside of school across Wales. However, **secondary age children** are less likely to undertake at least three occasions of activity per week, and **increasing participation of females in sport**, particularly since the COVID-19 pandemic, has been recognised as a national issue by Sport Wales.

**Child poverty** in Ceredigion is higher than average and has seen the second highest increase nationally since 2014/15. In Ceredigion 3,459 children are living in poverty. This is a regional issue affecting Carmarthenshire and Pembrokeshire as well.

The data available suggest that **in-work poverty is increasing** and remains a key challenge for households, particularly in Aberystwyth North, Cardigan & Aberporth and Aberystwyth South.

The **Ceredigion education system** is recognised as one of the strongest in Wales and one of the County's primary assets. The additional life-skills of Welsh medium education are wide-reaching to all aspects of well-being.

The **gap between the top GCSE** results of pupils from deprived backgrounds and those from non-deprived backgrounds has widened

To meet the needs of families, **childcare providers** will need to consider adapting their provision to meet the changing needs and more flexible working patterns in the future.

Our engagement with younger people highlighted their **desire for more play areas** and **recreational facilities** in Ceredigion.

Attitudes of children towards **outdoor play** in Ceredigion are positive. The provision and encouragement of children to take part in outdoor activities is essential during the short term recovery period from COVID-19.

Children feel connected to their local **natural environment** and recognise the importance of **protecting the environment** for theirs and future generations. **Climate change** was recognised by children as the biggest challenge being faced currently, more than twice as great as any other threat.

Further research is needed to understand the full impact of the **COVID-19 pandemic** and associated **isolation** on the well-being of children within the different communities of Ceredigion.



# YOUTH





*In this chapter: Growing Independent, Out and About as Part of the Community, Broadening Horizons: First Home and Job*

6.1 Growing Independent

As children grow they become more independent, some will want to start their careers, seek further education, or move away from home.

Demographic Trends

In 2020, there were 2,285 people aged 16 to 18 in Ceredigion, representing 3.1% of the County’s population. This figure is projected to decrease over the longer term to 2,181 by 2043 which is a 4.6% reduction. For those aged 19-21 the population is much larger at 5,628 primarily due to the significant number of students studying at the two universities, and which is projected to increase by 3.1% up to 2043.

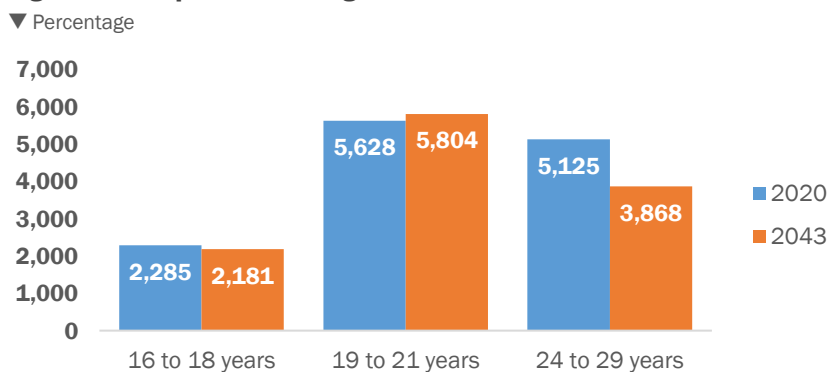
However, the initial years after college or university when younger people start their careers and enter the workforce show a marked decline in population. The 24 to 29 year old population are the most likely to move away from Ceredigion in search of opportunities and these trends are projected to continue. In 2020, this age group numbered 5,125 but is projected to decrease by a staggering 24.5% by 2043, a reduction of 1,257. This trend can be seen in Table 6.1 and Figure 6.1.

Table 6.1: Population change 2020 to 2043

	2020	2043	Difference	% Difference
16-18 years	2,285	2,181	-104	-4.6%
19-21 years	5,628	5,804	176	3.1%
24-29 years	5,125	3,868	-1257	-24.5%

Source: Welsh Government 2018-based population projections

Figure 6.1: Population change 2020 to 2043



Source: Welsh Government 2018-based population projections

It is well-known and an often discussed issue that many young people leave the county to pursue opportunities elsewhere in Wales or further afield across the UK. This is partly as a result of a decline in public sector jobs, which have always been an important part of the Ceredigion economy, but also in search of career opportunities and higher value jobs.

These trends have potentially serious consequences for the future economy of Ceredigion and its cultural heritage. The ageing population and decreasing working age population that is projected over the next twenty five years has

serious ramifications for strengthening the local economy and interventions to reverse this trend are already in place.

Our stakeholder event with Give Us Support (GUS), facilitated by RAY Ceredigion, reflect these trends. The majority of the younger people in attendance said that they didn't want to stay living in their local area, as they wanted to seek work or education opportunities outside of the county or move to be closer to their family.

Furthermore, a survey of younger people in Ceredigion conducted in 2020 revealed that just 22% of respondents said they would stay in Ceredigion after finishing school or further education, with 38% saying they would leave and 40% undecided.<sup>138</sup>

Whilst the reasons for younger people leaving the county are varied, they are not complex. When asked what would make a difference to their future in Ceredigion, the main themes identified were connectivity, employment opportunities and affordability of housing, see Figure 6.2.

Figure 6.2: Reasons for younger people leaving Ceredigion (2020 consultation)



Source: Ceredigion County Council

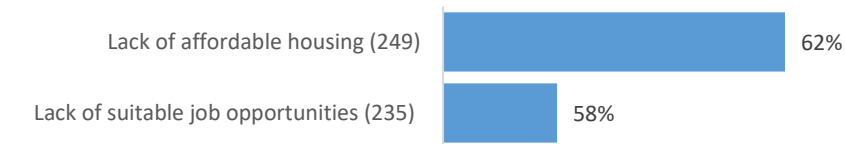
These themes have been high on the agenda for some time, but the COVID-19 pandemic has exacerbated each – digital connectivity in particular has become essential over the last twelve months where online access has largely been the only way to keep in touch, the impact on the economy has heightened concerns over job losses at the end of the furlough scheme, and the housing boom being witnessed across West Wales is also making the already limited housing stock in Ceredigion less affordable, particularly for younger first time buyers.

These same themes emerged from the stakeholder events. The key concerns raised were around the lack of; affordable housing, higher paid jobs and job opportunities. Similar responses were also given in our Well-being Survey and School's Survey. Amongst the responses to our School Survey, jobs were identified as the biggest concern in their local area in the future, followed by housing, ahead of the global concerns around the environment and climate change. Less than half, 40.5% said that they can do the type of job that they want in their local area, and only 43% said they want to stay living in their local area.

These issues were also reflected in the general Well-being Survey. Lack of affordable housing and suitable job opportunities were the two biggest concerns amongst respondents regarding the economy in the future, as shown in Figure 6.3. Meanwhile, 60% recognised young people moving out of the area for education or work opportunities as being their biggest concern in relation to maintaining the county's vibrant community (Figure 6.3).

Figure 6.3: Future concerns regarding the loss of younger people

Looking ahead, what concerns you the most about prosperity in the county? (Please tick all that apply)



<sup>138</sup> Ceredigion County Council (2020) Consultation on Developing a New Ceredigion Economic Strategy 2020-2035: Feedback Report



Looking ahead, what concern you the most about your County’s vibrant community and thriving Welsh language? (Please tick all that apply)



Source: Ceredigion PSB Well-being Survey

Retaining young people is essential, economically, socially and culturally. This age group is most likely to include economically and socially mobile people who are looking for work, education and other social opportunities. The young people of today will be vital in filling key roles in the local economy, taking up jobs in healthcare, and to answer to general caring and well-being needs of their senior generation.

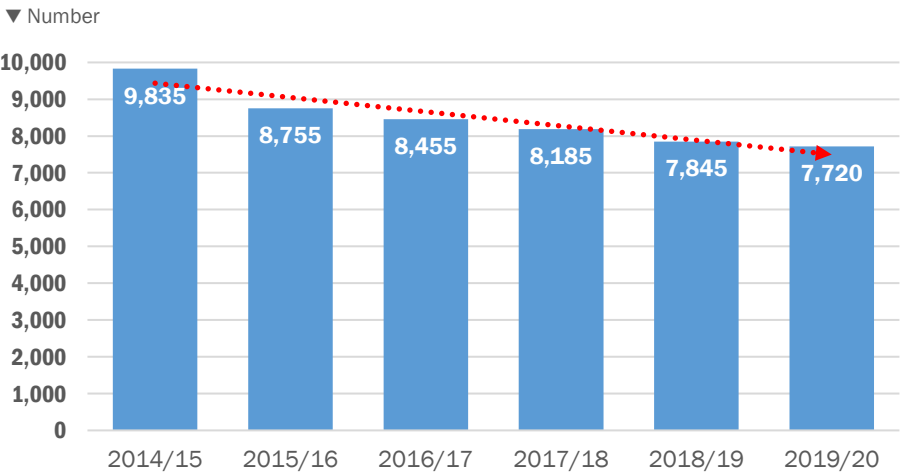
But there is also a fundamental link to culture and language, for retaining younger people is essential to continuing the long-held traditions of the county as one of the bastions of Welsh language and culture. Young people leaving the County will most likely lead to a loss of Welsh speakers and the sense of connection they have with their county’s history.

These are not new issues, but they do remain of critical importance in moving forward. There are already interventions in place in the county to reverse this trend by focusing on developing the local economy to creating improved job opportunities and attracting better paid jobs, along with investment and schemes to improve connectivity with the rest of Wales either physically or digitally. But, these are longer term ambitions that will need to be monitored over decades rather than years.

Students

At the same time, the challenging environment for Higher Education has meant that the student population of the county is also decreasing. Ceredigion’s 18 to 24 population is dominated by students enrolled at the two universities - Aberystwyth University and University of Wales Trinity St David’s (Lampeter Campus). Up to 9,000 students have been known to enrol in both universities collectively, but trends show that the number enrolling at Aberystwyth University has been decreasing since 2014/15 (Figure 6.4).<sup>139</sup> This comes despite the University continually being ranked the highest in Wales for student satisfaction over the last six years.<sup>140</sup>

Figure 6.4: Number of HE student enrolments at Aberystwyth University



Source: Higher Education Statics Agency

<sup>139</sup> HESA (2021) who’s studying in HE? HE Student enrolments by HE provider. Online: <https://www.hesa.ac.uk/data-and-analysis/students/whos-in-he> Accessed: 04/10/2021.  
<sup>140</sup> The Times/Sunday Times Good University Guide (2021).

The student population is an integral part of the County's economy. A report by London Economics revealed that in the academic year 2018/19, a single first year student in Ceredigion boosted the economy by over £87,000.<sup>141</sup> It is thought that Ceredigion's economy has benefited from almost £80 million because of the impact new international students also.<sup>142</sup> Education in Ceredigion also employs 3,500 people or 14% of the jobs in the county and is one of the largest sectors.

## First Independence

Between the ages of 16 and 24, young people are expected to develop their independence. As a result, this life stage is often associated with risk-taking behaviours.

Although it isn't legal to buy or drink alcohol until the age of 18, young people often begin drinking before this. 11.1% of adults reported very heavy (binge) drinking in Ceredigion according to Public health Wales data<sup>143</sup>, which is in-line with the rest of Wales. These figures are not available by age cohort and therefore include all respondents aged 16+ but binge drinking and heavy drinking are often seen in younger people, particularly students, as university life is often associated with excessive alcohol consumption.<sup>144</sup>

The COVID-19 pandemic has increased anxiety and stress levels which are also linked to an increase in alcohol consumption during the pandemic period. Various sources such as the British Liver Trust suggest there have been substantial increases in consumption during the last eighteen months<sup>145</sup>, and the Public Health Wales' ongoing "How are we doing in Wales?" survey recorded a 22% increase in alcohol consumption as at February 2021.<sup>146</sup>

Excessive alcohol consumption can have detrimental effects on our health and well-being. Chronic health problems including mental ill health, cardiovascular conditions and many more, can be associated to excessive alcohol consumption. The earlier we start drinking alcohol, the more likely it will affect our health and well-being later in life.

Much like alcohol, recreational and prescription drug misuse can negatively affect our health and well-being. It is also a criminal offence to use illegal drugs. In 2020-21 the Aberystwyth North community area had the highest drug possession offences in Ceredigion with 12.7 per 1,000 population (114 offences), and although this area has a larger population overall, is possibly linked to the large number of students and young people in that area, although data is not available by age. Borth & Bont-goch had the lowest number of offences at 1.1 per 1,000 population (8 offences), see Figure 6.5.

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<sup>141</sup> "International students bringing nearly £80m of economic benefits to Ceredigion and enriching its culture". Aberystwyth University. (Online: <https://www.aber.ac.uk/en/news/archive/2021/09/title-248086-en.html>). Retrieved: 24/02/2022.

<sup>142</sup> London Economics (2021). The costs and benefits of international higher education students to the UK economy – September 2021.

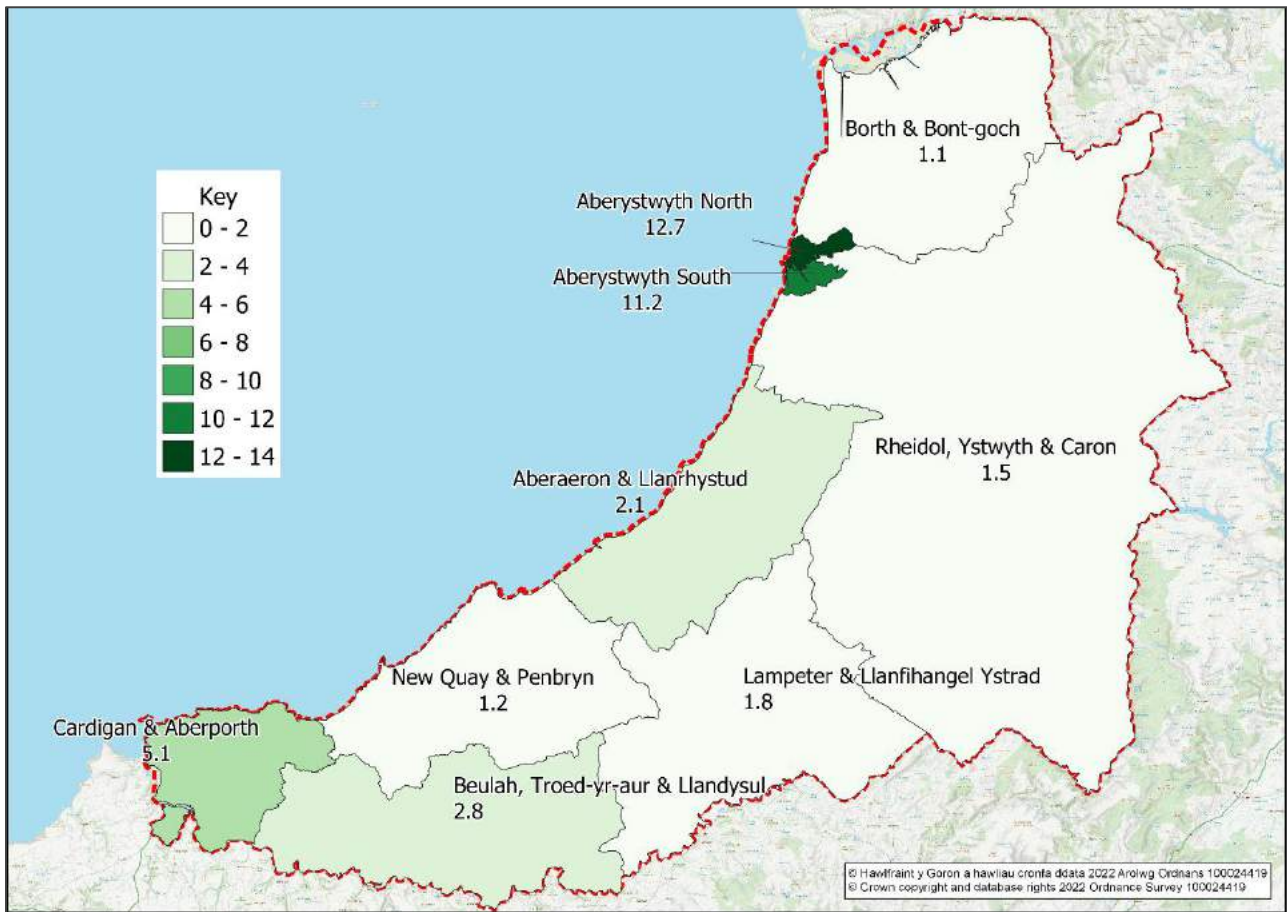
<sup>143</sup> Public Health Wales (2019) Percentage of adults who reported heavy and very heavy drinking, by Local Authority, Wales, 2016/17-2017/18.

<sup>144</sup> National Union of Students (2018) Students and Alcohol National Survey.

<sup>145</sup> British Liver Trust (2020)

<sup>146</sup> "How are we doing in Wales?". February 2021. Public Health Wales. Online: <https://phw.nhs.wales/topics/latest-information-on-novel-coronavirus-covid-19/how-are-you-doing/how-are-we-doing-in-wales-reports/week-44-report-how-are-we-doing-in-wales/>. Retrieved: 14/10/2021.

Figure 6.5: Number of Drug Related Offences 2020-21 (by 1,000 population)



Source: Adapted from Dyfed Powys Police, 2020/21

Having a child at a young age can negatively affect our health and mental well-being as well as the health and mental well-being of the child. Young people tend not to have the financial and/or social means to enable them to look after an infant. This can not only cause stress on the mother, it can also affect the baby’s upbringing.

The rate of under 18 conceptions per 1,000 females aged 15-17 in Ceredigion (9.1) is much lower than the national average (18.9). Trends indicate that since 2014 there has been a gradual decline in the number of females aged 15-17 having a baby in Ceredigion.<sup>147</sup>

Youth Mental Health

28.6% of the 17-24 year old respondents to our Well-being Survey noted that ‘Feeling healthy and happy’ was one of the most important things that they valued in relation to their physical health and/or mental well-being.

As reflected in the previous chapter, the beginning of independence is often associated with taking on certain responsibilities. Adolescence is a unique and determinative time for a young person and can often be a period when young people are at heightened risk of experiencing poorer mental health.<sup>148</sup> It is a time when we are exposed to many physical, emotional and social changes. Much like children, the young people of today can feel more pressures to succeed in ways previous generations did not. These pressure include succeeding at examinations throughout school and higher education.

The use of social media has been increasing in all age groups. Often, young people can feel pressured to meet expectations of stereotypes on social media, causing severe anxiety when expectations are not met. Additionally, online trolling or cyber bullying is on the rise across all online social media platforms, affecting many young people’s

<sup>147</sup> DataCymru Core Data Set

<sup>148</sup> Page N., Hewitt G., Young H., Moore G., Murphy S. (2021) Student Health and Wellbeing in Wales: Report of the 2019/20 School Health Research Network Student Health and Wellbeing Survey. Cardiff University, Cardiff, UK. 105.

mental health and well-being. It is within the student population where mental health issues appear to be most prevalent, where studies show that the vast majority of Universities (94%) have experienced a sharp rise in the number of people accessing support services.<sup>149</sup> The most commonly reported conditions were anxiety and depression.<sup>150</sup>

The COVID-19 pandemic has likely exacerbated many mental health issues, and increased the number of young people suffering with a mental health issue. COVID-19 has meant that most people have been subject to restrictions; young people have been isolated from friends and family, anxiety caused by exams being cancelled and education changing completely. A study by Young Minds revealed that 67% of respondents agreed that the pandemic would have a long-term negative effect on their mental health.<sup>151</sup>

Young people who experience a mental health condition are more likely to experience mental health problems later in life. Therefore, it is essential that support is available to young people. Area 43 is an independent charity and plays a key role in the third sector in Ceredigion and West Wales, by providing information, support and training to young people aged 16-25 and counselling services to those aged 10-30.

### Case Study ►

#### **Ceredigion representative on National Youth Board for well-being and mental health**

A pupil from Ysgol Gyfun Aberaeron has been selected to join 10 other young people from across Wales to sit on a National Youth Board. The board has been formed to support Welsh Government (WG) to design a whole-school approach to emotional well-being and mental health. The board will meet with WG officials, AMs, Health Board officials and other key figures, such as the Children's Commissioner to improve mental health and emotional well-being services for young people across Wales. The pupil will have the opportunity to feedback the board's developments to other young people through the Ceredigion Youth Council.

In December 2021, Ceredigion's School Service, Youth Service, CAVO with Ceredigion's Connect to Kindness team called on young people to design a mural based on the theme of Kindness which began during National Anti-bullying in November last year. The idea was developed from the West Wales Regional Partnership Board's Connect to Kindness campaign. In schools, the campaign emphasises how kindness in the classroom encourages positivity which children can take with them throughout their lives.

The winning design was created by a group of pupils at Ysgol Bro Teifi. As a prize for winning the mural design competition, 'Marvellous Murals' will bring their plans to life on the school site. This will enable the children and young people to be reminded of the important message of being kind to themselves and others. All other schools who took part will receive £200 and a Connect to Kindness badge from the West Wales Care Partnership Regional Board for the pupils to celebrate their creativity and kindness.

<sup>149</sup> Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment

<sup>150</sup> Unite Students Insight Report (2019)

<sup>151</sup> Young Minds (2021) Coronavirus Impact on young people with mental health needs.





that faster, reliable and affordable digital connectivity was key to meeting their future needs, particularly as schools now use digital platforms for homework and other activities.

The COVID-19 pandemic has of course brought these issues to the fore, and for younger people the nationwide lockdown and moving of teaching online meant a greater reliance on good broadband access.

However, staying connected with others doesn't just mean over the internet, as exactly 50% of the 17-24 respondents to our Well-being Survey noted that 'Lack of transport' was something that concerned them the most about future prosperity in Ceredigion.

In Ceredigion and many rural areas, public transport is infrequent to and from some of the most rural areas of the county. For a young person being able to drive and owning a car can therefore be essential, but this comes with costs that young people often may not be able to afford. This can result in making travelling to see friends and socializing difficult, leaving some feeling lonely and isolated, which negatively affects their well-being.

Continuing to upgrade digital infrastructure facilities and investment in public transport will enable young people to stay connected and improve well-being.

## 6.2 Out and About as Part of the Community

### Environmental Awareness

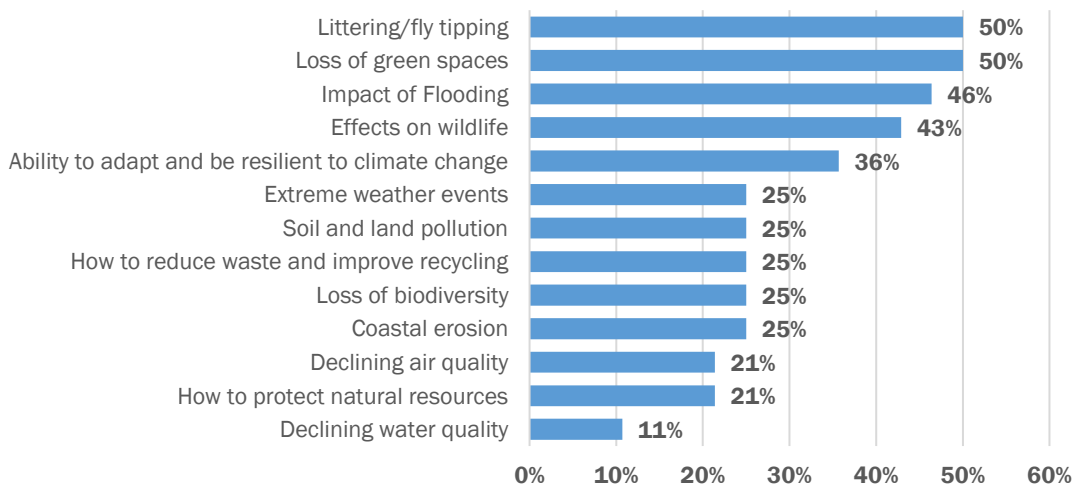
Environmental awareness and concerns over protecting the environment continues to grow amongst younger generations, and this is visible in the results to our Well-being and School Survey's. In particular, young people not only value their local environment but are also more vocal in expressing their concerns, particularly in relation to climate change as we saw in the School Survey results.

There are many studies showing a growing trend in 'climate anxiety' amongst young people in Wales, where they feel increasing anxiety about the impact of climate change. Place2Be, a charity offering counselling and mental health support in schools have reported on this in Wales and further afield. While the tangible impact of climate is widely known and understood, the impact on people's well-being and mental health requires more attention. Amongst the 17-24 age group in Ceredigion, 36% highlighted the ability to adapt and be resilient to climate change as their biggest concern in relation to the environment in the future.

However, in our Well-being Survey we found that the biggest causes for concern amongst this age group were the more local issues of *loss of green spaces* and *littering/fly-tipping* (Figure 6.7) where exactly half of respondents identified these concerns. Closely behind was the *impact of flooding* on Ceredigion's communities where 46% identified this concern. In all three of these scenarios, Ceredigion has witnessed growing concerns in recent years and it is perhaps not surprising that these have come to the fore. For example, in the last six years there have been several storms causing widespread flooding and damage in the county, and most recently storms Ciara and Dennis in 2020 that would have been witnessed by many respondents.



**Figure 6.7: Looking ahead, what concerns you the most about your local environment? (Responses from 17-24 year olds)**



Source: Ceredigion PSB Well-being Survey

According to our Well-being Survey, by far the most common thing young people (aged 17-24) would consider doing to improve their local environment is recycle more (78.6%). Closely followed by use locally produced food (67.9%), reduce waste (64.3%) and walk more (64.3%).

It follows that the top thing that young people think needs to be in place to enable them to do things that will help improve their environment, is that recycling needs to be made easier (53.6%), that there are more routes for connecting towns/villages (53.6%), that there is affordable sustainable transport (46.4%) and more litter-pick schemes in the community (46.4%).

In Ceredigion there are a number of strategies in place to help encourage our younger people to better our environment. Caru Ceredigion is one example which encourages and inspires every generation to get involved and work together to make Ceredigion a healthier environment to live in and promote sustainable living.<sup>155</sup> Additionally, The Environmental Partnership Grant which is being hosted by CAVO, will offer funding from £250 to £1,000 towards any individuals, groups, professionals, students, UK institutions or charities that can demonstrate a drive to make an impact on the environment.<sup>156</sup>

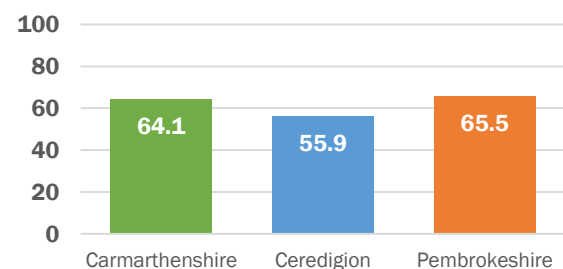
**Feeling Safe**

Feeling safe is a topical and perhaps surprising issue of late in Ceredigion. Overall, the crime rate in Ceredigion continues to be low and the county continues to be one of the safest places to live in Wales and across the United Kingdom. The overall number of offences committed in the county in 2020/21 decreased by 8% on the previous year and, when calculated per 1,000 population, is the lowest in the West Wales Region. (Figure 6.8)

<sup>155</sup> Caru Ceredigion. Online: <https://www.ceredigion.gov.uk/resident/car-u-eredigion/> Retrieved: 21/10/2021.  
<sup>156</sup> CAVO (2021) The Environmental Partnership Grant closes on 30th June 2021. Online: <https://www.cavo.org.uk/2021/06/16/the-environmental-partnership-grant-closes-on-30th-june-2021/> Retrieved: 21/10/2021.

**Figure 6.8: Crime rate per 1,000 population 2020/21**

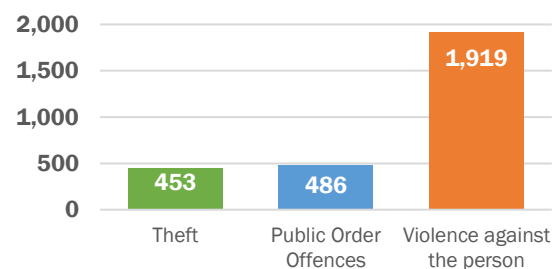
▼ Number per 1,000 population



Source: Adapted from Dyfed Powys Police, 2020/21

**Figure 6.9: Most prevalent types of crime in Ceredigion 2020/21**

▼ Number of incidents

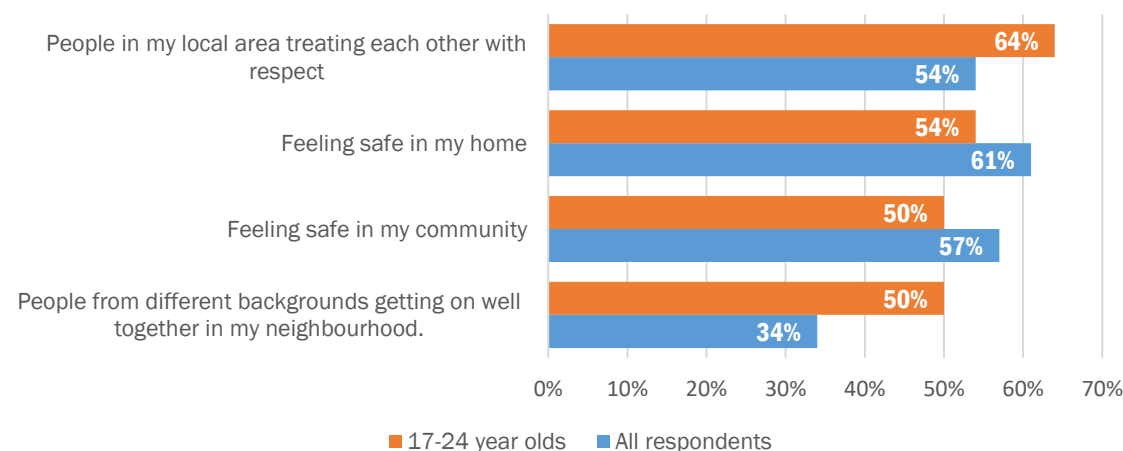


Source: Dyfed Powys Police (2021)

By far the most prevalent type of crime is “violence against the person”, which includes a range of offences from minor offences such as harassment and common assault, to serious offences such as actual bodily harm and grievous bodily harm (Figure 6.9).

Despite the low crime figures in Ceredigion, feeling safe is still essential to well-being and features prominently in the Well-being Survey and stakeholder events. Younger people, however, tend to be slightly less concerned than across the population at large. For example, amongst the 17-24 age group, 54% stated that *feeling safe in their own home* was what they valued the most about their community, behind *people treating each other with respect* (64%). But across all responses feeling safe in their own home was identified as the single most important theme, identified by 61% of all respondents (Figure 6.10).

**Figure 6.10: Which three things do you value the most in relation to the community that you live in?**



Source: Ceredigion PSB Well-being Survey

When considering the future, younger people were most concerned by *Prejudice* and *Community resources being closed down*. There were still 43% identifying *people feeling unsafe and afraid of crime*, which was noticeably higher than all respondents where 29% selected this option.

We found during the production of the assessment that feelings of safety have come to the fore, possibly as a result of concerns around the impact of COVID-19. This is visible, not only in the results to the well-being survey, but also during the stakeholder events and workshops run during the summer of 2021. The findings reveal a number of comments in relation to a much wider definition of ‘feeling safe’ that includes general community cohesion, safe travel, access to services and safe environments. This was raised in the Climate Change and Natural Resources workshop and appeared throughout the engagement, some examples of the variety of comments raised are shown in Table 6.2.

Table 6.2: Sample comments regarding community safety

"We need more <b>safe, green spaces</b> for our children to exercise and play especially since the pandemic".	"Cycle paths. We live in a wonderful area, yet if we want to commute to work we have to do so on busy roads. Until such time <b>safe cycle paths</b> are in place, I would not feel safe on cycling to work".
"A <b>safe and caring community</b> as we now have will help to achieve my aims."	" <b>Safe environment</b> , steady and sufficient income."
"I am inspired by being outdoors surrounded by nature. We must also halt the biodiversity loss and climate crisis to maintain the outdoor spaces as <b>safe and nice places to be.</b> "	"I find it frustrating that I can't use Welsh in my community and that it's <b>difficult to walk to other communities safely.</b> "

Source: Ceredigion PSB Well-being Survey

The breadth of views suggests that when new implementing services and new schemes, safety must always be a fundamental concern in their design to ensure not only the physical safety, but also the well-being, of those using them. Safety in this broad sense has been clearly identified as a key determinant of well-being and strongly links to the **Healthier, More Equal** and **Cohesive** Well-being Goals. However, this is an area that requires further investigation to fully understand the nature of people’s concerns and exactly *why* it featured so prominently in the engagement activity.

Whilst the perception of crime tends to be higher than the reality of crime, it’s not entirely clear as to why the wider sense of feeling safe emerged so often during the engagement. One possible explanation is that these feelings have come to the fore in response to the ongoing concerns surrounding the COVID-19 pandemic, both in terms of the direct threat to human health but also the wider impacts such as that on mental health, social isolation and loss of employment. It could also be that, like crime and anti-social behaviour, perceptions of safety are influenced by the media. In order to fully understand this issue, further research is needed, and Appendix 5 contains this and a number of other issues that the Ceredigion Public Services Board may wish to pursue following the publication of the Assessment.

People who leave prison are less likely to reoffend if they have strong foundations in place, such as a stable home, a steady job, and good health free from substance misuse. Those who leave prison and don’t have stable accommodation are nearly 50% more likely to reoffend. As well as this, supporting offenders with training and education can mean that they go on to secure employment and are up to 9% less likely to reoffend.

Substance misuse is also a key priority in Wales, and it is important to educate offenders on the outcomes of substance misuse, which can be an offence in itself, but under the influence of drugs or alcohol people can be unaware of their actions and more likely to offend. Although there are no prisons in Ceredigion and no female prisons in Wales, the HM Prison and Probation Service Reducing Reoffending Plan (2021-2024) works on a national, divisional and local level and aims to keep communities safer in Wales by reducing reoffending risks.

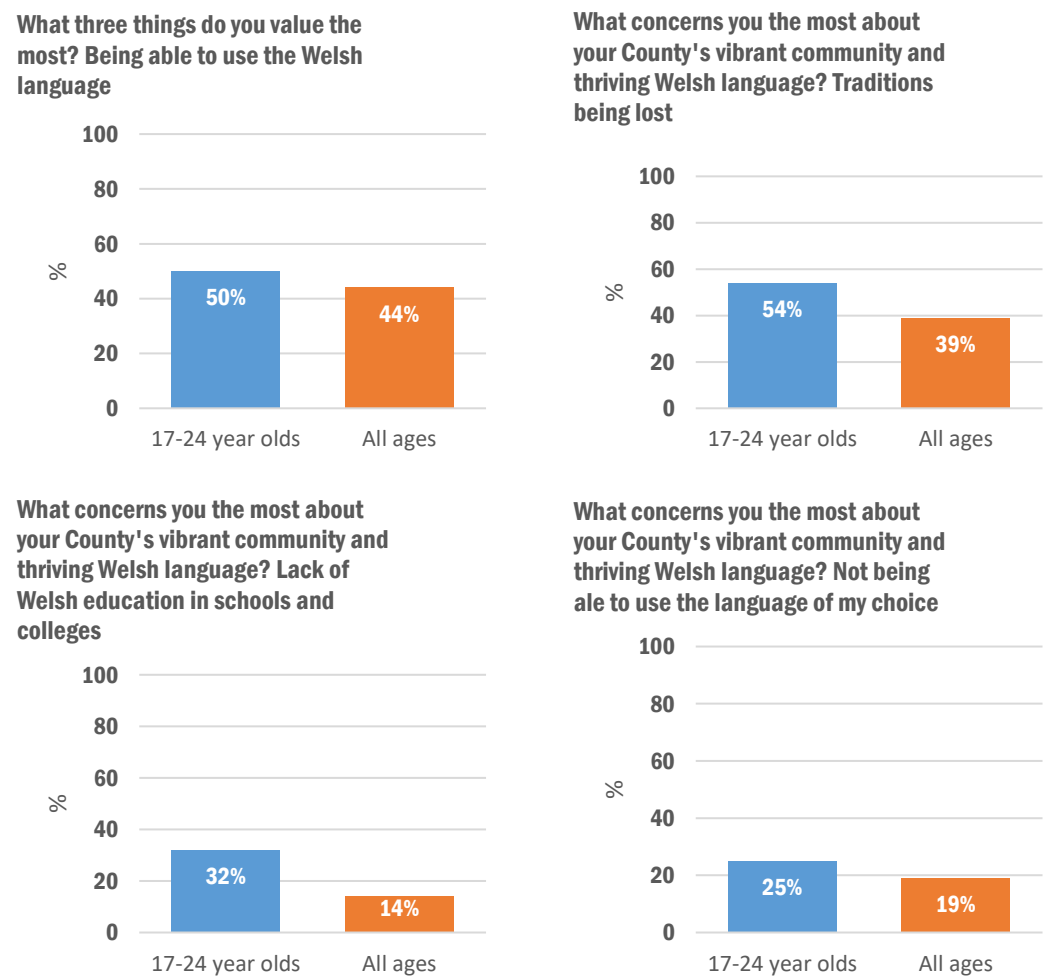
Welsh Language and Culture

Of the responses to our Well-being Survey from 17-24 year olds, 46% said they could speak Welsh and 32% noted that Welsh was their main language. While there have been concerns that the Welsh language is being spoken less outside of educational settings in general daily life, the results indicate a strong connection to Welsh language and culture amongst younger people, and an equally strong desire to actively maintain that for future generations. In order to meet this desire and ensure a Ceredigion of vibrant culture and thriving Welsh language we must provide the opportunities to enable them to use the Welsh language whenever they want.

For example, exactly 50% said that being able to use the Welsh language was the most important thing in relation to a vibrant community and Welsh language, higher than the overall results for this question. Furthermore, over half (54%) identified “traditions being lost” as the thing that concerns them the most in relation to language and culture, followed by 32% identifying the “lack of Welsh education in schools and colleges”, and a further 25% identifying “not

being able to use the language of their choice”. In all questions relating to language and culture, options relating to Welsh language scored higher within the 17-24 respondents than across the survey results as a whole (Figure 6.11).

Figure 6.11: Well-being Survey Results 17-24 year olds



Source: Ceredigion PSB Well-being Survey

Ensuring that there are opportunities to use the Welsh language outside of the formal school environment is key to promoting and facilitating the use of Welsh language in everyday life. Using Welsh in different contexts (e.g. in after school activities and clubs) is particularly important for Welsh learners to develop confidence in using the language outside of school and to pick up informal/casual forms of Welsh. This is recognised at national policy level, where The Welsh Government recently announced that as from September 2022, free Welsh lessons will be made available to anyone between 16 and 25 years old and to all education practitioners.<sup>157</sup> This positive development will help remove barriers to accessing the language and promote the many benefits it brings to people’s lives, and ultimately, contribute to achieving one million Welsh speakers by 2050. Furthermore, it is important that Welsh speaking children are able to participate in clubs and activities in the language of their socialisation. In Ceredigion, there are opportunities for children and young people to join groups such as Young Farmer’s Clubs and the Urdd and activities at Theatr Felinfach, Theatre Troedryhiw, Radio Beca and Theatr Arad Goch.

<sup>157</sup> “Free Welsh lessons available to all 16 – 25s and teaching staff Welsh Government”. Welsh Government 2022. Online: [https://gov.wales/free-welsh-lessons-available-all-16-25s-and-teaching-staff?utm\\_source=rss-announcements&utm\\_medium=rss-feed&utm\\_campaign=announcements-Free+Welsh+lessons+available+to+all+16+to+25s+and+teaching+staff](https://gov.wales/free-welsh-lessons-available-all-16-25s-and-teaching-staff?utm_source=rss-announcements&utm_medium=rss-feed&utm_campaign=announcements-Free+Welsh+lessons+available+to+all+16+to+25s+and+teaching+staff). Retrieved: 14/02/2022.

Young Farmers Clubs are very popular across Ceredigion - there are 19 clubs in total with over 700 active members. The Clubs provide young people, living in rural areas, between 10 and 26 years old with a variety of opportunities and experiences.<sup>158</sup>

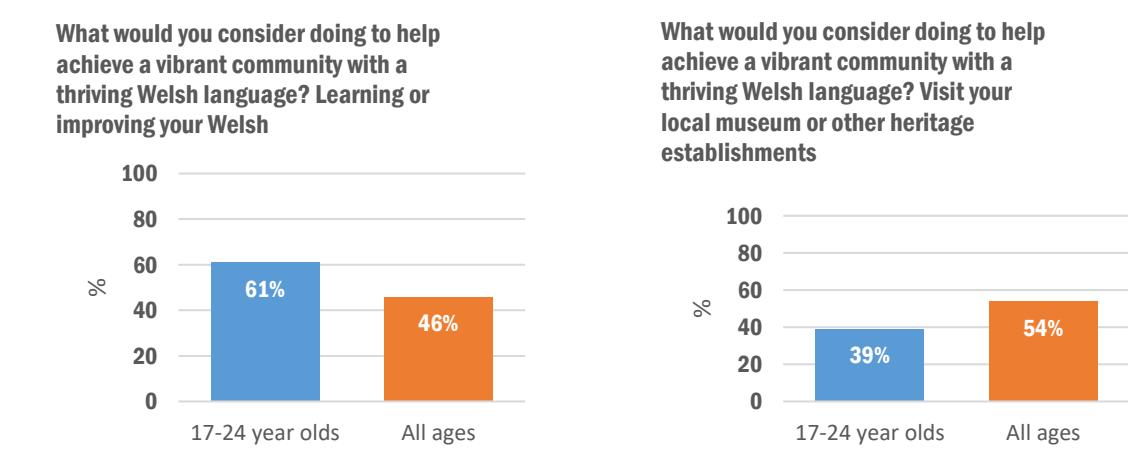
The National Eisteddfod is due to take place in Tregaron in 2022 and holds great opportunity for young people in Ceredigion to take part and celebrate Welsh language and culture. Although the Eisteddfod attracts people of all ages, Maes B, is a campsite dedicated to young people that showcases Welsh bands, enabling young people to experience Welsh language music and culture.<sup>159</sup>

The 2022-32 Welsh in Education Strategic Plan has committed to collaborate with Welsh medium providers to expand the provision that enables children to gain access to Welsh medium extracurricular activities and develop opportunities to use their Welsh language skills (e.g. Urdd Gobaith Cymru, Ceredigion Actif, Arad Goch Theatre Company, Cered etc.). The Plan also aims to provide activities for specific days to promote the Welsh language, such as Shwmae Su’mae Day, Welsh Music Day and Saint David’s Day.

According to the National Survey for Wales, 66% of Ceredigion people are attending or participating in arts, heritage and culture activities at least 3 times a year, which is lower than the national average (70%). This data is not available by age cohort and therefore it is difficult to establish how many of the 66% in Ceredigion are young people.

However, from our Well-being Survey, we do know that younger people not only have a connection with language and culture, but also have a desire to maintain it for future generations and support the vibrant culture and thriving Welsh language well-being goal, as demonstrated in Figure 6.12. For example, 61% said they would consider “learning or improving their Welsh language skills” to help achieve a vibrant Ceredigion with thriving Welsh language, 39% said they would “visit their local museum or other heritage establishments”, and a further 39% would “watch a TV programme in the medium of Welsh using sub-titles to assist”. The question of what support is needed to achieve this revealed that “opportunities to learn and improve my skills” was identified by exactly 50% of respondents, closely followed by “opportunities to use Welsh informally” at 43%.

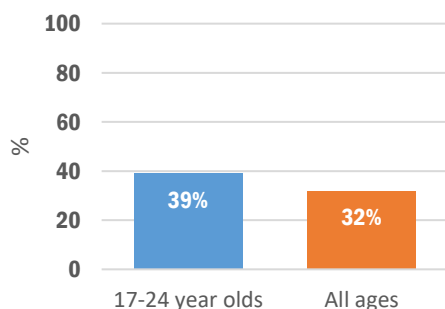
Figure 6.12: Well-being Survey Results 17-24 year olds



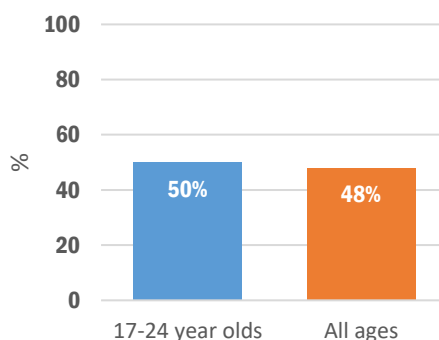
<sup>158</sup> Ceredigion Y.F.C. Online: <https://yfc-eredigion.org.uk/en/home/> Retrieved: 05/10/2021.

<sup>159</sup> National Eisteddfod. Online: <https://eisteddfod.wales/about-us> Retrieved: 05/10/2021.

What would you consider doing to help achieve a vibrant community with a thriving Welsh language? Watch a TV programme in the medium of Welsh using sub-titles to assist



What support would need to be in place to do these things? Opportunities to learn and improve my skills



Source: Ceredigion PSB Well-being Survey

## 6.3 Broadening Horizons: First Home and Job

Access and opportunity are inextricably linked to money. Low income, whether due to unemployment, reliance on benefits or low paid work, limits access to adequate housing, education and other services or facilities, as well as to essentials such as food, fuel and clothing. In Ceredigion, like anywhere, this age group is particularly at risk of reduced access and opportunity.

Finding a home of one's will be a defining step for many young people. This may mean moving to one of the local towns, with Aberystwyth being especially attractive due to its larger range of employment opportunities.

### Employment and affordable housing

Finding a home of one's own is a defining step for many young people, but finding suitable and affordable accommodation in Ceredigion can be difficult. The growth in demand and limited stock has kept house and rental prices high in the county, and housing affordability has been a concern for many years, particularly for younger people.

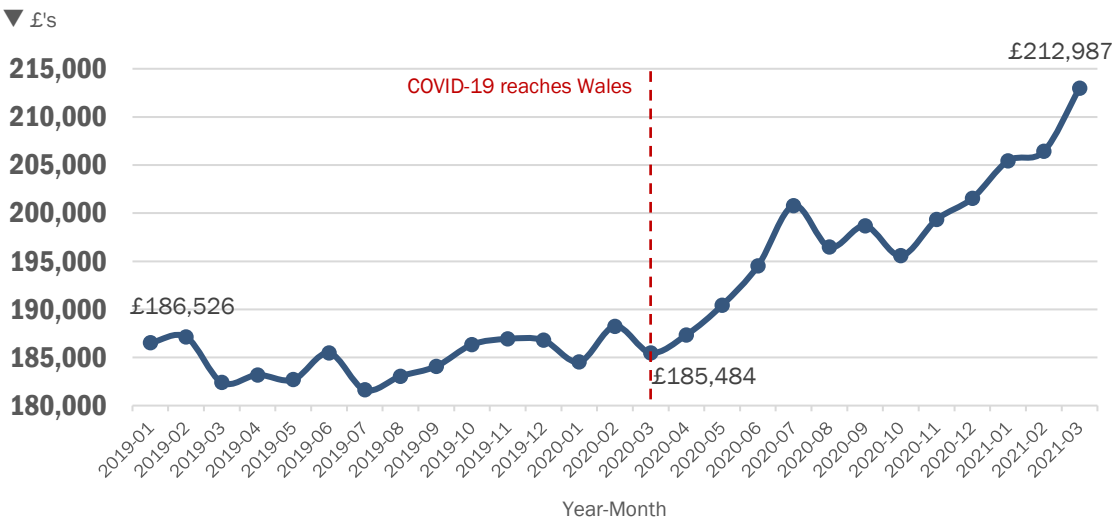
Whilst it is true that housing affordability affects every local authority in Wales, the issue is particularly acute in Ceredigion due to consistently high demand, limited stock and lower than average earnings. For example, the Housing Affordability Ratio, which is the ratio of median house price to median gross annual work placed based earnings has consistently ranked one of the highest across Wales for the last twenty years, never dropping out of the "top 5" during that time. The latest data for 2020 shows that this trend is continuing as Ceredigion ranks 4th highest nationally.

Demand for properties in Ceredigion have also increased noticeably over the last 15 months, and average house prices in Ceredigion are currently at their highest on record, reaching £212,987 by March 2021, rising from £185,484 just twelve months prior. In the previous year (2019), prices remained relatively stable between £182,000 and £187,000. However, immediately following the arrival of the COVID-19 pandemic, prices started to increase as demand for properties in the county grew, and have continued on the same trajectory since, Figure 6.13.<sup>160</sup>

<sup>160</sup> HM Land Registry, House Price Index, March 2021



Figure 6.13: Average Property Price in Ceredigion for all types of property



Source: HM Land Registry, House Price Index

This ‘housing boom’ looks set to continue as the imbalance of demand versus supply continues to push prices up and place additional pressure on the housing market both locally and nationally.

The extent of the increase in Ceredigion is perhaps better reflected in the yearly percentage change in prices, which shows that in March 2021 property prices in Ceredigion had increased by 14.8% compared to just twelve months earlier. To put this into perspective, this is the highest increase in Ceredigion for a decade.

Whilst these are issues that affect all of us, evidence has long pointed to specific challenges faced by younger people in the local housing market in Ceredigion, and one of the reasons why some look to move away from the area. Since the last Census in 2011, the population of Ceredigion has shown a marked decline, particularly in the 16-64 age profile. In short, Ceredigion has experienced outward migration of young people, partly as a result of a decline in public sector jobs, which have always been an important part of the Ceredigion economy, but also in search of career opportunities and higher value jobs.

This view was shared by representatives of the Town and Community Councils. During the stakeholder event, the affordability of housing, particularly for the younger population in Ceredigion was recognised as a key concern.

The 18-24 population, for example, has decreased by 3.7% or 3,198 during this period, and these trends are projected to continue. Of particular note is the 20-29 age group, which is projected to decrease by 21% by the end of the decade, which equates to the loss of 2,595 people. The impact is of course more than just economic, it has longer-term implications for culture, language and the demographics of the Welsh heartlands.<sup>161</sup>

In January 2020, engagement with younger residents on economic and employment related issues revealed the importance of jobs and housing in the local economy, as both employment opportunities and availability of affordable housing were two of the top three priorities identified, as shown in Figure 6.14.<sup>162</sup>

<sup>161</sup> Population projections by local authority and year. StatsWales. Online: <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2018-based/populationprojections-by-localauthority-year>. Retrieved: 27/10/2021

<sup>162</sup> “Consultation on Developing a New Ceredigion Economic Strategy 2020-2035: Feedback Report”. Ceredigion County Council, 18<sup>th</sup> February 2020.

**Figure 6.14: Younger Persons Economic Survey 2020 – Top Three Priorities**



Source: Ceredigion County Council, Economic Strategy Consultation, 2020

The COVID-19 pandemic and the subsequent lockdowns in Wales have also played their part in the growing need for action in tackling the challenges faced in accessing the housing market. Two of the main themes emerging from the pandemic are the way which young people have been disproportionately impacted, particularly in relation to employment, and the way in which the concerns over housing affordability have been exacerbated.

For example, the increase in demand for properties in Ceredigion since the pandemic began, and the subsequent increase in house prices highlight the struggle many first time buyers face in trying to gain a footing on the housing ladder. Although Wales as a whole is witnessing a housing boom, the growth in the more rural and coastal regions during the pandemic has been profound - Carmarthenshire, Ceredigion, Gwynedd and Anglesey have all witnessed significant growth during this period.

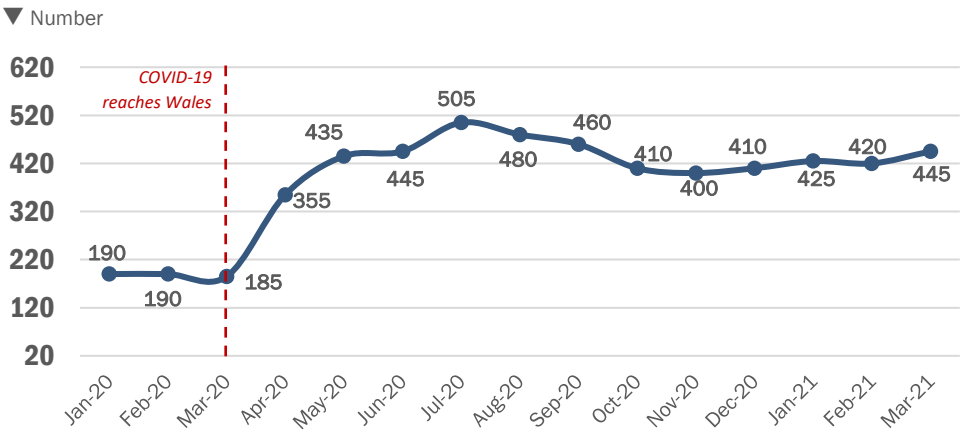
During 2020, Wales also saw the largest increase in first time buyers' deposits across all regions of the United Kingdom at 25%. In cash terms this was an increase of £6,634, although the number of first time buyers in Wales also decreased from 15,890 to 12,190 between 2019 and 2020.<sup>163</sup>

Furthermore, the challenges of gaining and maintaining employment as young people embark on their careers is equally important, and one that has also been exacerbated by the impact of lockdown in Wales. Younger people under the age of 25 are, for example, two and a half times more likely than those over 25, to have been working in sectors such as hospitality and (non-food) retail that closed entirely as a response to the COVID-19 outbreak.<sup>164</sup> The impact can be seen in the sharp increase in the Claimant Count for people aged 18-24 in Ceredigion, which has been disproportionately larger than the population at large, rising 92% between March 2020 and April 2020 alone, and has risen still further to 141% as at March 2021, see Figure 6.15. (The Claimant Count is the number of people claiming benefit principally for the reason of being unemployed).

<sup>163</sup> Halifax, 12 months to December 2020, UK Finance. Online: <https://www.lloydsbankinggroup.com/media/press-releases/2021/halifax/soaring-house-prices-failed-to-deter-first-time-buyers-2020.html>. Retrieved: 22/06/2021.

<sup>164</sup> Johnson, Paul. "We may be in this together, but that doesn't mean we are in this equally". Institute of Fiscal Studies. Online: <https://www.ifs.org.uk/publications/14821>. Retrieved: 14/05/2020.

**Figure 6.15: Claimant Count 18-24 Year Olds**  
 The number of people claiming benefit principally for the reason of being unemployed aged 18-24



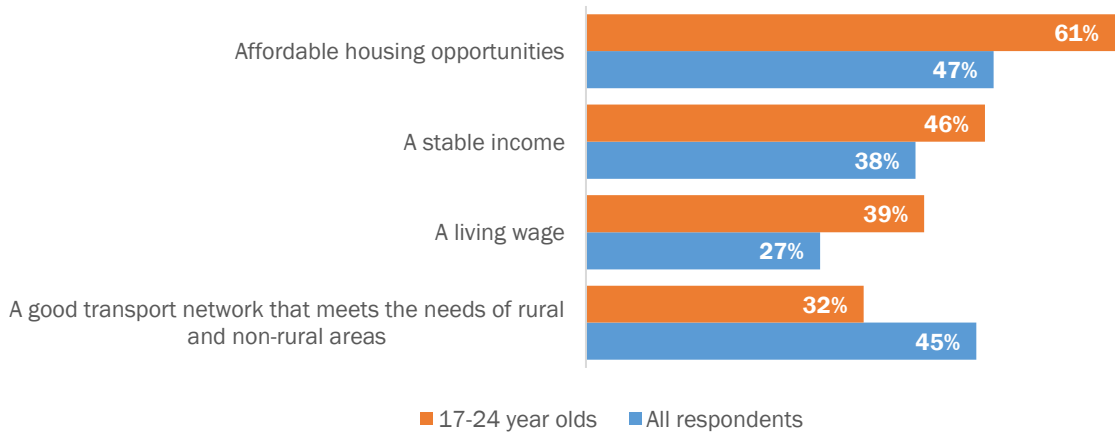
Source: ONS, Claimant count by sex and age

Recent research by The Prince’s Trust and the Learning and Work Institute has warned that young people will increasingly bear the brunt of the unemployment crisis.<sup>165</sup> Their study, demonstrates that while some areas of the economy might begin on the road to recovery following the pandemic, young workers are under-represented in these sectors, and the industries that typically employ young people will be hardest hit in the long-term, singling out hospitality and leisure as examples of this, both central to Ceredigion’s economy.

More recently in Ceredigion, there have been growing concerns over the impact of second homes on not only affordability, but also the resulting impact on language and culture if younger people and local people are unable to live in their local area and subsequently move away. These issues sparked a strong response in the Well-being Survey and have brought these issues to the fore, even more so than prior to the COVID-19 pandemic. Representatives of the Town and Community Council’s also shared this view, highlighting that protecting the Welsh language for future generations needs to be a priority.

The results largely speak for themselves and confirm that housing affordability generally, but particularly for younger people and first time buyers, is rapidly ascending the agenda in Ceredigion. For example, when asked which three things they valued the most in relation to a Prosperous Ceredigion, the majority (61%) of those aged 17-24 identified *affordable housing opportunities*, over and above *a stable income* and *a living wage*. The importance placed on the ability to access and afford decent accommodation was highlighted by the fact that this was noticeably higher than the result for all respondents at 47% (Figure 6.16).

**Figure 6.16: Q18 Which three things do you value most in a prosperous community?**

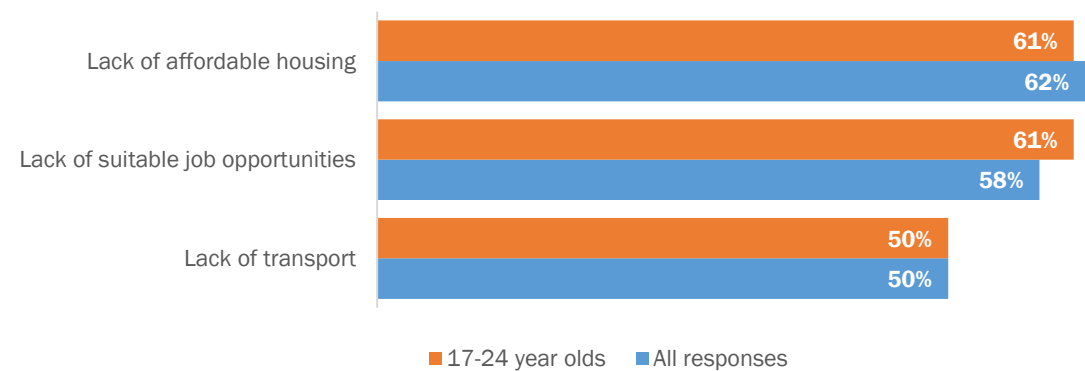


Source: Ceredigion PSB Well-being Survey

<sup>165</sup> “Facing the Future: Employment prospects for young people after Coronavirus”. Princes Trust and the Learning and Work Institute. Leicester: March 2021.

When looking ahead to the future *lack of affordable housing* was also identified by those aged 17-24 as being the biggest concern in relation to a Prosperous Ceredigion with 61% also identifying this option (Figure 6.17).

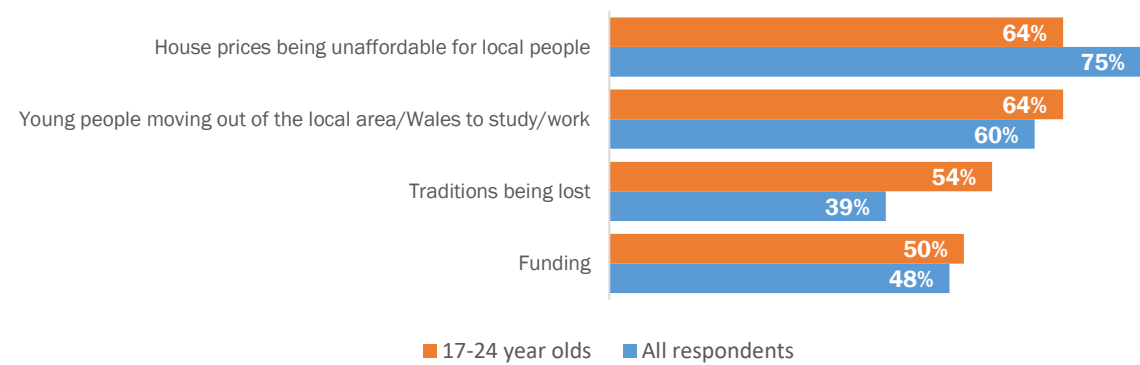
**Figure 6.17: Q19 Looking ahead, what concerns you the most about prosperity in the county?**



Source: Ceredigion PSB Well-being Survey

The longer term impacts on culture and language were also reflected in the results. Amongst the 17-24 age group the majority (64%) identified *house prices being unaffordable for local people* as the most important challenge in relation to a vibrant community and thriving Welsh language in Ceredigion. Amongst respondents of all ages, this was even higher at 75% (Figure 6.18). This was jointly the most important issue highlighted, along with young people moving out of the local area/Wales to study/work, both of which are inextricably linked.

**Figure 6.18: Q44 Looking ahead, what concerns you the most about your County's vibrant community and thriving Welsh language?**



Source: Ceredigion PSB Well-being Survey

The written comments to the survey provide a greater insight into some of these issues and highlight a variety of angles, some of which highlight the need for additional support for first time buyers, some highlighted the need for more affordable homes, some focused on the need for affordable rental accommodation and others highlighted the concern over second homes and holiday homes in the county. A sample of these comments is shown in Table 6.3.

Table 6.3: Sample comments from the Ceredigion Well-being Survey

"Hoffwn fynd i fyw i dy rhatach i'w brynu a'i gadw ond nid oes lleoedd tebyg i'w cael. Mae angen tai fforddiadwy i bobl 50+ yn ogystal a'r ifanc - 'first and last time housing' "	"Some houses in the village have doubled in price in 4 years. Whenever they do come on the market or renters leave, they get turned into holiday homes and AirBnbs."
"If you don't stop people buying up all the property for second homes/holiday lets there will be no need for your plans. Younger people will have nowhere to live and older people can't downsize freeing up houses for younger people/families."	"Provide funding schemes to assist local first time buyers to buy a home in the area - too many homes in Wales are being sold to people from outside the area and that is damaging the language and the communities."
"If we really want to build a fairer society we need to ensure that there are houses available for all e.g. all new developments are £150k+ 2-storey detached houses. This makes it especially difficult for people from other backgrounds, because normally they can't afford to live in a nice area and are forced to either move away or struggle to survive financially without having time and opportunity to integrate and share their culture."	"We really need affordable rented accommodation particularly for single people."

Source: Ceredigion PSB Well-being Survey

Housing affordability is a multifaceted issue with a number of causes and effects. The evidence available and The Well-being Survey results confirm that it remains a key driver in the well-being of future generations in Ceredigion, and is recognised across all age groups, but particularly for younger people. The COVID-19 pandemic has brought some of these issues to the fore, and in particular the way in which younger people have been disproportionately affected. This is a regional as well as local issue, although the impacts are particularly acute in Ceredigion. Figure 6.19 summarises the main challenges around housing affordability.

Figure 6.19: Summary of issues affecting housing affordability



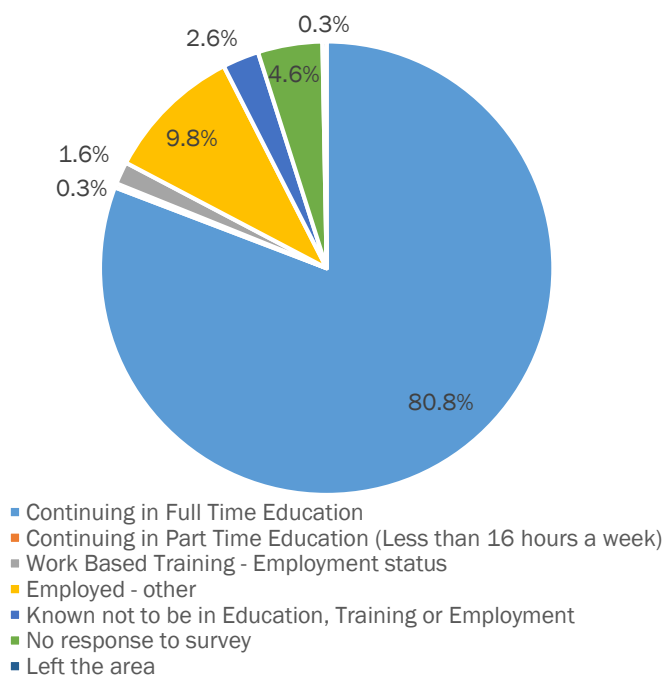
Source: Ceredigion Public Services Board

Starting Work

**Leaving school** is usually followed by attending **Further Education or Higher Education** or by **finding a first job**. Over a third (38%) of 16-19 year olds in Ceredigion are economically active, whilst 62% are economically inactive, which means that they were not working, not seeking work and/or not available to start work.

Figure 6.20 outlines the **destination of school leavers** (Year 13) in Ceredigion in 2020. The majority of school leavers (80.8%) continued in full time education, of this cohort, 6.2% remained in school, 9.8% went to college, 62.8% went to higher education and 2% took a gap year, but intended to study higher education the following year. There were 5 (or 1.6%) who decided to undertake work-based training and 30 school leavers (9.8%) secured employment. Only 2.61% (or 8 school leavers) were known not to be in Education, Training or Employment (NEET), which is the third lowest nationally.

Figure 6.20: Destination of school leavers (Year 13) in Ceredigion – 2020

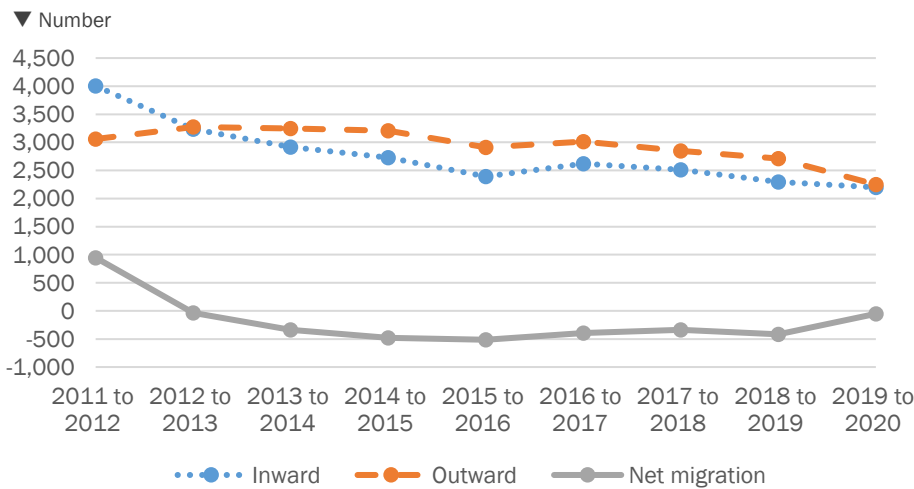


Source: Careers Wales (2021)<sup>166</sup>

Ceredigion has long been an **exporter of its younger population** to other parts of the UK in search of an education, career and social opportunities and higher salaries. Although Ceredigion has a net gain of inward migration among the 15-19 year old age group due to Aberystwyth University and UWTSD Lampeter Campus drawing many young people from across the UK to study, this number is exceeded by those leaving in the 20-24 age group. This is largely due to university students moving away after completing their studies or school leavers seeking jobs further afield.

Figure 6.21 shows migration between Ceredigion and the rest of the UK (internal migration) amongst the 16-24 age group over the last decade. Since 2012-13, outward migration of the younger population has exceeded the number moving into the county, resulting in a **negative net internal migration**.

Figure 6.21: Migration between Ceredigion and the rest of the UK amongst the 16-24 age group (2011-2020)



Source: Stats Wales (2021)<sup>167</sup>

<sup>166</sup> Careers Wales (2021). 'Recent destinations by year, school cohort and local education authority from schools in Wales'. [Online]. Available at: <https://careerswales.gov.wales/careers-professionals/pupil-destinations> (Accessed: 22.10.21)

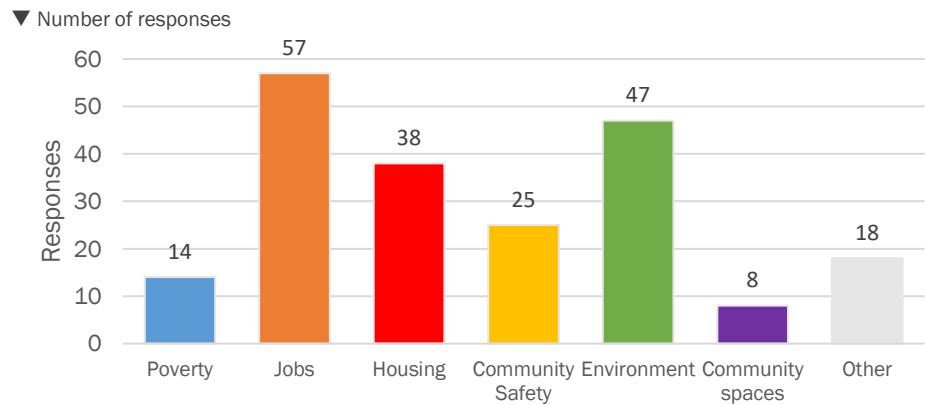
<sup>167</sup> Stats Wales (2021). 'Migration between Wales and the rest of the UK by local authority, flow, gender and age'. [Online]. Available at: [Migration between Wales and the rest of the UK by local authority, flow, gender and age \(gov.wales\)](https://stats.wales.gov.wales/migration-between-wales-and-the-rest-of-the-uk) (Accessed: 21.10.21).



The outward migration of Ceredigion’s younger population can be partly explained by the **perceived lack of job opportunities** and **limited number of high paid jobs** within the County. Ceredigion’s economy relies heavily on the public sector, however, jobs have decreased in recent years due to service and funding cuts. Similarly, there are limited opportunities in vocational and career choices such as engineering or manufacturing, financial and other high-value services. As reflected in the 2021 Future Trends Report, job creation has occurred unevenly across local authority areas in Wales, with Ceredigion experiencing the second largest decrease in job creation between 2001 and 2008.

Concerns about securing jobs within Ceredigion was highlighted by school pupils in our School Survey. Jobs came out as the top concern when school children were asked – ‘What are your biggest concerns about your local area as you grow up?’ 57 pupils (or 28%) selecting this option, see Figure 6.22.

**Figure 6.22: School Survey responses to the question – ‘What are your biggest concerns about your local area as you grow up?’**



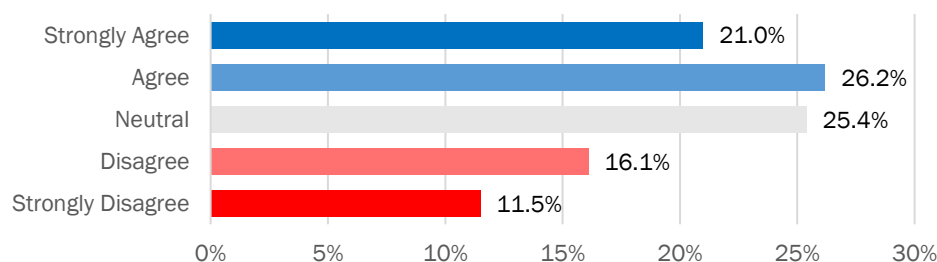
Source: School Survey 2021

Ceredigion has a **highly qualified workforce**, 51.6% of residents (18-64 year olds) have a NQF level 4 or above (equivalent to the first year of a Bachelor’s degree programme), resulting in its workforce being the second most qualified in Wales, after the Vale of Glamorgan.<sup>168</sup> However, Ceredigion’s labour market suffers a **skills miss-match** (such as, over- or under qualification, skill gap or skill shortages). Engagement with the Enterprise and Innovation PSB Project Group (which includes representatives of Ceredigion’s private sector), highlighted that one of the key issues is the absence of skilled workers in certain sectors, such as the Hospitality Sector which is experiencing a significant shortage of skills and labour in the County.

According to our School Survey, just under half of respondents (47.2%) felt that they could secure a job that they wanted in their local area, a quarter were unsure (25.4%), and just over a quarter (27.6%) felt that they couldn’t (see Figure 6.23). Analysing this data further highlights that those who completed the survey in Welsh were more optimistic about securing a desired job in their local area compared to respondents who completed the survey in English. This could be due to a number of reasons, for example, the ability to speak Welsh provides a greater advantage to secure certain jobs in Ceredigion, particularly within the public sector.

<sup>168</sup> NOMIS (2021). ‘Annual Population Survey: Qualifications – NVQ’. [Online]. Available at: [Nomis - Official Labour Market Statistics - Nomis - Official Labour Market Statistics \(nomisweb.co.uk\)](https://nomisweb.co.uk) (Accessed: 21.10.21).

**Figure 6.23: School Survey responses to the statement– ‘I can do the type of job I want in my local area’**



Source: School Survey 2021

According to HESA, the **average starting salary for graduates** working in the UK is £24,217, which is higher than the average starting salary in Wales (£22,270)<sup>169</sup>. Although there is limited data on the average starting salary for graduates in Ceredigion, it is expected to be lower. As over half of Aberystwyth University graduates in 2018/19 were earning less than £21,000 a year, with 10% earning less than £15,000 annually.<sup>170</sup> In addition, Ceredigion workers tend to earn on average significantly less per week than the Welsh and UK average (£504.4 compared to £541.7 and £587.1)<sup>171</sup> The lack of higher paid jobs in the County, particularly for young graduates is one of the causes identified for the out-migration to other parts of the UK with better paid jobs.

Ensuring that the younger population and future generations of Ceredigion have a good start in adult life is vital. We want Ceredigion to be an attractive place that is full of opportunities for young people to stay and develop a career. The Ceredigion Economic Strategy (2020-35)<sup>172</sup>, outlines the steps we must take in order to do so, such as, raising awareness of the range of rewarding career pathways available in Ceredigion, to working with partners to ensure that our enterprises know they can access a pool of people with the right skills to enable growth. Further work needs to be done to overcome the mismatch between jobs and skills in the county, in sectors where there may be a skills gap or skills shortage. We also need to ensure that people’s need for housing, connectivity and social opportunities are met.

It is essential that the voices of young people are heard in Ceredigion, and providing the opportunity for this to happen will be essential in delivering the seven national well-being goals and creating the Ceredigion we want now and in the future.

<sup>169</sup> HESA (2021). ‘Graduate Salaries’. [Online]. Available at: [Graduates' salaries | HESA](#) (Accessed: 21.10.21).

<sup>170</sup> Ibid.

<sup>171</sup> NOMIS (2021). ‘Labour Market Profile- Ceredigion’. [Online]. Available at: [Labour Market Profile - Nomis - Official Labour Market Statistics \(nomisweb.co.uk\)](#) (Accessed: 21.10.21).

<sup>172</sup> Ceredigion County Council (2020). ‘Boosting Ceredigion’s Economy: A Strategy for Action 2020-2035’. [Online]. Available at: [boosting-eredigions-economy-a-strategy-for-action.pdf](#) (Accessed: 22.10.21).

## Summary of themes: Youth



Ceredigion has long been an **exporter of its younger population** to other parts of the UK in search of education, career and social opportunities and higher salaries. The impact is more than just economic - it has longer-term implications for culture, language and the demographics of the Welsh heartlands.

Younger people in Ceredigion identify **connectivity, employment opportunities** and **affordability of housing** as key to making a difference to their future.

The **student population** is integral to the county's economy, but the number of students has been decreasing since 2014/15.

The rate of **under 18 conceptions** per 1,000 females in Ceredigion is much lower than the national average, and has been gradually declining since 2014.

Continuing to upgrade **digital infrastructure** facilities and investment in **public transport** will enable young people to stay connected and improve well-being.

It is essential that younger people can **access mental health support** and the COVID-19 pandemic has likely exacerbated many mental health issues in young people.

**Environmental awareness** and concerns over protecting the environment continues to grow amongst our younger population. Young people were most concerned about fly-tipping and the loss of green spaces.

The top three things that young people wanted to be put in place to **improve the environment**, was for recycling to be made easier, better routes connecting towns/villages and affordable transport.

Despite the low crime figures in Ceredigion, **feeling safe** features prominently in The Well-being Survey and stakeholder events. When considering the future, younger people were most concerned by Prejudice and Community resources being closed down.

While there have been concerns that the **Welsh language** is being spoken less outside of educational settings in general daily life, our survey results indicate a **strong connection** to **Welsh language and culture** amongst younger people, and an equally strong desire to actively maintain that for future generations.

**Housing affordability** remains a key driver in the well-being of future generations in Ceredigion.

The COVID-19 pandemic has highlighted the way in which younger people have been **disproportionately affected**.

The mismatch between **jobs and skills** in the county, in sectors where there may be a skills gap or skills shortage will be a key challenge for the local economy.



# ADULTHOOD





*In this chapter: Being an Adult, Part of a Community, Close to Nature, Home and Family, Caring and Responsibilities, Health for the Future, Job, Career and the Economy, Workplace Well-being*

## 7.1 Being an Adult

### Nurturing Creativity

To lead fulfilling adult lives, it is important to retain the creativity and imagination that we developed in our childhood, which can be aided through **participating in cultural life**. Culture in this context includes the arts, heritage and the historic environment, including museums, libraries and the media. Culture enriches our lives - adults who participate in cultural life tend to have better physical and mental health, higher self-efficacy and higher life satisfaction.<sup>173</sup> The Welsh Government recognises the importance and value of culture through the inclusion of a National Well-being Goal; *'that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation'*.

Ceredigion is considered a **centre of Welsh culture**, rich in art, music, food, Welsh language, 19<sup>th</sup> century buildings and more recently film and TV. The County has a strong network of arts organisations and facilities, such as, the regionally important Aberystwyth Arts Centre, Cardigan's Theatr Mwldan, the National Library of Wales and the Arad Goch centre.

The **National Library of Wales**, located in Aberystwyth, is one of six legal deposit libraries in the UK. (A legal deposit library means that by law a copy of every UK print publication must be given to the Library by its publishers). Legal deposit libraries also cover digital and online publications, and provides a national archive of the UK's print and non-print published materials.

The library plays a central role in ensuring culture and heritage is accessible to all and enable people locally and across Wales to learn, research and enjoy. There are a number of services offered within the library which include reading rooms, exhibitions and events. The National Library is of great cultural significance to Ceredigion and provides its residents with excellent opportunities to take part in arts, culture and heritage activities throughout the year.

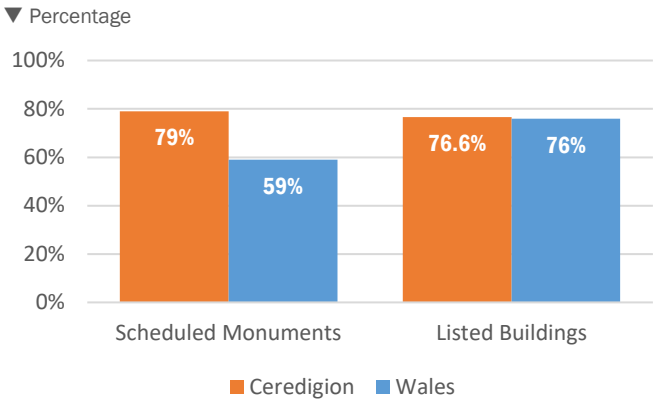
There are 267 **scheduled monuments** of national importance and 1,946 **listed buildings** of special or architectural interest in Ceredigion. These structures represent the physical embodiment of the County's distinct and rich cultural history, and provide many opportunities to participate in cultural activities. Condition assessment surveys are carried out on a rolling programme, and show that 79% of scheduled monuments in Ceredigion inspected to date in the current survey cycle beginning in 2011, are in stable or improved condition, much higher than the national indicator score for Wales of 59%. However, the percentage of listed buildings in a stable or improving condition is currently 76.6%, in line with the national figure of 76% (Figure 7.1).<sup>174</sup>

<sup>173</sup> Lakey, J. Smith, N. Oskala, A. McManus, S. (2018). 'Culture, sport and wellbeing: findings from the Understanding Society survey'. [Accessed Online]. Available at: NatCen Social Research

<sup>174</sup> CADW Schedule of Monuments and Listed Buildings, 2021.



**Figure 7.1: National Well-being Indicator 40 - Percentage of designated historic environment assets that are in stable or improved conditions**



Source: CADW Schedule of Monuments and Listed Buildings (2021)

Pre-COVID-19, the creative industries<sup>175</sup> were one of the fastest growing parts of the Welsh economy. With an annual turnover of approximately £2.2 billion, employing more than 56,000 people in Wales. Not only does the sector create jobs and wealth, it also contributes to a strong national brand and helps promote Wales and its culture to the world.

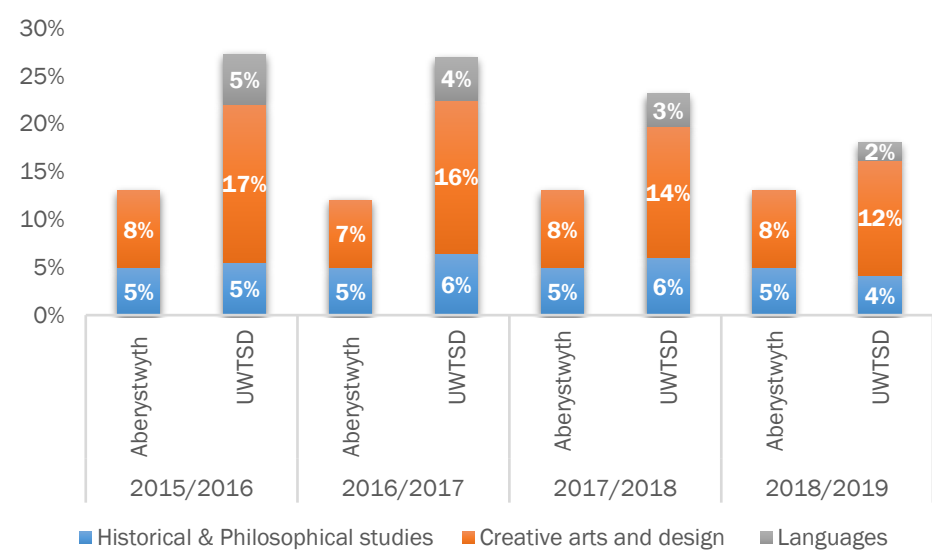
Although, the exact number of employees within the creative industry in Ceredigion is unknown, we do know that the County has a wide-range of organisations that cater to the industry. For example, Coleg Ceredigion, Aberystwyth Art’s Centre, The National Library of Wales, Aberystwyth University and University Trinity St Davids (Lampeter Campus) all support, teach and hold posts within the creative industry. Aberystwyth University has recently boosted its creative industry research, with the creation of a new post - ‘Creative Exchange Fellow’, aimed at cultivating links with businesses, the third sector and artists to develop creative arts and humanities projects.

The screen industry has been particularly successful in Ceredigion, contributing to tourism and raising the profile of the County and Wales across the world. For example, the hit TV series *Hinterland/ Y Gwyll* (2013-16), took advantage of Ceredigion’s vast-wide open spaces and raw landscapes of the Cambrian Mountains. The detective drama secured the Grand Award at the 2016 New York International Film and Television awards, which is given to a group of the highest scoring programmes among all entries.

Student enrolment in humanities and arts courses at Aberystwyth University and the University of Wales Trinity Saint David (UWTSD) (Lampeter Campus) can provide an indication of the desirability of working in these sectors. Trends in student enrolment in humanities and art courses since 2015 vary between the two Universities (see Figure 7.2)

<sup>175</sup> Creative industries sub-sectors include: advertising, architecture, arts and culture, crafts, creative technology, design, fashion, games, music, publishing and TV and film.

Figure 7.2: Percentage of student enrolment in arts and humanities subjects for Aberystwyth University and University of Wales Trinity Saint David (UWTSD), 2015-2019

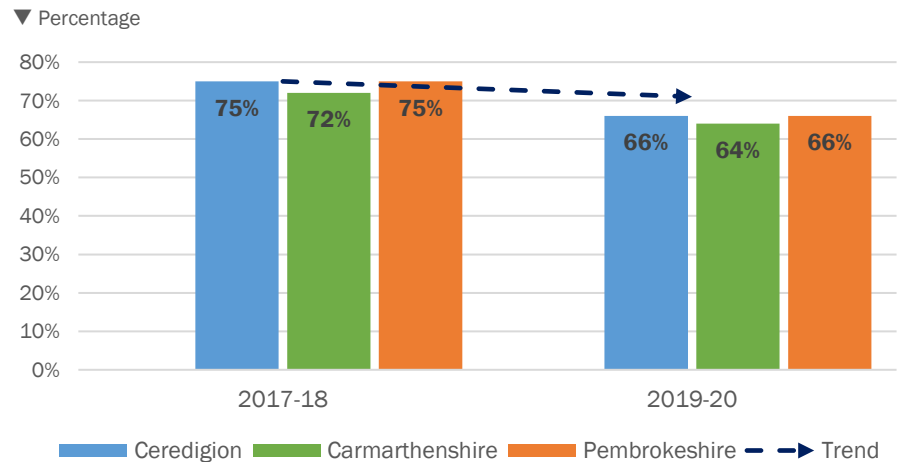


Source: Higher Education Statistics Agency (HESA)

The University of Wales Trinity St David (UWTSD) has experienced a **reduction in the number of students enrolling in humanities and arts courses** since 2015 (Lampeter, Carmarthen and Swansea Campuses), whilst enrolment in these subjects for Aberystwyth University students have remained stable (Figure 7.2). The largest reduction in student enrolment in UWTSD humanities courses was in the languages courses, declining by 61%, from 520 in 2015/16 to 200 in 2018/19.<sup>176</sup> However, it is difficult to ascertain whether the Lampeter Campus experienced this decline.

Although, culture and heritage are important features of Ceredigion’s composition, the **number of people attending or participating in arts, culture or heritage activities is declining** in Ceredigion. During 2017-18, 76% of people in Ceredigion attended or participated in arts, culture or heritage activities at least three times a year, this declined to 66% during 2019-20, which is below the national average (70%) (See Figure 7.3). This decline is also a regional and national trend. The reduction in attendance and participation rates could be attributed to the reduced levels of funding to the Art’s Council for Wales, which was £2.503m in 2018-19, 6.6% less than the previous year. It could also be linked to the competing demands of new technologies.

Figure 7.3: The number of people attending or participating in arts, culture or heritage activities, 2017-2020

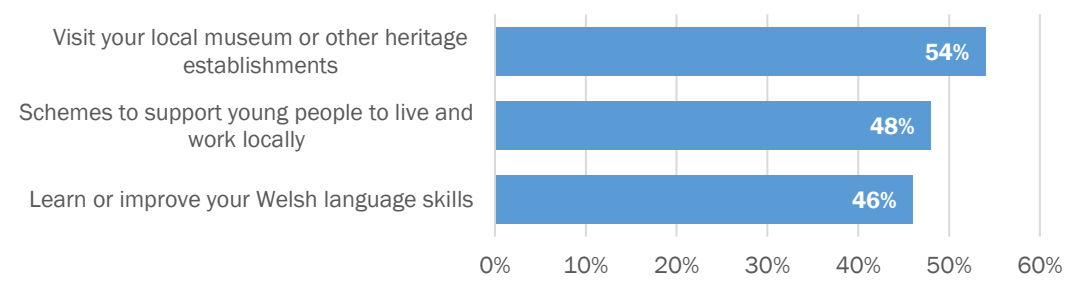


Source: Stats Wales, National Survey for Wales (2021)

<sup>176</sup> Higher Education Statistics Agency (HESA) (2021). HE student enrolments by HE provider and subject of study. [Online]. Available at: [What do HE students study? | HESA](#) (Accessed: 16.09.21).

Despite the decline in visitor numbers, there is much evidence to demonstrate that **people value the role that arts and culture** plays in their lives. For example, in our Well-being Survey, 54% of respondents said that they would consider visiting their local museum or other heritage establishments to help achieve a vibrant culture and thriving Welsh language in Ceredigion, higher than any other response (Figure 7.4).

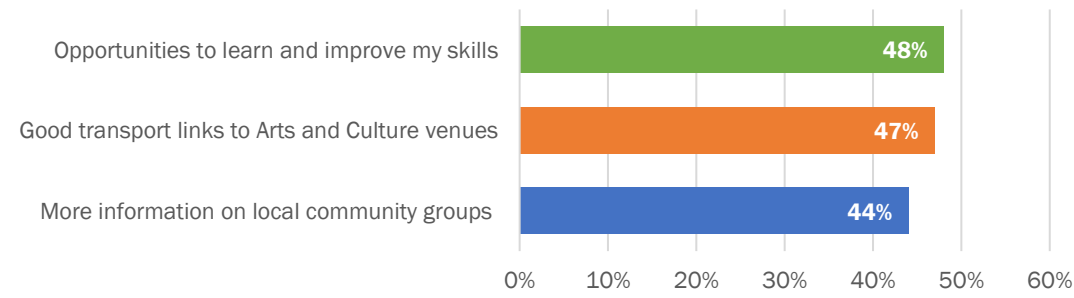
**Figure 7.4: Top 3 actions respondents would take to achieve a vibrant community with a thriving Welsh language**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

When asked what type of support would need to be put in place to enhance culture and achieve vibrant communities within Ceredigion, *opportunities to learn and improve my (Welsh) skills* was the most selected response, whilst nearly half of the respondents (47%) selected *good transport links to Arts and Culture venues* (Figure 7.5). Inadequate public transport within the County has been identified as a considerable challenge for residents; particularly those who cannot drive or do not own a car, and for individuals who live in the more rural settlements (refer to section 7.2 Well Connected Communities).

**Figure 7.5: Top 3 types of support needed to enable vibrant communities in Ceredigion**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

Conversely, **Ceredigion Museum in Aberystwyth** goes against the general trend, as it saw a significant increase in visitor figures from approximately 25,000 per year prior to 2017, to over 70,000 per year thereafter, a significant increase of 56%. This is likely due to the £1.3 million Heritage Lottery Fund redevelopment project that the Museum benefited from, resulting in a shop, a café and an extensive community engagement programme. Unfortunately, the COVID-19 pandemic halted this encouraging trend, as the Museum had to shut its doors from March 2020 to August 2021. Although the museum has now re-opened, we expect that visitor numbers to be significantly down this year as social distancing measures have imposed a restriction on visitor numbers.

The impact of the pandemic on the arts, cultural and creative industries is clearly very serious. The suspension of live performances and public cultural activity has caused a shock to the society’s sense of well-being, as well as the economy. In July 2020, the Welsh Government announced £53 million for a COVID-19 **Cultural Recovery fund** and the Arts Council for Wales reserved £2.5 million. £1.3 million of that was allocated to organisations and individuals

within Ceredigion. It is expected that the 2020-2021 participation and attendance figures will demonstrate an even sharper decline.

Moving forward, we will need to keep a close eye on these trends, particularly as participation/attendance in arts, cultural or heritage activities is one of the National Indicators which measures progress towards the achievement of the National Well-being Goals. To prevent this trend from unfolding we will need to address the potential drivers of participation and attendance decline. For example, greater use of digital technologies and approaches for arts and culture content could be used to attract new audiences and enable a different type of engagement (as demonstrated in the case study below).

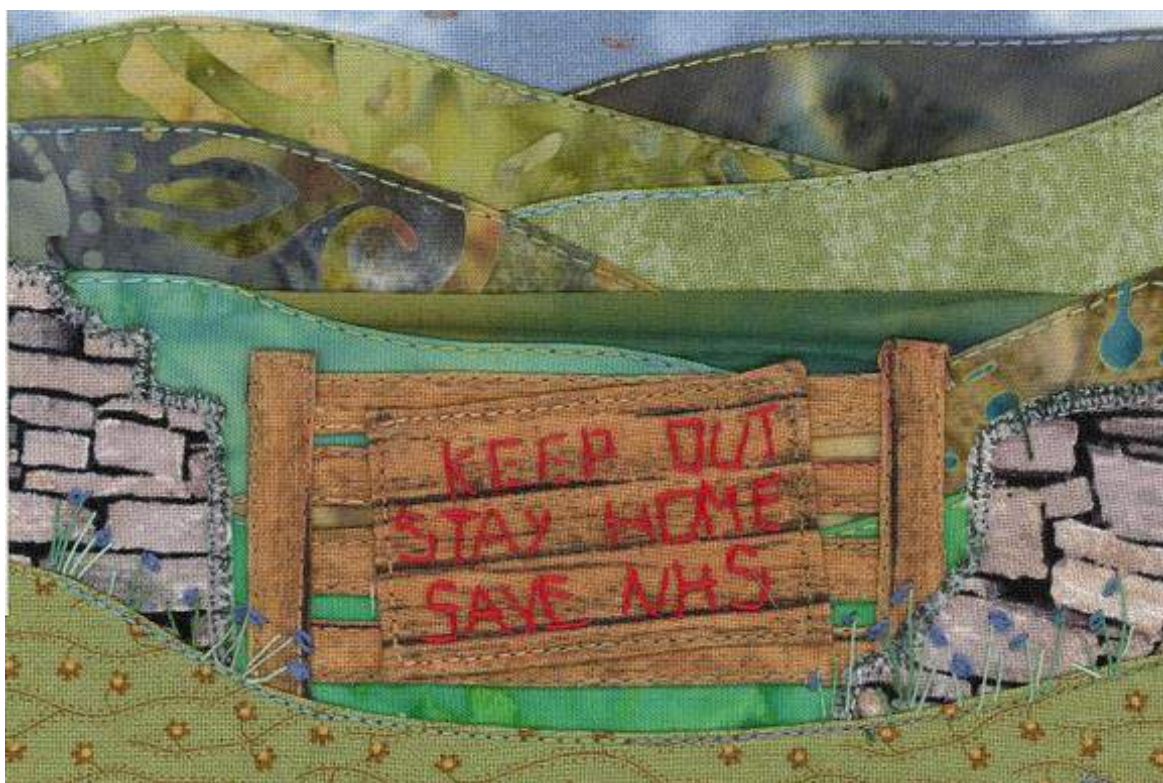
Local arts and cultural organisations and facilities in Ceredigion have used alternative and innovative methods to continue their service and provide support through the COVID-19 pandemic in a creative manner. The Libraries across Ceredigion offered a click and collect service and have recently opened for appointment services, whilst the staff in the Ceredigion Museum (Aberystwyth) utilised projects to stay engaged with local people during the lockdowns (refer to the case study below).

## Case Study ►

### **Ceredigion Museum – Adapting to the COVID-19 pandemic**

The Ceredigion Museum's project 'Human Threads', helped members of the community to record and share their experiences of the pandemic by contributing to a patchwork and digital quilt. The Human Thread's project facilitator worked with the hard-to-reach groups, such as Syrian refugee groups and members of the Asian and Black communities, to ensure that the quilt represented the various communities of Ceredigion. The Interim Evaluation Report highlighted that the Human Threads exhibition had a positive effect on people's well-being, increasing the well-being of visitors by approximately 12% and 27% for those engaging in the workshops. Figure 7.6 below displays a patchwork created by a participant for the Human Threads Exhibition. The patchwork highlights concerns about the pandemic, requesting locals and visitors to 'stay home' for the sustainability and safety of the Local Health Board.

**Figure 7.6: A patchwork created by one of the participants as part of the quilt in the new “Human Threads” exhibition at Ceredigion Museum**



Source: Ceredigion Museum

The return of the **National Eisteddfod**, originally due to take place in Tregaron in 2020 but pushed back to 2022 due to the pandemic, will play an integral role in re-establishing the arts and culture sector in Ceredigion post-pandemic. It is hoped that the Eisteddfod will bring about greater participation and involvement, which is key to meeting the National Well-being Goal: ‘**A Wales of Vibrant Culture & Thriving Welsh Language**’, and will leave a lasting legacy for our communities for years to come.

Town Centre high streets are vital spaces that sustain the cultural life of the varied communities that use them. However, high street shops have been under pressure from online retailers for many years, and the constraints imposed by the COVID-19 pandemic have exacerbated the situation. The local authority conducts a footfall survey in Aberystwyth Town Centre annually, the latest 2021 figures highlight the lowest footfall since the survey began in 1995. Research shows that footfall levels across UK retail centres have declined due to the lockdowns, and have recovered at different rates as restrictions were lifted.

However, the impact of the lockdowns provides an opportunity to re-develop the town centres, utilise digital technology and reinvigorate the shopping experience. For example, the local authority have already trialled pedestrianizing some of the main Town Centre’s through the ‘Safe Zones’, to ensure that residents and businesses felt safe and were able to practice social distancing whilst shopping.

## 7.2 Part of a Community

### Community Cohesion

**Cohesive and connected communities** are an important part of people’s individual well-being, as such, the Welsh Government have dedicated one of their National Well-being Goals to achieving ‘attractive, safe, viable and well connected’ communities.



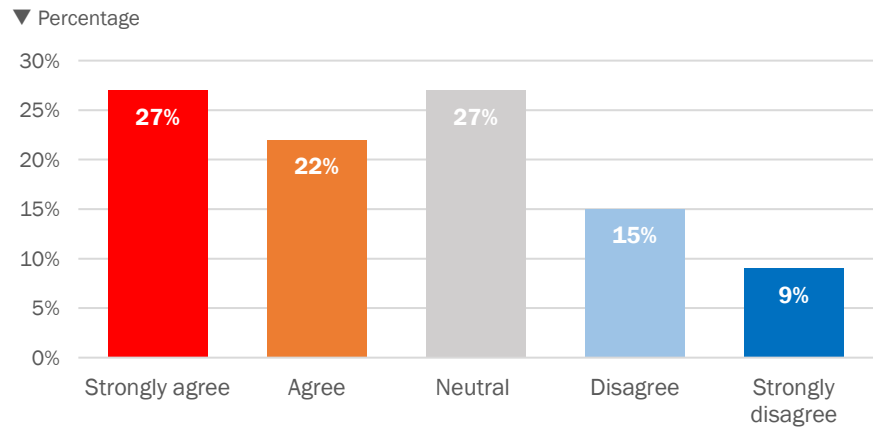
Research by the World Health Organisation indicated that lack of agency, trust, belonging and insecure neighbourhoods explain 19% of the gap in poor health between the top and bottom averages for people in Europe.<sup>177</sup>

The National Survey of Wales includes three national indicators that relate to community cohesion. According to these indicators, community cohesion in Ceredigion has improved in some areas since 2016-17, (such as, feelings of belonging to the local area; people getting on well from different backgrounds; and people in their local area treating people with respect), and has remained unchanged in others (such as, satisfaction with their local area), and deteriorated in other aspects (such as, feeling safe in their local area after dark).

Ceredigion residents are the **most satisfied with their local area as a place to live**, according to the National Survey for Wales. During 2020-21, 95% of adults were satisfied with their local area as a place to live, which is significantly above the national average (87%). This percentage has remained unchanged since 2016-17 when the questions were first introduced. The high level of satisfaction with the local area is particularly encouraging as it is one of the Welsh Governments National Indicators, and therefore, will have a positive impact on four of the National Well-being Goals (**A Resilient Wales, A Healthier Wales, A Wales of Cohesive Communities** and **A Globally Responsible Wales**). However, further data is required to understand if there is a difference between satisfaction with the local community areas and different age groups.

According to The School’s Survey, 49% *strongly agreed/agreed*, 27% were *neutral* and 24% *strongly disagreed/disagreed* with the statement ‘*I want to stay living in my local area*’. See Figure 7.7 for a breakdown of responses.

**Figure 7.7: School Survey breakdown of responses according to the statement – ‘I want to stay living in my local area’**



Source: School Survey 2021

The National Survey of Wales reported that 74% of Ceredigion respondents agreed with the three statements that: **they belong to their local area; people in the area from different backgrounds get on well together; and people in their local area treat people with respect** (compared to 67% in 2016-17). This the sixth highest percentage out of the 22 local authority areas and is above the national average (70%). This positive trend was also experienced on a national scale and may be linked to the renewed sense of community and togetherness emerging from the COVID-19 pandemic. Encouraging progress has been made on this National Indicator on both a local and national scale, which will have positively contributed to a number of the Well-being Goals.

After dark, 84% **felt safe in the local area: when at home, walking, on public transport, and in their car** (compared to 91% in 2016-17). Although, people in Ceredigion are feeling less safe after dark since 2016-17, residents feel the third safest in Wales under all four situations, slightly behind Bridgend residents (89%) and Gwynedd residents

<sup>177</sup> Welsh Government (2020). ‘The Future Generations Report 2020: Chapter 3: A Wales of Cohesive Communities’. [Online]. Available at: <https://www.futuregenerations.wales/wp-content/uploads/2020/07/Chapter-3 -A-Wales-of-Cohesive-Communities.pdf> (Accessed: 13.10.21).

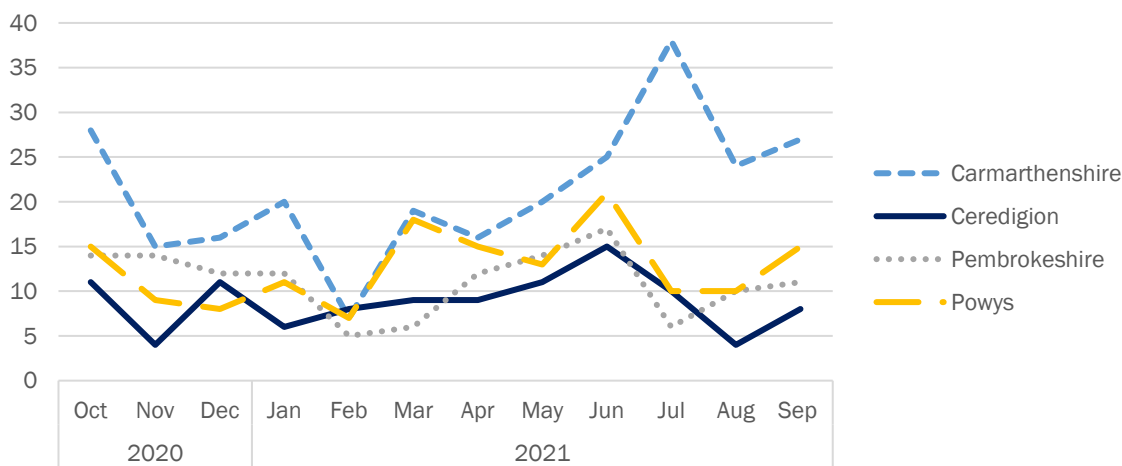


(88%). Over a quarter of our Well-being Survey respondents (29% or 113 respondents) were concerned about *people feeling unsafe and afraid of crime* in the future, however this was the third least selected option.

The COVID-19 pandemic and the nationwide lockdowns have raised concerns over the numbers of scams taking place, particularly as some people have been isolating and feel more vulnerable. Although quantifying the prevalence of scams is difficult, there is anecdotal evidence that the numbers of scams have increased during this period, and as a result an awareness campaign has been launched to remind residents to be vigilant and signpost residents to resources by the National Trading Standards Scams Team.<sup>178</sup>

Evidence from Victim Support indicates that the **number of hate crime incidents** in Ceredigion have remained relatively stable since October 2020 (Figure 7.8). The number of incidents ranged from 4-15 per month, peaking in June 2021. This slight increase was also experienced regionally and may have been driven by the relaxation of COVID-19 restrictions.

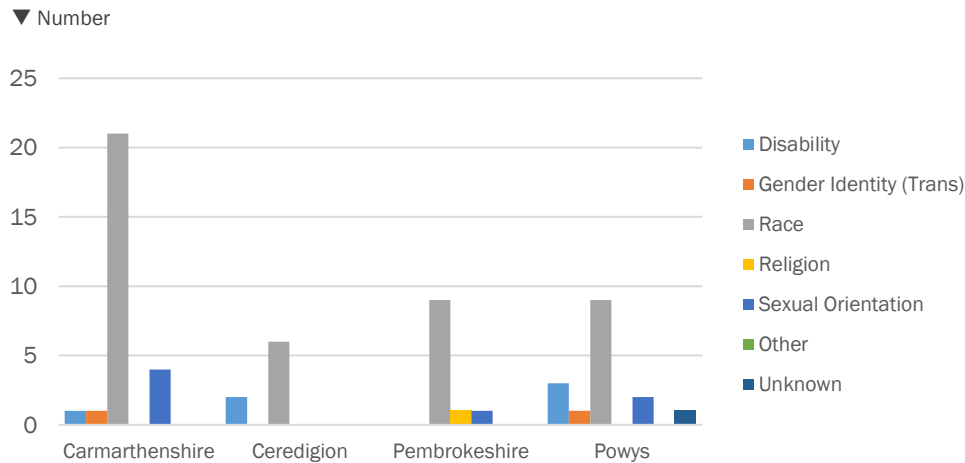
Figure 7.8: Hate crime incidents across the Dyfed-Powys region (2020-21)



Source: Victim Support (2021)

Data on the number of hate crime incidents for September 2021 highlight that racial incidents are still very common across the Dyfed-Powys region (see Figure 7.9). Out of the 8 hate crime incidents in Ceredigion during September 2021, 6 were related to race, whilst 2 were related to disability. Although, the number of incidents seem low, one incident is one too many. These findings indicate that hate is dividing us in parts of Ceredigion and creating distrust in our communities.

Figure 7.9: Hate Crimes by type across the Dyfed-Powys region (September 2021)



Source: Victim Support (2021)

<sup>178</sup> National Trading Scams Team. Online: <https://www.nationaltradingstandards.uk/work-areas/scams-team/>

On a national scale, Victim Support saw an increase of 11% in the number of people seeking support after experiencing a hate crime during 2020-21, compared to the previous year.<sup>179</sup> The overwhelming majority of the charity's hate crime cases were race and nationality related (71%), which increased by 8% compared to the previous year.

This increase and high prevalence of race and nationality hate crime incidents on a national and local scale can be linked to the UK's referendum vote to leave the European Union and the COVID-19 pandemic. The nation is divided on their views on the impact of immigration on their local areas. Research by Hope not Hate Wales indicate that 57% of Welsh residents say the arrival of immigrants has changed their local community for the better, whilst 43% think it has changed things for the worse.<sup>180</sup> Hope not Hate have found that the economic challenges and deepening inequality exacerbated by the pandemic, is feeding frustrations and resentments in Wales<sup>181</sup>.

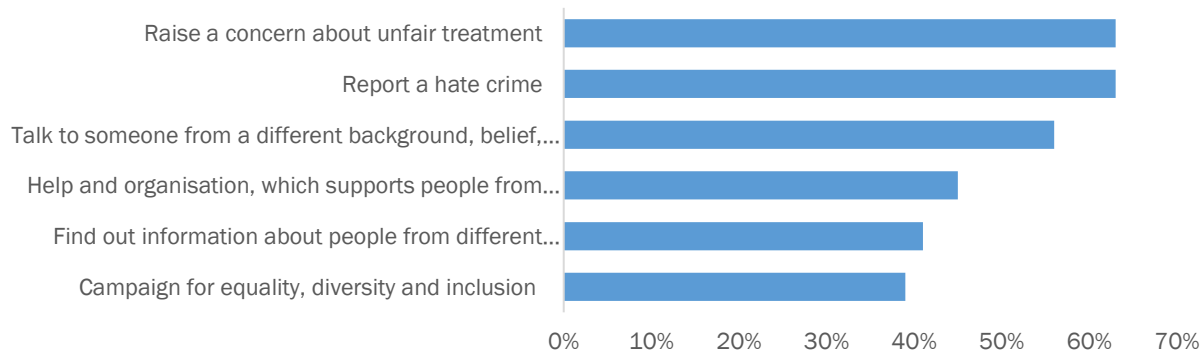
The following lived experience provides an insight into the day-to-day hardships faced by a disabled person living in Ceredigion. The individual highlights that they have been victimised and bullied throughout their life, and this has not changed since moving to Ceredigion. The individual provides examples when they have felt intimidated by members of the public, for example, whilst shopping and during health visits.

“I am disabled and have been victimised and bullied all my life and living here has not changed anything. I cannot go shopping without some form of intimidation, health appointments are the same.”

- Lived experience from the Well-being Survey (2021)

The Well-being Survey asked respondents what they'd consider doing to help **make things fairer for everyone in their community**, the top three options selected were – ‘*raise a concern about unfair treatment*’ (63% or 238 respondents) ‘*report a hate crime*’ (63% or 236 respondents) and ‘*talk to someone from a different background, belief, and/or who is a disabled person*’ (56% or 212 respondents). The figures indicate that the majority of respondents wanted to actively make things more equal in their community (see Figure 7.10).

**Figure 7.10: What would you consider doing to help make things fairer for everyone in your community?**



Source: Regional Well-being Survey (2021)

<sup>179</sup> Victim Support (2021). *Figures reveal a stark increase in the number of people seeking support for hate crime*. [Online]. Available at: <https://www.victimsupport.org.uk/figures-reveal-a-stark-increase-in-the-number-of-people-seeking-support-for-hate-crime/> (Accessed: 14.10.21).

<sup>180</sup> Hate Hope Charitable Trust (2021). ‘Fear and Hope: Wales. Identity, politics and belonging in today’s Wales’.

<sup>181</sup> Ibid.

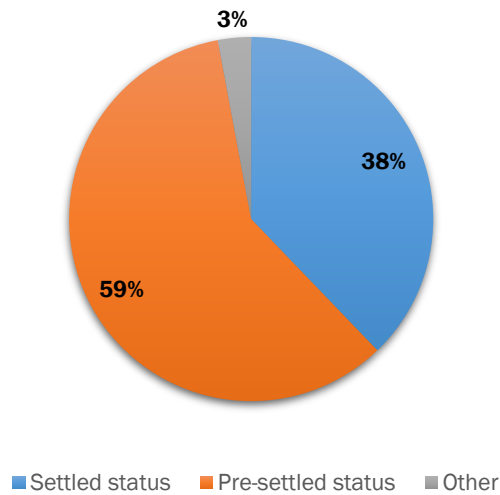
To support residents in doing so, 56% (or 206 respondents) said that they needed support in *‘being confident that raising concerns of unfair treatment/ reporting a hate crime would not have negative consequences for me or my family’*, 55% (or 200 respondents) required the *‘availability of accurate information’*, whilst 45.8% (or 167 respondents) stated that they would need support on *‘how to go about raising concerns about unfair treatment/report a hate crime’*.

These figures indicate that there is a clear need for a greater awareness of hate crime and more information on the reporting process to the police, online reporting facility or local organisation in Ceredigion, as 70% of the respondents that said they would report a hate crime needed more information on how to do so. The PSB is committed to preventing hate crime in Ceredigion, as such PSB organisations are working closely with Dyfed-Powys Police and Victim Support to pro-actively prevent hate offences.

EU nationals are hugely important to Ceredigion and its communities. It is estimated that at least 2,000 European Union citizens reside in Ceredigion (4% of its population), which makes it the fourth highest ranked county in Wales. Over the last few years PSB member organisations have been raising awareness of the **EU Settlement Scheme (EUSS)** amongst Ceredigion’s EU citizen population. Failing to register or not being accepted by the scheme would be life changing for those affected, their families and also on their established relationships within the community.

A total of 2,380 applications were made in Ceredigion, 900 were provided ‘settled’ status, 1,410 pre-settled’ status, whilst 70 were given ‘other’ status (includes refused, withdrawn, and void or invalid applications), see Figure 7.11.<sup>182</sup>

**Figure 7.11: Percentage of ‘settled’, ‘pre-settled’ and ‘other’ status provided to EU Settlement Scheme applications in Ceredigion (August 2018-March 2021)**



Source: UK Government (2021)

The figures indicate that the EUSS was a great success in Ceredigion. However, it is likely that this process was extremely stressful for those involved, particularly those who lacked digital skills as the scheme was delivered online. Third sector organisations (such as CAVO) and public bodies (such as, Ceredigion County Council and Aberystwyth University) offered support for these groups by providing face-to-face appointments and holding information sessions for those that required further information or were struggling to complete the process online.

The Welsh Government is aiming towards becoming the world’s first **Nation of Sanctuary**, to ensure that refugees and asylum seekers are welcomed and supported to settle into communities across Wales. Ceredigion has been successful in hosting refugee’s from Syria for over 5 years, with 74 Syrian families settling in the county. There has been a number of refugee led events in Ceredigion which have had a positive impact on community integration. For example, The Syrian Dinner Project (organised by the Red Cross and Syrian Women who had an interest in catering)

<sup>182</sup> UK Government (2021). ‘EU Settlement Scheme Statistics’. [Online]. Available at: [EU Settlement Scheme quarterly statistics, March 2021 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/eu-settlement-scheme-quarterly-statistics-march-2021) (Accessed: 15.10.21).

was very well received by the Aberystwyth community, which resulted in the project developing into a social enterprise. A takeaway service was set up during the COVID-19 pandemic and meals were donated to Aberystwyth's Bronglais Hospital to thank the NHS during the outbreak. Ceredigion County Council has also signed up to the Home Office scheme to resettle 'locally employed' Afghans who worked for the UK government in Afghanistan.

## Case Study ►

### Syrian Refugees re-settled in Ceredigion

The Local Authority and the Community Sponsorship schemes run by community groups - Croseo Teifi and Aberaid, have enabled 74 refugees from war-torn Syria to settle in Ceredigion under the Home Office Vulnerable Persons Resettlement Scheme. Ceredigion County Council pledged to resettle 50 individuals to Ceredigion between 2015 and 2020, and have succeeded in surpassing the target. Some of these individuals have now moved on to other areas within the UK and 66 are currently living in the county.

The percentage of people who feel able to influence decisions affecting their local area is one of the Welsh Government National Indicators. The latest data (2018-19) indicates that Ceredigion is performing poorly on this indicator during with a low proportion of residents (18%) feeling that they can influence decisions affecting their local area. Residents also feel less able to influence decisions than they did two years previously (2016-17), a 4% point decline. The 2020-21 data is not yet available for Ceredigion, however, the latest data for Wales highlights a significant increase in the proportion of people able to influence decisions since 2016-17 as highlighted in the Well-being of Wales Report 2021.<sup>183</sup> If the downward trend seen in the previous two sets of results continues in Ceredigion it will have a damaging impact on our contribution to achieving **A Healthier Wales, A Wales of Cohesive Communities** and **A Globally Responsible Wales** is hindered.

The Well-being Survey indicates that this is likely, as just under one third of respondents (32% or 124 respondents) selected '*having opportunities to influence local decisions*' as an asset in their community, which was the least selected asset. This highlights that a significant proportion of respondents do not feel that they can influence local decisions in their area. This could be linked to the COVID-19 pandemic and its impact on governance, as decision-makers have had to act quickly and make difficult decisions in order to protect the health and well-being of the population. These figures highlight that more needs to be done to work co-productively with citizens and communities to ensure that their voices are being heard. Co-production Network for Wales are currently working with three PSB clusters to implement co-production and involvement into their engagement, key lessons learned will be shared so that we can embed these principles into our processes and practices. Furthermore, our new engagement platform 'Have Your Say Ceredigion' will enable residents to talk openly on key points, through utilising polls, ideas and stories.

## Well-connected Communities

**Social connectedness** is a key driver of well-being outcomes. Socially, well-connected and resilient people and communities are happier and healthier, and are better at positively shaping their lives. Achieving well-connected communities is growing in importance, the Welsh Government launched their first strategy; '*Connected Communities*' in 2020, for tackling loneliness and social isolation and building stronger social connection.

This is particularly important in rural areas like Ceredigion, as structural barriers may limit connectedness which could result in perceived loneliness and social isolation. Sparsely populated communities, public transport availability, digital connectivity and long distances to access services are some of the rural-specific barriers that challenge the development of a well-connected Ceredigion.

<sup>183</sup> "Well-being of Wales 2021". Welsh Government. 30 September 2021. 6.

High quality **road networks** are key to enabling well-connected communities, they provide access to services, employment, training and recreation. Ceredigion has one of the largest accumulative road lengths in Wales at 2,265km in total. Around 51.5% of roads in Ceredigion are B and C roads (1,167km), which are classed as ‘minor roads’. The county does not have a motorway, the closest is the M4 in Carmarthenshire, approximately 64.2km from the centre of Ceredigion. The percentage of A and B roads classed to be in ‘poor condition’ has increased slightly over the last three years. Whilst the percentage of C roads in ‘poor condition’ has improved slightly (19.4% in 2016-17 to 17.3% in 2018-19), however, this is still not meeting the national target - 12% of roads in poor condition.<sup>184</sup> The composition and condition of Ceredigion’s road structure leads to increased travel distances and times, which results in the average person spending a higher proportion of their income on fuel.

**Public transport** plays a central role in supporting local economies, improving the health and well-being of communities and protecting the environment. Recently, an £8 million train station opened in Bow Street, aimed at increasing the connectivity for the communities in north Ceredigion. It is hoped that the addition will open up new employment and education opportunities for local residents in the area. However, the county lacks a train network linking the north to the south of the county, which places the bus service as the main mode of public transport. The bus industry has been in decline since 2009. Public funding cuts and more recently HGV driver shortages, due to post-Brexit migration rules and COVID-19, has led to shrinking transport networks and bus cuts. These changes will have disproportionately affected the minority groups, such as those on low incomes, and those unable to drive, such as the young and elderly.

Our engagement activities captured some of the **lived experiences** of residents, through our stakeholder events and open-ended questions within the Well-being Survey and School Survey. The following provides an insight into what it might be like living as a disabled person in Ceredigion. Their lived experience highlights the negative impact that the County’s transport network has had on the mobility and day-to-day life as a person living with disabilities. This is a key national policy issue and features as one of the well-being ambitions in Llwybr Newydd, The Wales Transport Strategy 2021.<sup>185</sup> The ambition being to remove the barriers that prevent people from using sustainable transport, including public transport, through inclusive design, staff training and service standards in-line with equality, language and human rights duties. Therefore, a greater understanding of lived experiences and the issues people with disabilities face, can be used to support the design and delivery of transport infrastructure and services in the future.

“Transport has always been a huge problem in the County, particularly for disabled people. You’re limited to going from town to town if you don’t drive and the accessibility of transport is not trustworthy.”

- Lived experience from Ceredigion Disability Stakeholder Forum (2021)

According to Sustrans Cymru, between 30%-40% of Ceredigion residents experienced **transport poverty** in 2016<sup>186</sup>, meaning over a third of people were unable to make the journeys that they need. This is likely a result of the inadequate and infrequent nature of public transport in Ceredigion, leading to a reliance on the private car, which for some is not practical or financially viable. However, the ‘Levelling Up Fund’ has promised to invest £4.8 million in high-value local infrastructure to the area’s most at need across the UK.<sup>187</sup> This investment is crucial for the long-term

<sup>184</sup> Stats Wales (2021) ‘Percentage of local authority road network in poor condition by road type and year’.[Online]. Available at: [Percentage of local authority road network in poor condition by road type and year \(gov.wales\)](#) (Accessed: 14.09.21).

<sup>185</sup> Llwybr Newydd The Wales Transport Strategy 2021. Welsh Government. Cardiff, 2021.

<sup>186</sup> Sustrans Cymru (2016) [Online]. Available at: [Microsoft Word - FINAL WelTAG Stage One Aberystwyth to Carmarthen Improving Strategic Transport \(gov.wales\)](#)

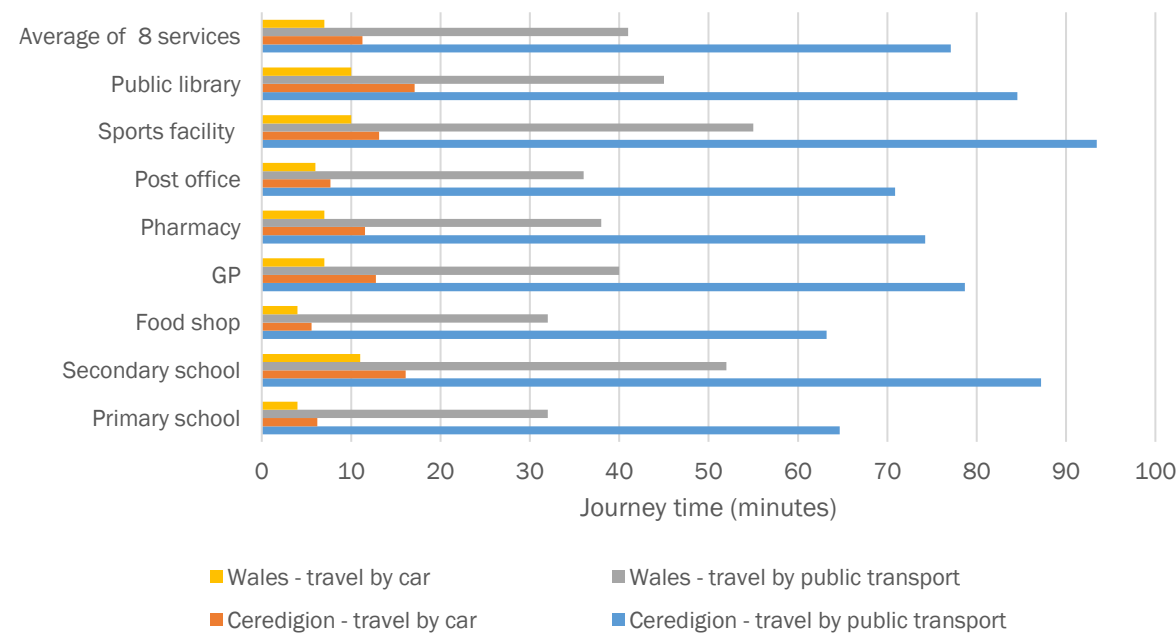
<sup>187</sup> UK Government (2021). ‘Levelling Up Fund: Prospectus’. [Online]. Available at: [Levelling Up prospectus.pdf \(publishing.service.gov.uk\)](#) (Accessed: 14.09.21).

sustainability of the public transportation system in Ceredigion, particularly if we are to meet the needs of a diverse population and reduce the reliance on the private car.

Ceredigion residents travel further to **access services** and employment than the average person in Wales. According to the Welsh Index of Multiple Deprivation (WIMD), access to services in Ceredigion is ranked the second worst in Wales, with 50% of its small areas in the most deprived 10% of Wales.

People residing in rural areas tend to travel longer distances to access services compared to urban areas due to geographic barriers and poor infrastructure. Figure 7.12 displays the average return time by mode of transport to reach the nearest key services in Ceredigion compared to the Welsh average.

**Figure 7.12: Average return travel time by mode of transport to reach the nearest key services during 2019**



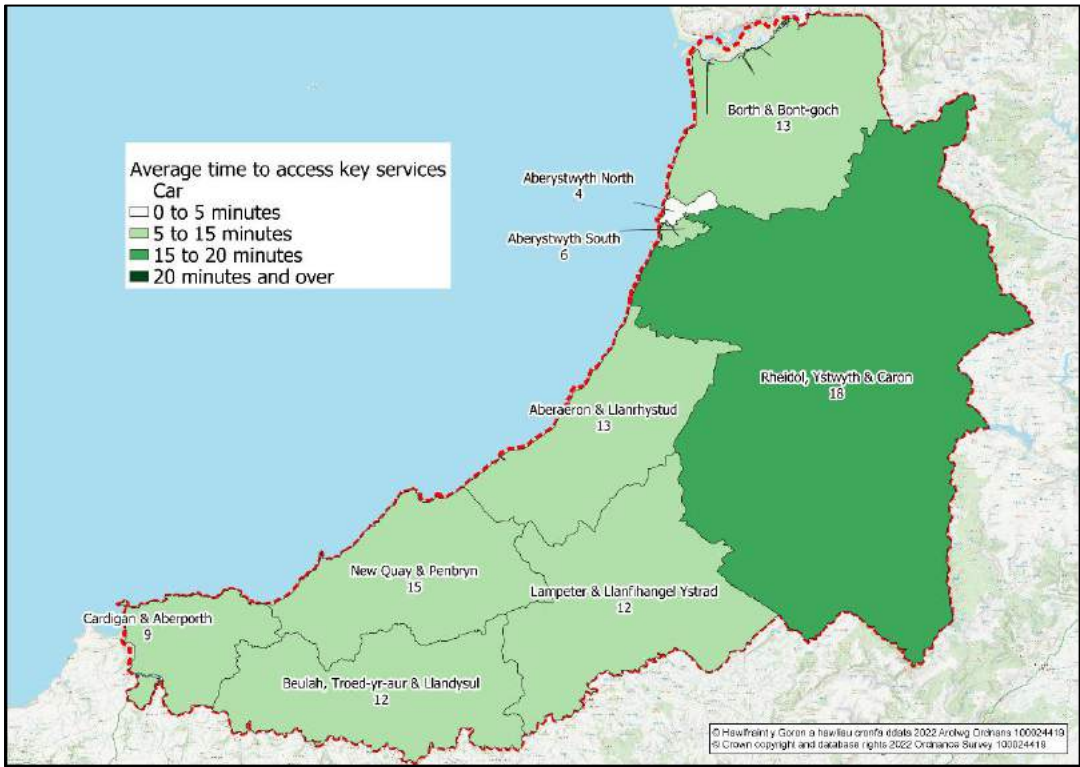
Source: Welsh Government (2019), WIMD

Public transport users experience longer travelling times to access key services than car users, both in Ceredigion and nationally. However, the average return travelling time across all eight services by public transport was 61% higher in Ceredigion than the national average (41 minutes compared to 77 minutes). In some cases (e.g. travelling to the post office), the return journey takes eight times longer on a public bus than it would using a car in Ceredigion. This can be challenging for people without a car in Ceredigion as certain key services become inaccessible.

The maps in Figures 7.13 and 7.14 provide a breakdown of the average return time to access eight key services (public library, sports facility, post office, pharmacy, GP, food shop, secondary School and Primary school) by mode of travel for each community area in Ceredigion. Aberystwyth South and Aberystwyth North are the only Community Areas in Ceredigion with shorter journeys than the national average to access key services by both car and public transport (7 minutes and 41 minutes respectively).

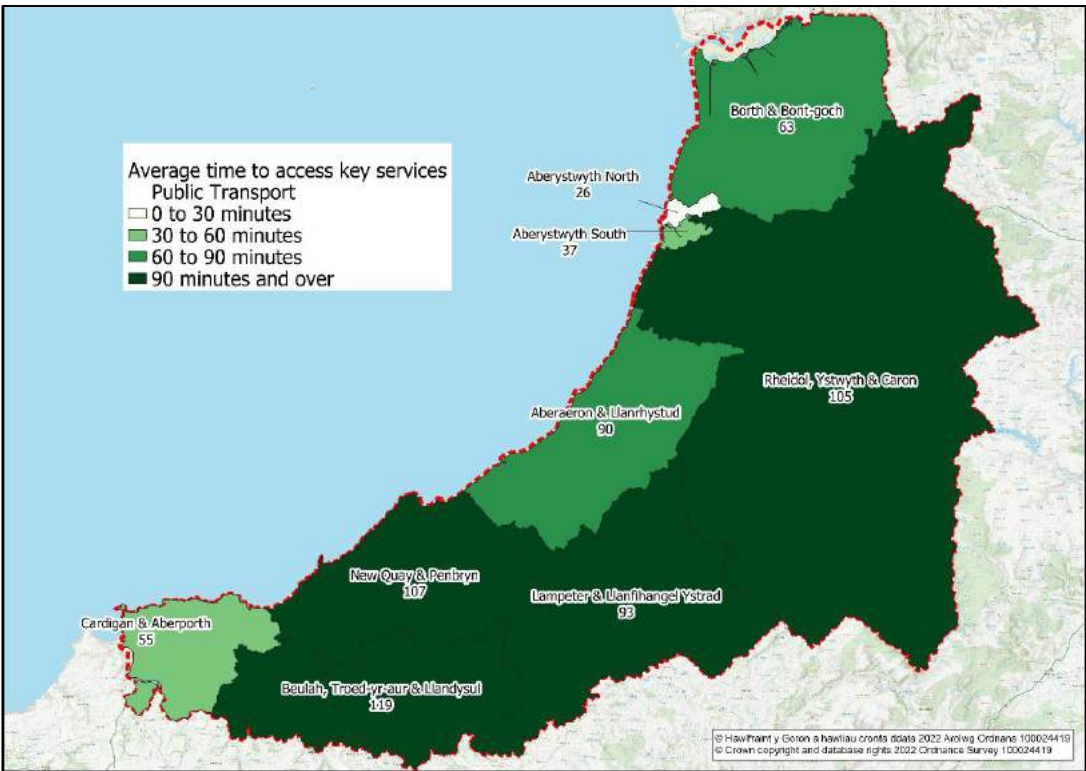


7.13: Average car return time to access key services by Community Area – 2019



Source: Welsh Government (2019), WIMD

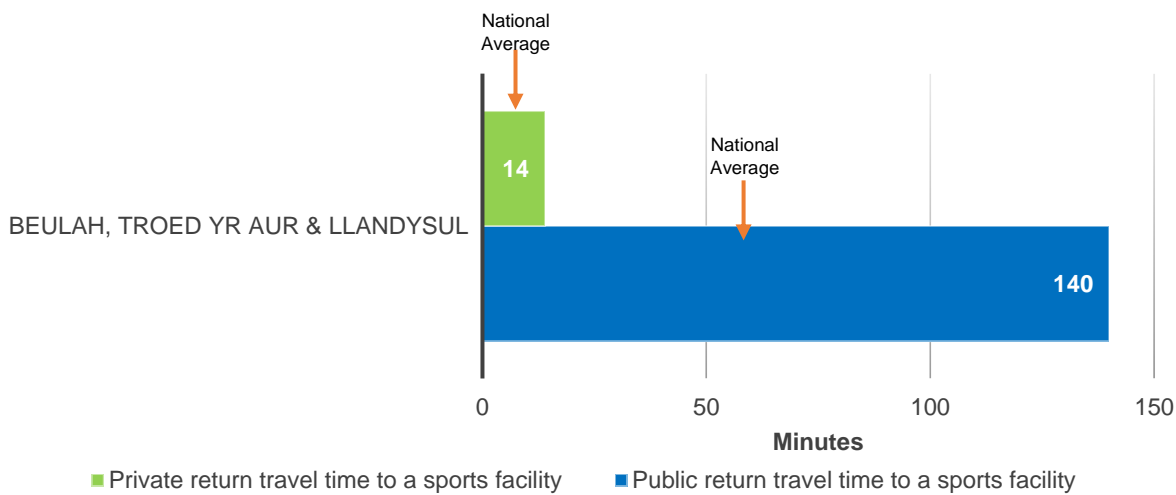
7.14: Average public transport return time to access key services by Community Area – 2019



Source: Welsh Government (2019), WIMD

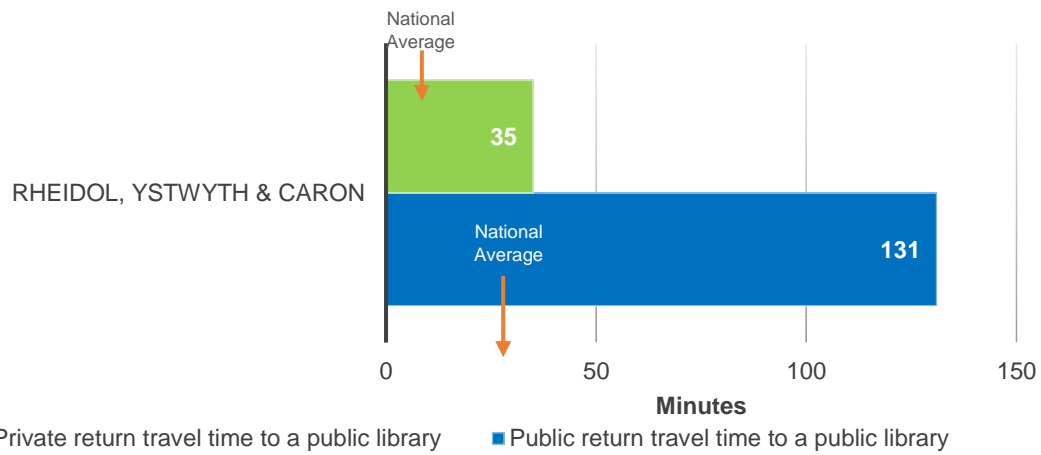
The journey times are significantly longer for those residing in the more rural settlements, such as, Beulah, Troed-Yr-Aur & Llandysul with an average return time of just under 2.5 hours to a sports centre and Rheidol, Ystwyth & Caron with an average return time of over 2 hours to a public library<sup>188</sup> (Figure 7.15 and 7.16). These figures indicate that the significant percentage of people living in Ceredigion without access to a car (18.4% in 2011), particularly those in the most rural settlements, can be a real disadvantage. The situation is exacerbated when difficulty accessing physical services is experienced in conjunction with digital exclusion (refer to the next section).

**Figure 7.15: Average public and private return time to sports facility from Beulah, Troed-Yr-Aur & Llandysul**



Source: Welsh Index of Multiple Deprivation (2019), Indicator Data by Middle Layer Super Output Area

**Figure 7.16: Average public and private return travel time to a public library in Ystwyth, Caron & Rheidol**



Source: Welsh Index of Multiple Deprivation (2019), Indicator data by Middle Layer Super Output Area

### Transport Network

A good transport network that meets the needs of rural and non-rural areas is a desire held by many of our residents. In response to The Well-being Survey, 45% valued *a good transport system*; this was the second most valued thing for a prosperous community (behind affordable housing). However, analysing the data further revealed that certain groups place a higher value on a good transport network, than others. Over half (62%) of respondents aged 65+, 50% of 17-24 year olds and 54% of respondents who stated that their day-to-day activities were limited

<sup>188</sup> Welsh Index of Multiple Deprivation (2019). [Accessed Online]. Available at: <https://statswales.gov.wales/Catalogue/Community-Safety-and-Social-Inclusion/Welsh-Index-of-Multiple-Deprivation/WIMD-2019>

because of a long-term health problem or disability identified *a good transport network* as the thing they valued the most in a prosperous community. The greater dependence on public transport by these groups could be driving this higher figure.

Table 7.1 highlights the key challenges and desires raised by residents in our engagement events, in relation to Ceredigion’s transport network. Comments focused largely on the need for: better provision of public transport (particularly for disabled people, low-income households, driverless households and those living in deeper rural areas), better maintenance and expansion of cycle paths and footpaths, and cheaper, greener alternatives to the combustion engine car (e.g. low cost electric cars).

**Table 7.1: Summary of challenges and desires raised by participants in our Engagement Events**

Challenges	Desires
Electric cars are expensive and inconvenient (time taken to charge)	Greener transport links
Rural public transport is poor – bus stops are too far away to walk	A greater provision of cycle paths linking towns and villages
Lack of adequate public transport for people with disabilities	Access to free public transport
Public transport only runs at certain times of the day	Reopening of the train line from Aberystwyth to Carmarthen
Lack of public transport is increasing the carbon footprint of rural areas	Allow bikes to be taken on rural bus services
	Proper integration with railways and bus services
	Better provision of public transport in the evenings
	More frequent maintenance of public footpaths
	Electric cars need to be made cheaper

Source: The Well-being Stakeholder Events, The Well-being Survey, The School Survey (2021)

### The Wales Transport Strategy 2021

The Welsh Government has developed a Transport Strategy (*The Wales Transport Strategy 2021*), which sets out their vision for how the transport system can help deliver our priorities for Wales, in order to create a more prosperous, green and equal society.<sup>189</sup> Welsh Government have embedded a modal shift within the strategy, steering away from the use of the private car, and have recognised the need to focus on changing people’s behaviour towards travel. This Strategy will play a key role in tackling the climate emergency, protecting the lives of our future generations and achieving net zero by 2050.

The Strategy stets out three priority areas, namely:

- **Priority 1: Bring services to people in order to reduce the need to travel.**
- **Priority 2: Allow people and goods to move easily from door to door by accessible, sustainable and efficient transport services and infrastructure.**
- **Priority 3: Encourage people to make the change to more sustainable transport.**

Under this strategy, Regional Transport Plans are required for every part of Wales. In this instance, Ceredigion falls under the Mid Wales region for the development of the Regional Transport Plan (with Powys and the majority of the Brecon Beacons National Park). It is important to note that Ceredigion will face different transport issues than other parts of Wales due to its unique characteristics (rural, sparsely populated, distinctive topography etc.) and will therefore require different solutions.

<sup>189</sup> Llwybr Newydd: the Wales Transport Strategy 2021 (2021). [Online]. Available at: [Llwybr Newydd: the Wales Transport Strategy 2021 \[HTML\] | GOV.WALES](#) (Accessed:31.01.22).

The table below outlines the three priority areas of the *Wales Transport Strategy 2021* and the potential challenges in achieving these priorities for Ceredigion, in addition to the progress thus far.

**Table 7.2: The potential challenges for Ceredigion in achieving the *Wales Transport Strategy 2021* Priority Areas and progress to date**

Priority Areas	How?	Challenges?	Current progress
Priority 1: Bring services to people in order to reduce the need to travel	<i>Better physical and digital connectivity.</i>	Ceredigion has the second highest proportion of premises in Wales unable to access speeds of 10 Mbit/s (12%). <sup>190</sup> A significant amount of work is required to ensure that all residents are digitally connected.	Broadband speeds and mobile coverage are improving year on year. The number of 'not spot' premises in Ceredigion has significantly declined from 31% in 2017 to 15% in 2021. <sup>191</sup>
	<i>More local services.</i>	Access to services affected by rurality (e.g. longer travel times and reliance on private car leading to higher costs), thus, broadband connectivity will be key to access services in the future.  Need to prioritise those who are not digitally connected or who lack digital skills.	Since the onset of the COVID-19 pandemic, more services have moved online, making it easier and more affordable for residents to access services.  A number of Ceredigion's health services are integrating to increase efficiency and effectiveness of service delivery, whilst also improving user accessibility (e.g. cutting down travel times) .For example, the development of the Integrated Health Centre's (IHC) in Aberaeron and Cardigan and proposals for Cylch Caron in Tregaron.
	<i>Remote/ home working to reduce reliance on cars.</i>	The shift towards remote working permanently could increase the risk of social isolation. There is a greater risk in rural communities when services are further away and travelling times are longer.  Increase in employee costs who work from home as energy consumption rises. Particularly concerning for residents in Ceredigion as a high proportion of households are reliant on more expensive fuel types (e.g. oil).  Certain delivery services will be unable to work from home e.g. retail, hospitality and tourism, which feature strongly in the local economy. Therefore, alternative green solutions for these services will need to be developed.	The Welsh Government have set an ambition for 30% of Welsh workers to work remotely in the future. Although we do not have recent figures on the number of remote workers in Ceredigion, we know that public sector organisations are working towards this. For example, the majority of Ceredigion County Council employees are working from home and plans for the future of work are in development.  The publication of the 2021 Census results in summer 2022 will provide a better indication on the number of employers working from home/ remotely.
Priority 2: Allow people and goods to move easily from door	<i>Provide reliable, effective and affordable transport services that people want to use, can use and do use.</i>	Extending the geographical reach of public transport into every community will be a significant economic challenge in rural Ceredigion.  Impacts of climate change, such as increased flooding, poses a risk to the	The County has experienced a reduction in bus and rail passenger journeys and bus funding cuts in recent years.  Transport for Wales is enhancing its Fflecsi Bwcabus service in Ceredigion,

<sup>190</sup> OfCom (2019) 'Connected Nations 2019: Wales Report'. [Online]. Available at: [Connected Nations 2019 Wales report \(ofcom.org.uk\)](https://www.ofcom.gov.uk/consult/condocs/cn2019/wales/cn2019-wales-report/)(Accessed: 09/09/21).

<sup>191</sup> OfCom (2020) 'Connected Nations update Summer 2021'. [Online]. Available at: [Connected Nations Update: Summer 2021 \(ofcom.org.uk\)](https://www.ofcom.gov.uk/consult/condocs/cn2021/cn2021-update-summer-2021/)(Accessed: 13.01.22)

		<p>resilience of the transport network in Ceredigion.</p> <p>National data highlights a decline in bus and rail passenger service use in recent decades, further exacerbated by the COVID-19 pandemic.<sup>192</sup> Although, local data is not available it is likely that this is a trend also experienced in Ceredigion. This decline needs addressing in order to meet priority 2.</p>	<p>which will allow service users to book and track their journey online.</p> <p>There are plans for a new depot in Carmarthen which will power 8 electric buses, replacing the diesel buses on the Carmarthen to Aberystwyth T1 bus route.</p> <p>New services and a number of improvements made to the Cambrian Main line railway including the new bus/rail interchange at Bow Street.</p> <p>Ongoing investment in TrawsCymru passenger waiting and information provision along the TrawsCymru service corridors in Ceredigion – including new bus shelters and real time information displays.</p>
<p>Priority 3: Encourage people to make the change to more sustainable transport</p>	<p><i>Make sustainable transport more attractive and more affordable and by adopting innovations that make it easier to use.</i></p>	<p>It will be difficult for residents to change their behaviour to use low-carbon, sustainable transport when the infrastructure is lacking.</p> <p>Substantial planning, resources and investment will be required across the public and private sector to deliver the charging needs for electric cars.</p> <p>To date, the focus of Active Travel improvements in Ceredigion has been on the three Welsh Government designated Active Travel Settlements of Aberystwyth, Cardigan and Lampeter. This is due to the focus and availability of Welsh Government grant funding, which has disadvantaged other smaller settlements located in the more rural areas of the County.</p> <p>Challenges to the roll-out of EV charging include take-up and availability of electric or hybrid vehicles in Ceredigion, grid capacity to support charging and striking an effective balance in provision between the availability of home and destination charging facilities as well as for onward travel through the County.</p>	<p>A number of footpaths and cycle paths have been constructed or upgraded (for example, Bow Street - IBERS - Penrhyncoch Shared Use Path Scheme) and cycle parking installed (for example Aberystwyth University, Bronglais Hospital, National Library of Wales Cycle Parking).<sup>193</sup></p> <p>Following extensive public consultation, a review of the Ceredigion Active Travel Network Maps has been recently completed. Existing and Future Routes Map will be submitted to the Welsh Government in March 2022. The Future Routes Map will provide the basis for investment in the coming years in and around the three Welsh Government designated Active Travel Settlements of Aberystwyth, Cardigan and Lampeter.</p> <p>At 2020, Ceredigion had 7 EV charging points. The Electric Vehicle Charging Strategy for Wales<sup>194</sup> predicts that Ceredigion will need 7,935-8,260 chargers by 2025. Ceredigion County Council is currently developing its Ultra Low Emission Vehicle Strategy and has commenced the first phase roll-out of public EV charge-points on Council-controlled land such as public pay and display car parks. Further grant funding has been made available for fleet vehicle transition. In addition, hydrogen and other cleaner fuels may be developed</p>

<sup>192</sup> Stats Wales (2020). The percentage change on local bus services in Great Britain country by year. [Online]. Available at: [The percentage change on local bus services in Great Britain country by year \(gov.wales\)](https://gov.wales/the-percentage-change-on-local-bus-services-in-great-britain-country-by-year)

<sup>193</sup> Ceredigion County Council (2020). Active Travel Report 2019-20. [Online]. Available at: [Active Travel - Ceredigion County Council](#) (Accessed: 31.01.22).

<sup>194</sup> Welsh Government (2020). Electric Vehicle Charging Strategy for Wales. [Online] Available at: [Electric Vehicle Charging Strategy \(gov.wales\)](#) (Accessed: 31.01.22).



Increasing broadband connectivity in Ceredigion will be essential to achieving the three priorities, as physical connectivity is relatively poor due to the longer travelling times and the reliance on road-based travel due to the absence of frequent bus services and rail infrastructure<sup>195</sup>. In addition, the reliance on cars indicate a need to invest in the region’s road network and support the uptake of low emission vehicles (e.g. electric/hybrid vehicles). There is also an increased risk to the resilience of the transport network through impacts of climate change, including the flood risk to roads and rail lines. Further work is needed to increase and future-proof transport network resilience to the impacts of climate change.

End to end active travel may play a smaller part in the achievement of these priorities in Ceredigion, as those in the most rural settlements would have to travel too far for active travel to be a viable mode of transport. However, active travel that forms part of a journey involving public transport, or car sharing is a more practical option for Ceredigion residents. There is a demand for more, safer and accessible walking and cycling routes within and between rural communities. Furthermore, electric bikes opens up cycling to more people, for example, for longer journeys or on more challenging terrain. There are greater opportunities in rural areas, like Ceredigion, to develop ‘hubs’ for interchange between passenger transport and private motor vehicles and bikes as well as to provide opportunities for EV charging.

Digital Connectivity

Having **access to the internet** and **mobile phone networks** is becoming more of a necessity. Currently, there is a growing social and economic gap between those who are connected and those who are not, known as the ‘digitally excluded’.<sup>196</sup> Ofcom’s 2019 Connected Nations Wales Report, found a stark contrast between access to different broadband speeds in Ceredigion. Clustered around the main towns, in particular Aberystwyth, the availability of Full Fibre Broadband, the fastest and most reliable broadband technology, is 20%, which is much higher than the West Wales region (8.8%) and the Wales average (7.5%).

However, the inconsistency of coverage across the county, particularly in more rural areas is where there are concerns. For example, Ceredigion has the second highest proportion of premises in Wales unable to access internet speeds of 10Mbit/s or more at 12%, which equates to 4,500 premises (refer to Figure 7.17).<sup>197</sup> The necessity of improving digital connectivity was highlighted during the COVID-19 pandemic, when Ceredigion’s residents reported that communication over the internet was vital during this time and will likely continue to be vital in the future<sup>198</sup>. Figure 7.17 highlights that poor access to broadband is a regional issue, with four mid and west Wales’s constituencies each having double percentages of premises without access to basic internet speeds.

<sup>195</sup> Welsh Government (2021) Mobility in Wales: Background report for Llwybr Newydd – The Wales Transport Strategy 2021. [Online]. Available at: [Llwybr Newydd the Wales transport strategy 2021: Mobility in Wales \(gov.wales\)](#) (Accessed: 31.01.22).

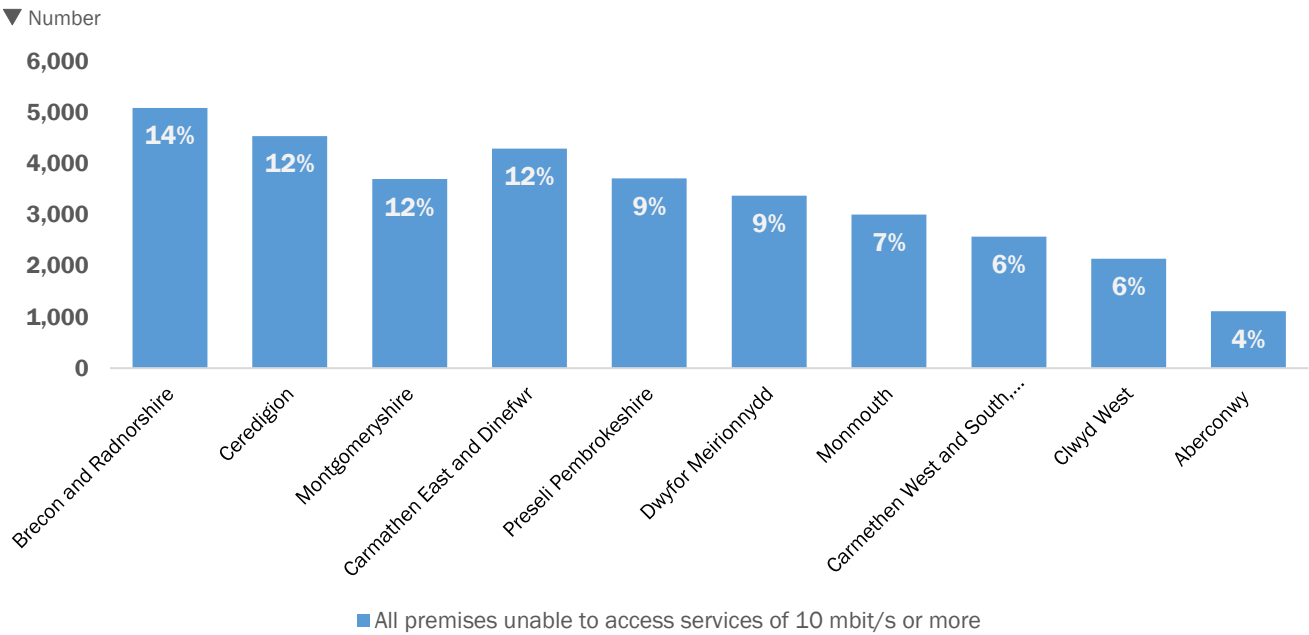
<sup>196</sup> Fairhurst, G. Farrington, J. Phillip, L and Williams, F. (2016) ‘Digital by Default’ and the ‘hard to reach’: Exploring solutions to digital exclusion in remote rural areas. [Online]. Available at: [‘Digital by Default’ and the ‘hard to reach’: Exploring solutions to digital exclusion in remote rural areas - Fiona Williams, Lorna Philip, John Farrington, Gorry Fairhurst, 2016 \(sagepub.com\)](#) (Accessed: 14.09.21).

<sup>197</sup> OfCom (2019) ‘Connected Nations 2019: Wales Report’. [Online]. Available at: [Connected Nations 2019 Wales report \(ofcom.org.uk\)](#)(Accessed: 09/09/21)

<sup>198</sup> Ceredigion County Council (2020) ‘Economic Update Report’. [Online]. Available at: [economic-impact-update-report.pdf \(ceredigion.gov.uk\)](#) (Accessed 14.09.21).



Figure 7.17: National Assembly for Wales’s constituencies with the highest percentage of premises unable to access services of 10Mbit/s or more



Source: OfCom (2019) Connected Nations 2019 Wales Report

Older people, disabled people, low income households and households residing in rural settlements are **disproportionately affected by digital exclusion**. According to reports, older people are disproportionately represented among those who do not have internet access, which is particularly concerning as they make up 25.4% of Ceredigion’s population. In addition, it is far more likely for the 65+ population and disabled population struggle in mastering basic digital skills.<sup>199</sup>

Broadband access and mobile coverage varies by location. Table 7.3 demonstrates the variations in access to broadband speeds between the Community Areas. The main towns in Ceredigion have greater accessibility to Superfast Broadband (such as Aberystwyth North, Aberystwyth South and Cardigan & Aberporth) compared to the more rural communities (such as Borth & Bont-goch and Rheidol, Ystwyth and Caron). However, Aberystwyth South is the only Community Area in Ceredigion with Superfast Broadband availability greater than the national average (94%).

Just over half of Ceredigion’s Community Areas are within the worst 10% of areas in the UK for 10mbit/s availability. Within these communities, approximately 1,000 properties are unable to receive a broadband service of any kind, making them the worst hit in Wales. The situation is worsened when ‘not-spots’ or ‘partial not-spots’ (not being able to receive mobile coverage or broadband) exist in these remote communities (see Figure 7.18). At present 15% of premises in Ceredigion are ‘not-spots’, slightly above the national average of 10%.

<sup>199</sup> Wales Co-operative Centre, 2018. Digital Inclusion In Wales. [online] Wales Co-operative Centre. Available at: [Accessed: 14.09.21].

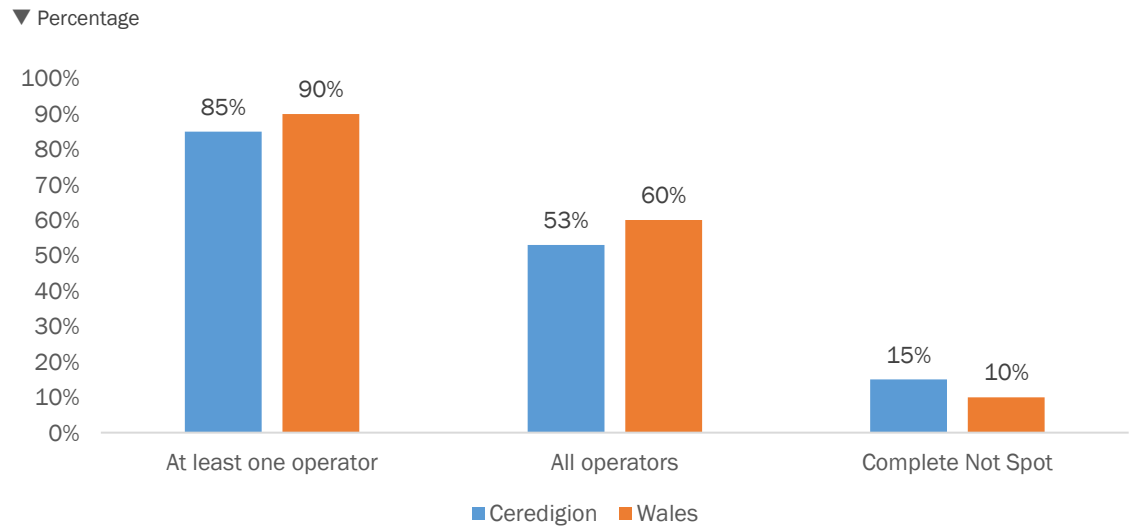
Table 7.3: Broadband connectivity speeds by Community Area in Ceredigion compared to all UK areas -2021

Community Area	Average download speed (Mbit/s)	Superfast availability (30 Mbit/s)	Unable to receive decent broadband	Receiving under 10 Mbit/s	Receiving over 30 Mbit/s
Borth & Bont-goch	56.5	88.9%	2.2%	12.2%	64.7%
Aberystwyth North	53.5	93.9%	0.0%	3.4%	78.9%
Aberystwyth South	55.2	97.2%	0.0%	9.3%	77.5%
Aberaeron & Llanrhystud	54.4	77.4%	3.5%	21.3%	59.4%
New Quay & Penbryn	56.7	72.3%	9.0%	29.8%	52.7%
Lampeter & Llanfihangel Ystrad	52.3	72.7%	7.2%	24.1%	54.7%
Cardigan & Aber-porth	53.1	89.5%	0.8%	10.9%	66.5%
Beulah, Troed-yr-aur & Llandysul	51.0	72.7%	6.7%	27.9%	52.7%
Rheidol, Ystwyth & Caron	54.8	70.5%	9.6%	26.8%	57.1%

Key to table shading: Best 10% of areas in the UK Best 30% of areas in the UK Worst 30% of areas in the UK Worst 10% of areas in the UK

Source: OfCom (2021), Connected Nations Report 2021

Figure 7.18: Coverage of premises by mobile network - 2021



Source: OfCom (2021), Connected Nations Report 2021

Although, digital connectivity issues are still apparent within certain communities in Ceredigion, the figures for both broadband speeds and mobile coverage are improving year on year. For example, data from Ofcom shows that the percentage of premises with Superfast Broadband availability in Ceredigion has increased from 60% (21,565 premises) in 2018 to 81% (30,640) in 2021. Furthermore, the number of ‘not-spot’ premises in Ceredigion has significantly declined since 2017, when 31% of premises were ‘not-spots’, compared to 15% in 2021.

One example of how digital connectivity can stimulate innovation within the local economy and support local communities is the LoRaWan network, which is currently in its final stages of deployment by the Local Authority. The network will allow both the public and private sector to deploy sensors to monitor an extensive range of variables for mitigation and planning purposes. For example, the sensors can be used to monitor salt bin levels, flooding, and coastal erosion.

Ceredigion has been identified as **an area requiring assistance** in receiving better broadband speeds. The Broadband Upgrade Fund is one example of a pilot campaign which provides opportunities for businesses and residents to solve connectivity issues by receiving small grants. Furthermore, the Mobile Network Operators have proposed through

the 'Shared Rural Network Programme', to collectively increase 4G mobile network coverage throughout the UK to 95% by the end of 2025<sup>200</sup>.

Economically, research carried out on behalf of Ofcom confirmed the positive relationship between broadband investment and economic growth – their study over a fifteen year period up to 2016 showed how broadband adoption led to a 0.37% increase in GDP per annum or 5.5% over the period of the study.<sup>201</sup>

Looking ahead, it is expected that the variety of support and funding schemes available to residents will further improve the county's digital connectivity. In addition, it is anticipated that the pandemic will accelerate digital transformation over the longer-term, due to a new reliance on digital infrastructure and connectivity. Digital infrastructure will need to support and adapt to the new ways of working for example, delivering medical consultations virtually. However, even if Ceredigion experiences an improvement in broadband and mobile network access, for some communities the digital divide will still remain. Poverty, poor digital literacy, and lack of opportunity may constrain take up.

To achieve the National Well-being Goals: '**A Wales of Cohesive Communities**,' '**A Healthier Wales**' and '**A More Equal Wales**,' further work is required to connect local residents to opportunities in Ceredigion, particularly the groups who are disproportionately affected by the structural barriers that limit connectedness.

## Thriving Welsh Linguistic Community

The Welsh language is seen as the bedrock of Ceredigion's **sense of community**. The Well-being Survey respondents ranked the ability to use the Welsh language as the second most valuable asset in relation to the County's culture and language. According to the 2011 Census, the percentage of people aged 3 and over who spoke Welsh in Ceredigion was 47% (compared to 19% nationally), the third highest amongst Welsh Local Authorities.

The ability to speak Welsh is associated with higher subjective well-being, therefore it is unsurprising that it is one of the National Indicators that measures the progress of Wales towards the Well-being Goals. Research shows that there is a direct link between using the Welsh language and higher life satisfaction, strong sense of identity and feelings of belonging.<sup>202</sup> For example, this is reflected in the high proportion of Ceredigion residents that are satisfied with their local area as a place to live (94%), which is the highest in Wales.<sup>203</sup>

The **level of Welsh language skills** differs geographically within the county as different social factors come into play. The more rural settlements, such as, Tregaron (situated in Rheidol, Ystwyth and Caron Community Area) tend to have a higher proportion of residents that can speak, read and write Welsh (56%), than the more urban areas, such as Aberystwyth Penglais (situated in Aberystwyth North Community Area) at 18%.<sup>204</sup> This can be attributed to the large proportion of students that reside in Aberystwyth (approximately 39% of Aberystwyth's population), who may be attending the University from elsewhere in the UK or from overseas. Table 7.4 highlights the difference in Welsh skills by Community Area in Ceredigion.

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<sup>200</sup> UK Government (2020). 'An Update on Rural Connectivity: Government Response to the Committee's Seventeenth Report of Session 2017-19'. [Online]. Available at: [An Update on Rural Connectivity: Government Response to the Committee's Seventeenth Report of Session 2017-19 - Environment, Food and Rural Affairs Committee - House of Commons \(parliament.uk\)](#) (Accessed: 14.09.21).

<sup>201</sup> Pantelis Koutroumpis. The economic impact of broadband: evidence from OECD countries April 2018 [https://www.ofcom.org.uk/\\_data/assets/pdf\\_file/0025/113299/economic-broadband-oecd-countries.pdf](https://www.ofcom.org.uk/_data/assets/pdf_file/0025/113299/economic-broadband-oecd-countries.pdf)

<sup>202</sup> Welsh Government (2020). 'What factors are linked to people speaking the Welsh language?' [Online]. Available at: [What factors are linked to people speaking the Welsh language? \(gov.wales\)](#) (Accessed: 15.09.21).

<sup>203</sup> Stats Wales (2020). 'Percentage of people satisfied with local area as a place to live by local authority'. [Online]. Available at: [Percentage of people satisfied with local area as a place to live by local authority \(gov.wales\)](#) (Accessed: 16.09.21).

<sup>204</sup> Stats Wales (2013) 'Welsh Language skills by LSOA, 2011 Census'. [Online]. Available at: [Welsh language skills by LSOA, 2011 Census \(gov.wales\)](#) (Accessed: 16.09.21).

**Table 7.4: Percentage of residents with Welsh skills and without Welsh skills in 2011 by Community Area in Ceredigion**





Community Area	Can speak Welsh	Can speak, read and write Welsh	No Welsh skills
Borth & Bont-Goch	50.8%	41.5%	37.2%
Aberystwyth North	27.4%	24.1%	63.3%
Aberystwyth South	32.9%	25.9%	51.6%
Aberaeron & Llanrhystud	55.1%	45.2%	35.3%
New Quay & Penbryn	48.6%	39.6%	41.4%
Lampeter & Llanfihangel Ystrad	52.4%	43.2%	39.6%
Cardigan & Aberporth	52.0%	39.7%	36.0%
Beulah, Troed-yr-Aur & Llandysul	54.6%	45.9%	36.9%
Rheidol, Ystwyth & Caron	54.7%	45.8%	35.2%
<b>Ceredigion Total</b>	<b>47%</b>	<b>38.8%</b>	<b>42.2%</b>

Source: Stats Wales, Census 2011

Welsh language skills also vary between age groups. Younger people are more likely to speak Welsh, compared to older people in Ceredigion.<sup>205</sup> This is likely a consequence of the use of Welsh in schools, as some may use the language less frequently after leaving the Welsh-medium education system.

By looking at census data from 2001 and 2011, the percentage of 3-15 year olds in Ceredigion that are able to speak Welsh, has increased from 77.2% in 2001, to 78.4% in 2011, an increase of 1.2 percentage points (refer to Table 7.5). This demonstrates that the Welsh-medium education system in Ceredigion is effective in increasing the use of Welsh language for primary and secondary school children in the County.

**Table 7.5: Number and percentage of Welsh speakers in Ceredigion by age group, 2001 and 2011 Census**

	3-15 yrs	16-64 yrs	65+	All over 3 yrs
<b>Able to speak Welsh 2001 Census</b>	8,232 (77.2%)	22,195 (45.9%)	13,868 (54.0%)	37,918 (52.0%)
<b>Able to speak welsh 2011 Census</b>	7,175 (78.4%) 	20,503 (41.9%) 	7,286 (46.4%) 	34,964 (47.3%) 

Source: Stats Wales, 2001 and 2011 Census

At the time of the last Census in 2011, **the proportion of Welsh speakers** in Ceredigion fell under 50% for the first time in its history. The 2001 Census reported that 52% of the population of Ceredigion over 3 years of age could speak Welsh, this declined to 47% in 2011, a fall of 4.7 percentage points. The steepest decline was in the 65 and over age group, a reduction of 7.6 percentage points. This change occurred during a period when the corresponding population of Ceredigion increased from 72,884 in 2001 to 73,847 in 2011 – an increase of 1.3%.

The decline in Welsh speakers in the County between the census years can be attributed to population mobility and migration patterns in Ceredigion. A greater proportion of the County’s population in 2011 (including 9,000 students) were born outside Wales, than in 2001 (refer to Table 7.6). Outside the university towns of Aberystwyth and Lampeter the growth in the number of residents born outside Wales is most significant in the older age groups.

<sup>205</sup> Stats Wales(2013). ‘Welsh language skills by local authority, gender and detailed age groups, 2011 Census’. [Online]. Available at: [Welsh language skills by local authority, gender and detailed age groups, 2011 census \(gov.wales\)](#)(Accessed: 16.09.21).

Table 7.6: Birth location of the Ceredigion population 2001-2011

	Born in Wales	Born in England	Total
2011	42,005 (55.3%)	5,532 (7.3%)	75,992
2001	43,903 (58.6%)	27,299 (36.4%)	74,941

Source: NOMIS; Census 2011, table KS204EW & Census 2001, table KS05

Migration patterns also drive the decrease in Welsh speakers within Ceredigion. Approximately 600 international migrants moved to Ceredigion every year (between 2001 and 2011), whilst around 5,700 moved out of Ceredigion per year.<sup>206</sup> Table 7.7 highlights that the internal out-migration is largely the result of young people moving away from the County, often as a result of wanting to pursue career opportunities, life experiences and other opportunities in neighbouring counties or other parts of the United Kingdom.

Table 7.7: Internal migration 2010-2011 (migration between Ceredigion and the rest of the UK) by specific age groups

	Internal Migration (Total)	20-24 yr olds	25-29 yr olds	45 to 64 yr olds	65+
Ceredigion	Inflow	1,590	390	560	240
	Outflow	2,530	710	500	320
	Net	-940	-322	60	-80

Source: Stats Wales, 2011<sup>207</sup>

Subsequent surveys in the years since the last Census present a more positive picture, albeit based on surveys rather than the whole population. The Annual Population Survey for instance, suggests that Welsh speakers in Ceredigion have been increasing in recent years. In 2011, 55.1% of respondents said they could speak Welsh, increasing to 62.3% in 2021. The National situation is also encouraging, as current patterns and trends project an overall increase of Welsh speakers. By 2050 it is predicted that there will be 666,000 people (equivalent to 21%) aged three and over able to speak Welsh (an increase of 100,000 more Welsh speakers than there were in 2011), as reflected in the 2021 Future Trends Report.

The **percentage of residents using Welsh every day** in Ceredigion has also increased over recent years, from 43% in 2016, to 45% in 2021.<sup>208</sup> It could be argued that increasing the day-to-day use of Welsh could be far more influential to language growth than the numbers that speak it. However, there is no doubt that the pandemic has reduced the opportunities for learners to practice their skills, due to, for example, the cancellation of events such as the Urdd Eisteddfod, National Eisteddfod and the Royal Welsh Show, and a reduction in the number of Welsh language community groups that were able to continue virtually. It is still too early to assess the full impact of the pandemic on the Welsh language and how this will affect well-being.

The Welsh Government set an ambitious target to reach 1 million Welsh speakers by 2050, known as ‘**Cymraeg 2050**’. In order to facilitate a greater use of the Welsh language in Ceredigion and support the national well-being goal, a variety of schemes and strategies have been implemented across the county, such as:

- The creation of a Culture Service, to co-ordinate community work by promoting culture together with the Welsh language across the County; Menter Iaith Cered, along with Theatr Felinfach are part of this new fabric.

<sup>206</sup> Stats Wales (2021). ‘Components of population change, by local authority and component’. [Online]. Available at: [Components of population change, by local authority and component \(gov.wales\)](#) (Accessed: 24.09.21).

<sup>207</sup> Stats Wales (2021). ‘Migration between Wales and the rest of the UK by local authority, flow and period of change’. [Online]. Available at: [Migration between Wales and the rest of the UK by local authority, flow and period of change \(gov.wales\)](#) (Accessed: 01.10.21)

<sup>208</sup> Stats Wales (2021). ‘Annual Population Survey – Frequency of speaking Welsh by local authority and year’. [Online]. Available at: [Annual Population Survey - Frequency of speaking Welsh by local authority and year \(gov.wales\)](#) (Accessed: 16.09.21).

- Ceredigion County Council is implementing the Welsh in Education Strategic Plan, which sets out the Council's intention to promote Welsh medium education within the County.
- Aberystwyth University offers 'Learn Welsh' classes to residents in Ceredigion, Powys and Carmarthenshire, supporting beginners up to fluent Welsh speakers to improve their skills and confidence.
- Hywel Dda University Health Board Welsh Language Scheme
- Ceredigion County Council's Language Strategy (2018-23)

The decline in Welsh speakers presents one of the most significant challenges to the socio-cultural and economic landscape in Ceredigion and to achieving well-being goals of '**A Wales of vibrant culture and thriving Welsh language**' and '**A Wales of more cohesive communities**'. The figures suggest that the percentage of Welsh speakers in Ceredigion could decline further unless the schemes and initiatives implemented across Ceredigion (highlighted above) trigger a reversal in that trend. The 2021 Census results (to be published in spring 2022), will provide a better indication of whether this decline will continue longer-term or if the trends have been reversed.

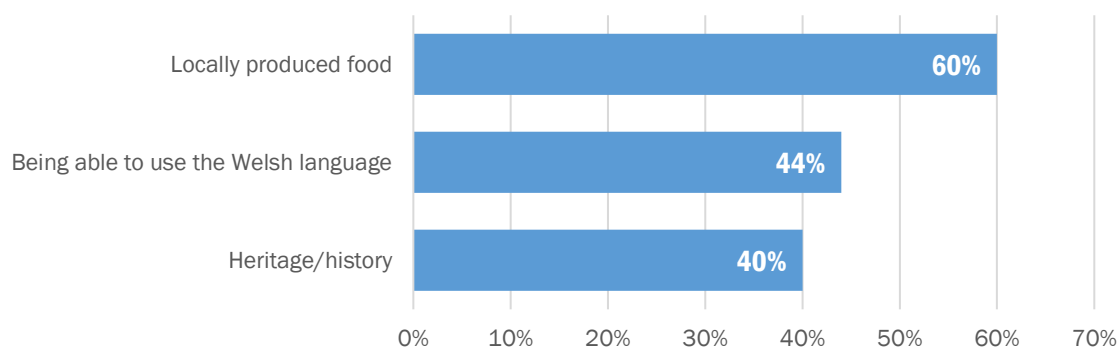
The out-migration of the younger population also poses challenges to the socio-cultural and economic landscape in Ceredigion. There is a perception among some that there are few professional opportunities for young people to follow a rewarding career in Ceredigion, and that the only option is to move from the area to study, live and work elsewhere. Furthermore, as shown in The Well-being Survey, there is a growing concern over suitable and affordable housing, particularly for young people and first time buyers in the county. These reasons are largely borne out of necessity, and are sometimes linked to the decline in public sector jobs, which have always been an important part of the local economy.

*"I would really like to learn Welsh, it would be great if this could be done at a local level e.g. community hall or pub, rather than going to a college or doing an online course. By doing it at a local social venue it becomes easier to practice among the local Welsh speaking community and would develop better social cohesion."*

- Respondent to the Well-being Survey

It is clear from our engagement with the public that using the Welsh language is essential to the county's vibrant community, as it was the second most common response (44%/171 respondents selected this), after locally produced food (see Figure 7.19). However, two additional trends emerged from our engagement with the public on the Welsh language. Some Welsh learners had experienced periods of unease whilst learning the language and suggested that they would benefit from a friendly and supportive atmosphere to learn or strengthen their Welsh language skills. Whilst, others were concerned about the emphasis given to the national drive to reach 1 million Welsh speakers by 2050.

**Figure 7.19: Top three responses to - which three things do you value the most in relation to your county's vibrant community and thriving Welsh language?**



Source: Regional Well-being Survey (2021)



In order to ensure Ceredigion's communities remain vibrant places where our culture and Welsh language thrive, opportunities to learn Welsh or indeed improve existing Welsh skills at any stage in life are clearly essential, as are the ongoing initiatives to promote the use of the Welsh language and the associated cultural benefits. This was supported by our Well-being Survey respondents, with a large number of comments suggesting a variety of different training and promotional options to encourage the use and uptake of the Welsh language.

The unique way in which Welsh language and culture is interlinked with the delivery of all seven National Well-being Goals makes it of key importance to well-being locally and regionally and has been identified as one of our key themes across West Wales.

## 7.3 Close to Nature

### Natural Environment

Ceredigion's **natural environment** is one of the county's greatest assets. Its rural character features coastlines, reservoirs, remote uplands and mountains, making it a great area to connect people to nature. We know that greater exposure with natural environments is associated with better health and well-being.<sup>209</sup> This is clearly reflected in the results of our Well-being Survey and engagement events during the summer and autumn of 2021.

Ceredigion offers a wealth of opportunity for residents to connect with nature, the county features:

- A 60 mile Coastal Path
- Two internationally important wetland areas – Dyfi estuary and Cors Caron which can be visited anytime, for free
- 14 Special Areas of Conservation
- 100 sites of Special Scientific Interest
- 7 National Nature Reserves

People living in Ceredigion would appear to have a great advantage in the natural environment, however, the county has higher levels of **green space** deprivation than expected due to inaccessibility and proximity issues. Private farmland, few cycle paths or pavements, as well as poor public transport services often surround people who do not live in, or live near, the main towns in Ceredigion. Out of the twenty-two local authorities, Ceredigion residents on average travel the second farthest (768 meters) to access their nearest park, public garden or playing fields.<sup>210</sup>

Distances to access public green space also vary across Ceredigion. The more rural communities, such as, Borth and Bont-Goch and Rheidol, Ystwyth & Caron fare worse, with distances averaging 1.5 km. However, a greater percentage of households in these communities have access to a private outdoor space (90% of households in Rheidol, Ystwyth & Caron and 92% in Borth & Bont-goch), than the county's average (88%),<sup>211</sup> which may act as a substitute for public green space. The importance of having access to public green space and/or a garden was made apparent during the COVID-19 pandemic as we adapted to the restrictions put in place to control the virus. Access to nature and green spaces emerged as a key priority during our engagement with the general public – 68% of respondents to our survey identified this as what they value the most about their local environment, much higher than any other option (Figure 7.20). Therefore, further support and work is required to encourage and enable people, without a private outdoor space, or through lack of transport or disability find it difficult to access public green space in their communities.

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<sup>209</sup> Nature (2019). 'Spending at least 120 minutes a week in nature is associated with good health and wellbeing'. [Online]. Available at: [Spending at least 120 minutes a week in nature is associated with good health and wellbeing](#) (Accessed: 20.09.21).

<sup>210</sup> ONS (2020). 'Access to gardens and public green space in Great Britain'. [Online]. Available at: [Access to gardens and public green space in Great Britain - Office for National Statistics \(ons.gov.uk\)](#) (Accessed: 24.09.21).

<sup>211</sup> Ibid.

Figure: 7.20 Summary of results to the Ceredigion well-being survey on environmental issues

Q23. Which three things do you value the most about your local environment?



Q24. Looking ahead, what concerns you the most about your local environment?



Source: Regional Well-being Survey (2021)

Case Study ►

Re-Connecting Nature

Green health and access to nature has gained traction within the PSB in recent years. The Climate Change and Natural Resources PSB Project Group commissioned work during early 2020, to identify publically owned land in Ceredigion that would enhance opportunities for people to better understand and enjoy local nature and green spaces, and to improve health and well-being.

The 'Re-connecting Nature' report identifies one hundred and seventy sites and seven potential projects across Ceredigion. Opportunities included: tree planting, gardening, walking and cycling, litter picking, creation of wildlife refuges and community art projects. A key priority of the project was to ensure that the sites were accessible to all, through path improvements and utilising sites close to or within communities. It will be interesting to see which projects will be taken forward by the PSB and the types of well-being benefits this will bring to the surrounding communities in the future.

**Fly tipping and litter** pose a threat to wildlife and can also have a negative impact on people’s mental health and well-being.<sup>212</sup> Ceredigion recorded the lowest number of fly tipping incidents in Wales during 2019-20 (159), reducing by 59% since 2015-16<sup>213</sup>. In addition, during 2018-19, the County scored the highest amongst Welsh local authorities on the cleanliness indicator (83.6) and 97.8% of streets were considered to have an acceptable level of cleanliness by the public.<sup>214</sup> However, the Well-being Survey highlighted that the majority (65%) were concerned about littering and fly-tipping in their future local environments, the highest of all responses to future concerns

<sup>212</sup> Welsh Government (2021). ‘A Litter and Fly-tipping Free Wales: Litter and Fly-tipping Prevention Plan for Wales’. [Online]. Available at: [litter-and-fly-tipping-prevention-plan-wales-consultation-document\\_0.pdf \(gov.wales\)](#) (Accessed: 24.09.21).  
<sup>213</sup> Stats Wales (2021). ‘Recorded fly-tipping incidents by local authority’. [Online]. Available at: [Recorded fly-tipping incidents by local authority \(gov.wales\)](#) (Accessed: 24.09.21).  
<sup>214</sup> Keep Wales Tidy (2019). ‘How clean are our streets? All Wales Local Environment Audit and Management System Report 2018-19’. [Online]. Available at: [Street cleanliness surveys | Keep Wales Tidy](#) (Accessed: 24.09.21).

about their local environment (Figure 7.20). Early evidence indicates a significant increase in fly tipping instances and littering in the county during the pandemic, a trend also experienced nationally. This could be attributed to the temporary closure of recycling centres in Ceredigion, reduced provision of refuse collectors and the halting of volunteer litter picking groups.

**Air pollution** is considered to be the most important environmental contributor to the burden of human disease in the UK with cost implications valued at more than £20 billion a year. Poor air quality has significant health consequences and current air pollutant concentrations are believed to cause the deaths of around 40,000 people in the UK each year with an order of magnitude greater impact on morbidity.<sup>215</sup>

Ceredigion is known to have very good air quality, for example in 2018 Ceredigion had the second lowest level of NO<sup>2</sup> concentration at just 5 compared to 9 nationally.<sup>216</sup> NO<sup>2</sup> is released into the atmosphere when fuels are burned, for example petrol or diesel in a car engine or natural gas in a domestic central heating boiler or power station. There are very few industrial sources of air pollution in Ceredigion and no motorways or heavily trafficked roads, which contributes to good air quality.

With this considered, it is not surprising that just 20% of respondents to our Well-being Survey saw declining air quality as something that concerned them about the local environment in future.

## Environmental Issues

The **Climate and Nature Emergencies** combined are the greatest challenges of our time. They are both inextricably linked - climate change is driving nature's decline, and biodiversity loss leaves us ill-equipped to adapt to change and reduce carbon emissions. The fallout from both will have extreme impacts on people's health and well-being. By 2050, it is predicted that Welsh summers will **average temperatures will increase by 1.34°C**. Warming above this level will result in further sea level rise, extreme weather events, biodiversity loss and species extinction. The greatest impacts will be upon the lives of the younger population and future generations. As reflected in the 2021 Future Trends Report, some people and areas are especially vulnerable to change (such as coastal communities in Ceredigion), which risks exacerbating inequalities.

The **Climate Change Risk Assessment (CCRA3)** found that the gap between the level of risk we face from climate change and the level of adaptation underway has widened in Wales.<sup>217</sup> In short, adaptation action has failed to keep pace with climate change. To meet **a globally responsible, healthier, equal and resilient Wales**, and Net Zero target, immediate and co-ordinated action needs to be taken. We all recognise that we must use our natural assets in a sustainable way and reduce our carbon emissions to address the dual threats from the climate and nature emergencies.

**Coastal and fluvial** (from rivers) **flooding** and subsequent **coastal erosion** are threatening our communities and environment, as observed during the winter of 2020. Ceredigion has an extensive coast and network of rivers and high and low lying land, which when combined with urbanised areas, means it's at risk of flooding from a number of sources. According to our Well-being Survey, 40% respondents are concerned about the impact flooding will have on their local area and 34% are concerned about coastal erosion. Incidents of flooding are expected to become more frequent in Ceredigion as a result of climate change, due to an increase in severe weather events and rising sea levels.

Coastal communities are particularly at threat from rising sea levels, a combination of flooding types and coastal erosion. Climate Central, an independent climate change organisation of leading scientists, predict that a large portion of Aberystwyth and most of Borth and Ynyslas will be underwater by 2030 (see Figure 7.21).<sup>218</sup> This change driven by global warming is reflected in the 2021 Future Trends Report, whereby sea level rise in Aberystwyth is

<sup>215</sup> Gov.uk. Health Matters: Air Pollution. Online: <https://www.gov.uk/government/publications/health-matters-air-pollution/health-matters-air-pollution>

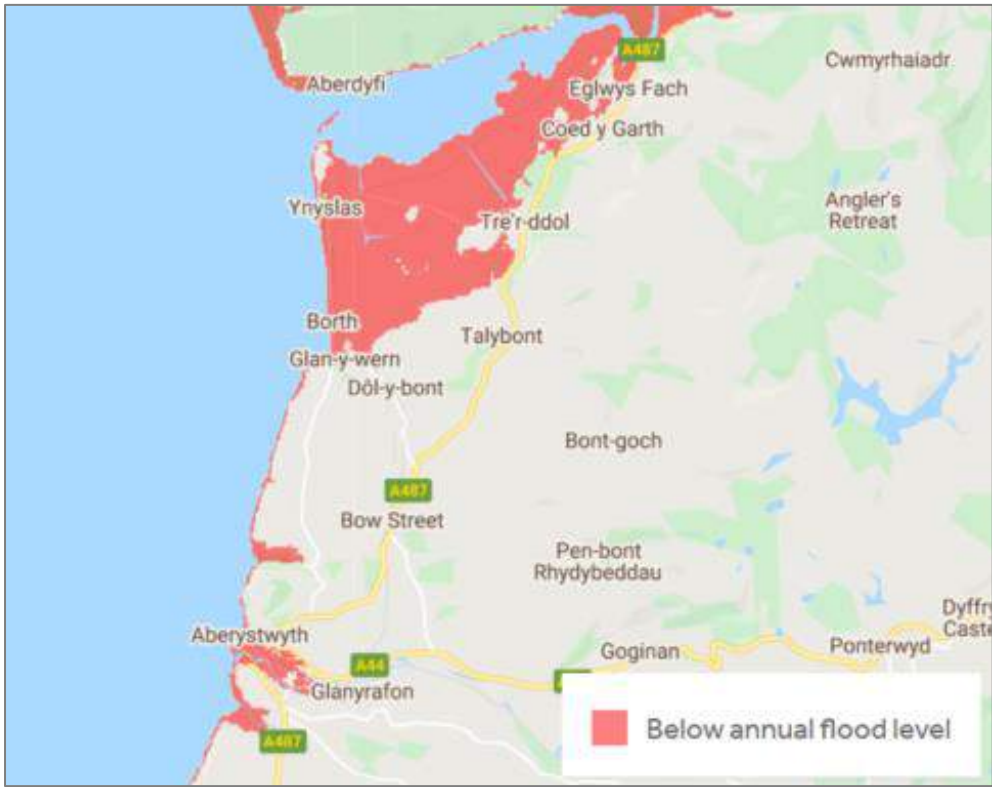
<sup>216</sup> Data Cymru: Assessment of Local Well-being Core Data Set, 2021.

<sup>217</sup> Dr. Alan Netherwood (2021) Evidence for the third UK Climate Change Risk Assessment (CCRA3). [Online] Available at: [CCRA-Evidence-Report-Wales-Summary-Final.pdf \(ukclimaterisk.org\)](https://www.ukclimaterisk.org/Summary-Final.pdf) (Accessed: 02.02.22).

<sup>218</sup> Climate Central (2021). 'Land projected to be below annual flood level in 2030'. [Online]. Available at: [Climate Central | Land projected to be below annual flood level in 2030](https://www.climatecentral.org/land-projected-to-be-below-annual-flood-level-in-2030) (Accessed: 27.09.21).

predicted to increase by 22cm by 2050. This could potentially displace people within these communities, destroy acres of land and habitats and generate huge economic losses.

**Figure 7.21: Land projected to be below annual flood level in 2030 – North Ceredigion**



Source: Climate Central

**Case Study ►**

**Borth 2030: A Community-Led Response to Future Well-being Challenges**

A new community-based project has recently commenced in Borth. At the beginning of 2021, an independent group came together to consider the opportunities and threats facing the village of Borth over the coming years. In identifying the key issues, the group consider two key questions:

*“What does a better, happier, safer, sustainable and thriving Borth look like in 2030 and beyond?” and*

*“What are our biggest opportunities and threats?”*

Initial discussions have been aligned with the Well-being of Future Generations (Wales) Act (2015) and aims to facilitate discussions which can lead to a thriving, happier, sustainable and greener future for the village community, and all involved: residents, tourists, businesses and third sector (charities and volunteers) and statutory bodies.

However, a significant amount of work is underway in Borth and Ynyslas to tackle the challenges that lie ahead. A community-based group, ‘Borth 2030’ has been established, in order to consider the opportunities and future threats facing the village and to find solutions that will lead to a happier, sustainable and greener future for Borth. In addition, Ceredigion County Council and Natural Resources Wales are working collaboratively with AECOM to develop an outline business case and design a coastal protection scheme to protect communities in north Ceredigion from the risk of coastal flooding and erosion.

The scheme will protect many homes, businesses, tourists and local amenities and the road and train networks. Furthermore, the **Welsh Information for Nature-based Solutions<sup>219</sup> (WINS)** (developed by NRW), provides an opportunity to identify potential solutions to tackle inequalities arising from the exposure to flooding in Ceredigion. The fight against flooding and coastal erosion in areas like Borth will be on-going for future generations.

The **West Wales Shoreline Management Plan (SMP2)<sup>220</sup>** sets out the shared strategic approach (Pembrokeshire, Ceredigion, Powys, Conwy and Ynys Môn) for managing the coastline from coastal flooding and erosion in order to reduce the risks to people and the natural environment over the next century.

Shoreline Management Plans split the 100-year period over the short term (2005-25), medium term (2025-2055) and long term (2055-2105). The Plan used four approaches that can be applied to each policy unity, for each period. These include:

- Hole the line (HTL) by maintaining or changing existing standard of protection
- Advance the line (ATL) by building new defences on the seaward side of the original defences
- Managed realignment (MR) which allows the shoreline to move backwards and forwards, with management to control or limit the movement
- No active intervention (NAI) where there is no investment in coastal defences and natural processes are allowed to continue to create an evolving coastline

The following table sets out the potential risk (over the next 100 years) and the suggested management approach for the coastal areas in Ceredigion, outlined in the West Wales SMP2. *(Note: this only provides a summary of some of the main coastal areas at risk in Ceredigion; refer to SMP2 for an extensive list).*

**Table 7.8: Potential risks to some coastal areas in Ceredigion over the next 100 years and suggested management approach, outlined in the West Wales Shoreline Management Plan (SMP2).**

AREA	RISK	MANAGEMENT APPROACH		
		2005-2025	2025-2055	2055-2105
POPPIT DUNES, NEAR CARDIGAN	Significant flood risk in the future to properties at Poppit and the possible loss of property within the Dunes. Potential loss of areas of the Caravan Park in the future, subject to development of a long-term plan of management.	MR	MR	MR
LLANGRANNOG	In the medium to long term, sea level rise could put properties at risk and lead to a degraded beach, separated from the village.	HL	MR	MR
NEW QUAY HEAD TO TRAETH DOLAU	Erosion of the cliffs, potential loss of property, deterioration of defence at Rock Street and loss of access.	MR	MR	NAI
NEW QUAY BAY	Potential loss of property, increased erosion and cliff instability with sea level rise.	MR	MR	MR

<sup>219</sup> Natural Resources Wales (NRW) (2022). Welsh Information for Nature-based Solutions (WINS). [Online]. Available at: [Welsh Information for Nature-based Solutions \(WINS\) \(arcgis.com\)](#)(Accessed: 09.02.22).

<sup>220</sup> Cardigan Bay and Ynys Enlli to the Great Orme Coastal Group. [Online]. Available at: [Main Document | GABC \(grwparfordirolgorllewincymru.cymru\)](#) (Accessed: 10.02.22).

AREA	RISK	MANAGEMENT APPROACH		
		2005-2025	2025-2055	2055-2105
<b>ABERAERON HARBOUR</b>	Current flood defences are unlikely to provide adequate protection in the future.	HL	HL	HL
<b>LLANRHYSTUD BAY</b>	Naturally eroding cliffs vulnerable to sea level rise. Potential flood risk to the Caravan Park.	MR	MR	MR
<b>TAN Y BWLCH (ABERYSTWYTH)</b>	Slowly eroding shingle ridge, sensitive to sea level rise. Present risk of normal tidal flooding to local areas of the valley.	MR	MR	NAI
<b>SOUTH MARINE TERRACE, MARINE TERRACE AND VICTORIA TERRACE (ABERYSTWYTH)</b>	With no active intervention, the defence might fall within epoch 1 with erosion resulting in the loss of the promenade. Resulting in risking the loss of properties.	HL	HL	HL
<b>BORTH VILLAGE</b>	Potential increase of flood risk area to include much of Borth village.	HL	HL	MR

Source: Cardigan Bay and Ynys Enlli to the Great Orme Coastal Group (2011), SMP2<sup>221</sup>

In addition to the coastal adaptation outlined in the SMP2, the Ceredigion County Council's **Local Flood Risk Management Strategy** outlines the local approach to deliver flood and coastal erosion risk management.<sup>222</sup>

Further work will be required to explore where **carbon mitigation** and **adaptation opportunities** overlap, in order to combine resources and maximise effectiveness. For example, a nature-based solution, such as tree planting, is both an adaptation and mitigation response to address climate change. Planting trees will help reduce soil erosion flooding in a number of ways (by decreasing surface run-off and increasing water infiltration etc.), whilst simultaneously sequestering carbon from the atmosphere.

Wales is one of the worst affected nations in the world for **biodiversity loss**. Research by the State of Nature Partnership highlights that one in six species in Wales is threatened with extinction.<sup>223</sup> Ceredigion's rich variety of species and habitats are under threat due to the unsustainable management of agricultural land and woodland, climate change, invasive non-species and pollution of freshwater habitats.<sup>224</sup> As reflected in the **CCRA3 (Wales Summary)**,<sup>225</sup> the loss of such wildlife will have a direct impact on our health and well-being as ecosystem goods and services (such as, fresh water and food, regulation of floods and disease outbreaks, and recreational benefits) will no longer be adequate to meet our needs. The Well-being Survey highlights this concern amongst Ceredigion residents, as *the effects on wildlife and biodiversity loss* ranked within the top three future concerns about the local environment.

As reflected in the 2021 Future Trends Report, a trend is emerging towards decreasing ecosystem resilience in Wales (a trend also experienced at a local level), which means that natural resources are less able to resist, recover and adapt to change and thus cannot provide ecosystem services in the same way in the longer term. Without addressing the root causes of biodiversity loss and targeting interventions to help species recovery where necessary, sustainable development, the quality of life of future generations in Ceredigion and the achievement of **A Resilient Wales, A Healthier Wales and An Equal Wales** will be seriously threatened.

<sup>221</sup> Cardigan Bay and Ynys Enlli to the Great Orme Coastal Group. [Online]. Available at: [Main Document | GABC \(grwparfordirolgorllewincymru.cymru\)](#) (Accessed: 10.02.22).

<sup>222</sup> Ceredigion County Council (2014). Local Flood Risk Management Strategy October 2014. [Online]. Available at: [local-flood-risk-management-strategy.pdf \(ceredigion.gov.uk\)](#) (Accessed: 11.02.2022).

<sup>223</sup> State Of Nature (2019). 'State of Nature Report 2019'. [Online]. Available at: [State-of-Nature-2019-UK-full-report.pdf \(nbn.org.uk\)](#). (Accessed: 27.09.21).

<sup>224</sup> Natural Resources Wales (2021). 'Mid Wales Area Statement: Sustainable land, water and air'. [Online]. Available at: [Natural Resources Wales / Sustainable land, water and air](#) (Accessed: 27.09.21).

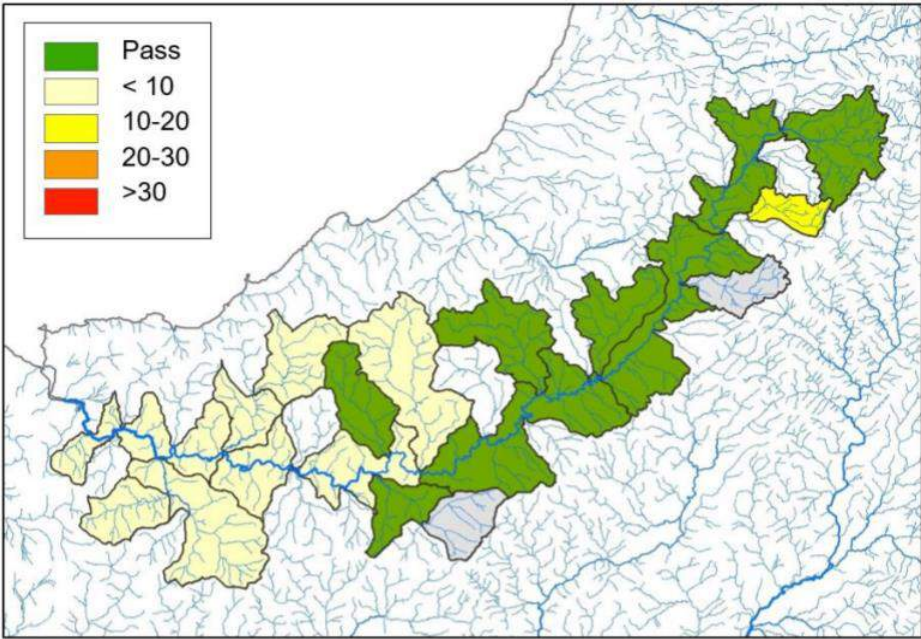
<sup>225</sup> Dr. Alan Netherwood (2021) Evidence for the third UK Climate Change Risk Assessment (CCRA3). [Online] Available at: [CCRA-Evidence-Report-Wales-Summary-Final.pdf \(ukclimaterisk.org\)](#) (Accessed: 02.02.22).



The actions associated with feeding our population have led to significant environmental damage. According to Natural Resources Wales, **ammonia air pollution emissions** have stabilised across the UK, however, they have significantly increased in Ceredigion. Ammonia (NH3), a pollutant largely from agricultural activity has a damaging impact on biodiversity. Disposition of ammonia to the environment can cause large changes to plant communities and affect the animal species that rely on them. The increase in Ceredigion can be attributed to a high prevalence of intensive agriculture and slurry related pollution.<sup>226</sup> As a result, the survival of the rich variety of rare lichens in the county are under threat. This is particularly concerning as lichens are a keystone species and are therefore vital to the health and well-being of the entire ecosystem. Immediate action is required if we are to address the long-term threat to our environment and future generations.

New evidence by Natural Resources Wales found that the lower parts of the River Teifi have failed **phosphate level** standards, an outcome also experienced within Special Area Conservation (SAC) rivers across Wales. Too much phosphate can cause a form of water pollution known as eutrophication, resulting in decreased levels of oxygen and the subsequent destruction of plant and animal life. This threatens some of Wales’ most special wildlife that inhabit the river Teifi, such as the Atlantic salmon and wild trout. Phosphates can enter river systems from land management practices, sewerage and foul water that contain detergents and food waste. The river Teifi has also suffered several pollution incidents such as those recorded in December 2016 and June 2017.<sup>227</sup> Of the water bodies assessed in the Teifi, eight passed and eight failed phosphate levels. All of the failing water bodies are in the lower catchment (refer to Figure 7.22), which includes the towns of Lampeter, Newcastle Emlyn and Cardigan, where farming is more intensive.

**Figure 7.22: Map of phosphorus compliance for Afon Teifi SAC. Water bodies shaded green pass their target, other colours fail to meet the target**



Source: Natural Resources Wales (2021)<sup>228</sup>

In light of this new evidence, Local Planning Authorities are required to ensure that all planning applications within the SAC catchment area meet stringent tests. This has created an impasse on certain developments, which could have damaging impacts on the local economy. The situation is particularly acute for rural Ceredigion as the County is already facing a housing crisis; house prices have spiralled, younger people are finding it increasingly difficult to get on the housing ladder and the need for affordable and good quality housing is increasing. Phosphate pollution is a

<sup>226</sup> Natural Resources Wales (2021). ‘Mid Wales Area Statement: Sustainable land, water and air’. [Online]. Available at: [Natural Resources Wales / Sustainable land, water and air](#) (Accessed: 27.09.21).  
<sup>227</sup> Natural Resources Wales (2021). ‘Compliance Assessment of Welsh River SACs against Phosphorus Targets’. [Online]. Available at: <https://cdn.cyfoethnaturiol.cymru/media/693025/compliance-assessment-of-welsh-sacs-against-phosphorus-targets-final-v10.pdf?mode=pad&rnd=132557227300000000> (Accessed: 11.10.21).  
<sup>228</sup> Ibid.

critical environmental issue with potentially detrimental knock-on economic and social impacts. It poses a risk to the health and well-being of Ceredigion residents and future generations, if left unchecked. Public bodies across the region are working together with policy makers, businesses, land managers and residents to identify and implement sustainable solutions to address the issue.

The **CCRA3 Report** (Wales Summary)<sup>229</sup> recommends changing land management practices, including improved technologies to measure nutrient input and better soil conservation. The report identifies an opportunity to improve climate resilience for land management, Net Zero and nature protection by integrating adaptation into national policies such as, **Wales' Sustainable Farming and Our land Strategy** and **Natural Resources Policy**.

The **Welsh Information for Nature-based Solutions**<sup>230</sup>, provides an opportunity for the Public Services Board to identify potential solutions to tackle nutrient enrichment in Ceredigion. These include but are not limited to, restoration of land well connected to the local water environment, hedgerow planting in proximity to agricultural land and the planting of riparian woodland.

Ceredigion is one of the richest parts of Wales for landscape and agriculture. The agricultural and fishing sector employ a large number of people in Ceredigion, approximately 4,500<sup>231</sup> (equating to 12.6% of the total labour force), providing food for Wales and further afield. **Food and nutrition security** are important determinants of health and well-being. However, COVID-19, Brexit and Climate Change threaten its stability. The pandemic changed consumer behaviour (e.g. panic buying and stockpiling), leading to food shortages nationally, whilst Brexit continues to impact supply chains and agricultural funding, and climate change threatens global food production. Whilst all residents are affected, vulnerable population groups are particularly at risk (e.g. those on low incomes, families with children, farmers, fishers and those who live in areas of deprivation). For example, job losses due to the COVID-19 pandemic has caused an increased reliance on food banks for low-income households in Ceredigion (refer to section 7.6).

Farmers have faced extreme pressures recently; the COVID-19 pandemic hit the agricultural communities at a time when they are already facing the uncertainties of Brexit. The Welsh Government have proposed to replace the Basic Payment Scheme (BPS) (funded by the European Union), with the **Sustainable Farming Scheme (SFS)**, outlined in the **Brexit and our Land report**.<sup>232</sup> The BPS provided support via universal income, whilst the SFS scheme will provide an income stream to farmers in return for delivering sustainable land management outcomes, such as, biodiversity, clean water and animal health.

Although, environmental groups support this transition, farmers are concerned about the proposed changes.<sup>233</sup> We know that many farmers rely on income support to make a profit.<sup>234</sup> It may not be viable for the small-scale family farmer in Ceredigion to have the tools and the means to meet the sustainable land management outcomes that the scheme proposes. Furthermore, it is difficult to assess whether the payment rates will be sufficient in meeting the farmers' needs, as they are not yet available. The Welsh Government will publish an outline of the scheme in 2022, and the final consultation will take place in spring 2023. This period will be very important in ensuring that the government works closely with farmers as their future support is designed.

Ceredigion presents a great opportunity to develop and support a well-functioning food system, as the County holds a significant proportion of agricultural land (10% of Wales' agricultural land<sup>235</sup>) and has a strong history of food and culture. Future policies and land management practices will need to change in order to mitigate environmental damages, support farmers and future food security, and improve access to healthy and nutritious foods. On the individual level, consumer behaviour will need to change, for example by, reducing single-use plastic, only buying in-

<sup>229</sup> Dr. Alan Netherwood (2021) Evidence for the third UK Climate Change Risk Assessment (CCRA3). [Online] Available at: [CCRA-Evidence-Report-Wales-Summary-Final.pdf \(ukclimaterisk.org\)](#) (Accessed: 02.02.22).

<sup>230</sup> Natural Resources Wales (NRW) (2022). Welsh Information for Nature-based Solutions (WINS). [Online]. Available at: [Welsh Information for Nature-based Solutions \(WINS\) \(arcgis.com\)](#) (Accessed: 09.02.22).

<sup>231</sup> ONS (2021) Annual Population Survey - [Workplace employment by Welsh local areas and broad industry \(gov.wales\)](#)

<sup>232</sup> The Welsh Government (2018). Brexit and our land: Securing the future of Welsh farming. [Online]. Available at: [Brexit and our land - securing the future of Welsh farming \(gov.wales\)](#) (Accessed: 08.02.22).

<sup>233</sup> The Welsh Government (2021). Brexit and our Land: Securing the future of Welsh farming – our response. [Online]. Available at: [Brexit and our land - our response \(gov.wales\)](#) (Accessed: 08.02.22).

<sup>234</sup> Ibid.

<sup>235</sup> Stats Wales (2021) Type of Agricultural Land (Hectares) by Area - [Type of Agricultural Land \(Hectares\) by Area \(gov.wales\)](#)

season foods and buying local produce. Positively, we are starting to see the motivation for changes in consumer behaviour in Ceredigion. The Well-being Survey highlighted a strong desire for residents to buy local produce and support local businesses to improve their communities economic circumstances (79% of respondents – refer to page 127), a trend also experienced nationally since the beginning of the COVID-19 pandemic.

**Ash Dieback (ADB)** is the most significant tree disease to affect the UK since the Dutch Elm disease in the 1960s & 70's and has the potential to kill 90% of Ceredigion ash trees over the next 5 to 10 years.<sup>236</sup> Not only does this present an immediate danger to the surrounding areas, but it also risks the loss of ecosystem services that ash trees provide, such as, improving air quality, mitigating the effects of climate change, carbon sequestration and flood attenuation. The scale of the health and safety risk caused by Ash Dieback is substantial in Ceredigion. As such, Ceredigion County Council have developed an Ash Dieback Action Plan (ADAP) to outline how to manage the anticipated risks and issues associated with the spread of Ash Dieback across the county. Furthermore, residents can report signs of Ash Dieback via TreeAlert (Forest Research) which will support the efforts to protect the nation's trees.

In 2011, Ceredigion had the highest **ecological footprint** in Wales (3.59 gha)<sup>237</sup> (The ecological footprint is the impact of a person or community on the environment, expressed as the amount of land required to sustain their use of natural resources). Clearly, much has changed over the last decade as Ceredigion's **carbon footprint** has reduced by approximately 40% and operational carbon emissions have reduced by 27% over the last five years.<sup>238</sup> According to a new study by the World Wildlife Fund for Nature (WWF) and the University of York-based research centre, Ceredigion has the lowest carbon footprint in the UK (10.8 CO<sub>2</sub>e).<sup>239</sup> This could be attributed the increase use of renewable energy tariffs and installation of solar panels on homes (10% of homes have them installed in Ceredigion, compared to the UK average of 7%).

This is a very encouraging trend and contributes positively to achieving '**A Globally Responsible Wales**' and Ceredigion County Council's and the Welsh Government's aim to achieving net zero by 2030. However, further data is required, in particular local data on the ecological footprint of the county, to truly assess the longer-term impacts.

## Sustainable Management of Natural Resources

Natural Resources for Wales (NRW) published their **second State of Natural Resources Report (SoNaRR2020)** in 2020, this report aims to bridge the gap between where we are and where we want to be. The report builds on the evidence base in the first SoNaRR, illustrating some of the key challenges, priorities and opportunities for the sustainable management of natural resources. The report sets out four aims that fit within sustainable development and the achievement of the well-being goals (see Table 7.9). NRW's **Mid Wales Area Statement**, published in 2021, outlines the key challenges facing Mid Wales and what can be done to meet those challenges. Table 7.9 provides an indication of Ceredigion's situation against the four aims, using the evidence base from the Mid Wales Area Statement.

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<sup>236</sup> Ceredigion County Council (2021). 'Ceredigion County Council: Ash Dieback Action Plan (ADAP)'. [Online]. Available at: [Tree Council Ash Dieback Action Plan Template \(ceredigion.gov.uk\)](https://ceredigion.gov.uk/template/ceredigion.gov.uk) (Accessed: 11.10.21).

<sup>237</sup> Stockholm Environment Institute and GHS (2015). 'Ecological and Carbon Footprints of Wales update to 2011'. [Online]. Available at: [GHD Report \(gov.wales\)](https://gov.wales/ghd-report) (Accessed: 29.09.21).

<sup>238</sup> DataCymru Core Data Set (2021) Local Authority territorial CO<sub>2</sub> emissions estimates 2005-2019 (kt CO<sub>2</sub>).

<sup>239</sup> WWF (2021). 'UK is keen to be green according to the largest ever analysis of consumers' carbon footprints'. [Online]. Available at: [UK is keen to be green according to the largest ever analysis of consumers' carbon footprints | WWF](https://www.wwf.org.uk/news/2021/09/uk-is-keen-to-be-green) (Accessed: 29.09.21)

**Table 7.9: Ceredigion’s situation against the four aim’s from the SoNaRR report, using the Mid Wales Area Statement (MWAS) as the evidence-base**

SoNaRR2020	Mid Wales Area Statement
<b><u>Aim 1:</u></b> Stocks of Natural Resources are Safeguarded and Enhanced	<ul style="list-style-type: none"> <li>Harmful impacts of unsustainable land management has increased the amount of ammonia and nitrates in our ecosystem. Urgent measures are required to address this ongoing threat to our natural environment. (MWAS – Sustainable land, water and air)</li> </ul>
<b><u>Aim 2:</u></b> Ecosystems are Resilient to Expected and Unforeseen Change	<ul style="list-style-type: none"> <li>Flooding is set to become more frequent in the future as a result of climate change, the communities of Ceredigion will need to become more adaptive and resilient. (MWAS – Sustainable land, water and air)</li> <li>Japanese knotweed and Himalayan balsam (invasive non-native species) are a particular problem in the Rheidol and Teifi Rivers. There has been an attempt to control Japanese knotweed in the Rheidol Valley, however, it is slowly returning.</li> <li>Rhododendron is an issue in the lower Dyfi, it affects both woodlands and protected sites. (MWAS- improving biodiversity)</li> </ul>
<b><u>Aim 3:</u></b> Wales had Healthy Places for People, Protected from Environmental Risks	<ul style="list-style-type: none"> <li>The communities and agricultural land along the Ceredigion coast are particularly at threat from rising sea levels. Sea defences offer some protection to coastal assets. However, the long-term protection of these vulnerable areas pose serious challenges to both communities and policy makers. (MWAS – Sustainable land, water and air)</li> <li>The rugged stretch of Wales Coastal Path along the Ceredigion coastline, Bwlch Nant Yr Arian and extensive footpath networks provide a wealth of opportunity for outdoor enjoyment. (MWAS – Reconnecting people and places)</li> </ul>
<b><u>Aim 4:</u></b> Contributing to a Regenerative economy	<ul style="list-style-type: none"> <li>Mid Wales currently supports around 10% of the Welsh tourism economy. There is a need to strike a balance between maintaining unique features of the area but also ensuring visitors continue to have a positive experience. (MWAS - Reconnecting people and places)</li> <li>Mid Wales has the highest productive forest holding in Wales, contributing to the rural economy, processing several wood companies. The forests grow annually, ensuring that we will continue to have a sustainable forestry resource in the future. (MWAS- Forestry resources)</li> </ul>

Source: NRW, SoNaRR2020 (2020)<sup>240</sup> & Mid Wales Area Statement<sup>241</sup>

## Climate & Nature Emergencies

Following the Welsh Government’s declaration of a Climate Emergency in 2019, three out of the four statutory PSB member organisations have followed suit (Ceredigion County Council, Hywel Dda University Health Board and Natural Resources Wales) in addition to some of our invited participatory partners. This means that these organisations have pledged to reduce their emissions and achieve net zero carbon by 2030. However, concerns were highlighted during our engagement with PSB organisations around meeting the 2030 target due to funding challenges.

In June 2021, the Welsh Government declared a Nature Emergency, calling for statutory targets to be set and reverse the decline in biodiversity. It has been described as an “historic step”, as the Senedd is one of the first parliaments in the world to declare such an emergency. Our engagement with PSB partners highlighted that senior engagement within public sector organisations in Ceredigion has hugely improved as a result. Both declarations are a significant positive step that underlines the urgency with which we must tackle the problem our county and the world faces.

<sup>240</sup> Natural Resources Wales (2020) The Second State of Natural Resources Report (SoNaRR2020). [Online]. Available at: [SoNaRR2020 Executive Summary \(cyfoethnaturiol.cymru\)](#)(Accessed: 28.01.22)

<sup>241</sup> Natural Resources Wales (2021) Mid Wales Area Statement. [Online]. Available at: [Natural Resources Wales / Mid Wales Area Statement](#)(Accessed: 28.01.22).

## Decarbonisation

In October 2021, the Welsh Government launched its **Net Zero Wales Plan**,<sup>242</sup> which sets out a five-year plan of action for the next stage of the country's pathway to net zero by 2050. The plan highlights the progress that has already taken place, however, states that everyone must continue to work together to deliver a greener and fairer future. It is vital that businesses, public sector bodies, communities, schools and individuals use this plan to shape their initiatives and policies moving forward to ensure that we meet the target of net zero carbon by 2050.

A net zero society, if delivered successfully, offers enormous opportunities to create a vibrant and socially-just economy. However, decarbonising Ceredigion and Wales will be a huge challenge. It needs careful consideration to ensure that it improves the lives and conditions for the most marginalised and vulnerable.

For Ceredigion, the creation of new job opportunities brought about by decarbonisation could bridge the skills mismatch and reduce unemployment rates (refer to section 6.3 Broadening Horizons: First Home and Job), and more efficient transport and heating systems could help tackle transport and fuel poverty, creating safer, more cohesive and prosperous communities. Cleaner growth will have positive environmental impacts for the County, particularly over the longer-term. Furthermore, the wider benefits such as, improved health and well-being will reduce the demand on the local health service and social care sector.

Ceredigion has a huge potential in renewable energy generation, already producing more renewable electricity than it consumes (117% of electricity consumption is met by renewables<sup>243</sup>). This is due to a combination of low electricity consumption and its diverse renewable energy generation, including hydropower, onshore wind and biomass electricity and CHP. The County has the second highest capacity for biomass heat projects in Wales (Powys has the highest) and the largest hydropower project in Wales, Rheidol Power Station (capacity of 56 MW).

However, transitioning to a net zero society will require a fundamental reshaping of the economic system, which will present certain challenges. Policies and interventions become counterintuitive if they do not take into consideration the voices of the communities that they effect. For example, this can be seen in recent controversies over the National Trust's aim to plant more than 20 million trees and the subsequent land use changes. Although well-intentioned, these changes raise real concerns over the potential negative impacts on food production, farmers and rural communities.

Additionally, retrofitting homes and the phasing out of fossil fuels (such as oil and gas) will be particularly challenging in Ceredigion, given that a high proportion of properties are heavily reliant on oil, are old stock and energy inefficient.

Furthermore, decarbonisation will have an impact on the future of work. A transition to a green economy will have an uneven impact on different sectors and certain groups. The creation of 'green' jobs (particularly in construction, manufacturing and engineering) could reproduce existing occupational gender segregation. As reflected in the **Inequality in a Future Wales Report**<sup>244</sup>, routes into 'green' jobs are often through construction training. In 2019/20, 95% of all construction apprenticeships were men<sup>245</sup>, meaning women will benefit less from this transition. Furthermore, it is likely that there is a low level of representation from the ethnic minority groups and people with disabilities within the construction sector.<sup>246</sup> On the other hand, certain male dominated sectors may also experience heavy job losses (such as people working in fossil fuels, heavy industry and vehicle manufacturing). Table 7.10 summarises the potential challenges and opportunities brought about by decarbonising Ceredigion.

<sup>242</sup> Welsh Government (2021) All Wales Plan 2021-25: Working Together to Reach Net Zero. [Online]. Available at: [WG43508 Working together to reach Net Zero: All Wales Plan 2021-25 \(gov.wales\)](#) (Accessed: 01.02.22)

<sup>243</sup> Welsh Government (2018). 'Energy Generation in Wales: 2018'. [Online]. Available at: [energy-generation-in-wales-2018.pdf \(gov.wales\)](#) (Retrieved: 17.01.22)

<sup>244</sup> Dr MacBride-Stewart, S. and Parken, A. (2021). Inequality in a Future Wales: Areas for action in work, climate change and demographic change [Online]. Available at: [FGCW Equalities-Report E-UPDATED.pdf \(futuregenerations.wales\)](#) (Accessed: 02.02.22).

<sup>245</sup> Statistics Wales (2020) Statistics Wales (2020) Apprenticeship learning programmes started by quarter, sector and programme type. [Online]. Available at: [Apprenticeship learning programmes started by quarter, sector and programme type \(gov.wales\)](#) (Accessed: 02.02.22)

<sup>246</sup> Ibid.



**Table 7.10: A summary of the potential challenges and opportunities brought about by transitioning to a net zero society**

Challenges	Opportunities
The creation of 'green' jobs could reproduce existing inequalities within the benefited sectors	Creation of new 'green' jobs (construction, engineering and manufacturing). This presents a good opportunity for Ceredigion as the construction sector makes up 9% of all industries. <sup>247</sup>
Job losses in high emitting industries (motor repair and gas industries)	Enhanced skill base
The need to support workers to adapt their skillset or retrain out of declining industries	More efficient transport and heating systems
Land use changes negatively impacting farmers	Physical and mental health benefits with the reduction of fuel and transport poverty (particularly for children, the disabled and elderly people)
Retrofitting old housing stock	Improved energy security, with a more resilient economy that relies less on fossil fuels and imported gas
Phasing out oil in heavily dependent areas	Reduced demand on the NHS and social care
Phasing out of mains gas (relatively cheap way to heat properties), the impact on lower income households	Improved air quality
Financing decarbonisation	Improved quality of life

Organisations in Ceredigion are already making good progress in reducing their carbon emissions. The latest annual figures from the local authority show that they have already exceeded their 15% target to reduce carbon emissions by 2022/23. Carbon reduction and energy saving projects such as, LED street lighting programmes, changes to fleet vehicles, reductions in business miles and the installation of renewable energy generation (solar panels, biomass district heating etc.) have all contributed to this decrease. Furthermore, Aberystwyth University's carbon emissions are down 41% since 2011/12, largely due to the decarbonisation of grid supplied electricity each year.

The Net Zero Wales Plan provides some ideas of Pledges that individuals and organisations can make towards reaching net zero by 2050. Table 7.11 provides a summary of these suggestions.

**Table 7.11: Potential Pledges that individuals and organisations can make in order for Wales to reach net zero by 2050.**

Individual	Organisation
Chose to re-use plastics often made from fossil fuels	Commit to net zero and then produce and publish an action plan on how you will get there
Drive less – and take public transport	Encourage low carbon vehicle use, active travel or more remote working within your organisation
Buy local and avoid food waste	Minimise the waste from your products and packaging
Buy clothes that last and invest time to repair them if needed	Talk to your supply chain - ask the businesses in your supply chain how they are reducing their emissions
Turn off the light when not in use and unplug appliances	Install or procure renewable energy
Join or start a group to help develop community projects to tackle climate change	Educate and engage people on climate change
Get involved in planting trees of wildflowers in your garden or community	Plant trees on your land

<sup>247</sup> Statistics Wales (2019) – Workplace employment by Welsh local areas and broad industry. [Online]. Available at: [Workplace employment by Welsh local areas and broad industry \(gov.wales\)](https://gov.wales/workplace-employment-by-welsh-local-areas-and-broad-industry) (Accessed: 02.02.22).



A well-managed transition to a net zero society can be achieved and livelihoods can be improved. However, both the opportunities and threats of decarbonisation may be felt unequally across different communities. It is important that the public are aware of the potential positive and negative impacts of decarbonisation and are involved in the conversation. Furthermore, as reflected in the Inequality in a Future Wales report, new training in 'green' jobs should be accessible to all, and support given to help move individuals to non-traditional job roles. Progress will need to accelerate if we are to achieve net zero across the Welsh public sector by 2030, as well as a net zero Wales by 2050.

During the life stages approach, some themes are clearly cross-cutting, such as the environmental issues of climate change, decarbonisation and coastal erosion. It is recognised that the relationship between the environment and all life stages is of paramount importance and that much of the discussion featured in the adulthood section applies to all life stages. This is one area that could benefit from further work in moving forward to fully understand the relationship between the environment and different demographic groups.

## 7.4 Home and Family

### Starting a Family

**Finding a partner** is an important life event. Relationships play a central role in shaping an individual's well-being. Research by the ONS has found that people who are married or in a civil partnership in the UK are more likely to report higher personal well-being (measured by life satisfaction, feeling worthy, happiness and anxiety) than those in any other marital status. Widowed individuals report the second highest personal well-being, whilst single, separated or divorced individuals report the lowest personal well-being.<sup>249</sup> However, the quality of these relationships matter. Studies have found that poor quality or unhappy relationships have a higher negative influence on well-being than being single.<sup>250</sup>

According to the 2011 Census figures, more than half the households in Ceredigion are formed by couples, either married or in a same-sex civil partnership (13,300 or 42%), or cohabiting (3,300 or 10%). Whilst just under half the households do not live in a couple, 19% (6,000) are single, 11% (3,500) are divorced and 13% (4,200) are widowed. It is likely that **living arrangements** in Ceredigion have changed over the last decade and will continue to change in the future as non-marital cohabitation, same-sex families, single-parent households, childfree couples, and having children later on in life are increasingly common in our society.

The well-being of parents and families depends greatly on the **economic circumstances of the household**. The Well-being Survey supports this as respondents ranked *a stable income* as the third most valuable asset to their local economy (see Figure 7.23). Income poverty relative to the UK median is one of the Welsh Governments National Indicators. This indicator measures income inequality, not living standards. Ceredigion is underperforming on this measure, nearly one third of households in Ceredigion (10,250) are living in poverty (living on less than 60% of the UK average income)<sup>251</sup> and this figure is increasing. Between 2018 and 2020 the number of households living in poverty increased by 9% (or 856 households).

The situation in Ceredigion is a significant concern as it can bring about a multitude of stresses to the family/household, such as food and fuel poverty, debt, restricted social opportunities, and the breakdown of family

<sup>248</sup> Welsh Government (2021). All Wales Plan 2021-25: Working Together to Reach Net Zero. [Online]. Available at: [WG43508 Working together to reach Net Zero: All Wales Plan 2021-25 \(gov.wales\)](#) (Accessed: 28.01.22)

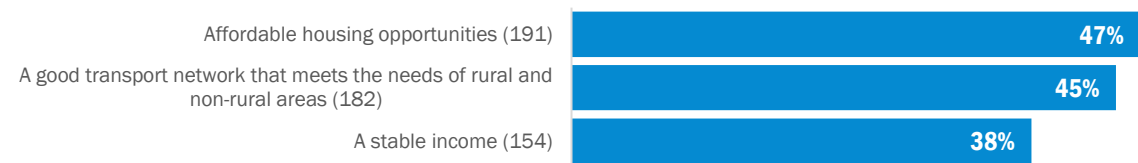
<sup>249</sup> ONS (2019). 'Personal and economic well-being: what matters most to our life satisfaction?' [Online]. Available at: [Personal and economic well-being - Office for National Statistics \(ons.gov.uk\)](#) (Accessed: 4.10.21).

<sup>250</sup> Robles, T.F., Slatcher, R.B., Trombello, J.M. & McGinn, M.M. (2014). Marital quality and health: A meta-analytic review. *Psychological Bulletin*, 140 (1), 140-187.

<sup>251</sup> CACI Paycheck directory (2020). 'No of HH below 60% GB median income.' [Internal].

relationships, all of which negatively impact well-being. Furthermore, this increase sets Ceredigion back on its contribution to achieving all of the 7 National Well-being Goals.

**Figure 7.23: Q18. Which three things do you value most in a prosperous community?**



Source: Regional Well-being Survey (2021)

The **economic impact of the COVID-19 pandemic** is likely to lead to reduced household incomes in Ceredigion and increase absolute poverty in the coming years. The restrictions put in place to limit the spread of the virus resulted in certain types of work and households being hit the hardest (e.g. leisure and hospitality jobs, self-employed workers, travel and transportation jobs etc.). Some workers in these sectors will have been supported by the Coronavirus Job Retention Scheme (CJRS) and the Self-Employment Income Support Scheme (SEISS). However, it is reasonable to expect reductions in income for workers in shut-down sectors, due to earning cuts or redundancies. Furthermore, the ending of the £20 Universal Credit uplift at the end of October 2021 has the potential to widen health inequalities and leave the 4,600 individuals on Universal Credit in Ceredigion<sup>252</sup> even further behind the average for living standards.

There are, however, some encouraging signs of recovery, as Ceredigion has seen a sustained decrease in the Claimant Count (the number of people claiming benefits principally for the purposes of being unemployed), which by August 2021 had fallen to its lowest level since the pandemic began (1,425 claimants).

In the UK, **home ownership** has long been viewed as the most sought after housing tenure. Research by the ONS has found that people who own their houses outright or have a mortgage, rate their life satisfaction more than those who are renting.<sup>253</sup> The combination of local house prices above the national average (£183,750 compared to £175,000<sup>254</sup>) and local earnings below the national average (£26,400 compared to £28,300<sup>255</sup>) means that Ceredigion has one of the highest affordability ratios nationally; this has been the case for the last 20 years. In Ceredigion, full-time employees could typically expect to spend around 7 times their earnings on purchasing a home (Figure 7.24).

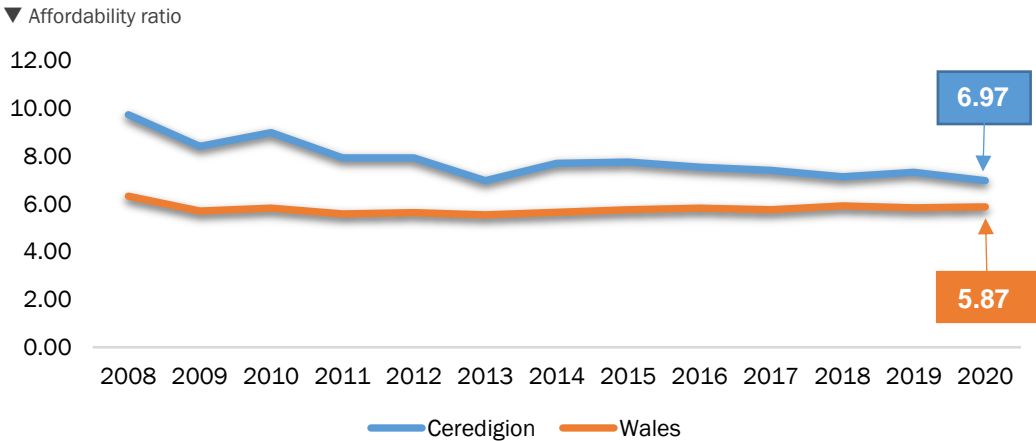
<sup>252</sup> Department for Work and Pensions (2021). 'Universal Credit Statistics'. [Online]. Available at: <https://www.gov.uk/government/collections/universal-credit-statistics>. (Accessed: 5.10.21).

<sup>253</sup> ONS (2019). 'Personal and economic well-being: what matters most to our life satisfaction?' [Online]. Available at: [Personal and economic well-being - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/qualityoflife/articles/personalandeconomicwellbeingwhatmattersmosttoourlifesatisfaction/2019-03-28) (Accessed: 4.10.21).

<sup>254</sup> ONS (2021). 'House price to workplace-based earnings ratio.' [Online]. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian> (Accessed: 4.10.21).

<sup>255</sup> Ibid.

**Figure 7.24: Ratio of house prices to work-placed earnings in Ceredigion and Wales, 2020**



Source: ONS, ASHE Table 8 (2020)

This means that it can be very difficult for residents to buy in Ceredigion, particularly for the younger population trying to get on the property ladder. This concern featured heavily in our Well-being Survey, with 62% of respondents concerned about the future of housing affordability in Ceredigion (Figure 7.25), and was consistently mentioned as one of the biggest challenges in the future, in the written comments and at stakeholder events.

**Figure 7.25: Q19. Looking ahead, what concerns you the most about prosperity in the county?**



Source: Regional Well-being Survey (2021)

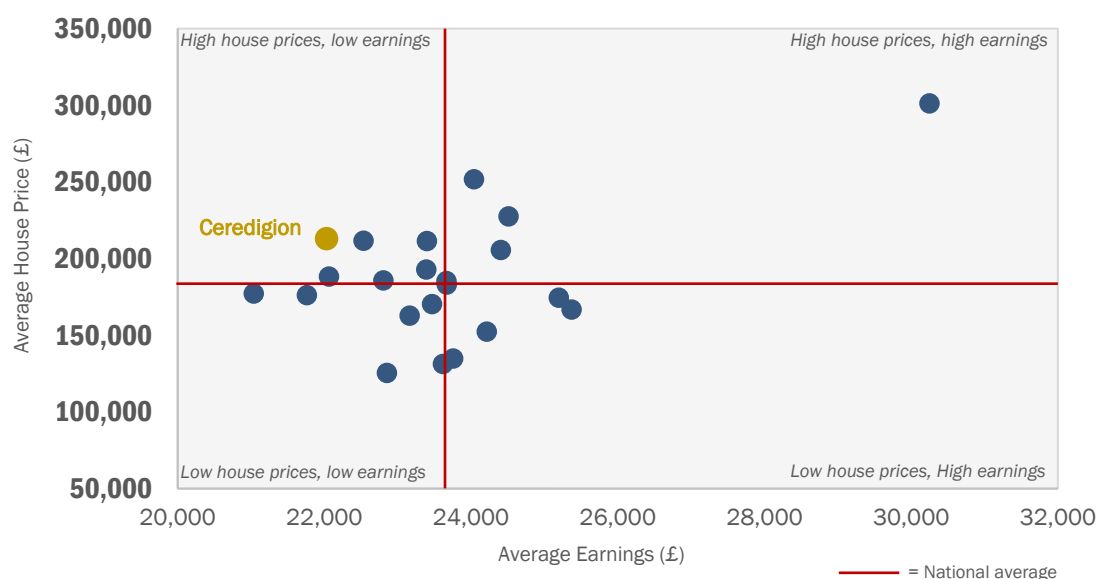
However, for the first time since 2013 the housing affordability ratio dropped below 7 in Ceredigion, as earnings increased by more than house prices. The COVID-19 pandemic however, is very likely to have reversed that trend during 2020, as the West Wales region along with other parts of the nation saw a ‘housing boom’ that in Ceredigion saw house prices reach £212,987 by March 2021, rising from £185,484 just twelve months prior, and this 14.8% increase is the highest increase in the county for a decade. Since then, Wales as a whole has seen an increase in prices, and this looks set to continue as the imbalance of demand versus supply continues to push prices up and place additional pressure on the housing market both local and nationally.

**Low incomes and high rents** also means that it can be difficult to afford to rent locally. The average property rent in Ceredigion is approximately £730, however rental prices vary across the county and by property type.<sup>256</sup> Rental supply can be quite limited in many areas outside Aberystwyth, and even within the town the rental market is heavily skewed towards student housing, which pushes prices up.

When the level of average annual earnings is mapped alongside property prices, Ceredigion is very firmly in the ‘High House Price and Low Earnings’ category, and has the ‘worst’ ratio between house prices and earnings nationally, i.e. the highest house prices and the lowest earnings, see Figure 7.26.

<sup>256</sup> Home.co.uk (2021). ‘Ceredigion Market Rent Summary’. [Online]. Available at: [Home.co.uk: Ceredigion Market Rent Summary](https://www.home.co.uk/ceredigion-market-rent-summary) (Accessed: 4.09.21).

**Figure 7.26: Average House Prices compared with Average Earnings across Wales**



Source: HM Land Registry, House Price Index & ONS, Annual Survey of Hours and Earnings (2020)

During 2020, Wales also saw the **largest increase in first time buyers' deposits** across all regions of the United Kingdom at 25%. In cash terms this was an increase of £6,634.<sup>257</sup> Additional support for first time buyers, better quality and more affordable housing stock and an increase in better paid jobs within the county will be required in the future in order to make buying or renting a home more affordable for the local person in Ceredigion. To meet this need, alternative housing options may also become more common in Ceredigion, such as Community Led Housing, which is used successfully elsewhere in Wales, including the neighbouring counties of Gwynedd and Carmarthenshire.

Ceredigion has a **high proportion of old housing stock**, which often have problems of excessive cold and damp, as well as fall and trip hazards. This makes it difficult to adapt and improve the safety and energy efficiency of the homes. These issues may be exacerbated in the rural communities of Ceredigion, which may be subject to more exposed conditions and do not have access to mains gas systems. Poor quality housing in rural areas (e.g. Llansantffraed 1, Lledorod and Melindwr), coupled with relatively high overcrowding rates in a few areas in towns (Aberystwyth, Lampeter and Cardigan) drive Ceredigion's relatively poor housing position.<sup>258</sup> Poor quality and inadequate housing can impact our health and well-being, for example, it can lead to problems such as, chronic diseases and injuries and can have harmful effects on childhood development.

According to the **Inequalities in a Future Wales Report**, women, minority ethnic and disabled people are more likely to experience housing difficulties and claim housing benefits, and are less likely to own a property. Similarly, approximately 50% of the Black, Asian and minority ethnic population in Wales live in rented properties, compared to just under a third of the white population.<sup>259</sup> Although, there is a greater likelihood that women, LGBTQ+, ethnic minority communities and people with disabilities will live in poor housing, the majority of people who are homeless or rough sleeping are men.<sup>260</sup> Many of the changes in government policy relating to housing and housing benefit changes will likely impact these groups the most. There is evidence to suggest that these groups will be the most disadvantaged by the decarbonisation of the housing system, if delivered unsuccessfully.<sup>261</sup>

<sup>257</sup> Halifax, 12 months to December 2020, UK Finance. Online: <https://www.lloydsbankinggroup.com/media/press-releases/2021/halifax/soaring-house-prices-failed-to-deter-first-time-buyers-2020.html>. Retrieved: 22/06/2021.

<sup>258</sup> Welsh Government (2019) 'Welsh Index of Multiple Deprivation (WIMD) 2019'. [Online]. Available at: [WIMD - Ceredigion \(gov.wales\)](https://wimd.gov.wales) (Accessed: 4.10.21).

<sup>259</sup> Dr MacBride-Stewart, S. and Dr Parken, A. (2021). Inequalities in a Future Wales: Areas for action in work, climate and demographic change – Full Report. [Online]. Available at: [Future Trends and Inequalities in Wales \(futuregenerations.wales\)](https://futuregenerations.wales) (Accessed: 07.02.2021).

<sup>260</sup> Ibid.

<sup>261</sup> Ibid.

## Violence Against Women, Domestic Abuse and Sexual Violence (VAWDASV)

Violence against Women, Domestic Abuse and Sexual Violence (VAWDASV) is a fundamental violation of human rights, the source and result of inequality and has damaging implications for families, children and the society as a whole. VAWDASV includes but is not limited to: domestic abuse, sexual violence, forced marriage, female genital mutilation (FGM), sexual exploitation, trafficking, child sexual abuse and coercion.

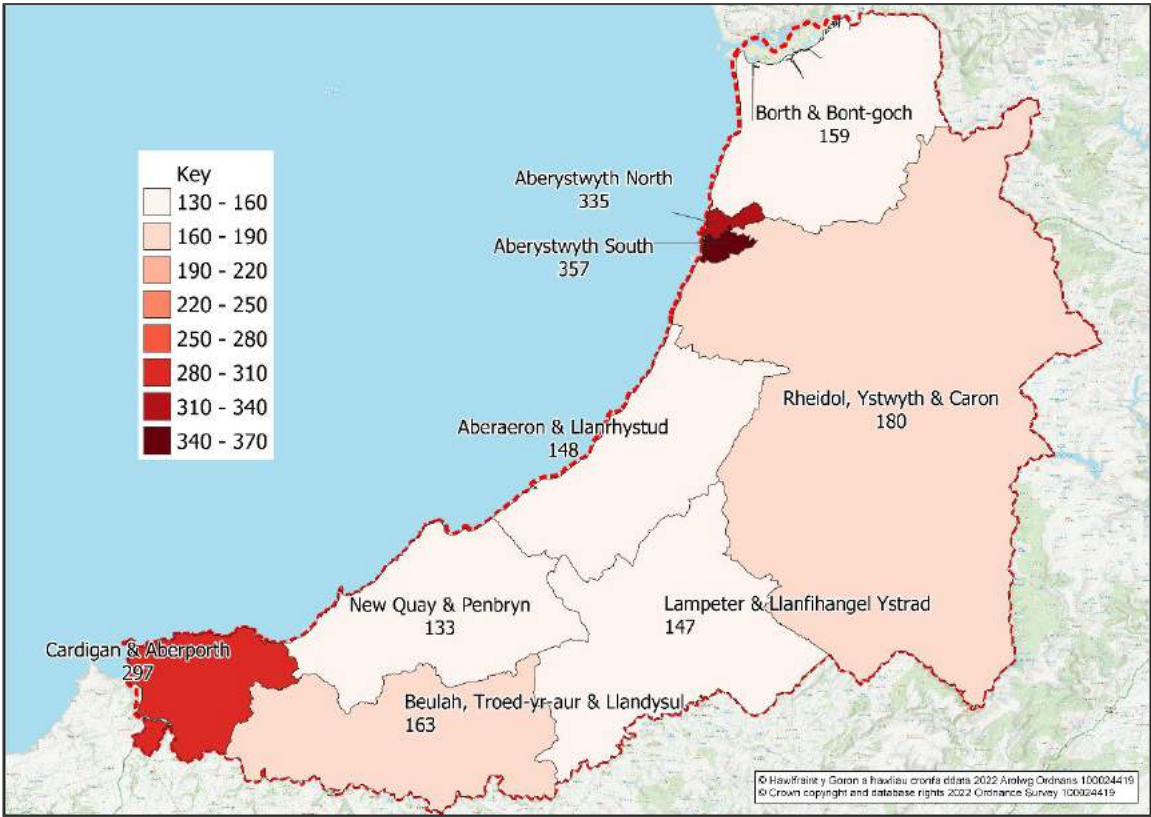
In 2015, the Welsh Government introduced the ‘Violence against Women, Domestic Abuse and Sexual Violence (Wales) Act’, which resulted in a National Strategy (2016-2021) that seeks to bring about improved public sector response to violence against women, gender-based violence, domestic abuse and sexual violence. The Well-being of Future Generations Act (Wales) 2015 also aims to prevent VAWDASV and support survivors.

The number of **violent crimes** in Ceredigion is increasing. During 2020-21, Dyfed-Powys Police reported 1,919 violence against the person incidents; this is an increase of 11% (+183 reported offences) since 2018-19.<sup>262</sup> Carmarthenshire and Pembrokeshire have also experienced an increase in the number of reported violent crimes.

This increasing trend may reflect improved recording by the police as the new requirements under the Well-being of Future Generations Act (Wales) 2015, the Social Services and Well-being (Wales) Act 2014 and the VAWDASV 2015 Act has pushed violent crimes up the agenda in the recent years, alongside increased reporting by victims.

Figure 7.27 displays the number of reported violent crimes by community area in Ceredigion during 2020-21.<sup>263</sup> Violent crimes against the person is a county-wide issue, however, offences tend to cluster around the main towns, such as, Aberystwyth and Cardigan. Ceredigion’s rural characteristics (long stretch of coastline, large mountainous areas and remote communities) often presents challenges in narrowing down potential criminal pathways. Furthermore, the Ceredigion coastline is a popular tourist destination, which brings its own implications for crime.

**Figure 7.27: Number of violent crimes against the person by community area in Ceredigion (2020-21)**



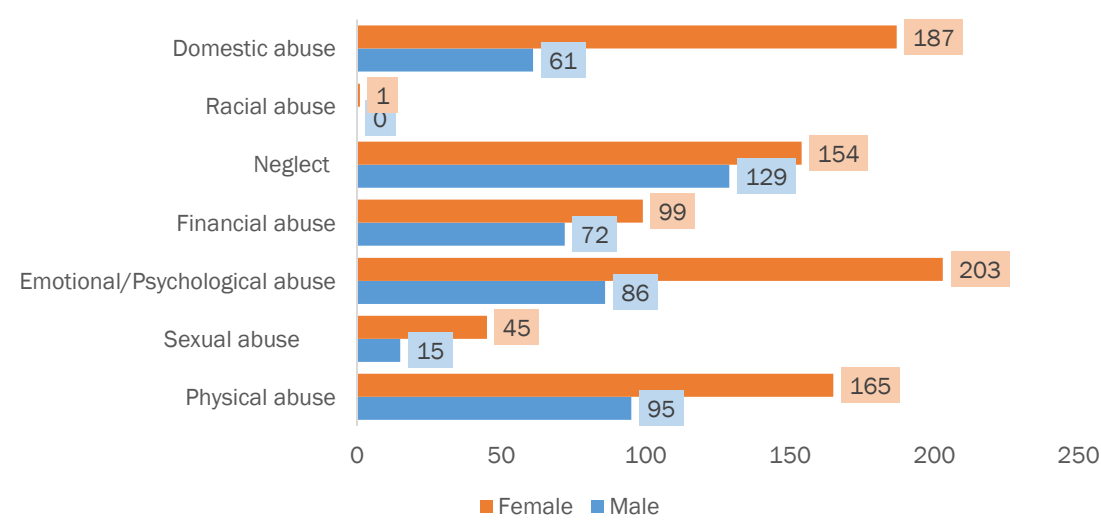
Source: Dyfed Powys Police (2021)

<sup>262</sup> Dyfed Powys Police (2021) Crimes by Community Area.

<sup>263</sup> Ibid.

The 2018-19 data is the most up to date data regarding **alleged abuse** in Ceredigion (Figure 7.28). These issues affect both men and women but as the evidence shows, women tend to be disproportionately impacted by much of the violence and abuse. The top three types of alleged abuse reported during 2018-19 in Ceredigion was: **emotional and psychological abuse** (289 victims) (this form of abuse is characterized by a person subjecting or exposing another person to behaviour that may result in psychological trauma, including anxiety, depression or post-traumatic disorder), **neglect** (when a person deprives a vulnerable adult of the care necessary to maintain the vulnerable adult’s physical or mental health) (283 victims) and **domestic abuse** (248 victims).

**Figure 7.28: Types of alleged abuse in Ceredigion by measure and gender (2018-19)**



Source: StatsWales (2019)<sup>264</sup>

Encouragingly, the number of alleged victims of emotional and psychological abuse and domestic abuse has decreased in Ceredigion since 2016-17, with domestic abuse rates falling by 40%, however, one victim is a number still too high. Conversely, the number of victims that have suffered neglect has increased significantly since 2016-17 by 47%, primarily due to a sharp increase in male victims (up 72%). Moving forward, public bodies and third sector organisations will need to monitor this increase closely, whilst ensuring that effective prevention strategies are in place to mitigate any further increase.

Further data at a local and community level is needed to understand the current and future trends of abuse rates in Ceredigion and its communities. It is likely that the pandemic has caused an increase in certain types of abuse, such as domestic abuse, as lockdown restricted the mobility and reduced the social circles of individuals at risk. In addition, the uncertainty, fear, financial and health concerns created by the pandemic may have led to violence and psychological breakdown within households. Worryingly, the Office for National Statistics reported that there was a 12% increase in the number of domestic abuse cases referred to victim support across Wales and England in mid-May 2020.<sup>265</sup>

Furthermore, there is an evidence gap regarding violence against migrant, refugee and asylum seeking women (including those from the Gypsy and Traveller community) in Wales on both a national and local level. The Unchartered Territory Rapid Review found that migrant women are particularly at risk when it comes to domestic violence as they are subjected to the additional fear that reporting abuse would lead to complications with immigration enforcement, resulting in deportation.<sup>266</sup> In addition, women from minority ethnic backgrounds may suffer cultural and social pressures and may decide to stay in their abusive relationship out of fears of becoming socially excluded. Further work is needed to ensure that the experiences of marginalised and diverse communities are recorded and are not excluded.

<sup>264</sup> Stats Wales (2019). ‘Types of alleged abuse by local authority, measure and age of alleged victim’. [Online]. Available at: [Types of alleged abuse by local authority, measure and age of alleged victim \(gov.wales\)](#)(Accessed: 18.10.21).  
<sup>265</sup> Office for National Statistics (2020). ‘Domestic abuse in England and Wales overview: November 2020’. [Online]. Available at: [Domestic abuse in England and Wales overview - Office for National Statistics \(ons.gov.uk\)](#) (Accessed: 18.10.21).  
<sup>266</sup> Assami, A. and Hopkins, J.C. (2021) ‘Uncharted Territory Review’. Public Health Wales NHS Trust.



The next iteration of the National Strategy for VAWDASV is due to be published by Welsh Government later on this year (2021). The strategy will set out the ambition of a whole system approach to VAWDASV.

## 7.5 Caring and Responsibilities

A **good work-life balance** is crucial to well-being. A healthy work-life balance will mean different things to different people. For some it might mean splitting time equally between work and leisure, while for others it's about feeling fully satisfied in both areas of life. It includes employers being supportive of well-being and mental health by providing flexibility around the non-working commitments of employees, such as, providing flexitime, home-working, compressing working hours or providing paid leave to care dependants in an emergency. Employees who are provided with these benefits report less stress, less burnout, and were 40% less likely to quit their job over the next four years than those who weren't afforded these benefits.<sup>267</sup>

It is not surprising therefore that a good work-life balance featured heavily in our Well-being Survey. Respondents noted that a better work-life balance would provide more time outside of working hours to engage in a variety of activities to support their well-being now and in the future, outlined in Figure 7.29.

**Figure 7.29: Activities identified by Ceredigion residents as being important to supporting their well-being now and in the future**



Source: Regional Well-being Survey (2021)

Sometimes it can be easy to normalise long hours or be under an extreme amount of stress, this was highlighted in The Well-being Survey, with several respondents stating that in order to improve their well-being they required “shorter working hours”, “lower expectations from managers” and “more time off work”. With the exception of Carmarthenshire, employees in Ceredigion tend to work slightly longer hours per week (37 hours) compared to employees in neighbouring local authorities in Mid and West Wales; Pembrokeshire (36.8 hours) and Powys (35 hours).<sup>268</sup> Furthermore, the proportion of full-time workers in Ceredigion (72.4%) is higher than the national average (71.0%).<sup>269</sup> This could partly explain why respondents in Ceredigion feel that they need a better work-life balance.

On the other hand, the National Survey for Wales indicates that employees in Mid Wales (this includes Ceredigion and Powys) have more choice over their working arrangements than other regions across Wales. During 2019-20, the Mid Wales region had the highest percentage of employees that chose to:

- Work from home during normal working hours (32%), the highest amongst the five regions and the national average (27%)
- Work part-time (37%), which was significantly higher than the national average (29%)
- Work flexible hours (40%), the highest amongst the five regions and the national average (34%)

Furthermore, 27% of survey respondents in the Mid Wales region selected ‘always’ when asked the question – ‘*can you influence organisation-wide decisions at work?*’, a higher percentage than the national average (19%). However, this data has not taken into consideration the impact of the COVID-19 pandemic, which will have greatly influenced the results across the five regions. It is likely that work-life balance has gained a greater awareness since the pandemic first arrived and therefore the workforce are more conscious of its importance and more confident in requesting changes to their working patterns. Similarly, it is also likely that some are re-evaluating their work-life

<sup>267</sup> Kelly, E. L. and Phyllis, M. (2020). *Overload: How good jobs went bad and what we can do about it*. Princeton University Press.

<sup>268</sup> ONS (2020). ‘Earnings and hours worked, place of residence by local authority: ASHE Table 8’. [Online]. Available at: [Earnings and hours worked, place of residence by local authority: ASHE Table 8 - Office for National Statistics \(ons.gov.uk\)](#) (Accessed: 6.10.21).

<sup>269</sup> Ibid.

balance and the opportunities that remote working can provide, such as spending more time with their family during lunch breaks.

Working and parenthood can be a very challenging balancing act for so many parents. Some will need more support than others, such as young parents, parents with disabilities or health problems, un-paid carers, low-income households, parents with drug and alcohol problems and foster parents. In particular, support will be needed by families with children with health, mental health and developmental conditions.

Caring for another person can bring fulfilment and strengthen relationships, however, it can also negatively impact an individual's personal life particularly when work and other demands are combined. Unpaid carers that work might find it difficult to juggle a job and their caring responsibilities, which could result in them quitting or reducing their work hours. Research highlights that providing more than 50 hours of unpaid care can increase the probability of self-reported poor health.<sup>270</sup> At the time of the last Census in 2011, there were 8,700 (11.4%) unpaid carers in Ceredigion (similar to the national average of 12%), with 4% providing more than 50 hours of unpaid care per week.<sup>271</sup> This is a slight increase from the 2001 Census (+1,000), whereby 10.7% (or 7,700) of Ceredigion's population were unpaid carers.<sup>272</sup>

The COVID-19 pandemic has exacerbated the difficulties that unpaid workers face. A report by Care UK indicated that three quarters of carers (74%) reported being exhausted as a result of the pandemic, and more than a third (35%) said they feel unable to manage their unpaid caring role.<sup>273</sup> Public Health Wales have also highlighted that many caring relationships have deteriorated during the pandemic, negatively impacting both the carer and the individual cared for.<sup>274</sup>

Our engagement with Ceredigion Carers Alliance, which is a forum made up of professionals that deliver services to unpaid carers and those they care for in Ceredigion, highlighted a number of changes when asked what needed to change to secure the well-being of unpaid carers for future generations. In particular, economic changes were highlighted, as outlined in Figure 7.30.

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<sup>270</sup> West Wales Care Partnership (2021). 'Carers'. [Online]. Available at: <http://www.wwcp-data.org.uk/carers> (Accessed: 6.10.21).

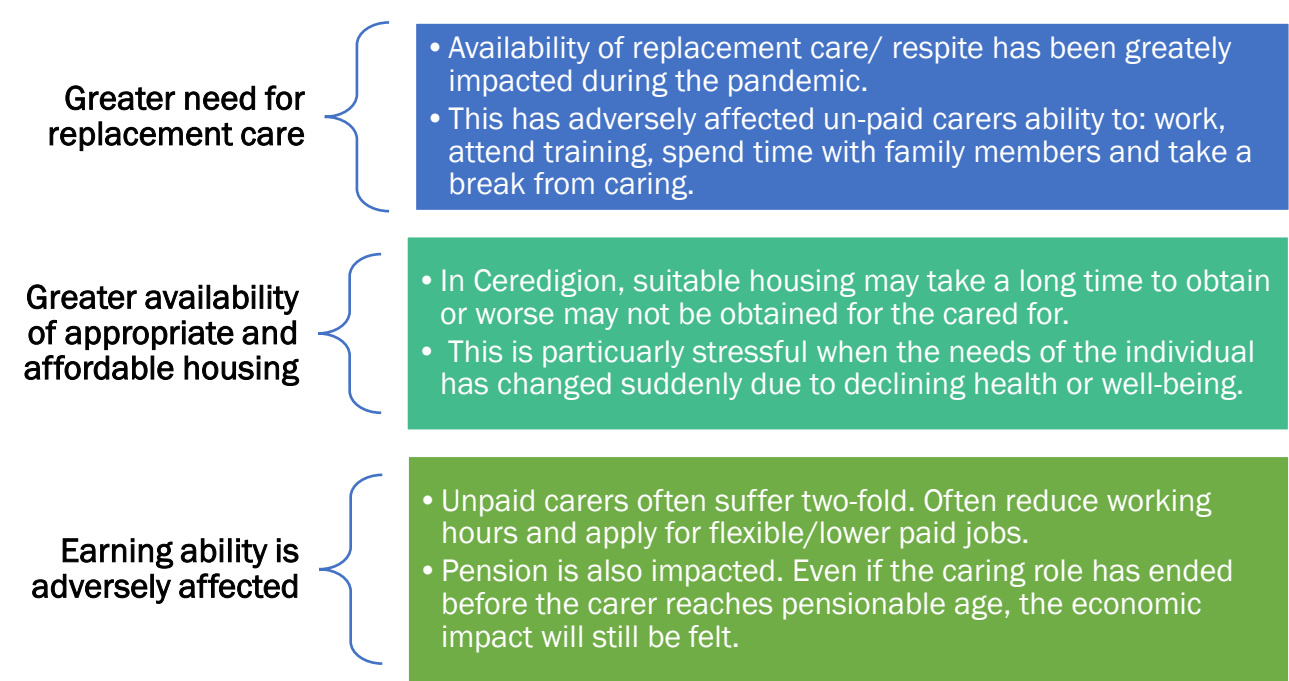
<sup>271</sup> NOMIS (2013). 'Provision of unpaid Care: QS301EW'. [Online]. Available at: <https://www.nomisweb.co.uk/census/2011/qs301ew> (Accessed: 5.10.21).

<sup>272</sup> NOMIS (2003). 'Health and provision of unpaid care: KS008'. [Online]. Available at: <https://www.nomisweb.co.uk/census/2001/ks008> (Accessed: 5.10.21).

<sup>273</sup> Carers UK (2021). 'Carers Week: worn out unpaid carers uncertain the services they relied on will continue post-pandemic'. [Online]. Available at: <https://www.carersuk.org/news-and-campaigns/news/carers-week-worn-out-unpaid-carers-uncertain-the-services-they-relied-on-will-continue-post-pandemic> (Accessed: 6.10.21).

<sup>274</sup> Burrows, D. Jones, S. Lyttleton-Smith, J. Sheehan, L. (2021). 'Voices of Carers during the COVID-19 Pandemic: Message for the future of unpaid caring in Wales'. [Online]. Available at: <https://phw.nhs.wales/publications/publications1/voices-of-carers-during-the-covid-19-pandemic-messages-for-the-future-of-unpaid-caring-in-wales/> (Accessed: 6.10.21).

**Figure 7.30: Sample responses from the Ceredigion Carers Alliance when asked – ‘What needs to change to secure economic well-being for future generations?’**



Source: Ceredigion Carers Alliance Stakeholder Event (2021)

Unpaid carers are often relied upon to fill gaps in service provision, particularly when there are pressures on public funds or when there are fewer people eligible for state provided social care.<sup>275</sup> Due to Ceredigion’s ageing demographic, it is likely that the number of unpaid carers will increase in the future. The ‘Healthier Wales’ Well-being Goal recognises the invaluable role of unpaid carers to Welsh communities. To meet this goal and the demands of our future demographic, the preventative aspects of the Social Services and Well-being (Wales) Act will need to be fully embedded in public services and key services providers. In addition, we will need to continue to recognise the vital role played by this informal workforce and provide effective support services to prevent carers from reaching crisis point.

New ways of working, such as greater remote working in the future, may not be suitable for all, for example parents, who may find it challenging to work from home whilst parenting. The pandemic has also brought about a greater awareness of the need for improved mental health support in the workplace. The Advisory, Conciliation and Arbitration Service (ACAS) found that over a third (36%) of British employers have seen their mental health support improve since the start of the COVID-19 pandemic.<sup>276</sup> Mental health and well-being support, combined with flexibility of working have been rapidly ascending the agenda in organisations during the pandemic period and provide the opportunity to help build greater resilience in the workforce in the future as well as improving well-being, allowing us to achieve a resilient and healthier Ceredigion and Wales.

<sup>275</sup> National Assembly for Wales (2018). ‘The cost of caring for an ageing population’. [Online]. Available at: <https://senedd.wales/laid%20documents/cr-ld11773/cr-ld11773-e.pdf> (Accessed: 6.10.21).

<sup>276</sup> The Advisory, Conciliation and Arbitration Service (2021). ‘Over a third of businesses report that employee mental health support has got better since the start of the pandemic.’ [Online]. Available at: <https://www.acas.org.uk/over-a-third-of-businesses-report-that-employee-mental-health-support-has-got-better> (Accessed: 6.10.21).

## 7.6 Health for the Future

### Healthy Behaviours and Adult health

**Well-being and health** are inextricably linked. There are a number of correlations between good well-being and **physical health outcomes**, such as, improved immune system response, increased longevity, slower disease progression and cardiovascular health are to name a few.<sup>277</sup>

The **West Wales Population Assessment** (published in 2022), provides an assessment of need for care and support, and the support needs of carers in West Wales. It also assesses the extent to which those needs are not being met, and the level of services required to meet those needs. The Assessment focuses on the health and social care needs of West Wales residents, and therefore aligns very closely with this Assessment.

Findings from the West Wales Population Assessment 2022 inform the health priority areas for Ceredigion. Table 7.12 provides a summary of these findings under the eleven priority areas set out in the Assessment, namely: Children and Young People; Mental Health; Health and Physical Disabilities; Learning Disability, Sensory Impairment; Autism; Unpaid Carers; VAWDASV; Older People and Dementia. For the full list of key messages, the impact of the COVID-19 pandemic on the population, and the identification of gaps and areas for improvement, please refer to Appendix 13. *(Note: these health issues and priorities are relevant to each of the life stages within the Assessment, but are located in the Adulthood Section for ease.)*

**Table 7.12: A summary of the key messages from the West Wales Population Assessment 2022 under the ten priority areas**

Population Group/ Priority Area	Summary of key messages
Children and Young People	Children and young people from areas of poverty were subject to increased risk of poor mental health and well-being. The COVID-19 Pandemic presents new challenges for Social Services in identifying children at 'risk'. Since the pandemic, the region has experienced a rise in Children and Young People seeking support with complex emotional and mental health difficulties.
Mental Health	The COVID-19 pandemic may have short-term effects on mental health due to periods of isolation; however, the long-term effects are unclear. The COVID-19 pandemic has had a worse effect on those from black, Asian and minority ethnic (BAME) backgrounds.
Health and Physical Disabilities	The situation for people with disabilities has improved; however, further work is required on accessibility. The COVID-19 Pandemic has had a lasting impact on physical and mental health for those people having to shield during the pandemic and individuals are presenting with more complex health issues due to delays in seeking help.
Sensory impairment	Both visual and hearing impairments are projected to increase in West Wales. The COVID-19 pandemic has led to a number of challenges for sensory impaired people, for example, communication difficulties, access to information, and isolation and loneliness.
Autism	Approximately 4,000 autistic people are living in West Wales. Increased funding for specialist services will be required as diagnosis rates and prevalence within the community increases. The COVID-19 pandemic has affected the care and support available for autistic people, in addition to negatively affecting their mental health and well-being.

<sup>277</sup> Department of Health (2014). 'The relationship between wellbeing and health.' [Online]. Available at: [The relationship between wellbeing and health \(publishing.service.gov.uk\)](https://publishing.service.gov.uk) (Accessed: 22.10.21).

<b>Learning Disability</b>	The population of people with a LD in West Wales is projected to remain relatively stable overall, whilst the number of people diagnosed with severe and multiple LD and older people with a LD is expected to increase. People with LD are more likely to experience poorer physical and mental health, often linked to poor diet, low levels of physical activity, smoking etc. The COVID-19 pandemic has had a particular effect on mental health and well-being of individuals with LD, the pandemic has affected access to certain services (e.g. day opportunities and short breaks).
<b>Substance Misuse</b>	The Welsh Government has recently launched its new Substance Misuse (drug and alcohol) Delivery Plan for 2019-2022. <sup>278</sup> The new plan builds on the progress made during the last strategy and is a key reference. The effect of the COVID-19 pandemic may have had a significant impact on substance misuse, however at present data is not available.
<b>Unpaid Carers</b>	Early identification and self-identification of unpaid carers is vital to ensure access to help and support. The COVID-19 pandemic negatively affected the social and economic well-being of carers (e.g. young carers missed the break from caring and social interaction with peers that school provided etc.).
<b>Older People</b>	West Wales has a higher proportion of older people than average across Wales. People are living longer with increasingly complex issues, whilst wanting to remain in their homes. The COVID-19 pandemic had a negative effect on the mental health of older people, due to social isolation and potential increased care needs due to 'long COVID'. Due to the reported mortality rates in residential care due to COVID, older people are now far more resistant to go into residential care settings, resulting in a much greater demand for alternative accommodation.
<b>Dementia</b>	The number of people living with dementia (PLWD) in West Wales is expected to increase. The COVID-19 pandemic has had a disproportionately negative impact on PLWD, as dementia is one of the age-independent risk factors for severity and death in COVID-19 patients.
<b>VAWDASV</b>	Violence against Women, Domestic Abuse and Sexual Violence (VAWDASV), is a major public health problem, a criminal justice issue and a violation of human rights. Research suggests that the COVID-19 public health restrictions has negatively affected the level of VAWDASV. It is likely that the scale and nature of VAWDASV has worsened – an increase in calls to helpline centres.

Source: Adapted from the West Wales Care Partnership (2022). *West Wales Population Assessment Overview 2022*. Pp.1 -18.

## Health Priorities: Obesity

In Ceredigion, similar to the rest of Wales and the developed world, more people are struggling to maintain a healthy weight. Over half of adults (58.4%) in Ceredigion are **overweight or obese**, which is very similar to the national average (60%).<sup>279</sup> Since 2012/13, the percentage of adults in Ceredigion who are **obese** (persons aged 16+ who have a body mass index of 30 or more) has increased by 18.1%, from 18% in 2012/13 to 21% in 2018-19 & 2019-20.<sup>280281</sup> Furthermore, the adult obesity rate in Ceredigion is catching up with the Welsh average. According to the Welsh Government, if current trends continue, 64% of adults in Wales will be overweight or obese by 2030.<sup>282</sup>

Obesity has a considerable impact on people's health and well-being, for example, having a higher BMI is the leading risk factor for living with a long-term illness.<sup>283</sup> Obesity is one of the most preventable causes of ill health and early death and is the direct cause of diseases of the heart as well as some cancers.<sup>284</sup> Furthermore, over 100,000 cases of type 2 diabetes in Wales are estimated to be associated with obesity.<sup>285</sup> Not only does obesity affect people's health and well-being, but it also has a serious impact on economic development, costing the health and care services and

<sup>278</sup> Welsh Government (2019). Substance Misuse deliver plan 2019 to 2022. [Online]. Available at: [Substance misuse delivery plan: 2019 to 2022 | GOV.WALES](#) (Accessed: 15.02.22).

<sup>279</sup> Statistics Wales (2021). Adult lifestyles by local authority and health board, 2018-1 & 2019-20. [Online]. Available at: [Adult lifestyles by local authority and health board, 2016-17 to 2019-20 \(gov.wales\)](#) (Accessed: 18.02.22).

<sup>280</sup> Ibid.

<sup>281</sup> Welsh Government (2014). Local Area Summary Statistics Ceredigion. [Online]. Available at: [LA profile framework document \(gov.wales\)](#) (Accessed: 18.02.22).

<sup>282</sup> Welsh Government (2019). Healthy Weight: Healthy Wales: Our national ambitions to prevent and reduce obesity in Wales. [Online]. Available at: [consultation-document\\_0.pdf \(gov.wales\)](#) (Accessed: 18.02.22).

<sup>283</sup> NHS (2022). Overview: Obesity. [Online]. Available at: [Obesity - NHS \(www.nhs.uk\)](#) (Accessed: 18.02.22).

<sup>284</sup> Welsh Government (2019). Healthy Weight: Healthy Wales: Our national ambitions to prevent and reduce obesity in Wales. [Online]. Available at: [consultation-document\\_0.pdf \(gov.wales\)](#) (Accessed: 18.02.22).

<sup>285</sup> Public Health Wales (2018). The case for action on obesity in Wales. [Online]. Available at: [The case for action on obesity in Wales 1118.indd](#) (Accessed: 18.02.22).

society as a whole millions. As at 2011, obesity cost NHS Wales £73 million.<sup>286</sup> Public Health Wales estimate that by 2050, the cost of obesity to NHS Wales will rise to £465 million and projects the cost to society and the economy at £2.4 billion.<sup>287</sup>

The Welsh Government's **Healthy Weight: Healthy Wales Strategy** acknowledges that the causes and drivers of obesity are complex. In Wales, widespread availability of energy dense, cheap convenience food and a decline in the desire or need to be physically active, have contributed to the increased levels of people who are overweight or obese.<sup>288</sup> Furthermore, obesity has a number of determinants, which is not exclusive to individual healthy behaviours, but incorporates other socio-economic and environmental determinants (such as, income, housing, education, gender, ethnicity etc.).<sup>289</sup>

Implementing the actions in the Healthy Weight: Healthy Wales Strategy will be key to reversing this increasing trend. The strategy places a higher priority for early intervention of overweight and obesity to drive change and promote healthy weight behaviours. PSB member organisations have already began incorporating the Strategy's core principles into their work. For example, the Strategy forms an integral part of the **Hywel Dda Health and Well-being Framework**. Hywel Dda University Health Board are also shifting toward a social model of health and well-being and long-term community driven focus on prevention. To achieve a '**Healthier Wales**', different organisations will need to work together with communities and individuals to enable change.

## Health Priority: Diabetes

According to Diabetes UK, Wales has the highest prevalence of **diabetes** in the UK.<sup>290</sup> In 2020, more than 209,015 people in Wales lived with diabetes (which equates to 7.6% of the population aged 17 and over), approximately 90% of whom have Type 2 Diabetes. In the Hywel Dda University Health Board region, this figure rises to 7.9%.<sup>291</sup> The number of people living with diabetes in Wales is increasing year on year. Much of the increase is in Type 2 Diabetes, driven largely by the ageing population and an increase in the numbers of overweight people.<sup>292</sup> It is widely accepted that the increase in diabetes prevalence is the fastest growing health crisis Wales is facing. If current trends continue, 11.7% of Ceredigion's population may have diabetes by 2025,<sup>293</sup> whilst 311,000 people in Wales could have diabetes by 2030.<sup>294</sup>

People living with diabetes have a significantly greater risk of developing a serious illness, hospitalisation and premature death, compared to the non-diabetic population. Type 2 diabetes is more prevalent in areas of deprivation. Those in the most deprived 20% of the population are one and a half times more likely than average to have diabetes at any given age. Furthermore, 9% of those living in the most deprived areas of Wales report to be living with diabetes, compared to 6% of those living in the least deprived areas (a difference of 3 percentage points).<sup>295</sup> This highlights the distinct impact that poverty and socio-economic determinants have on health.

With a new diagnosis of Type 2 Diabetes every minute, the financial pressure placed on the NHS is becoming unsustainable. NHS Wales spends approximately £500 million a year on Diabetes related care, which is 10% of its annual budget. Of concern, is a statistic reported by Diabetes UK, estimating that a further 580,000 people in Wales could be at risk of developing Type 2 diabetes.<sup>296</sup> Crucially however, Type 2 Diabetes can be prevented through

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<sup>286</sup> Public Health Wales (2018). The case for action on obesity in Wales. [Online]. Available at: [The case for action on obesity in Wales 1118.indd](#) (Accessed: 18.02.22).

<sup>287</sup> Ibid.

<sup>288</sup> Welsh Government (2019). Healthy Weight: Healthy Wales Strategy. [Online]. Available at: [North Wales Regional Partnership Board Annual Report \(gov.wales\)](#) (Accessed: 18.02.22).

<sup>289</sup> McHale, C. T., Laidlaw, A. H., & Cecil, J. E. (2020). Primary care patient and practitioner views of weight and weight-related discussion: A mixed-methods study. *BMJ Open*, 10. <https://bmjopen.bmj.com/content/10/3/e034023>

<sup>290</sup> Diabetes UK (2021). Diabetes in Wales. [Online]. Available at: [Diabetes in Wales | Diabetes UK](#) (Accessed: 18.02.22).

<sup>291</sup> Diabetes UK (2020). Cycling Nurses from Ceredigion win diabetes UK Cymru Award for their fundraising achievement. [Online]. Available at: [Cycling nurses from Ceredigion win Diabetes UK Cymru Award for their fundraising achievement | Diabetes UK](#) (Accessed: 18.02.22).

<sup>292</sup> Hywel Dda University Health Board (2016). Refresh Diabetes Plan March 2016. [Online]. Available at: [Microsoft Word - Item16Annex4 Hywel Dda Diabetes Refresh \(wales.nhs.uk\)](#) (Accessed: 18.02.22).

<sup>293</sup> Ibid.

<sup>294</sup> Diabetes UK (2021). Diabetes in Wales. [Online]. Available at: [Diabetes in Wales | Diabetes UK](#) (Accessed: 18.02.22).

<sup>295</sup> Hywel Dda University Health Board (2016). Refresh Diabetes Plan March 2016. [Online]. Available at: [Microsoft Word - Item16Annex4 Hywel Dda Diabetes Refresh \(wales.nhs.uk\)](#) (Accessed: 18.02.22).

<sup>296</sup> Diabetes UK (2021). Diabetes in Wales. [Online]. Available at: [Diabetes in Wales | Diabetes UK](#) (Accessed: 18.02.22).



lifestyle and behaviour changes, including increasing physical activity, not smoking and improving diets.<sup>297</sup> Positively, **Hywel Dda University Health Board's Diabetes Plan (refresh 2016)**,<sup>298</sup> highlights that diabetes services are improving across the region and across Wales. For example, in 2013, 300 people died from diabetes, which had fallen from 420 deaths in 2009. However, further work is needed to ensure progress continues and the current trends are reversed.

## Health Priorities: 'Long Covid'

Whilst COVID-19 symptoms may pass for most, some people are experiencing the longer-term effects of the virus. **'Long COVID'**, is a term used to describe symptoms that continue to develop after the acute phase of COVID-19, which includes both ongoing symptomatic COVID-19 (from 4 to 12 weeks) and post COVID-19 syndrome (12 weeks or more).<sup>299</sup> Recent evidence suggests that around 1 in 5 people affected by COVID-19 may still be experiencing symptoms three weeks after infection, and 1 in 10 could still be affected at three months, or longer, after initial infection.<sup>300</sup> Ongoing symptoms include fatigue, shortness of breath and difficulty concentrating, all of which affect a person's mental health, well-being and ability to work.<sup>301</sup>

Research by the ONS highlights that Long COVID disproportionately affects certain groups,<sup>302</sup> such as; gender, age, disability, deprivation and people with certain unhealthy lifestyle choices/ chronic diseases. The findings suggest the following:

- 6.6% of women compared to 5.8% of men reported experiencing long COVID
- Of any age group, those aged 30-49 were most likely to report experiencing long COVID (8.0%)
- Disabled adults (8.0%) were more likely to report experiencing long COVID than non-disabled adults (5.4%)
- Deprivation was also a contributory factor, with 8.4% of adults living in the most deprived areas of the UK reporting to have experienced long COVID, compared to 5.2% of adults living in the least deprived areas.
- Individuals with certain lifestyle related risk factors such as, smoking, physical and obesity were at a greater risk of experiencing long COVID.

It is important to note that these estimates are self-reported instances of long COVID experienced by respondents and are not clinical diagnoses. Furthermore, the data is only available at a UK level.

Recent insights show that risk factors for COVID-19 have widened health inequalities, for example, in obesity. The evidence suggests that people who are overweight or obese have an increased risk of testing positive for COVID-19 (particularly among BAME groups), be hospitalised if infected with COVID-19, be admitted to intensive care, and have a higher risk of COVID-19 related death.<sup>303</sup>

**HDdUHB 2020-21 Annual Report**, highlights that a greater understanding of the symptoms outlined above will help with long-term management, however, acknowledges that this will place an extra burden on the NHS and people's ability to return to work and life.<sup>304</sup> NHS Wales and other partners are working together to gain a better understanding of the syndrome.<sup>305</sup> People with long COVID might need a rehabilitation approach and some may need to go to the hospital for further investigation. NHS Wales and the Welsh Government have developed the **All**

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<sup>297</sup> Diabetes UK (2021). Diabetes in Wales. [Online]. Available at: [Diabetes in Wales | Diabetes UK](#) (Accessed: 18.02.22).

<sup>298</sup> Hywel Dda University Health Board (2016). Refresh Diabetes Plan March 2016. [Online]. Available at: [Microsoft Word - Item16Annex4 Hywel Dda Diabetes Refresh \(wales.nhs.uk\)](#) (Accessed: 18.02.22).

<sup>299</sup> Public Health Wales (2022). 'Long COVID (Post-COVID-19 Syndrome)'. [Online]. Available at: [Long COVID \(Post-COVID-19 Syndrome\) - Public Health Wales \(nhs.wales\)](#) (Accessed: 21.02.22).

<sup>300</sup> Welsh Government (2021). All Wales Community Pathway for Long COVID. [Online]. Available at: [All Wales Community Pathway For Long COVID | GOV.WALES](#) (Accessed: 21.02.22).

<sup>301</sup> Hywel Dda University Health Board (2021). Director of Public Health Annual Report 2020-21: Reducing Health Inequalities and Promoting Health Equity.

<sup>302</sup> ONS (2021). Coronavirus and the social impacts of 'long COVID' on people's lives in Great Britain: 7 April to 13 June 2021. [Online]. Available at: [Prevalence of ongoing symptoms following coronavirus \(COVID-19\) infection in the UK - Office for National Statistics \(ons.gov.uk\)](#) (Accessed: 22.02.22).

<sup>303</sup> Public Health England (2020). Excess weight and COVID-19. Insights from new evidence. [Online]. Available at: [Excess Weight and COVID-19 \(publishing.service.gov.uk\)](#) (Accessed: 22.02.22).

<sup>304</sup> Hywel Dda University Health Board (2021). Director of Public Health Annual Report 2020-21: Reducing Health Inequalities and Promoting Health Equity.

<sup>305</sup> NHS Confederation (2022). Long COVID care in Wales. [Online]. Available at: [Long COVID care in Wales | NHS Confederation](#) (Accessed: 21.02.22).

Wales Community Pathway for Long-COVID<sup>306</sup> and HDdUHB are offering further support for people with long COVID.

Healthy Behaviours

Positive healthy behaviours in adults is also linked to high well-being, for example, these individuals are more likely to have a healthy diet, engage in physical activity and are less likely to smoke or take drugs.<sup>307</sup>

The goal of a ‘Healthier Wales’ requires public bodies to set objectives that deliver, ‘A society in which people’s physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood’. These determinants are cross-cutting and link to other national well-being goals such as, ‘A Prosperous Wales’, ‘A More Equal Wales’ and ‘A Wales of Cohesive Societies’.

Better quality of, and access to, health care services and greater availability of, and access to, leisure services were the most common answers in response to the question on what individuals could do to improve their own physical and/or mental well-being, which featured in The Well-being Survey. Figure 7.31 summarises the main actions respondents would take or the support they would need to improve their physical and/or mental well-being.

Figure 7.31: Actions identified by respondents to improve their own physical and/or mental well-being



Source: Regional Well-being Survey (2021)

13% commented on improved access to healthcare services, which was the most common response. This included, primary care, secondary care, mental health services and dental services), such as, “... a better health service...”, “regular free health and dentistry checks” and “better access to the GP...”.

We know that Health Boards across Wales have experienced an increase in demand over the last 18 months, with NHS Wales reporting the longest waiting times on record in August 2021. Hywel Dda University Health Board’s (HDdUHB) resources are also stretched. The latest figures (August 2021) indicates that 21,178 patients are waiting for diagnostic and therapy services (that is, the procedures required for detection, identification, and treatment of a medical condition), which is an increase of 24% since August 2019 (an additional 4,100 patients). We also know that the ambulance service is experiencing challenges.

On par with improved access to health care services, was the need for greater availability of, or access to leisure and exercise classes that are appropriate, affordable and free. Comments included “better access to gyms in the more rural areas...”, “more exercise classes...” and “access to facilities at a reasonable cost”. Local authority run leisure centres in Ceredigion were shut for a prolonged period to prevent the risk of spreading COVID-19. Those that did re-open, often only allowed current members to use their services, which may partly explain the desire for greater accessibility.

According to Public Health Wales, during 2016/17 – 2018/19 Ceredigion had the **third lowest proportion of smokers in Wales** (16.6%), which is below the all-Wales average of 18.4%.<sup>308</sup> These figures correlate with the smoking attributable mortality in Ceredigion, which is also the third lowest across Wales at 228 per 100,000. Whilst smoking

<sup>306</sup> Welsh Government (2021). All Wales Community Pathway for Long COVID. [Online]. Available at: [All Wales Community Pathway For Long COVID | GOV.WALES](#)(Accessed: 21.02.22).  
<sup>307</sup> Department of Health  
<sup>308</sup> Public Health Wales (2016/18-2018/19) Adults who smoke.

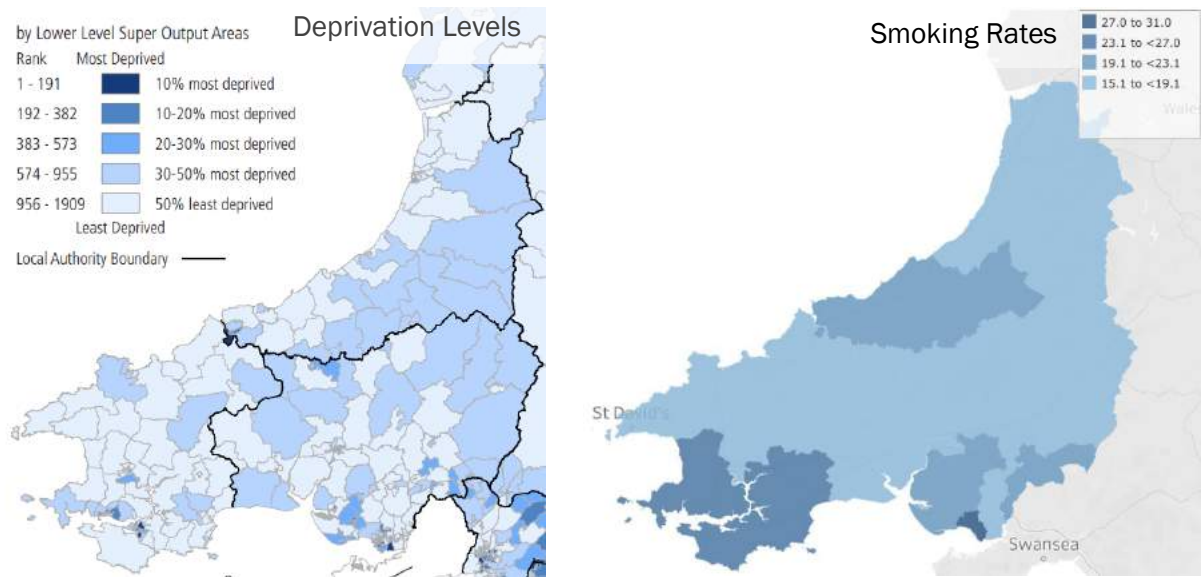
rates have been steadily falling in the HDdUHB area, Ceredigion has experienced a reversal of this trend, with annual prevalence increasing each year since 2013/14.<sup>309</sup>

The most recent data (2018/19) highlights that the HDdUHB smoking prevalence rate for children aged 11-16 years old is marginally below the national average (3.3% compared to 3.6%). National smoking rates for 11 to 15 year olds have declined since 1998 from 13% to approximately 3.6%. However, 8% of 15-16 year olds still smoke on a regular basis – and this figure has not fallen since 2013.<sup>310</sup>

Smoking rates are higher in south Ceredigion compared to north Ceredigion, and research shows that smoking rates are higher in more deprived areas.<sup>311</sup> The maps in Figure 7.32 compare deprivation across Wales to smoking rates in the Hywel Dda University Health Board region. There is some correlation between areas, such as Cardigan. Deprivation has long been considered a major risk factor to smoking and also for mental health issues, which can impact smoking rates. Research also highlights that smoking rates are higher among people with a mental health condition, people involved in the criminal justice system, adults experiencing homelessness, looked after children and people from the LGBTQ community.<sup>312 & 313</sup>

Not only does the increase in smoking rates affect our attainment of **A Healthier Wales**, but also **A More Equal Wales**. This evidence indicates that there is specific and targeted smoking cessation work still needed to be carried out.

**Figure 7.32: Map of Hywel Dda University Health Board region by deprivation levels compared to smoking rates in Hywel Dda (2019)**



Source: Hywel Dda University Health Board (2021)<sup>314</sup>

Next year's figures will be vital in understanding the impact of the COVID-19 pandemic on current and future smoking rates in Ceredigion. It is possible that smoking rates will have increased in Ceredigion as some research,

<sup>309</sup> Public Health Wales (2021)

<sup>310</sup> Action on Smoking and Health (2022). Smoking and young people. [Online]. Available at: [Smoking & Young People - Action on Smoking and Health \(ash.wales\)](https://www.ash.wales/) (Accessed: 17.02.22).

<sup>311</sup> ONS (2020). 'Smoking habits in the UK and its constituent countries'. [Online]. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandlifeexpectancies/datasets/smokinghabitsintheukanditsconstituentcountries> (Accessed: 25.10.21).

<sup>312</sup> Cox, S. Dawkins, L. Robson, D. Soar, K. (2020). 'Smoking amongst adults experiencing homelessness: a systematic review of prevalence rates, interventions and the barriers and facilitators to quitting and staying quit'. Cambridge University Press. [Online]. Available at: [Smoking amongst adults experiencing homelessness: a systematic review of prevalence rates, interventions and the barriers and facilitators to quitting and staying quit | Journal of Smoking Cessation | Cambridge Core](https://www.cambridge.org/core) (Accessed: 16.02.22).

<sup>313</sup> Action on Smoking and Health (2019). Health inequalities and smoking. [Online]. Available at: [ASH-Briefing Health-Inequalities.pdf](https://www.ash.wales/) (Accessed: 16.02.22).

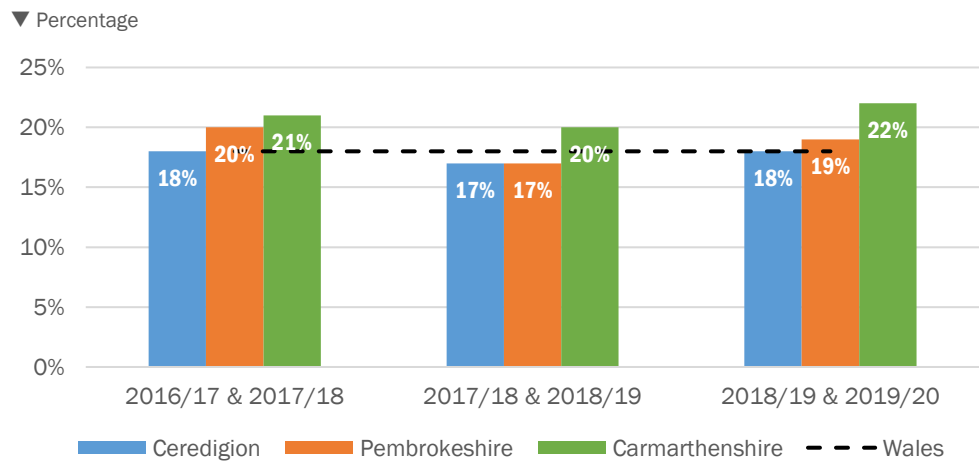
<sup>314</sup> Hywel Dda University Health Board (2021). A Rapid Desktop Tobacco and Smoking Health Needs Assessment for Hywel Dda University Health Board 2021.

such as that by Cancer Research UK, identified significant increases in smoking during the first nationwide lockdown.<sup>315</sup> This could be linked to the pandemic influencing unhealthy coping mechanisms.

According to Public Health Wales, during 2018/19 - 2019/20, 18% of adults reported that their **alcohol consumption** was more than the weekly guidance (that is, average weekly consumption above 14 units) in Ceredigion.<sup>316</sup> This is a slight increase from the previous year (1% point) and consistent with the increase nationally, however, it is still below the national average of 19% (Figure 7.33). During 2016-17, HDDUHB saw the largest rates of alcohol related hospital admissions for an alcohol specific condition across Wales.<sup>317</sup> Recent data from Public Health Wales shows that Ceredigion has seen an increase in admission rates for alcohol-specific conditions by 13% since 2015-16. Carmarthenshire’s admission rates for alcohol specific conditions substantially increased by 25% since 2015-16, whilst Pembrokeshire saw a small increase (3%). It is worth noting that both Ceredigion and Carmarthenshire introduced hospital based alcohol liaison nurses during this time, whereas Pembrokeshire does not have a hospital based alcohol liaison service.

Although data is not yet available at a local authority level that takes into the consideration the impact of COVID-19, Public Health Wales found that 18% of people reported consuming more alcohol than they did prior to the pandemic (which equates to 445,000 adults) in Wales.<sup>318</sup> Alcohol consumption in Ceredigion will need to be carefully monitored to ensure that consumption rates do not follow the national trend.

**Figure 7.33: Percentage of adults consuming above 14 units (over guidelines) in West Wales (2016-2020)**

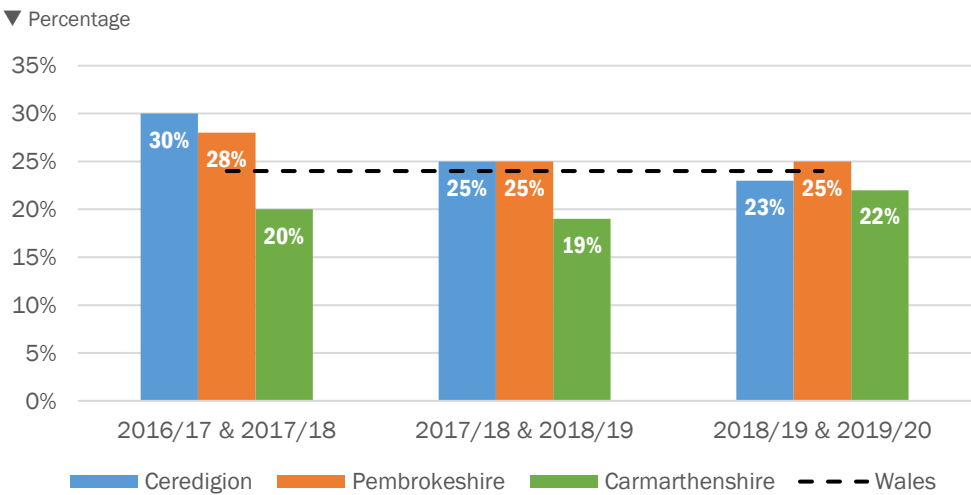


Source: Stats Wales, National Survey for Wales (2021)<sup>319</sup>  
Note: The National Survey for Wales results are self-reported. The Chart 7.33 shows two years of data combined.

According to the latest data, Ceredigion residents are also **eating less healthily** than previously. During 2018-19 and 2019-20, 23% of adults in Ceredigion reported eating five or more portions of fruit and vegetables the previous day, which is slightly below the national average (24%). Since 2016-17 and 2017-18, the proportion of adults in Ceredigion eating 5-a-day has declined by 7%. This is inconsistent with national trend, which has remained stable (Figure 7.34).

<sup>315</sup> Cancer Research UK (2021). ‘Smoking among young adults increased by 25% during first lockdown’. [Online]. Available at: [Smoking among young adults increased by 25% during first lockdown - Cancer Research UK - Cancer news](#) (Accessed: 25.10.21).  
<sup>316</sup> Stats Wales (2018-19/2019-20) Adult Lifestyles by local authority and health board.  
<sup>317</sup> Public Health Wales (2019). Alcohol specific admissions European age-standardised rates, persons, Hywel Dda local authorities, 2017/18.  
<sup>318</sup> Public Health Wales (2021). ‘Wales faces unprecedented triple challenge to health and wellbeing’. [Online] Available at: <https://phw.nhs.wales/news/wales-faces-unprecedented-triple-challenge-to-health-and-wellbeing/> (Accessed: 24.10.21).  
<sup>319</sup> Stats Wales (2020). ‘Adult lifestyles by local authority and health board, 2016-2020.’ [Online]. Available at: <https://stats.wales.gov.wales/Catalogue/National-Survey-for-Wales/Population-Health/Adult-Lifestyles/adultlifestyles-by-localauthority-healthboard> (Accessed: 25.10.21).

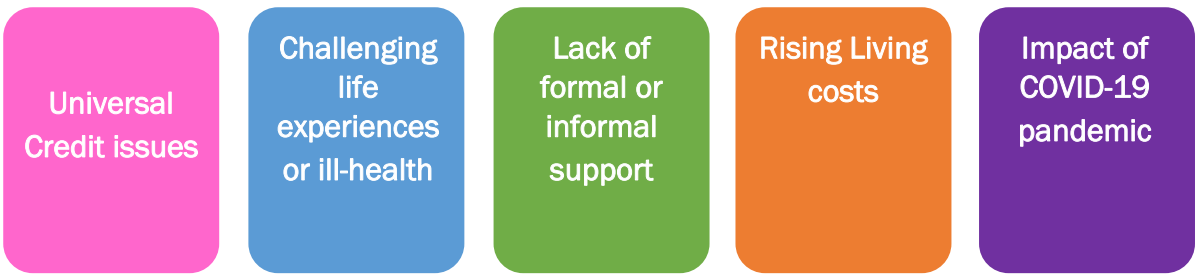
**Figure 7.34: Percentage of adults who reported eating five more portions of fruit and vegetables the previous day (2016-2020)**



Source: Stats Wales, National Survey for Wales (2021)<sup>320</sup>  
Note: The National Survey for Wales results are self-reported. Chart 7.34 shows two years of data combined.

The increase in **food poverty** within the county could partly explain this increase. The number of emergency food parcels given to people in crisis by food banks is on the rise in Ceredigion, a trend also seen nationally. During 2019-20, Trussell Trust Food Banks distributed 1,962 food parcels to Ceredigion residents (this equates to 2.7% of the population), this increased to 2,165 in 2020-21, a 10% rise from the previous year.<sup>321</sup> This increase can be linked to the pandemic which has made it harder for people to afford to buy sufficient nutritious foods. The Trussell Trust also report that problems with the benefit system (such as delays, inadequacy and reductions), challenging life experiences or ill-health and lack of informal and or formal support are drivers behind the increase in demand.<sup>322</sup> This is in addition to the already established increases in living costs and poverty in the county. The drivers of food poverty are highlighted in Figure 7.35.

**Figure 7.35: Drivers of Food Poverty in Ceredigion as identified during the public engagement July to October 2021**



Source: Regional Well-being Survey & Stakeholder Events.

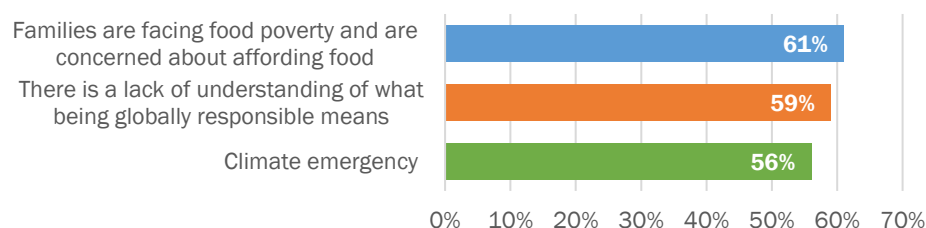
The Well-being Survey highlighted the level of concern amongst survey respondents regarding families facing food poverty and the affordability of food in the future. When asked – ‘*what concerns you most about your county’s global responsibility in the future?*’ food poverty was identified as the top concern, with 61% of respondents selecting this answer (Figure 7.36).

<sup>320</sup> Stats Wales (2020). ‘Adult lifestyles by local authority and health board, 2016-2020.’ [Online]. Available at: <https://statswales.gov.wales/Catalogue/National-Survey-for-Wales/Population-Health/Adult-Lifestyles/adultlifestyles-by-localauthority-healthboard> (Accessed: 25.10.21).

<sup>321</sup> The Trussell Trust (2021). ‘Latest Stats’. [Online]. Available at: [End of Year Stats - The Trussell Trust](#)(Accessed: 25.10.21).

<sup>322</sup> Ibid.

**Figure 7.36: Top 3 future concerns on the county's global responsibility**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

To tackle the growing food poverty crisis in Ceredigion a new Food Bank was established in Aberaeron. The Penparcau Hub has also set up a Penparcau Planting Project which aims to address food poverty in north Ceredigion by working with the local school, West Wales Housing and families to grow their own food and improve green spaces. However, further support and initiatives are required to tackle this issue, reverse the increasing trend and contribute positively to achieving **A Healthier Wales** and **A More Equal Wales**.

During 2015, physical inactivity cost NHS Wales £35 million a year.<sup>323</sup> It is widely recognised that physical activity can prevent some of the key health issues in Wales, such as chronic conditions like type 2 diabetes, heart disease, many types of cancer, depression, anxiety, arthritis and dementia.<sup>324</sup> Physical activity guidelines recommend that each week, adults should aim to do at least 150 minutes of moderate activity (e.g. brisk walking, riding a bike, dancing etc.) per week; or 75 minutes of vigorous intensity (such as running) or even shorter durations of very vigorous intensity activity (such as sprinting or stair climbing); or a combination of moderate, vigorous and very vigorous intensity activity.<sup>325</sup>

According to the National Survey for Wales, over half of adults in Ceredigion (63%) are meeting the physical activity guidelines, the highest proportion amongst all 22 local authorities. However, South Ceredigion report a lower prevalence of residents meeting physical activity guidelines (51.7%) than North Ceredigion (57.2%). Although, lockdown and COVID-19 restrictions had the potential to increase physical inactivity, a study by Sports Wales found that sport and physical activity in Wales kept to roughly the same levels during lockdowns.<sup>326</sup>

Having access to leisure centres and gyms can enable and encourage us to take part in more sporting activities. Sport Wales, the national organisation responsible for developing and promoting sport and physical activity in Wales, identify that not only can exercise boost our physical health, it is also important for our mental health and general well-being.<sup>327</sup> In The Well-being Survey, over a third (37%) of respondents noted that not being able to take regular exercise concerned them the most about staying physically and/or mentally well in future. This was supported by 13% of respondents who noted in the written comments that greater availability of or access to leisure and exercise classes that are appropriate, affordable or free was needed in Ceredigion.

There are six Leisure Centres in Ceredigion which offer a variety of activities and facilities for people of all ages. Table 7.13 displays the Leisure Centres in Ceredigion and whether they are run fully by Ceredigion County Council or supported by Ceredigion County Council.

<sup>323</sup> NHS Wales (2017). *Physical inactivity costs NHS Wales £35m a year – new research*. [Online]. Available at: [Health in Wales | Physical inactivity costs NHS Wales £35m a year – new research](#) (Accessed: 17.02.22).

<sup>324</sup> Department of Health and Social Care (2019). UK Chief Medical Officers' Physical Activity Guidelines. [Online]. Available at: [UK Chief Medical Officers' Physical Activity Guidelines \(publishing.service.gov.uk\)](#) (Accessed: 17.02.22).

<sup>325</sup> Ibid.

<sup>326</sup> Sport Wales (2021). 'Comres – Welsh sport activity levels during the coronavirus pandemic'. [Online]. Available at: [ComRes – Welsh sport activity levels during the Coronavirus Pandemic | Sport Wales](#)

<sup>327</sup> Sport Wales (2022). *Being Active: The benefits for all*. [Online]. Available at: [Being active: the benefits for all | Sport Wales](#) (Accessed: 17.02.22).



Table 7.13 Leisure Centres in Ceredigion

Leisure Centre	Provider
Aberaeron Leisure Centre	Run by Ceredigion County Council
Cardigan Leisure Centre	Run by Ceredigion County Council
Lampeter Leisure Centre	Run by Ceredigion County Council
Aberystwyth – Plascrug Leisure Centre	Run by Ceredigion County Council
Calon Tysul Leisure Centre	Supported by Ceredigion County Council
Caron Leisure Centre	Supported by Ceredigion County Council

Source: Ceredigion Actif

In 2018-19 there were 5,201 visits to leisure centres per 1,000 population in Ceredigion. By 2019-20 this had increased to around 6,689 per 1,000 population.<sup>328</sup> These trends indicated that the number of people visiting leisure centres in Ceredigion was increasing before the COVID-19 pandemic.

The COVID-19 pandemic had a detrimental effect on accessibility to leisure centres in Ceredigion, as many of the centres were recommissioned to be used as field hospitals, vaccination centres or COVID-19 testing centres. Although the majority of leisure centres have since reopened in Ceredigion, some still remain closed. However, Ceredigion Actif made sure that people of all ages were still able to stay active during this time and during lockdowns by providing a variety of online sport sessions. Additionally, Aberystwyth University was able to offer swimming facilities whilst the Plascrug Leisure Centre remained closed.<sup>329</sup>

Mental illness is something that one in four adults will experience in their lifetime.<sup>330</sup> Looking after our **mental health** is just as important as looking after our physical health.

The number of **admissions to mental health facilities** in the HDdUHB has fluctuated between 750-900 admissions annually. During 2019-20, the number of admissions to HDdUHB health facilities dropped to 717, which is the lowest number of admissions since recording began in 2010, a decrease of 20.5% (or 185 admissions) from the previous year. It is unlikely that the reduction reflects a decrease in demand for mental health services, but is likely a consequence of service-led changes, such as closing some teams to non-urgent referrals or discharging patients to create inpatient capacity. Additionally, the transition to a model of community care rather than inpatient stays may also be contributing to this decrease, which is a positive development to note.

According to Public Health Wales, during 2018-19 **mental well-being among adults** in Ceredigion was worse than the national average (50.2 compared to 51.4). Figure 7.37 displays mental well-being among adults across the 22 local authorities. Lower scores indicate lower mental well-being and higher scores suggest higher mental well-being. Ceredigion scores the 5<sup>th</sup> lowest (joint with Caerphilly) on mental well-being among adults.<sup>331</sup>

<sup>328</sup> Public Accountability Measures. Ceredigion County Council, 2021.

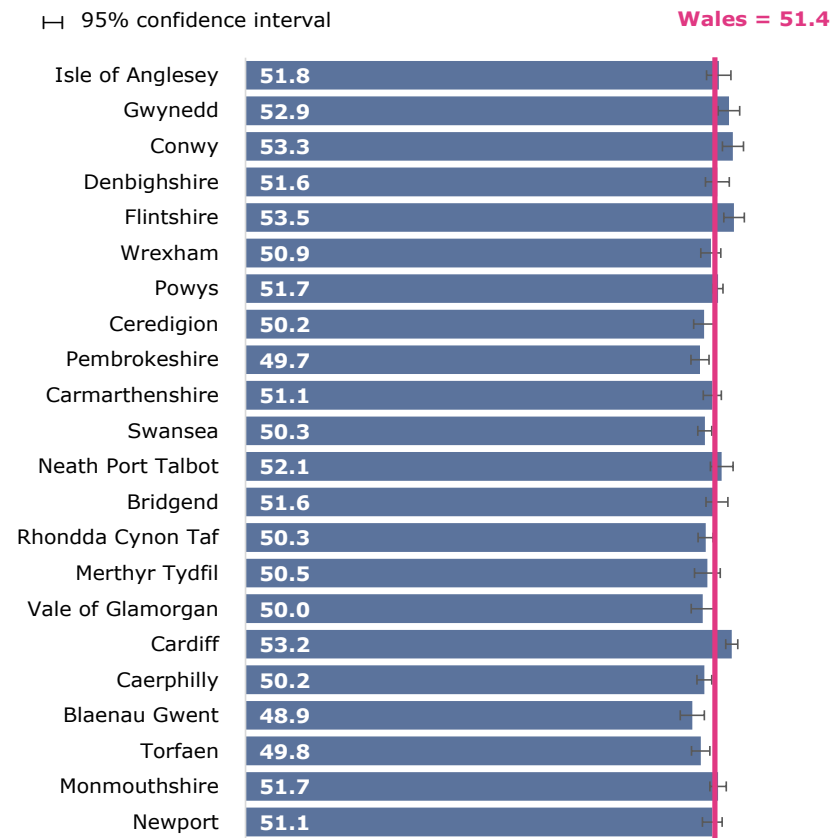
<sup>329</sup> Ceredigion Actif

<sup>330</sup> Hywel Dda University Health Board (2021). 'Adult Mental Health'. [Online]. Available at: [Adult mental health - Hywel Dda University Health Board \(nhs.wales\)](https://www.nhs.uk/healthboards/hywel-dda-university-health-board/adult-mental-health/) (Accessed: 26.10.21).

<sup>331</sup> Public Health Wales (2019) Mental Well-being among adults.

Figure 7.37: Mental well-being among adults, age-standardised average total score, persons aged 16+, Welsh local authorities (2018-19)

Mental well-being among adults, Age-standardised average total score, persons aged 16+, Wales local authorities, 2018-19  
Produced by Public Health Wales Observatory, using NSW (WG)



Source: Public Health Observatory (2019)

The COVID-19 pandemic is likely to have affected the well-being and mental health of residents in Ceredigion. Research by Cardiff University has found that there has been a decrease in psychological well-being in Wales since the first lockdown.<sup>332</sup> In addition, mental health problems are more severe in younger adults, women and those from areas of high deprivation. These findings are critical in planning for the upsurge of psychological distress that has been predicted to hit mental health services. Research undertaken by Cardiff University,<sup>333</sup> highlights the severity of the situation as it concludes that mental health in Wales will be a main concern for future care. The report suggests that there will be a significant increase in demand for mental health services over the coming years, especially considering the potential increases in unemployment and financial instability resulting from the pandemic. This could have damaging impacts on achieving a society in which people’s physical and mental well-being is maximised (**A Healthier Wales**). Monitoring and addressing this will need to be a priority for Ceredigion.

In Ceredigion, there has been a noticeable increase in the number of suicides in recent years, more than doubling from 6 in 2017 to 15 in 2019. This trend is not replicated across the West Wales region, where the neighbouring counties of Carmarthenshire and Pembrokeshire have witnessed a decrease over the same period, see Figure 7.38.<sup>334</sup> Nationally, Samaritans report that the overall trend in Wales is a decrease since 2018, which adds to the concern in Ceredigion.<sup>335</sup>

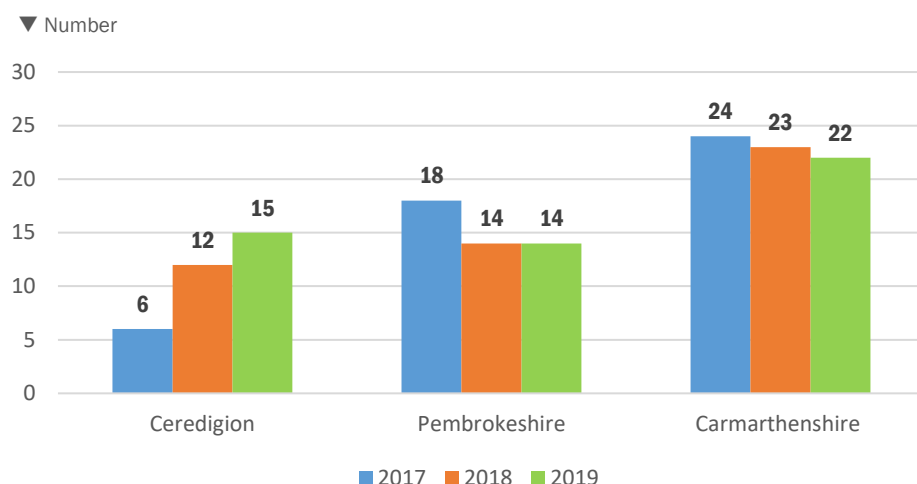
<sup>332</sup> O’Connor, C. Gray, N. C. Knowles, J. Pink, J. Simkiss, N. J. Snowden, R. J. Williams, S. D. (2020). *The influence of the COVID-19 Pandemic on mental well-being and psychological distress: impact upon a single country*. *Frontier Psychiatry*, 594115(11), pp. 1-11.

<sup>333</sup> Cardiff University (2021). Covid-19 in Wales: the mental health and wellbeing impact – briefing paper. [Online]. Available at: [COVID-19-Mental-health-FINAL-08-07-2021.pdf \(cardiff.ac.uk\)](#) (Accessed: 17.02.22).

<sup>334</sup> ONS (2021) Suicides in England and Wales by local authority.

<sup>335</sup> “Suicides in Wales 2020”. Samaritans, 2020. Online: [https://media.samaritans.org/documents/Suicide\\_Stats\\_Wales\\_2020\\_FINAL.pdf](https://media.samaritans.org/documents/Suicide_Stats_Wales_2020_FINAL.pdf). Retrieved: 20/02/2022.

**Figure 7.38: Number of suicides by local authority**



Samaritans, along with other mental health organisations note that middle-aged men are more likely to die by suicide than any other age group.<sup>336</sup> The loss of one's identity and/or income and relationship breakdowns can affect everyone differently, but the Priory Group notes that these issues can be more devastating for men than women, resulting in mental health issues, such as depression.<sup>337</sup> According to the Pharmaceutical Needs Assessment, women are more likely to actually *report* and *reach out* for help with depression, which could account for higher suicide rates in men.<sup>338</sup> Data from the ONS note that in 2019, males aged 45 to 49 years had the highest age-specific suicide rate in the UK.<sup>339</sup>

The mental health of farmers has been a particular concern during the COVID-19 pandemic. Farming tends to be a lonely profession and the impacts of the pandemic add to the pressures they face, which include financial issues, concerns around changing regulations and the strain this puts on families. Tir Dewi is a charity supporting farmers and their families in West Wales during difficult times. They reported in 2021 that almost three quarters (72%) of responses to one of their surveys stated that they would find it very difficult to ask for help and wouldn't do so.<sup>340</sup>

Although data is not yet available for 2020 or 2021, the concern is that these numbers could have increased with the additional pressures of COVID-19. Clearly, it is essential that the support is in place for those suffering from mental health issues, as is encouraging them to speak about their mental health and reach out for support.

## 7.7 Job, Career and the Economy

Having a job or a paid occupation is, for most people, an essential part of an adult's well-being. Employment provides the necessary financial means for people to live healthy and sociable lives, but can also provide a great sense of satisfaction and fulfilment. One of the major well-being benefits of work is that it provides the income, which enables people not only to meet their basic needs but also to fully participate in social and cultural life.

Whilst being in paid employment may mean being more financially secure, the *type* and *quality* of work also matters to well-being. This is very visible in the findings of our engagement activities where we have already seen the increasing desire for more flexible working. 38% of respondents to the Well-being Survey identified having "a stable income" as one of the top three things they value the most in a prosperous community, but interestingly it was ranked only 3<sup>rd</sup> behind "affordable housing opportunities" and a "good transport network" (Figure 7.39).

<sup>336</sup> Samaritans. Middle-aged men and suicide. Online: <https://www.samaritans.org/about-samaritans/research-policy/middle-aged-men-suicide/> Retrieved 17/02/22.

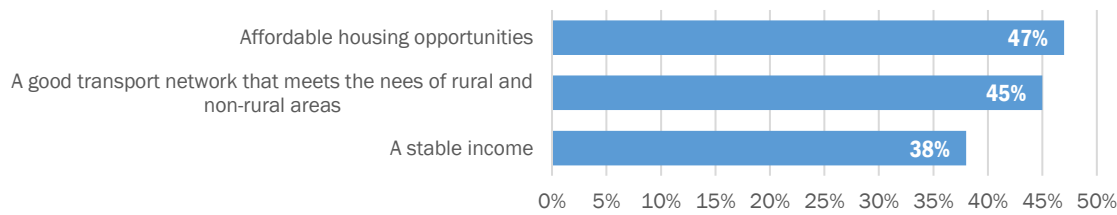
<sup>337</sup> Priory Group. Why are suicides so high amongst men? Online: <https://www.priorygroup.com/blog/why-are-suicides-so-high-amongst-men> Retrieved: 17/02/22

<sup>338</sup> Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment.

<sup>339</sup> ONS (2019) Suicides in England and Wales: 2019 registrations

<sup>340</sup> Tir Dewi. 23 November 2021. "As part of #WelshCharitiesWeek ITV Wales spoke to Wyn Thomas and one of our fantastic volunteers Catrin". [video]. Facebook. <https://www.facebook.com/tirdewi>.

**Figure 7.39: Which three things do you value the most in a prosperous community?**



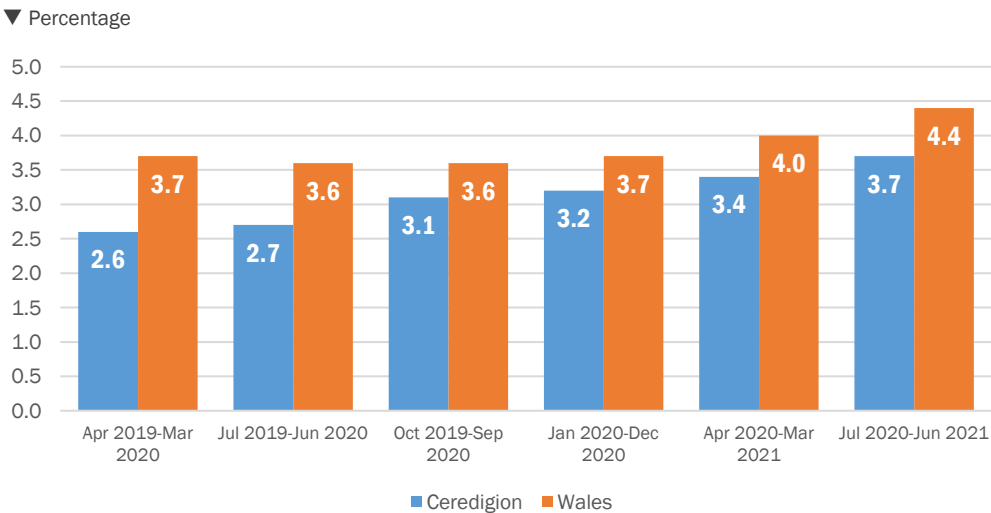
Source: Ceredigion PSB, Regional Well-being Survey (2021)

We also know from the chapter on *Youth* that job opportunities, particularly higher paid jobs, are a primary factor in young people’s decisions to remain in Ceredigion or search for employment opportunities outside of the County.

The workforce in Ceredigion numbers around 38,000. Of these, 57.6% are employees and 14.9% are self-employed. Tourism, hospitality, agriculture and food services, along with education, are its largest employers. People in employment make up 49% of the population aged 16 to 64. This is a low proportion in relation to the rest of Wales and the UK, but is skewed downwards by the high number of non-working Higher Education students who account for 10% of the population, as well as a high proportion (18%) of retirees. However, this is off-set by a much higher than average proportion of self-employed people.<sup>341</sup>

Both economic activity and employment rates have traditionally been below average in Ceredigion, but during the first half of 2021 both have increased and are currently above the national averages. Conversely, unemployment in the county has been lower than average in recent years, with around 1,400 people (3.7% of the economically active) reporting themselves as unemployed. Although the unemployment rate has increased during the COVID-19 pandemic from 2.6% to 3.7%, it remains below the average for Wales (Figure 7.40).<sup>342</sup> Both the above average employment rate and below average unemployment rate point to the skills shortages currently being experienced in the economy both locally and nationally, particularly in hospitality and HGV drivers, but this is being felt across all sectors. Local businesses in Ceredigion noted that the construction and agricultural sectors in Ceredigion are predicted to see a significant skills shortage in the future.

**Figure 7.40: Unemployment in Ceredigion**



Source: NOMIS, Local Authority Profile for Ceredigion

Around 2,200 people report that they are not economically active due to long-term illness or disability. It is likely that at least some of these may wish to work, if the right sort of opportunities were available, but as highlighted at

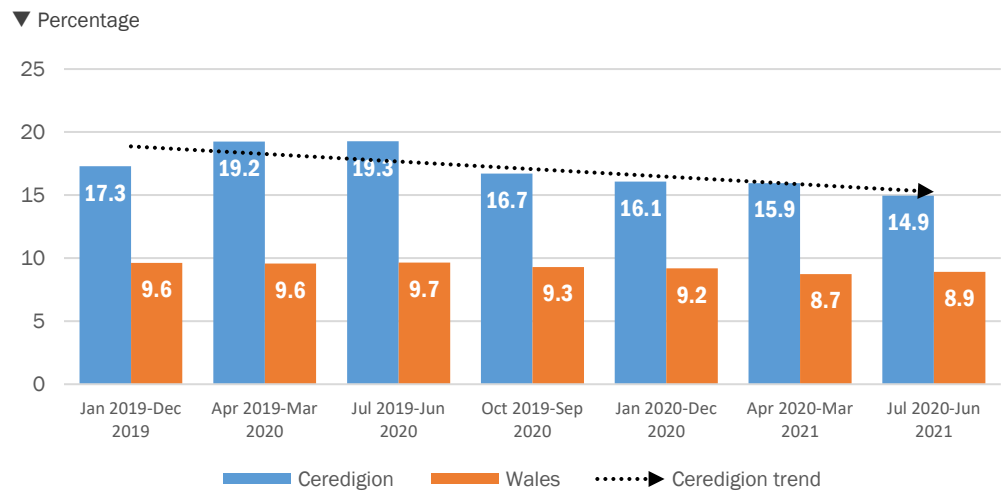
<sup>341</sup> NOMIS Local Authority Profile: Ceredigion. Online: <https://www.nomisweb.co.uk/reports/lmp/la/1946157390/report.aspx#tabempunemp>. Retrieved: 11/11/2021.

<sup>342</sup> Ibid.

the Ceredigion Disabled Persons Forum, there are other issues such as availability of public transport and accessibility of buildings that may determine whether they are economically active and seeking employment.

Ceredigion continues to have a much larger than average proportion of its workforce engaged in self-employment, but during the COVID-19 pandemic this has been decreasing from a peak of 19.2% at March 2020 to 14.9% at June 2021 (Figure 7.41). This equates to 2,100 less self-employed people in the local economy. Due to the nature of self-employment, it is difficult to identify the reasons for this, and in particular whether this is as a direct result of the pandemic or other unconnected factors. It is possible that the shift in employment has seen some of those previously self-employed becoming employees following the impact of the pandemic and moving to ‘safer’ employment. This would, at least in part, explain the anomalous increase in the employment rate. There are other unusual trends visible in the economic figures during the pandemic, and it is clear that these trends should continue to be monitored closely to provide intelligence and support the ongoing recovery.

Figure 7.41: Percentage of self-employed population aged 16-64



Source: NOMIS, Local Authority Profile for Ceredigion

Career progression is more difficult in economies like Ceredigion where there is a very limited number of medium and larger sized businesses that can provide career paths. Aberystwyth University and Ceredigion County Council are two of the larger employers, but there has been a decline in public sector jobs in recent years. Less than 1% of Ceredigion’s employers are ‘medium sized’ which employ between 50 and 249 people (Table 7.14). Increasing this number in the coming decades will be one of the main ways in which new and higher paid employment opportunities can be provided, along with greater career opportunities.

Linking this development to the expertise that already exists in the research and knowledge sectors of the economy provides a clear opportunity to achieve this aim. There is a feeling that the local economy has been over-reliant on the public sector in the past, and that the private sector will be essential for creating job opportunities and growing the economy in the future.

Table 7.14: The structure of businesses and organisations in Ceredigion

Main Indicator	Indicator Subset	Number
Businesses	Small	3,940
	Medium	25
	Large	5
	Total	3,965
Organisations	Public	40
	Private	3,925
	Voluntary Sector*	140
	Total	3,965

Businesses: UK Business Counts – enterprises by industry and employment size band, Inter Departmental Business Register (ONS), 2020.  
Organisations: UK Business Counts – enterprises by industry and employment size band, Inter Departmental Business Register (ONS), 2020.  
\*Voluntary sector = non-profit body or mutual association. These are counted within the Private Organisation total.

The key challenges facing the local economy are well-documented and can be summarised as the need to **attract new businesses and grow existing businesses, create more and higher paid job opportunities**, provide **opportunities for younger people to remain in the county**, and **increase average earnings** of the County in comparison to Wales as a whole.

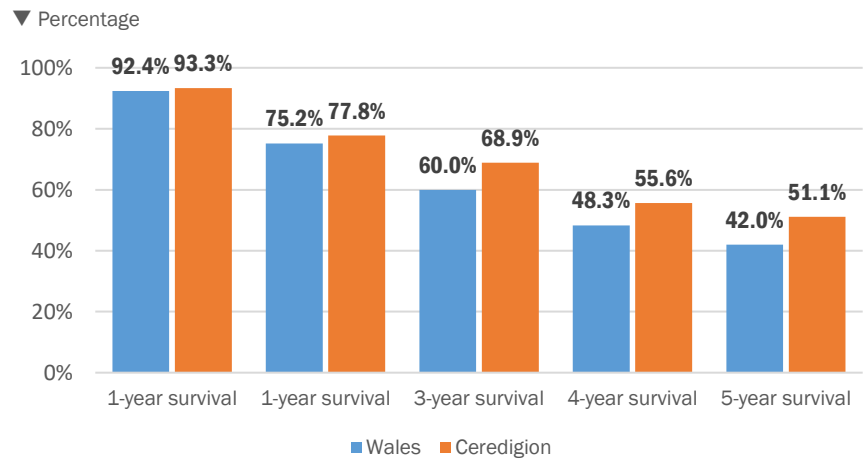
The demographics of Ceredigion are also changing. This Assessment has shown how the overall population of the County, and in particular the working age population (16-64), has been decreasing and is projected to continue to decrease over the longer term, bringing with it the challenges of meeting the future skills needs of the economy. The working age population is projected to decrease by 12.8% or 5,428 people up to 2043.

Job creation, and in particular higher paid jobs, featured highly in the results of our Well-being Survey, but was also raised as a key theme in every engagement event conducted in support of the Assessment. It was one of the main discussion points with private sector representatives at the Enterprise and Innovation PSB Project Group where the creation of higher paid jobs was linked to tackling many of the challenges, i.e. in providing opportunities for younger people to remain in the County, provide greater employment options, growing the economy and raising average earnings.

However, the local economy has many strengths and unique selling points from which to meet these challenges. For example, new business start-ups have some of the best **survival rates** across Wales (Figure 7.42), the workforce has much **higher than average skills and qualifications**, the **economy has grown** at a faster rate than the Wales average over the last five years, and the **knowledge economy is strong** with two highly-rated Universities.

In the latest Business Demography data for 2019, Ceredigion saw an increase in the numbers of new enterprises in the County and had a **positive net birth rate** for the first time since 2016.<sup>343</sup> Increasing the business birth rate will be a key focus in the coming years as drivers to grow the economy take effect. Building on its existing strengths in food services, tourism and agriculture provides a strong foundation for development, but also taking advantage of opportunities in sectors such as environmental science and renewable energy production could place the economy in a unique position. There are currently 2,835 active enterprises in the county.<sup>344</sup>

**Figure 7.42: Survival of newly born enterprises in Ceredigion 2019**



Source: Business demography, UK 2019

The feedback from our engagement events shows growing support for **developing the green economy** that places carbon reduction, resource efficiency and being socially inclusive at its core. This is understandable given the way in which Ceredigion residents strongly value their local environment – 68% valued “access to nature and green spaces” as the most important thing about their local environment in the Well-being Survey.

The green economy provides an opportunity to reduce pollution, enhance energy efficiency and prevent the loss of biodiversity, and Ceredigion is in a position to embrace this due to its unique geographical location. Exactly one third

<sup>343</sup> “Business demography, UK: 2019” Office for National Statistics. Online: <https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/businessdemography/2019>. Retrieved: 10/11/2021.

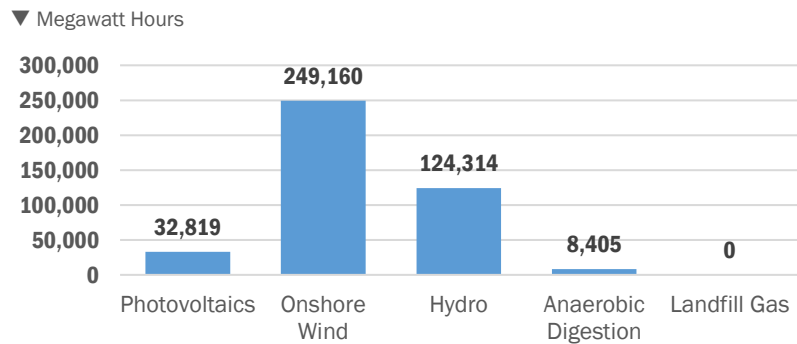
<sup>344</sup> Ibid.



of all respondents to the Well-being Survey stated that “a greener economy” was what they valued the most in a prosperous community, and over half (54%) said they would consider “improving energy efficiency and purchase green/renewable energy” to improve their local environment. Some of the written comments to the survey called for the focus of economic development to be on the green economy and the type of training and jobs that it could bring to the county.

Wales as a nation is a centre for the generation of renewable energy – an estimated 25% of the electricity produced in Wales is from renewable sources, and this has been increasing in recent years as the drive to reduce carbon emissions continues.<sup>345</sup> **Renewable energy production** is already important in Ceredigion - there are 2,415 renewable energy sites in the county, which are estimated to produce 447GWh (gigawatt hours) of electricity per annum (Figure 7.43).<sup>346</sup>

**Figure 7.43: Renewable Electricity Generated (MWh) in 2020 in Ceredigion**



Source: Renewable electricity by local authority 2014 – 2020, Department for Business, Energy and Industrial Strategy (BEIS), 2021

The County has the highest percentage of its electricity consumption delivered by local renewable electricity generation. This is due in part to its relatively high amount of renewable energy production, including hydropower, onshore wind and photovoltaics. For example, the county is home to the Rheidol Power Station, the largest hydropower project in Wales, and it follows that Ceredigion has the largest hydropower capacity in Wales.

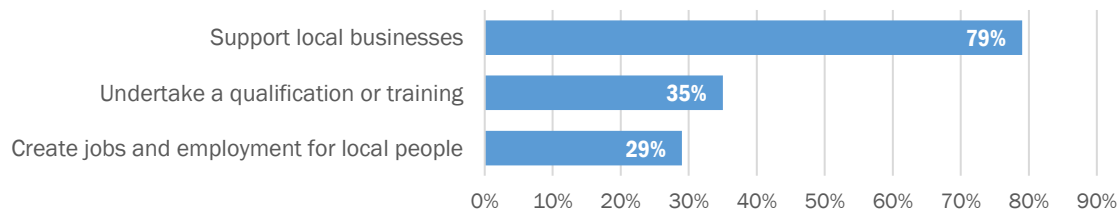
Continued investment in the County will be key to help ensure it remains attractive for local people and for newcomers alike. The Growing Mid Wales is a regional partnership and engagement arrangement between the private and public sectors, and with Welsh Government. The initiative represents the region's interests and priorities for improvements in the local economy, and creates a vision for the future growth of Mid-Wales. The **£110 million of Welsh and UK Government funding** will be used to generate further investment from the private sector to deliver local projects and increase the opportunity and prosperity in communities across the region.

Indeed, the results of the Well-being Survey present a very strong desire on the part of respondents to **support local businesses** and **buy local produce**. The written responses to the survey do not reveal exactly why there has been a sudden increase in support. One possible explanation is the impact of the COVID-19 pandemic which had a severe impact on the local economy and Ceredigion’s staple industries of agriculture, tourism, hospitality and food services. It may also be that respondents were directly affected through loss of income and/or being placed on furlough and want to support others in their community.

When asked what respondents would consider doing to improve their own or their community’s economic circumstances, the overwhelming majority (79%) stated “support local businesses”, more than twice as high as the next response (Figure 7.44). The follow-on question which asked what support would need to be in place to do these things also focused on the level of support in place – 58% stated “help for existing local businesses” and was the highest ranked option (Figure 7.45). There was also a high level of support specifically for buying and using locally produced food. These were the things that respondents *valued the most in relation to Ceredigion’s vibrant community (Q43)* and also what they *would most consider doing to improve their local environment (Q25)*.

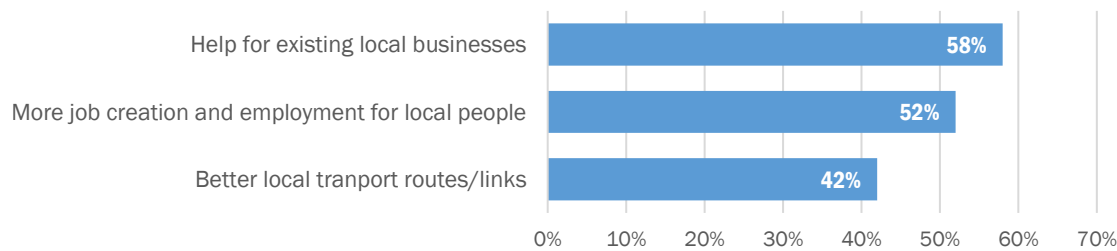
<sup>345</sup> “Energy Generation in Wales”. Welsh Government. 2019. 4.  
<sup>346</sup> “Renewable Energy by Local Authority 2014-2020”. Department for Business, Energy and Industrial Strategy. 2020.

**Figure 7.44: What would you consider doing to improve your own or your community's economic circumstances?**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

**Figure 7.45: What support would need to be in place to do these things?**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

The challenges facing the local economy are twofold, in addition to the longer-term ambitions there is also the immediate recovery from the COVID-19 pandemic. The COVID-19 pandemic has had a significant impact on the local economy and continues to do so, but there are some tentative signs of recovery.

The impact of the pandemic was all pervasive, having a profound impact not only on our **economy** but also on **our health** and on **the functioning of our society**. It is widely recognised that certain industries, such as tourism, accommodation, food services, and agriculture were all hit particularly hard during the pandemic. For example, virtually all tourism related businesses (97%) closed during the “lockdowns”, not just in Ceredigion but nationwide, and contributed to the 7,600 furloughed workers across the county at the height of the pandemic in June 2020.<sup>347</sup>

The mid and west Wales workforce witnessed staggering increases in their claimant counts when the pandemic first reached Wales. Ceredigion’s increased by 108% between March and April 2020, while Powys similarly witnessed a sudden increase of exactly 100%.<sup>348</sup> (The claimant count is the number of people claiming benefits principally for the reason of being unemployed). Younger people were **disproportionately affected** through the impact on employment, loss of working hours and income, the closure of tourism and hospitality sectors which tend to employ larger numbers of younger people, and more recently the impact on the cost of housing that has seen house and rental prices rise even higher.

In response, a total of 8,835 business grants were issued with a value of £49m to support Ceredigion’s businesses and protect jobs in the county.<sup>349</sup> It is clear that as the recovery period continues, these impacts should continue to be monitored to support the recovery process. It is still not entirely clear, for example, what the actual impact of the end of the Coronavirus Job Retention Scheme (Furlough Scheme) at the end of September 2021 will be.

There are some tentative signs of local economic recovery. For example, there has been a sustained decrease in the claimant count in Ceredigion since March 2021, falling from 1,925 to 1,375 by September, its lowest since the pandemic first reached Wales in March 2020.<sup>350</sup> Although this is still much higher than pre-pandemic levels, it is one

<sup>347</sup> “Coronavirus Job Retention Scheme Statistics”. Office for National Statistics. Online: <https://www.gov.uk/government/collections/hmrc-coronavirus-covid-19-statistics>. Retrieved: 10/11/2021.

<sup>348</sup> “CC01 Regional labour market: Claimant Count by unitary and local authority”. Office for National Statistics. Online: <https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/datasets/claimantcountbyunitaryandlocalauthorityexperimental>. Retrieved: 10/11/2021.

<sup>349</sup> Ceredigion County Council.

<sup>350</sup> “CC01 Regional labour market: Claimant Count by unitary and local authority”. Office for National Statistics. Online: <https://www.ons.gov.uk/employmentandlabourmarket/peoplenotinwork/unemployment/datasets/claimantcountbyunitaryandlocalauthorityexperimental>. Retrieved: 10/11/2021.

of the more visible and positive trends witnessed during the recovery phase. The anecdotal evidence from the tourism industry has been encouraging where some businesses have reported a strong summer season, partly driven by the desire of many to holiday within the UK this year.

The estimated numbers of job advertisements in Wales remained well-below pre-pandemic levels throughout 2020 and into 2021, and reflect the impact of the pandemic on the local and national economies. But at the end of April 2021 the pre-pandemic levels were exceeded for the first time and restrictions were eased and businesses began the road to recovery. As at the beginning of October, job advertisements in Wales had continued to increase and reached their highest level since the pandemic began as the demand for labour and concerns about skills shortages began to emerge.<sup>351</sup>

The recovery will of course continue for the foreseeable future, and it is clear that the implications of the pandemic on the local economy need to continue to be monitored to provide intelligence to support the recovery effort and understand its longer term implications.

For example, the pandemic is likely to have resulted in a longer-term shift in **working patterns**, based around more **flexible and remote working**. These issues were explored at the Enterprise and Innovation PSB Project Group with members of the private sector in Ceredigion, where a combination of benefits and challenges arise with the changes in working practices that have been seen since April 2020.

On the one hand, working remotely has made it more challenging to support employees who are struggling with their mental health as it is more difficult to ask for support, while managers may struggle to notice any concerns amongst staff in their care. On the other hand, members of the group also identified the benefits of flexible working where employees can work at times which are more suited to their home life, and positively impacting on their well-being. There was a feeling that flexible working has greater acceptance amongst employers, and that this can benefit an organisation and not negatively impact productivity.

## In-Work Poverty

Poverty remains one of the biggest challenges for Ceredigion and the West Wales region. Although well-being is multifaceted, many well-being issues have their root causes in not having enough money to live, pay bills, raise children and lead healthy lives. The evidence for this can be seen throughout this Assessment, whether it is life satisfaction, career prospects or educational attainment, poverty is a determining factor.

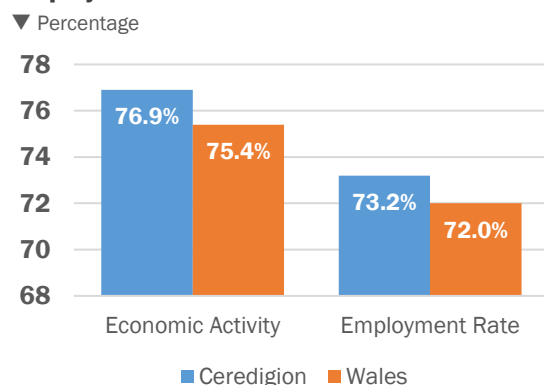
In-work poverty is a particular cause for concern, because whilst it is not a new issue in Ceredigion, it is likely to have been exacerbated in the last eighteen months by the COVID-19 pandemic through the loss of income and jobs during this period. Whilst we do not know for certain what the long-term implications of the pandemic will be, we do know that poverty is one of the biggest drivers of well-being in the County and across the region.

The employment rate and economic activity rate in Ceredigion are both better than average across Wales (Figure 7.46) yet there are almost a third of households (32.4%) living in poverty across the county. Poverty is defined as a household income which is less than 60% of the GB median, which in 2020 was £19,967. This, and other evidence such as the proportion of workless households being better than average in Wales (Figure 7.47), strongly points to *in-work poverty* being a particular concern.

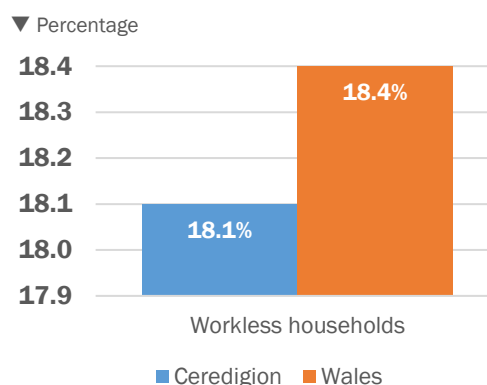
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<sup>351</sup> Online Job Advert Estimates. "Total job adverts by UK Countries and English regions, UK, Index February 2020 weekly average = 100". Office for National Statistics.

**Figure 7.46: Economic Activity and Employment Rate at June 2021**



**Figure 7.47: Workless Households**



Source: NOMIS, Local Authority Profile for Ceredigion

We know that earnings and incomes are lower than average in Ceredigion – average annual gross pay is £1,637 lower than across Wales and the lowest in the West Wales region (Table 7.15), while incomes are over £400 lower than average across Wales. (Incomes are income not just from paid employment, but also from pensions and other investments). There is an increasing reliance on two or more earners in a household, and it is therefore not surprising that households with only one worker are more likely to be in in-work poverty, and in particular lone parents and families with three or more children. Median incomes are lowest in Aberystwyth North where 37.8% of households are living in poverty, i.e. below 60% of the GB median income (Table 7.15, Table 7.16 & Figure 7.48).

**Table 7.15: Comparison of Average Earnings across the South West Wales Region**

Area	Annual gross pay (Median)	Annual gross pay (Mean)
Ceredigion	£22,028	£24,412
Carmarthenshire	£23,669	£27,250
Pembrokeshire	£22,062	£26,466
Powys	£22,534	£24,244
Swansea	£23,164	£25,227
Wales	£23,665	£26,805
UK	£25,780	£31,590
Ceredigion as % of Earnings in Wales	93%	91%
Difference between Ceredigion and Wales	£-1,637	£-2,393

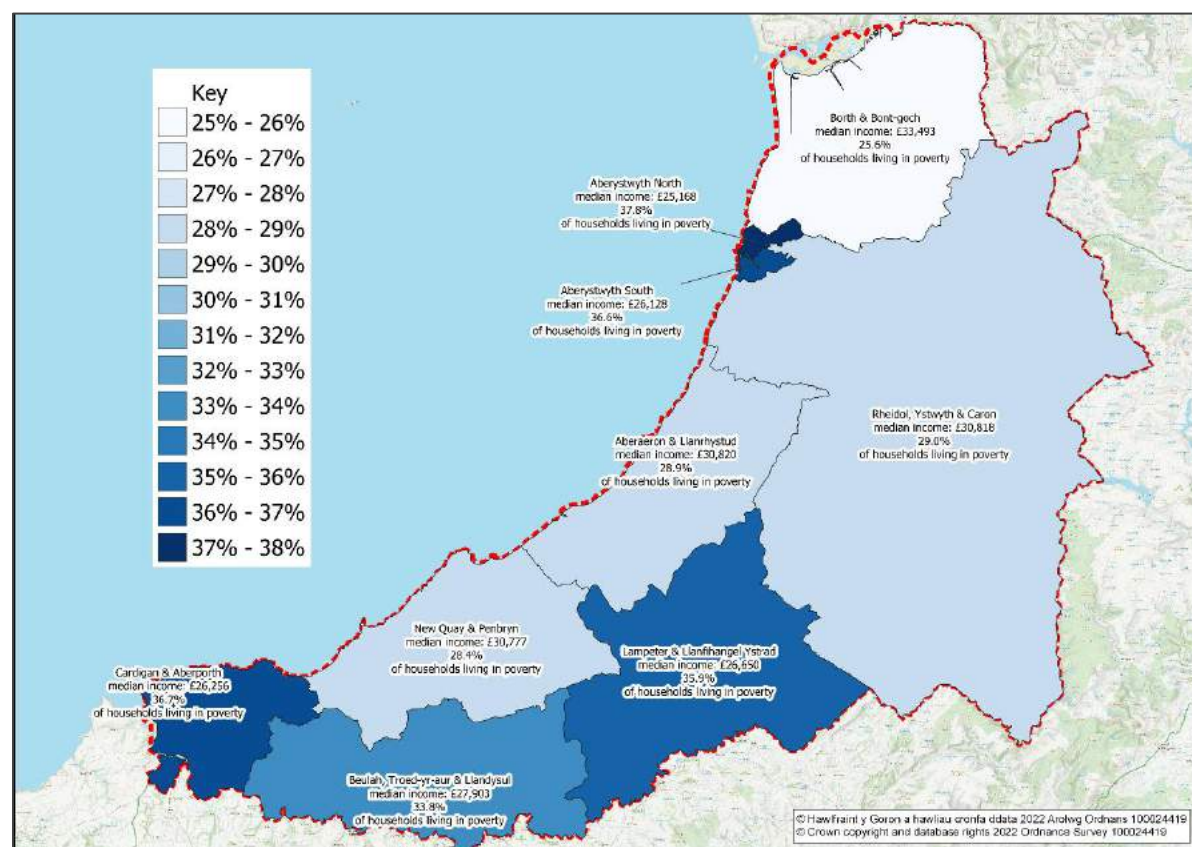
Source: ONS ASHE 2020, Table 8.7a Annual gross pay for all employee jobs by place of residence

**Table 7.16: Proportion of Households living in poverty by Community Area**

Area	Median Income	% of households living in poverty
Borth & Bont-goch	£33,493	25.6%
Aberystwyth North	£25,168	37.8%
Aberystwyth South	£26,128	36.6%
Aberaeron & Llanrhystud	£30,820	28.9%
New Quay & Penbryn	£30,777	28.4%
Lapeter & Llanfihangel Ystrad	£26,650	35.9%
Cardigan & Aberporth	£26,256	36.7%
Beulah, Troed-yr-aur & Llandysul	£27,903	33.8%
Rheidol, Ystwyth & Caron	£30,818	29.0%

Source: CACI Paycheck 2020

**Figure 7.48: Proportion of Households living in poverty by Community Area**



Source: CACI Paycheck (2021)

Low earnings and incomes do not drive poverty alone. Research shows that it is a combination of factors, and in particular access to affordable childcare, high housing costs and changes to tax credits/benefits.<sup>352</sup> Affordable childcare has been identified as one of the main reasons for workless households, either preventing parents to re-enter the workforce or increase their working hours.<sup>353</sup> As identified in the Childhood Chapter, there are concerns in Ceredigion and West Wales over the affordability as well as the sufficiency of childcare provision. Housing costs in Ceredigion have continued to climb thanks in large part due to the mini housing boom created by high demand and limited supply in the last eighteen months. Average house prices for example, reached record levels of £218,911 in June 2021<sup>354</sup> and the average first time buyer deposits are estimated to have increased by 25% since 2019.<sup>355</sup> The impact on young people and first time buyers is particularly acute.

Tax credits are considered to be particularly effective at reducing the risk of poverty.<sup>356</sup> The current Universal Credit system combines six social security payments, including Working Tax Credit and Child Tax Credit, into one payment. However, there are reductions to payments in the process such as no further payments for third or subsequent children, the ongoing freeze of most working-age payments and the lengthy wait times for initial payments which are often cited as causing severe hardship in the short-term. The combination of these factors, highlighted in Figure 7.49, appear to be the main drivers of poverty in Ceredigion. These drivers of income poverty among working households are also experienced on a national scale, as reflected in the 2021 Future Trends Report and are part of the Inequalities and Opportunities megatrend identified.

<sup>352</sup> Hick, Rod and Alba Lanau. "IN-WORK POVERTY IN THE UK: Problem, policy analysis and platform for action". Cardiff University. Cardiff, 2017. 3-4.

<sup>353</sup> Ibid. 4, 28 & 30.

<sup>354</sup> HM Land Registry UK House Price Index. Online: <https://landregistry.data.gov.uk/app/ukhpi>

<sup>355</sup> Halifax, 12 months to December 2020, UK Finance. Online: <https://www.lloydsbankinggroup.com/media/press-releases/2021/halifax/soaring-house-prices-failed-to-deter-first-time-buyers-2020.html>. Retrieved: 22/06/2021.

<sup>356</sup> Ibid.



Figure 7.49: Drivers of Poverty in Ceredigion



Source: Ceredigion Public Services Board

This can be seen in the Well-being Survey results where all four drivers featured prominently, as highlighted in Table 7.17. For example, “Affordable Housing Opportunities” were considered the most valued thing in a prosperous community where 47% of respondents selected this option. Conversely, the “lack of affordable housing opportunities” was the biggest concern when looking ahead in relation to a prosperous community where 62% identified this option.

Table 7.17: Sample comments from The Well-being Survey

“Increase wages in-line with the real living wage”	“Too many jobs paying minimum wage, a great lack of variety of”
“Access to affordable childcare outside of core school hours. Alternatively, an option to reduce working hours. There is not much opportunity for part time work in this area with a decent wage. Wages in Ceredigion are low, however the cost of living is high. This needs to be addressed.”	“More support, resources and funding is needed for childcare sectors/settings”

Source: Ceredigion PSB, Regional Well-being Survey (2021)

In Ceredigion, Poverty is indeed recognised as a major determinant of well-being, and the challenge is being met through a dedicated Sub Group of the PSB, which focuses on tackling hardship. In doing so, its contribution to the National Well-being Goals is greater than just creating a **Prosperous Ceredigion and Wales**, but rather the interlinked goals of being **Healthier, More Equal** and **Cohesive** which are derived from supporting those living in poverty in our county.

## 7.8 Workplace Well-being

The workforce in Wales spends up to one-third of their life at work. The desire to promote and support employee health and well-being including a good work-life balance and healthy lifestyles has been recognised for many years. The benefits of achieving this are widely recognised as reduced stress levels, greater motivation, better morale, and increased job satisfaction.

Whilst schemes were already in place in Ceredigion to strengthen workplace well-being through the adoption of flexible working patterns and employer led well-being programmes, the need has increased significantly in the wake of the COVID-19 pandemic in order for the local economy, businesses and individual households to recover.

The written comments to The Well-being Survey demonstrated the range of flexibility required in the future workforce. On the one hand better help for those with disabilities to enter the workforce was requested, greater flexibility to allow people to access learning opportunities at more convenient times outside of working hours, along with the lack of childcare provision specifically in Cardigan & Aberporth. Other initiatives include a more flexible working environment and active travel schemes focusing on reduced emissions, reduced travelling and creating a healthier work life balance.

Our engagement sessions also revealed the opportunities and challenges that exist during the recovery phase and beyond, as shown in Table 7.18. There is clearly a much greater awareness of employee well-being from an



organisation perspective, and at the same time a greater acceptance of the benefits that flexible working can be to an organisation.

**Table 7.18: Feedback from engagement events in relation to building resilience in the workforce in the future**

Opportunities	Challenges
<b>A greater awareness of employee well-being</b> Employee well-being from an organisational perspective has moved up the agenda, this trend began pre-pandemic, however, the pandemic has helped to accelerate this.	<b>Working remotely can be challenging</b> Working remotely has made it more challenging to support people who are struggling with their mental health as they are not face-to-face.
<b>Flexible working has improved</b> Flexible working started to improve pre-pandemic, however, this has accelerated over the last 15 months. People can now work at times which are more suited to their home life, positively impacting on individual well-being.	<b>Social media needs to be used responsibly</b> Social media and digitization is a ‘double edged sword’. It is a valuable tool, however, it needs to be used correctly and responsibly, for example providing accurate information.
<b>Greater acceptance of flexible working</b> There is now a greater acceptance that flexible working can benefit an organisation and does not impact negatively on productivity.	
<b>Utilising social media to support well-being</b> Social media is being used as a platform for people to gain improved support in relation to well-being issues.	

Source: Ceredigion Public Services Board (2021)

This is reflected in the Welsh Government’s aim to have 30% of Welsh workers working at, or near to home in the future, and to support organisations towards a longer-term shift to more people working remotely, and realise the benefits for workers, local communities and the environment.<sup>357</sup>

More recently, discussions in the Senedd have considered the possibility of piloting a four-day working week in Wales to extend the anticipated benefits. The result is a noticeable move at a national level to making fundamental changes to the way we work to achieve the national well-being goals for future generations. For Ceredigion, it presents the opportunity to make a concerted move towards creating a more flexible and resilient workforce and building the future for the county we want.

<sup>357</sup> “Remote working”. Welsh Government. Online: <https://gov.wales/remote-working>. Retrieved: 25/09/2021.

# Summary of themes: **Adulthood**



## CULTURE

The decline in **Welsh speakers** presents one of the most significant challenges to the socio-cultural and economic landscape in Ceredigion. Opportunities to learn Welsh or improve existing Welsh skills are essential, as are the ongoing initiatives to promote the use of the Welsh language

**Poverty** remains one of the biggest challenges for the County. Low earnings and incomes, affordable childcare, Universal Credit reduction and high housing costs/ housing affordability are the drivers of poverty in Ceredigion.

## SOCIAL

Ceredigion residents are the most **satisfied with their local area** as a place to live across Wales. However, just under 1/5th of residents feel that they can **influence decisions**. More needs to be done to work co-productively with communities to ensure their **voices are heard**.

**Reducing inequalities** in the County, particularly in the environment, health, housing, transport and educational attainment are important.

Encouragingly, the number of alleged victims of **emotional and psychological abuse** and **domestic abuse** has decreased in Ceredigion since 2016-17. However, **violence against the person** incidents are increasing.

**Hate crime** incidents have increased across the Dyfed-Powys region during 2020-21, which may partly explain the decline in perceptions of safety.

To enable a well-connected Ceredigion, greater **public transport availability**, better **digital connectivity** and shorter distances to **access services** is required. We must ensure that certain groups are not disproportionately affected by these challenges and that the infrastructure can support and adapt to the new ways of working.

## ENVIRONMENTAL

Access to **nature and green spaces** emerged as the key priority during our engagement with the general public on the environment. Further work is required to encourage and enable people, without a private outdoor space, or through lack of transport or disability to access public green space in their communities.

The **Climate and Nature Emergencies** combined are the greatest challenges of our time. Rising temperatures, flooding, coastal erosion, ash dieback, increase in ammonia air pollutions and phosphate levels, and biodiversity loss are the key challenges that Ceredigion faces now and in the future. Ynys Las and Borth are particularly at threat from rising sea levels and coastal erosion.

The declaration of the **Climate Emergency** and **Nature Emergency** is a significant positive step that underlines the urgency with which we must tackle the problem our County and the world faces.

**Decarbonisation** will be challenging and requires careful consideration as to how its implemented

**Phosphate pollution** is a critical environmental issue with potentially damaging knock-on economic and social impacts. The current impasse on certain developments creates a fundamental challenge in addressing the County's housing crisis.

Future policies and land management practices will need to change in order to **mitigate environmental damage** and **support future food security** and **nutrition**.

Coastal and fluvial **flooding** and subsequent **coastal erosion** threaten our communities and environment.

Ceredigion's **air quality is very good**.

Additional support for first time buyers, better quality and more **affordable housing** and an increase in **better paid jobs** will be required in the future in order to make buying or renting a home more affordable for local people in Ceredigion.

## HEALTH

It is likely that the number of **unpaid carers** will increase in the future. Continued recognition of the vital role played by unpaid carers and effective support services to prevent carers from reaching crisis point will be needed.

**Smoking rates** and **alcohol consumption** in Ceredigion will need to be carefully monitored to ensure that they do not deteriorate long-term following the pandemic.

The COVID-19 pandemic is likely to have affected the **well-being and mental health** of residents in Ceredigion, who already have the 5th lowest score for mental well-being across Wales.

The eleven health priority areas outlined in the West Wales **Population Assessment** requires careful consideration.

Specific adult health priorities of reducing **obesity**, tackling **diabetes** and **long COVID**.

Better **quality** of, and **access to health care services** was one of the most important things identified by survey respondents to maintain their physical and mental well-being.

Greater **availability** of, and **access to, affordable leisure services** in Ceredigion was also key to improving the **physical and/or mental well-being** of our survey respondents over the next ten years.

## ECONOMY

Ceredigion has some of the best business **survival rates** across Wales, the workforce has much **higher than average skills and qualifications**, the **economy has grown** at a faster rate than the Wales average over the last five years.

Ceredigion's residents have a strong desire to **support local businesses** and **buy local produce**.

**Renewable energy production** is an important part of the green economy in Ceredigion.

The key challenges facing the local economy are to attract **new businesses** and **grow existing businesses**, create more and **higher paid job opportunities**, provide **opportunities for younger people to remain in the County**, and **increase average earnings** of the County in comparison to Wales as a whole.

**Work-life balance** featured prominently in our Well-being Survey. Mental health and well-being support and flexibility of working will need to continue in order to build resilience within the workforce and improve well-being.

## **BREXIT & COVID-19**

Brexit, Covid-19 and Climate Change threaten **food security** in Ceredigion with certain groups at greater risk

Continue to monitor the **impacts of Brexit** to inform Well-being in Ceredigion

There is a need to monitor the **impacts of the COVID-19** on the economy to support the recovery and provide insight into future trends.

# OLDER PEOPLE







*In this chapter: Ageing Well, A Suitable Home, Maintaining Independence, Needing Help, At the End*

## 8.1 Ageing Well

### Continuing to Work

Ceredigion has an ageing population, a trend which is set to continue. The 2020 mid-year population estimates show that 18,668 or 25.6% of Ceredigion’s population were aged 65+. <sup>358</sup> Although the overall population is projected to decrease in Ceredigion over the next 25 years, the 65+ age group is expected to grow to 22,362 and account for 32.5% of the overall population. <sup>359</sup>

Table 8.1 demonstrates the demographic changes that the county is expected to see over the next 20 years. As mentioned in previous chapters, the number of children (0-15) and working age population (16-64) is expected to decrease, whilst a significant growth in the 65+ age group is expected, increasing by 23.7% (+4,305) by 2038 (see Table 8.1).

**Table 8.1: Projected population change by age group (2018-2038)**

Age group	Base year	Projection year		2018-2028		2018-2038	
	2018	2028	2038	number	percent	number	percent
Children (0 to 15)	10,950	10,080	9,310	-870	-8.0%	-1,640	-15.0%
Working age (16 to 64)	43,850	40,075	37,530	-3,775	-8.6 %	-6,320	-14.4%
65+ age group	18,195	20,425	22,500	+2,230	+12.3%	+4,305	+23.7%
Total	72,990	70,585	69,340	-2,505	-3.4%	-3,650	-5.0 %

Source: Welsh Government, 2018-based Local Authority population projections. Note: figures may not sum due to rounding

This is a nation-wide trend and is being driven by changing demographic patterns, such as, reducing fertility rates, increasing life expectancy and the ageing of the significant birth cohort of the 1960s baby boomers, who in 2028 will be aged 64 to 82.

The challenges brought about by an ageing population are multifaceted. Figure 8.1 demonstrates one of the challenges that Ceredigion faces, brought about by a shrinking workforce and an ageing population.

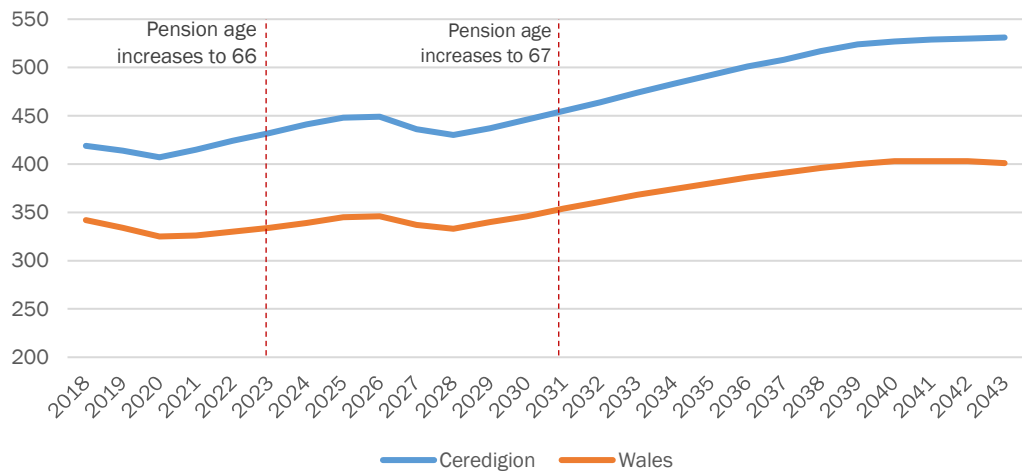
<sup>358</sup> ONS (2020) Mid-year Population Estimates.

<sup>359</sup> ONS (2018) Population Projections.



Figure 8.1: Ceredigion's projected dependency ratio (2018-2042)

▼ Dependants per 1,000 person of working age



Source: Local authority ageing statistics, population projections for older people, ONS 2020

Figure 8.1 highlights the increase in Ceredigion’s old age dependency ratio (OADR), that is, the number of state pension age per 1,000 people of working age (16-64). Although this presumes that people under 15 and over 65 years are outside of the labour force and that all working people are in employment, it does provide an indication of how the population will change, which is important to understand when planning for the needs of different age groups.

The number of dependents per 1,000 is much greater in Ceredigion compared to the all-Wales average. By 2028, the state pension age will rise to 67, however, the OADR in Ceredigion is still projected to increase from 419 dependents per 1,000 to 430 per 1,000 in 2028. Longevity is something to celebrate, it means more time spent in retirement for most, which provides the opportunity to try new things, spend time with family and live the life we chose to live. However, the increasing OADR has important labour market implications, in addition it is expected to place a greater demand on our local public services. This raises questions about the sustainability of the current models of working and care provision in Ceredigion.

As reflected in the **2021 Future Trends Report**, the ageing population is a nation-wide trend which interacts with other trends relating to health and the economy. It is expected that further resources will be required to fund the changing needs in the population, such as, changing housing and health needs. It is likely that this trend will result in changing working and life patterns in the future. Here lies both an opportunity and a challenge – we need to maximise the potential of our growing older population in Ceredigion and address the barrier that prevents some from living well.

An ageing population could lead to a rapid rise in inequalities due to the disruption to the traditional balance of education, work, health and social care provision.<sup>360</sup> Currently, there is a gap in social care provision in Wales.<sup>361</sup> This means that as the population gets older, an increasing number of workers are providing **unpaid-care** towards the end of their working life (for relatives and friends). A report by the ONS suggests that there is a greater care burden on some groups relative to others - one in four older female workers, and one in eight older male workers, have caring responsibilities in the UK.<sup>362</sup> In addition, women, including those from ethnic minority communities are more likely to provide care, but less likely to receive care and support themselves.

According to the **Inequality in a Future Wales Report**,<sup>363</sup> the care burden is already having profound effects on the capacity for older women to retire well and enjoy their later years in good health. Juggling work and unpaid care can

<sup>360</sup> Dr MacBride-Stewart, S. and Dr Parken, A. (2021). Inequalities in a Future Wales: Areas for action in work, climate and demographic change – Full Report. [Online]. Available at: [Future Trends and Inequalities in Wales \(futuregenerations.wales\)](https://futuregenerations.wales) (Accessed: 07.02.2021).

<sup>361</sup> *ibid*

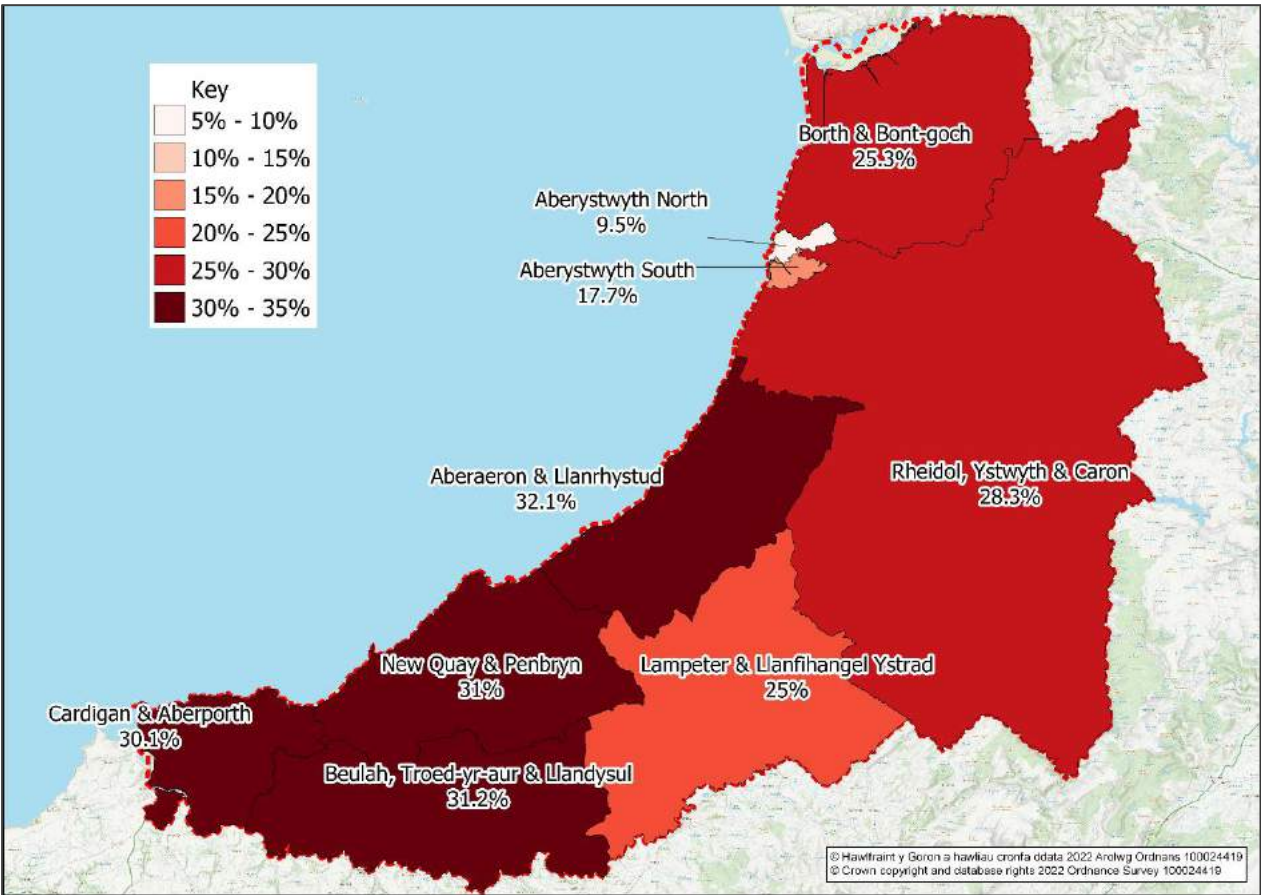
<sup>362</sup> ONS (2019). Living longer: caring in later working life. [Online]. Available at: [Living longer - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk) (Accessed: 07.02.22).

<sup>363</sup> Dr MacBride-Stewart, S. and Dr Parken, A. (2021). Inequalities in a Future Wales: Areas for action in work, climate and demographic change – Full Report. [Online]. Available at: [Future Trends and Inequalities in Wales \(futuregenerations.wales\)](https://futuregenerations.wales) (Accessed: 07.02.2021).

be extremely difficult, which may cause individuals to reduce their working hours. If current arrangements of mixing un-paid care and part-time employment continue, women may experience lower levels of financial security. As reflected in the **Inequalities in a Future Wales Report**, greater consideration on the burden of women across their life course is required, to prevent perpetuating inequalities as the population ages.

Figure 8.2 shows that Aberaeron and Llanrhystud currently have the highest proportion of people aged 65 and above at 32.1%, while at the other end of the scale Aberystwyth North has the lowest proportion at 9.5%, which likely due to the large student population in and around Aberystwyth University. The proportion of responses to The Well-being Survey were representative of the current 65+ population at 25.3%.

**Figure 8.2: Percentage of 65+ population by community area**



Source: Office for National Statistics, Mid-Year Population Estimates 2020

Older people tend to have higher levels of life satisfaction. According to the National Survey of Wales, those aged 65+ are the age group that are most satisfied with their ‘life nowadays’.<sup>364</sup>

Older people find satisfaction from working, the same as any other age group, but often older workers will look for employment that is meaningful, flexible, intellectually stimulating, sociable, age-inclusive and understanding of health conditions and/or disabilities. We know that keeping active is a key contributor to maintaining independence and well-being.

Research suggests that maximising working opportunities for older people can have profound impacts on their health and well-being. Offering older people rewarding employment can reduce the risk of developing serious health problems, improve well-being and give a sense of purpose.<sup>365</sup>

<sup>364</sup> National Survey for Wales  
<sup>365</sup> Dimitriadis S. (2019) Maximising the longevity dividend.

The concern around an ageing population is that local services, particularly healthcare services could be placed under severe pressures in the future, but a healthier population means less impact on health services now and in the future.

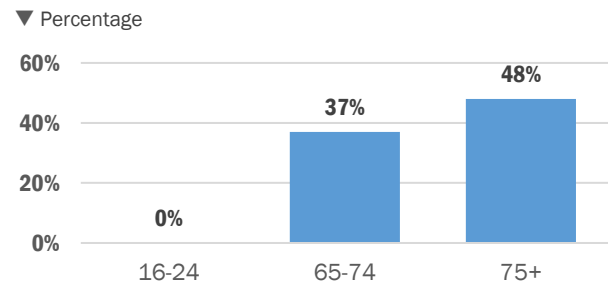
In the year ending June 2019, the economic activity rate in Ceredigion amongst the 65+ population was 15.2%. Within just twelve months this had decreased to 10.8%.<sup>366</sup> It is likely that the COVID-19 pandemic impacted on the economic activity rate of the 65+ population, as this age group were more at risk from becoming seriously ill from the virus, and took precautions to protect themselves, their families and their wider communities. Since then, as COVID-19 restrictions were lifted, the economic activity rate within this age group has increased, and by September 2021 had reached 14.1%.<sup>367</sup> The demand for skills and labour witnessed across the whole of Wales since the end of the second lockdown has created more opportunities for those looking to remain economically active to do so. For example, in Ceredigion the number of people who are economically active has increased by 2,100 between June 2020 and September 2021, although it is not known how many of those new entrants to the workforce are aged 65+.<sup>368</sup>

The state pension age is gradually increasing for both men and women and is currently 66. However, by 2028 it will rise to 67.<sup>369</sup> This means that many people will have to work for longer in the future before being able to access their state pension, but at the same time this will create more employment opportunities for the 65+ population to remain in the workforce.

Concerns were raised in The Well-being Survey by 22% of the 65+ respondents, that in the future employers/education providers would not be prepared to make reasonable adjustments for employees of different ages, sexes, genders, races, backgrounds, beliefs and/or who are disabled.

Recently, it is becoming more common to require good digital skills in order to get a job. This has increased even further since the beginning of the COVID-19 pandemic as much of the workforce were asked to work and communicate remotely, away from offices. The 65+ population are less likely to have basic digital skills.<sup>370</sup> The National Survey for Wales shows that 48% of the 75+ respondents noted that although they were internet users, they had less than three basic digital skills, compared to 37% for the 65-74 population and none for those aged 16-24.<sup>371</sup> This can be seen in Figure 8.3. In the UK, up to 79% of the 65+ population are non-internet users, in comparison to the 16-24 cohort, where just 1% are non-internet users.<sup>372</sup>

**Figure 8.3: Proportion of population with less than 3 digital skills**



Source: Welsh Government, National Survey for Wales, 2018/19

<sup>366</sup> ONS, Annual Population Survey, Employment and unemployment.

<sup>367</sup> Ibid.

<sup>368</sup> Ibid.

<sup>369</sup> Age UK. Changes to State Pension Age. Online: <https://www.ageuk.org.uk/information-advice/money-legal/pensions/state-pension/changes-to-state-pension-age/> Retrieved: 11/10/2021.

<sup>370</sup> Wales Co-operative Centre (2018) Digital Inclusion in Wales.

<sup>371</sup> National Survey for Wales

<sup>372</sup> ONS (2019) Exploring the UK's digital divide. Online: <https://www.ons.gov.uk/peoplepopulationandcommunity/householdcharacteristics/homeinternetandsocialmediausage/articles/exploringtheuksdigitaldivide/2019-03-04#what-is-the-pattern-of-digital-exclusion-across-the-uk> Retrieved: 11/10/2021.

The lack of digital skills could be a barrier to continuing to work post 65, although across the county there are training opportunities available to the general population to help older people in particular to improve their digital skills, such as through Dysgu Bro, which offers a range of courses for adults to improve their skills.

Volunteering rates tend to be higher in rural areas such as Ceredigion and older age groups are also more likely to volunteer. Around 30% of people aged 65-74 volunteer in Wales, compared to 24% in the 24-44 age cohort. This is a slight decrease from 35% in 2017-2018.<sup>373</sup>

In The Well-being Survey 38% of the 65+ respondents stated that they volunteer in Ceredigion, with 33% saying that they would consider joining a community/volunteer group to help achieve good community cohesion in their neighbourhood.

Volunteering has many well-being benefits such as helping to reduce social isolation amongst the older age groups and those in more rural communities. The numbers shown may have decreased due to the COVID-19 pandemic as older people were considered more at risk of becoming critically ill from COVID-19 and may not have felt confident to volunteer at this time.

Ceredigion's Enterprise and Innovation Project Group, made up of representatives from the private sector and local businesses identified both challenges and opportunities from an ageing population, combined with the loss of skills due to the corresponding decrease in the working age population. This was also echoed in The Well-being Survey where 44% of respondents said they were concerned about the so called 'talent drain' to other areas/counties.

Consultation carried out during the winter of 2020/21 revealed that there was recognition amongst the business community of the value of the 65+ population remaining in the workforce and having the opportunities to do so. In particular, was the ability to pass on their skills and experiences to future generations, as well as filling immediate gaps in the county's skills needs. This was expressed in the following response:

*“ Nearly 25% of the population of Ceredigion is 65 years old or over. Many of these people will possess very useful skills which can be shared with the community in an intergenerational way but need an organised way to do this. This could be on a mentoring basis and could cover anything from business support to passing on agricultural skills to the next generation of entrepreneurs. By harnessing the expertise and a lifetime of skills, of the over 65s to pass on to younger generations, you are enhancing the community, where everyone is valued. ”*

– written response to The Well-being Survey

More recently, in The Well-being Survey, almost half (46%) of the 65+ respondents said that they would like to use their skills/knowledge/experience to help others in their community. Creating the conditions for this to happen, such as training opportunities in digital skills and removing the barriers such as ageism, open up opportunities to tackle the economic challenges that lay ahead in terms of decreasing working age population, and also the opportunity for many to remain actively engaged in the economy post 65.

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<sup>373</sup> National Survey for Wales

## Keeping Heathy by Keeping Active

In 2019, Aberystwyth University held a one-day event to promote health and well-being for older adults in Ceredigion. Organised by the Well-being and Health Assessment Research Unity, the event aimed to raise awareness of health and physical exercise among the over 60s and to give older adults an idea of how their physical fitness compares to their peers. The event was a huge success with an overwhelming positive response from older adults who came from all over Ceredigion to engage in the event.

## 8.2 A Suitable Home

**Suitable and affordable homes** for older people are important determinants of health and well-being. Well-designed communities reduce health risks for older people, promote independency and well-being, whilst subsequently offering the potential to reduce social and health care costs.<sup>374</sup> Whilst, unsuitable housing can lead to ill health, such as pneumonia, hypothermia, fractures from falls, asthma and mental health issues. It is estimated that inappropriate housing for the elderly costs the NHS £624 million per year and is expected to rise to nearly £1 billion by 2041.<sup>375</sup> The ageing population of Ceredigion poses a significant challenge to policy makers and planners if we are to provide older people with suitable and affordable homes that can cater for their needs.

Much of the **housing stock in Ceredigion is inadequate** due to its old age which makes it difficult to heat and adapt to improve the safety and energy efficiency, as a result, Ceredigion residents have higher energy costs. In 2019, the median estimated energy cost per year in Ceredigion for existing flats was £651 and £1,158 for existing houses, both of which are significantly above the national average (£525 for existing flats and £907 for existing houses).<sup>376</sup> It is very likely that these figures will have increased due to the current UK energy crisis. This will have an adverse impact on older people, particularly those already living in fuel poverty, as heating usually needs to be at a higher temperature and left on for longer hours.

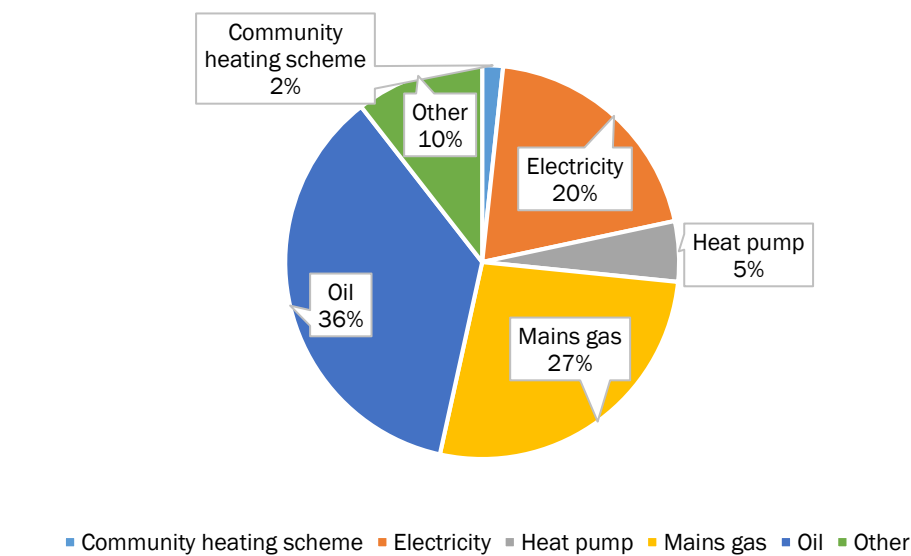
Furthermore, a high proportion of Ceredigion's households are located off the main gas network, which leaves residents reliant on more expensive fuels such as oil, electricity or LPG and dual fuel tariffs. Figure 8.4 highlights the main types of heating methods used by dwellings in Ceredigion. In-line with the UK plan to be net zero by 2050, the UK government has begun to phase out oil boilers so no new ones can be installed post-2025, which poses a significant challenge to Ceredigion and its communities, where over a third (36%) use oil as their main type of fuel.

<sup>374</sup> Maliene, V. Mulliner, E. and Riley, M. (2020). 'Older people's preferences for housing and environmental characteristics'. Sustainability, 12(5723), pp. 1-25.

<sup>375</sup> Age UK (2019). 'Later life in the United Kingdom 2019'. [Online]. Available at: [https://www.ageuk.org.uk/globalassets/age-uk/documents/reports-and-publications/late\\_life\\_uk\\_factsheet.pdf](https://www.ageuk.org.uk/globalassets/age-uk/documents/reports-and-publications/late_life_uk_factsheet.pdf) (Accessed: 20.10.21).

<sup>376</sup> The Office for National Statistics (2020). 'Energy Performance Certificate statistics for new and existing flats and houses'. [Online]. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/energyperformancecertificatestatisticsfornewandexistingflatsandhouses> (Accessed: 21.10.21).

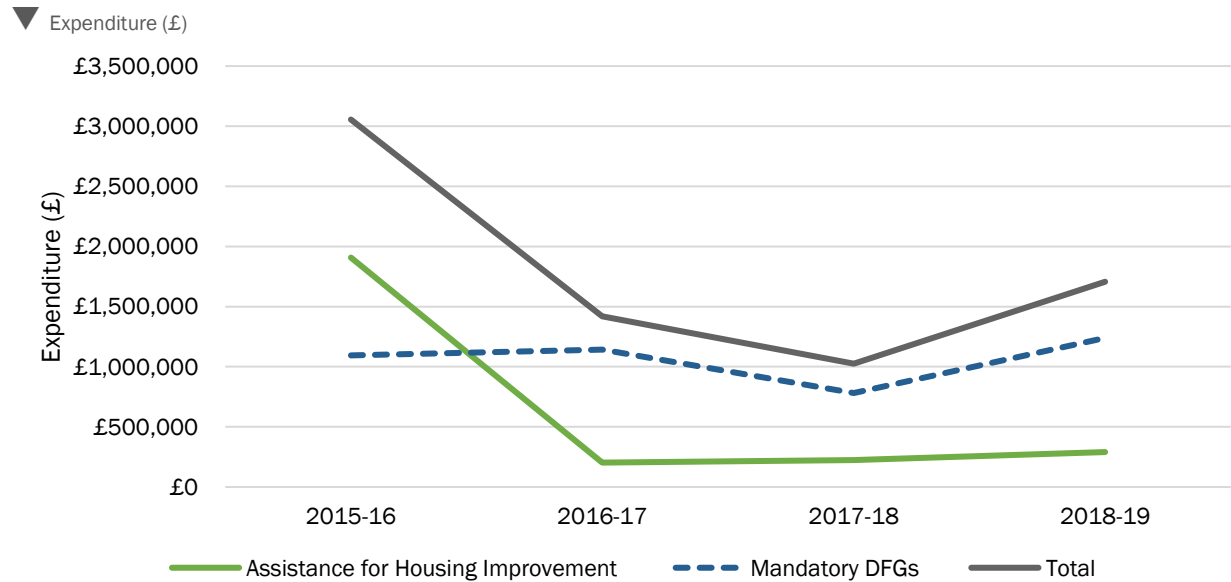
Figure 8.4: Estimated proportion of dwellings by main type of fuel type or method of heating used in central heating in Ceredigion (2019)



Source: ONS (2020)<sup>377</sup>

There is a growing desire to live at home and maintain independence as we age. To facilitate this, financial help is provided by the local authority to owners and tenants in Ceredigion for **home improvements**. **Mandatory Disabled Facilities Grants (DFGs)** are also paid by the local authority to help towards the cost of adapting a home to enable a disabled person to live there. Figure 8.5 displays the overall expenditure on all types of assistance for housing improvement, including Disabled Facilities Grants between 2015 and 2019.

Figure 8.5: Total expenditure on all types of assistance for housing improvement, including Disabled Facilities Grants in Ceredigion (2015-2019)



Source: Stats Wales (2020)<sup>378,379</sup>

<sup>377</sup> The Office for National Statistics (2020). 'Estimated proportion of dwellings with an Energy Performance Certificate by main fuel type or method of heating used in central heating.' [Online]. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/estimatedproportionofdwellingswithanenergyperformancecertificatebymainfueltypeormethodofheatingusedincentralheating> (Accessed: 20.10.21).

<sup>378</sup> Stats Wales (2020). 'Disabled facilities grants by local authority area and type of grant'. [Online]. Available at: <https://statswales.gov.wales/Catalogue/Housing/Disabled-Facilities-Grants/disabledfacilitiesgrants-by-area-granttype> (Accessed: 20.10.21)

<sup>379</sup> Stats Wales (2020). 'Assistance for housing improvement by local authority area, activity and measure.' [Online]. Available at: <https://statswales.gov.wales/Catalogue/Housing/Assistance-for-Housing-Improvement/assistanceforhousingimprovement-by-area-activity-measure> (Accessed: 20.10.21).



Expenditure in 2018-19 was higher than the totals for 2017-18 and 2016-17, but lower than the totals for 2015-16. During 2018-19, the overall expenditure on assistance for housing improvement (including DFGs) was £1.7 million, which is the highest increase out of the 22 local authority areas from the previous year (increased by 66% or £680,000). This increase could be partly linked to the increase in Occupational Therapy Staff, resulting in a greater number of improvement recommendations. Furthermore, 131 Mandatory Disabled Facilities Grants, with a total value of £1.2 million were completed by Ceredigion County Council during 2018-19, this represents almost three quarters of all spending (73%) on housing improvements. Taking into account the number of dwellings that received assistance in each local authority area, Ceredigion was the local authority with the third highest rate of spending (£48,500 per 1,000 dwellings) across Wales.

Currently, housing options in Ceredigion range from **general needs housing** with or without some degree of support (aids and adaptations, telecare, floating support, meals at home etc.) to **Sheltered Accommodation** (purpose built self-contained flats and bungalows with help available if a problem should arise), **Extra Care Housing** (similar to sheltered housing, however, they can provide on-site carers to assist with personal care). For some it may not be possible for them to remain safely living at home, therefore **Residential Care** and **Nursing Care** is offered.

**Residential care** refers to long-term care given to adults who stay in a residential setting rather than in their own home or family home. There are various residential care options available in Ceredigion depending on the needs of the individual. The local authority operates five residential care homes itself and commissions with several private companies both in Ceredigion and further afield. Work is ongoing to ensure that support mechanisms are used to help people stay in their own homes during their rehabilitation rather than in residential homes.<sup>380</sup>

According to the Housing Lin report, current provision of **housing for older people** (this includes social sector sheltered and age-exclusive housing and private sector retirement housing) in Ceredigion is significantly below the national average and ranks 22<sup>nd</sup> out of the 22 local authority areas in Wales.<sup>381</sup> **Housing with care** (includes extra care schemes) is slightly below the national average. At present there are two Extra Care Housing facilities in Ceredigion, Maes Mwldan in Cardigan and the newly built Maes Y Môr facility in Aberystwyth. These concerns were highlighted in The Well-being Survey when respondents were asked *what needed to be put in place to improve their physical and/or mental health*, outlined in Figure 8.6.

**Figure 8.6: Summary of main themes when survey respondents were asked – “what needed to be put in place to improve their physical and/or mental health”**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

There is better provision of **Residential Care** and **Nursing Care** in the county, however, it is still slightly below the national average. Despite Ceredigion’s ageing population, future demand for Residential Care is expected to decline due to an increase desire for Housing with Care (a shift towards independent living). Whilst, it is expected that there will be an increase in the need for Nursing Care given the growing cohort of older people in Ceredigion with complex needs (including severe dementia). Table 8.2 indicates the estimates future need (units/beds) in Ceredigion up to 2035.

<sup>380</sup> “Ceredigion Social Services: Statutory Director’s Annual Report 2019/20”. Ceredigion County Council, 2021. 8.  
<sup>381</sup> Housing LIN (2018). ‘Assessment of Specialist Housing and Accommodation Need for Older People in West Wales – for West Wales Care Partnership’. [Online]. Available at: [West\\_Wales\\_CP\\_Older\\_Peoples\\_Housing\\_Need\\_Assessment\\_HousingLIN-Final.pdf](http://West_Wales_CP_Older_Peoples_Housing_Need_Assessment_HousingLIN-Final.pdf) ([www.wcp.org.uk](http://www.wcp.org.uk)) (Accessed: 20.10.21).

Table 8.2: Ceredigion’s estimated future need (units/beds) by accommodation type up to 2035

	2020	2025	2030	2035
Housing for Older People	187	342	450	544
Housing with Care	52	83	107	143
Residential Care	-6	43	54	66
Nursing Care	76	153	206	251

Source: Housing LIN (2018)

A higher level of provision is needed in Housing for Older People, Housing with Care and Nursing Care in order to match the aspirations of the Welsh Governments Older People’s Expert Housing Panel report, and to meet the older people’s preference to staying independent and living in their home. The potential development of the Cylch Caron Integrated Resource Centre in Tregaron and Maes Y Môr (extra care scheme) in Aberystwyth will help to address this need. Maes Y Môr opened for applications in the summer of 2021, the facility will provide a supportive community of 56 apartments, allowing people to live in their own home with access to 24 hour on site care and support.

The **cost of residential and nursing care** is expensive. In Ceredigion, the weekly cost for residential accommodation in local authority homes is £644-£686,<sup>382</sup> which is similar to the national average (however, fees may differ for private residential accommodation). The Local Authority pays £668-£711 per week to the Nursing Homes in Ceredigion (run by the Independent Sector), although the cost may be higher than that paid by the Local Authority.<sup>383</sup> The amount an individual needs to pay for residential or nursing care depends on their financial circumstances.

During 2019, the Welsh Government increased the capital threshold from which care home residents have to self-fund from £40,000 to £50,000. There are significant weaknesses in the data, however, it is believed that self-funders make up 30% of the care home population across Wales<sup>384</sup> (further data is needed at a local level to understand the proportion of self-funders in Ceredigion). This group could expect to pay on average a substantial sum of £33,500 - £37,000 per annum for a residential or nursing home in Ceredigion. However, it is important to note that the allowance in Wales is much higher than across the UK, and double the threshold of £23,250 in Northern Ireland and England.

### 8.3 Maintaining Independence

Keeping active and staying connected are also known to improve health and quality of life for older people. There is strong evidence that people who are active have a lower risk of heart disease, stroke, type 2 diabetes, some cancers, depression and dementia. In order to reduce the risk of mental illness, and be able to go out and stay independent well into old age, older people are being advised to keep active. The dangers of reduced inactivity are higher rates of falls, obesity, heart disease and early death compared with the general population.

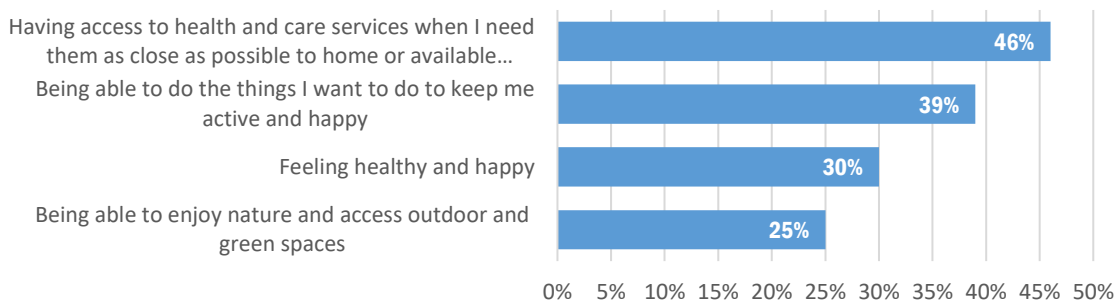
The desire to remain active in order to maintain physical and mental well-being was reflected in the results of the Well-being Survey (Figure 8.7), where 39% of respondents aged 65 and over said they valued being able to do the things they want to keep them active and happy, which was the second highest response behind access to health and care services (46%). This was followed by feeling healthy and happy (30%), and being able to take advantage of enjoying Ceredigion’s many opportunities to enjoy the outdoors and green spaces in order to remain active (25%). These are similar results to those across all age groups, indicating that future generations also recognise the importance of, and share the desire to, remain active as they grow older.

<sup>382</sup> Ceredigion County Council (2021). ‘Charging for Residential Care and Support. A guide to Financial Assessment and Charges 2021-2022’. [Online]. Available at: [Charging for Residential Care and Support 2021-2022 \(ceredigion.gov.uk\)](https://ceredigion.gov.uk) (Accessed: 20.10.21).

<sup>383</sup> Ibid.

<sup>384</sup> Sion, C and T, M. (2020). ‘The future of care in Wales: resourcing social care for older adults’. Cardiff University. [Online]. Available at: [social\\_care\\_final2\\_aug20.pdf \(cardiff.ac.uk\)](https://social_care_final2_aug20.pdf) (Accessed: 20.10.21)

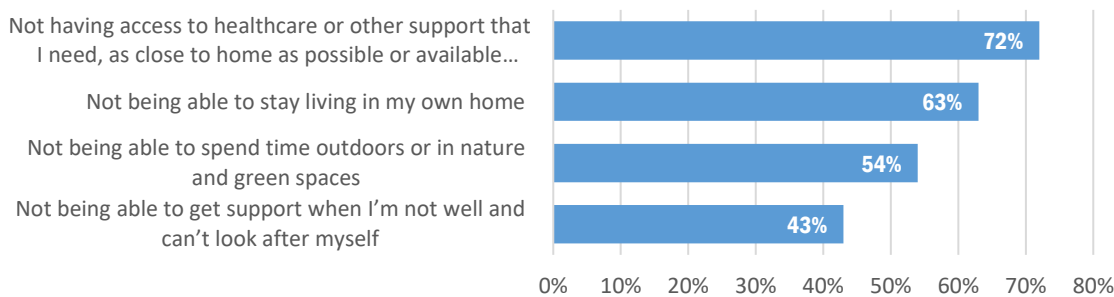
**Figure 8.7: Aged 65 and over - which three things do you value the most in relation to your physical health and/or mental well-being?**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

The things that concern Ceredigion’s residents the most with regard to staying physically and mentally healthy over the next ten years are access to healthcare and support nearby, mentioned by almost three quarters of respondents (72%), followed by not being able to live in my own home (63%) and then not being able to spend time outdoors or in nature and green spaces (54%), see Figure 8.8. These results are mirrored in the findings across all ages.

**Figure 8.8: Aged 65 and over - thinking ahead over the next ten years, what concerns you the most about being able to stay physically and/or mentally well?**

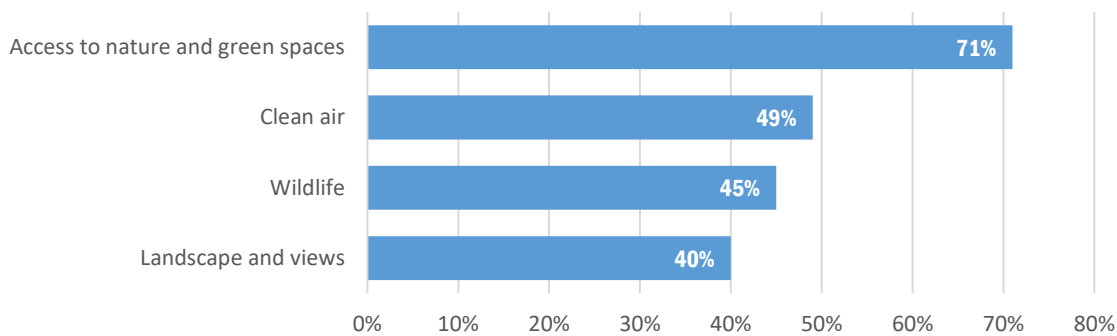


Source: Ceredigion PSB, Regional Well-being Survey (2021)

There is clearly a strong connection between remaining active as we get older and the natural environment around us. When we asked 65+ year olds in the well-being survey what they valued the most in their local environment, the overwhelming majority (71%) stated that access to nature and green spaces was the most important (Figure 8.9), much higher than the other responses to the question. This is also slightly higher than the responses across all age groups (68%) and demonstrates just how important access to the natural environment is to the well-being of older people. There is a variety of evidence that demonstrates the benefits of this connection - Natural Resources Wales Area Statement for Mid Wales summarises that outdoor recreation makes a significant contribution to not only our physical health, but can benefit mental well-being as well.<sup>385</sup>

<sup>385</sup> “Reconnecting people and places”. Mid Wales Area Statement. Natural Resources Wales. Online: <https://naturalresources.wales/about-us/area-statements/mid-wales-area-statement/reconnecting-people-and-places/?lang=en>. Retrieved: 24/02/2022

**Figure 8.9: Which three things do you value the most about your local environment?**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

The unique rural location of Ceredigion provides considerable opportunities to access the local environmental and nature based activities, and there are a range of organisations that either run or support activities across all age groups. There is also a flourishing Third Sector in Ceredigion, supported by the Ceredigion Association of Voluntary Organisations (CAVO) who proactively promote and support a range of community groups and projects across the county. Ceredigion for example, has a higher than average number of active Third Sector organisations (3,444 compared to 3,316 across Wales)<sup>386</sup>, a higher than average proportion of charities (4.48 per 1,000 population compared to 2.65 across Wales)<sup>387</sup> and a higher than average percentage of people who volunteer (30% compared to 26%).<sup>388</sup>

While outdoor recreational activities are often free and provide opportunities for everyone regardless of age or ability, for some older people there are barriers to taking part. For example, we know from the recent Physical Activity Development Plan consultation that the *opportunity* to take part, i.e. the activity being available at an appropriate time and place, was the most important factor in taking part in outdoor/physical activities for those aged 65+ in Ceredigion.<sup>389</sup> Providing opportunities that cater to older people in Ceredigion is clearly essential to their overall health and well-being, but equally important is designing those services to meet their specific needs, such as factoring in transport to and from activities and advertising opportunities via means other than digital ones.

Sport Wales provide a variety of resources specifically for older people in remaining active, and their strategy *Enabling Sport in Wales to Thrive* is committed to inclusivity regardless of age and ability – it states that “the vision is for life and it responds to the needs of people at different stages of their life”.<sup>390</sup> On a local level, the emerging Physical Development Action Plan for Ceredigion, due to be published in 2022, will similarly focus on the sustainable, successful and inclusive provision of services.<sup>391</sup>

As we get older, most people want to stay in touch with society – their community, friends and neighbours – and being active can ensure they keep doing that. Amongst the 65+ age groups in Ceredigion, 39% told us in the Well-being Survey that they already volunteer in a wide range of activities, from sports and local community groups, to litter picking and actively engaging in local democracy through town and community councils (Figure 8.10). This is higher than across all ages in Ceredigion (34%). It is this age group that also report greater levels of life satisfaction, possibly linked to having more time to contribute to community activities.

<sup>386</sup> “Third Sector Data Hub”. Wales Council for Voluntary Action (WCVA), 2019. 6 &12.

<sup>387</sup> Ibid.

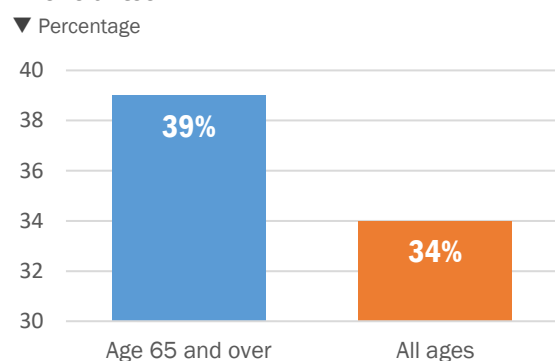
<sup>388</sup> “Wellbeing of Wales: national indicators”. National Survey for Wales, 2019/20.

<sup>389</sup> Ceredigion County Council (2022) Physical Activity Development Plan Consultation.

<sup>390</sup> “Enabling Sport in Wales to Thrive”. Sport Wales. (Online: <https://futures.sport.wales/#2>). Retrieved: 24/02/2022.

<sup>391</sup> Ceredigion County Council.

**Figure 8.10: Percentage of respondents who volunteer**



Source: Ceredigion PSB, Regional Well-being Survey (2021)

Ceredigion has a very active and well-organised third sector. There are many volunteering opportunities and the countless opportunities for outdoor activity provides many opportunities to follow active pursuits later in life. The valuable life skills and experience of older people mean their contributions to community life, in whatever capacity, are particularly valuable. Clearly, the provision of opportunities to volunteer, be active in the local community and keep in touch with others are all essential in achieving a healthier and cohesive Ceredigion, now and in the future. For older people specifically, these opportunities clearly play a vital role in not only health, but also maintaining independence.

For people with a disability in Ceredigion, **accessibility** was the most important issue highlighted in maintaining independence at any life stage. Our workshop with the Ceredigion Disabled Person's Forum revealed the need for better access to the town centres, shops, footpaths, disabled toilets, restaurants and other venues. Buildings without level access and disabled parking were identified as particular barriers to accessing venues and services. The lack of adequate **public transport** was also high on the list of factors that determines well-being, and for many this is the only form of transportation they have.

## 8.4 Needing Help

### Dementia and age-related conditions

Ceredigion has an ageing population and this trend is set to continue over the next fifteen years. Getting older means being at increased risk of developing a long-term illness, such as dementia, high blood pressure, arthritis and sensory loss,<sup>392</sup> and result in us needing more support from others as we get older.

Dementia and Alzheimer's was the third most common cause of death in Ceredigion between 2013 and 2020. Approximately 65 people died per year from dementia and Alzheimer's disease in the county, equating to around 8.2% of deaths each year during this period.<sup>393</sup>

Dementia is a term used to describe symptoms that impact memory, performance of daily activities and communication abilities, while Alzheimer's is the most common form of dementia and symptoms usually worsen over time.<sup>394</sup> People living with both conditions can often require significantly more support.

According to the West Wales Care Partnership, in 2020 there were 1,322 people aged 65+ living with dementia in Ceredigion. By 2035, this number is projected to increase significantly to 1,993.<sup>395</sup> This is a key local and regional issue for West Wales, as similar increases are projected across the region, see Figure 8.11. The total number of people living with dementia is expected to increase by 58% across the three counties by 2035.<sup>396</sup>

<sup>392</sup> Age UK. Conditions and illnesses. Online: <https://www.ageuk.org.uk/information-advice/health-wellbeing/conditions-illnesses/> Retrieved: 25/10/2021.

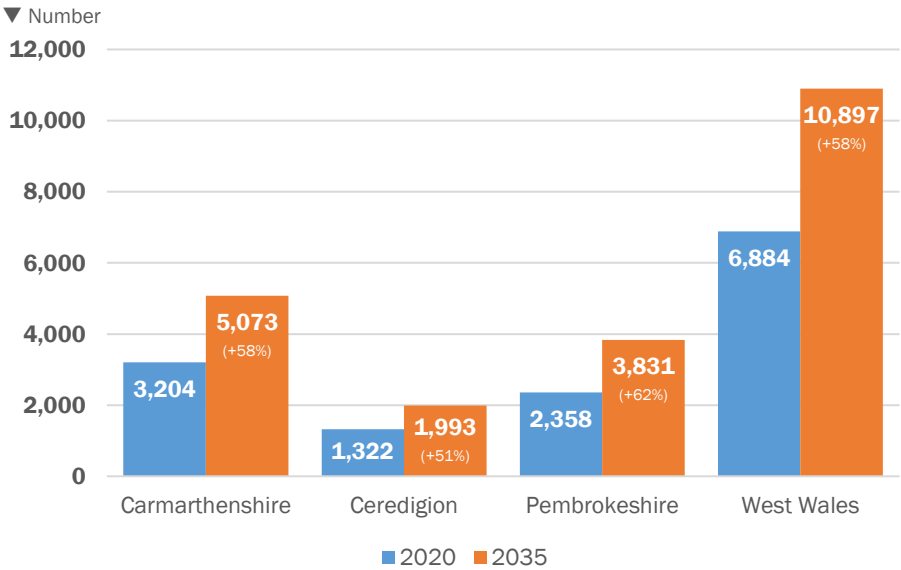
<sup>393</sup> Nomis Mortality Statistics – Underlying cause, sex and age.

<sup>394</sup> Healthline. Dementia and Alzheimer's: What Are the Differences? Online: <https://www.healthline.com/health/alzheimers-disease/difference-dementia-alzheimers> Retrieved: 25/10/2021.

<sup>395</sup> West Wales Care Partnership. Older People. Online: <http://www.wwcp-data.org.uk/older-people> Retrieved: 25/10/2021.

<sup>396</sup> Ibid.

Figure 8.11: People living with dementia aged 65+ in West Wales



Source: West Wales Care Partnership

Early onset dementia in people aged under 65 is also higher than average in Carmarthenshire, Ceredigion and Pembrokeshire. When added to other conditions related to ageing, this will place greater pressures on existing services and increase demand for support and care in the future, both of which need to be sustainable over the longer term.

Indeed, “not having access to healthcare or other support” was the single most important thing identified by Ceredigion respondents aged 65+ when looking ahead at how to maintain their physical and mental well-being over the next ten years. This was the same priority across all age groups. “Not being able to get support when I’m not well and can’t look after myself” also featured highly on the list of concerns, see Table 8.3.

Table 8.3: Q34 ‘Thinking ahead, over the next ten years, what concerns you the most about being able to stay physically and/or mentally well?’ (Aged 65+ responses)

Not having access to healthcare or other support that I need, as close to home as possible or available through technology	72%
Not being able to stay living in my own home	63%
Not being able to spend time outdoors or in nature and green spaces	54%
Not being able to get support when I’m not well and can’t look after myself	43%
Not being able to take regular exercise	36%

Source: Ceredigion PSB, Regional Well-being Survey (2021)

62.7% also said not that ‘not being able to stay living in my own home’ was something that concerned them when thinking about the next 10 years. It is well known that, in general, older people want to continue living in their own homes and this is reflected in the results to The Well-being Survey. But as needs intensify, demands on health and social care increase until remaining in one’s home is no longer possible and the move to a more suitable home is considered.

In Ceredigion, the demand for extra care housing has been increasing and is likely to continue. In Aberystwyth, Maes Y Môr is a new extra care housing scheme providing housing, 24 hour on-site care and a range of opportunities for social interaction and enjoying shared interests as part of supporting our older population. The link between keeping active and one’s well-being is reflected in these schemes that take into account the specific needs of people in this age group.



Consultation conducted during 2020 around another proposed scheme at Cylch Caron in Tregaron, reflected the growing interest in, and demand for, additional housing support for older people.<sup>397</sup> Ultimately, this will mean that the health and social care needs of the older people will increase and the need for more suitable accommodation will grow. Meeting these needs will be essential to ensure that we are able to continue living active and happy lives well into older age.

### Staying Connected

Loneliness and social isolation in older adults are serious public health risks and are linked to other serious medical conditions. But the two are not the same thing - loneliness is the feeling of being alone regardless of the amount of social contact, while social isolation is a lack of social connections. Social isolation can lead to loneliness in some people, while others can feel lonely without being socially isolated.

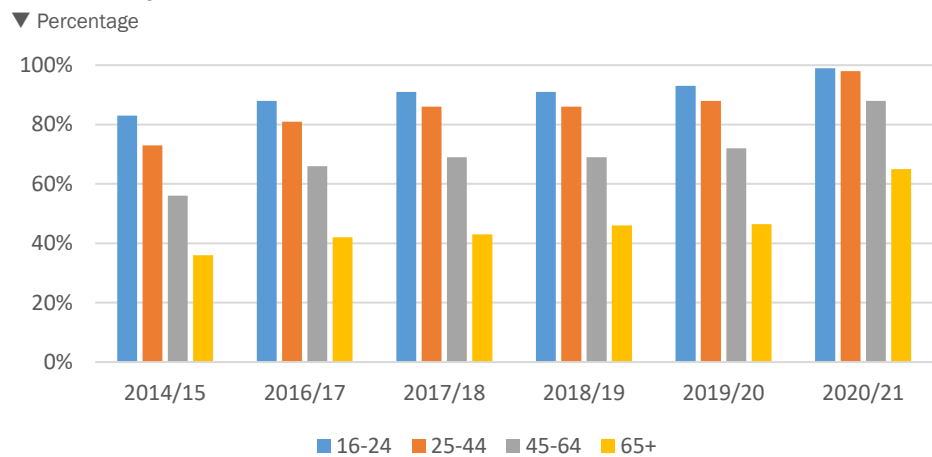
Social connectedness is therefore crucial to ageing well, but given the largely rural nature of Ceredigion, staying connected can be challenging, particularly for older people who may not have access to transport or digital connectivity, or may not be able to leave home due to an underlying health condition.

We know from the National Survey for Wales that any age group can be affected by isolation and loneliness including the very young, but concerns over the impact of COVID-19 are of a particular concern for older people, who may be more vulnerable and concerned about leaving home.

Reliable data on a local level is not available for either social isolation or loneliness, but there is much evidence referring to the impact of isolation regionally and nationally.

While older people identify as having less digital skills, the numbers of people aged 65+ using the internet *several times a day* has been increasing since 2014/15, but remains much lower than all other age groups (Figure 8.12).<sup>398</sup> Staying connected digitally can also be difficult because of the rural nature of Ceredigion as there are around 12% of households that do not have internet access.<sup>399</sup> For some, digital communications is an essential means of remaining connected, as demonstrated by the 49% of the 65+ responses who thought that digital connectivity was one of the three things they valued most in a prosperous community in The Well-being Survey.

**Figure 8.12: Use of internet 'several times a day' by age cohort and year**



Source: National Survey for Wales, 2020/21

Physical Transport can also be a challenge for some of Ceredigion’s residence in staying connected with others. As we get older our health and/or our confidence may prevent us from being able to drive, placing a greater reliance on public transport and which provides limited services from the most rural locations in Ceredigion.

<sup>397</sup> “Cylch Caron Extra Care Housing Scheme: Evidence and Consultation Report.” Ceredigion County Council, 2020.

<sup>398</sup> National Survey for Wales (2020/21).

<sup>399</sup> National Survey for Wales (2019/20).

The responses to our engagement events highlighted this as a particular concern – In The Well-being Survey 62% of respondents aged 65+ identified “a good transport network that meets the needs of rural and non-rural areas” as the thing they valued the most in a prosperous community. When asked to look ahead at the challenges in relation to a prosperous community, over slightly more than half (50.2%) identified “a good transport network” as being a concern. The Ceredigion Disabled Persons Forum also highlighted public transport as not being adequate to meet the needs of many people, and was a major barrier to travelling, accessing services or attending recreational events.

## 8.5 At the End

In 2020 there were 877 deaths registered in Ceredigion, and on average there have been around 796 deaths each year between 2013 and 2020. The leading causes of deaths in the county is cancer, with an average of 217 deaths per year, followed by heart diseases and dementia and Alzheimer’s disease. Table 8.4 shows the average top 3 causes of deaths in Ceredigion.<sup>400</sup> Deaths attributed to COVID-19 in Ceredigion were relatively low at 36, and reflect the way in which the numbers of cases were minimised during 2020. Older people are considered to be more at risk from COVID-19. Given the age profile of Ceredigion, if cases had been higher in the County the number of deaths attributed to COVID-19 would likely have been much higher also.

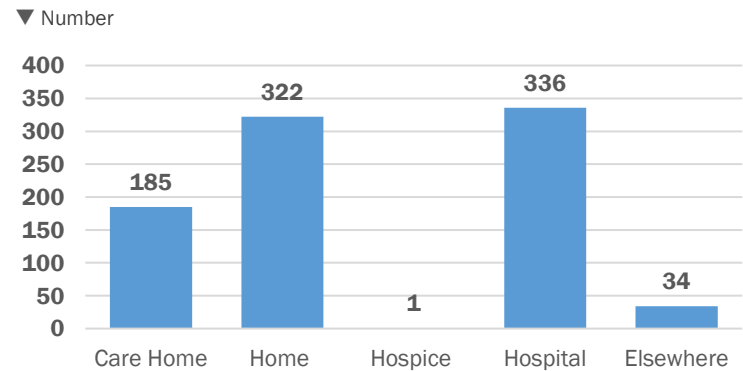
**Table 8.4: Top 3 causes of death in Ceredigion**

Cause of death	Average deaths per year (2013 – 2020)
All Causes	796
Cancer	217
Heart Diseases	101
Dementia and Alzheimer disease	65

Source: NOMIS, 2020

Figure 8.13 shows the number of death registrations by location in 2020 in Ceredigion. Unsurprisingly, hospitals had the most death occurrences in 2020 followed by those at home with 322. More and more people are wishing to receive care at home and die at home. Being at home is where most people feel happiest and most comfortable, having to leave home can be a traumatic experience, especially as we get older.<sup>401</sup>

**Figure 8.13: Death Registrations in Ceredigion in 2020 by location**



Source: ONS, 2021

As we get older or when we have a long term illness, it is more likely that we need some sort of care or end of life care in place. Sometimes family members are able to provide care for their loved ones, but this is not always the case. According to Money Advice Service, it is recommended to budget at least £30,000 per year for full-time care

<sup>400</sup> Nomis Mortality Statistics – Underlying cause, sex and age.  
<sup>401</sup> CARE At Home Group. Online: <https://careathomegroup.com/> Retrieved: 19/10/2021.

during the day,<sup>402</sup> which is likely to be prohibitive for many in Ceredigion given that the average household income is just £26,605.<sup>403</sup>

Another option for older people and/or people with a long term illness, are care homes. In Ceredigion there are around 22 nursing and care homes, which offer care for older people and adults with a long term illness or disability. On average the weekly cost for someone living in a residential care home is £704, whilst the average cost of a nursing home is £888 a week.<sup>404</sup>

For many, the costs noted above will make it impossible for people to be cared for in a home, without financial support. This highlights the specific problem faced by people living in poverty in Ceredigion when needing care. There is help available from Local Authorities to meet costs, but this can be a long and complicated process.<sup>405</sup>

Ceredigion's ageing population may place greater pressures on care and nursing homes in the future due to rising numbers of older people needing care. Additionally, many older people choose to retire in Ceredigion from other parts of Wales and the UK, and may have moved away from their family support and will therefore rely fully on local health services for assistance.

At the end of our lives it is important that we are able to receive the care and support we need if necessary. Unfortunately, socio-economic factors can have detrimental effects on this causing mental health and well-being issues not only for those who need care but also the family around them.

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<sup>402</sup> Care Sourcer Online: <https://www.caresourcer.com/caresupport/financing-care/care-at-home-wales/> Retrieved: 19/10/2021.

<sup>403</sup> CACI Paycheck 2021.

<sup>404</sup> Carehome.co.uk (2021) Care home fees and costs: How much do you pay? Online: <https://www.carehome.co.uk/advice/care-home-fees-and-costs-how-much-do-you-pay> Retrieved: 19/10/2021/

<sup>405</sup> Age UK. Online: <https://www.ageuk.org.uk/information-advice/care/paying-for-care/paying-for-a-care-home/> Retrieved: 21/10/2021.

## Summary of themes: Older People



Creating the conditions for Ceredigion's older residents to use their skills, knowledge and experience to help others in the community and remain **actively engaged in the economy**.

Our Well-being Survey and stakeholder events highlight that provision of opportunities to **volunteer**, be **active in the local community** and keep in touch with others are all essential in achieving a healthier and cohesive Ceredigion, now and in the future.

A higher level of provision will be needed in **Housing for Older People**, Housing with Care and Nursing Care in the county, in order to meet the needs of the older people's preferences to stay independent and live in their home.

The cost of **residential and nursing care** is expensive, financial support is provided to those under the £50,000 threshold. Further data is needed at a local level to understand the proportion of self-funders across Ceredigion who would typically pay £33,500 - £37,000 annually.

The number of people aged 65+ in Ceredigion with **dementia** is expected to increase significantly, which is a key local and regional issue for West Wales as a higher levels of support will be needed.

Ceredigion has an **ageing population**. It is expected that this will put a **significant strain on our public services** (particularly our local health service) and on our **local labour market**.

Not having **access to healthcare** or other support was the single most important thing identified by Ceredigion respondents aged 65+ when looking ahead at how to maintain their physical and mental well-being over the next ten years.

Buildings without **level access** and lack of **disabled parking** were identified as particular barriers to accessing venues and services by Ceredigion's disabled residents.

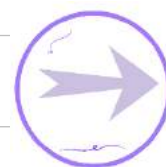
The lack of **adequate public transport** was also high on the list of factors that determines well-being.

For many, the high costs make it impossible for people to be **cared for in a home**, without financial support. This highlights the specific problem faced by people living in poverty in Ceredigion when needing care.

# NEXT STEPS







## 9.1 Publishing the Assessment

The draft Assessment of Local Well-being will be presented to the Ceredigion Public Services Board (PSB) on 18<sup>th</sup> November 2021, following which the draft will be consulted on between November 2021 and January 2022. The consultation will seek feedback on the Assessment and aim to 'check' that the themes identified are reflective of well-being as we understand it in the county, and in particular to identify any missing themes or issues not identified during the data analysis and engagement.

The final version of the Assessment is scheduled to be presented to the PSB at its meeting on 7<sup>th</sup> March 2022, and published on the Ceredigion PSB website on or before 21<sup>st</sup> March 2022.

**Table 9.1: Timetable for the Next Steps**

Date	Activity
10 <sup>th</sup> November 2021	Completion of Draft Assessment of Local Well-being
18 <sup>th</sup> November 2021	Draft Assessment of Local Well-being presented to Ceredigion PSB
18 <sup>th</sup> November 2021	Consultation on the draft Assessment of Local Well-being opens and runs for 8 weeks
17 <sup>th</sup> January 2022	Consultation on the draft Assessment of Local Well-being closes
18 <sup>th</sup> January 2022 to 28 <sup>th</sup> February 2022	Assessment of Local Well-being updated and final version produced
7 <sup>th</sup> March 2022	Final version of Assessment of Local Well-being presented to Ceredigion PSB
21 <sup>st</sup> March 2022	Ceredigion Assessment of Local Well-being published on Ceredigion PSB website

Source: Ceredigion Public Services Board

## 9.2 Using the Sustainable Development Principle to guide the Local Well-being Plan

Following publication, the Ceredigion PSB will use the Assessment of Local Well-being to assist in identifying priorities for improving the Social, Economic, Environmental and Cultural well-being of Ceredigion. This assessment will be a fundamental resource for the PSB to use as part of that process, and the priorities identified will be used to develop the new Ceredigion Local Well-being Plan which will be published by March 2023.

The Local Well-being Plan will include a set of Well-being Aims agreed by the PSB which are designed to maximise its contribution within Ceredigion to achieving the seven national Well-being Goals, and outline how it will use the Sustainable Development Principle and five ways of working to improve well-being in the county.

The Plan will also set out the short, medium and long-term actions to be achieved by the PSB over the next five years up to 2028. The expectation, in the first instance, is that the PSB will concentrate its collective efforts on a few specific priorities in order to add value to the services already being delivered. The Ceredigion PSB wants to enable individuals and communities to build the resilience required to respond to the changing world in which we live, for the improvement of economic, social, environmental and culture well-being of both present and future generations.

## 9.3 Stakeholder Engagement

As part of the process of developing the priorities the Ceredigion PSB will continue to consult and engage with the public and stakeholders, which will take place during the summer of 2022, the details of which will be published on the Ceredigion PSB website (<https://www.ceredigion.gov.uk/your-council/partnerships/ceredigion-public-services-board/>). In the same way that the Assessment was 'engagement led' so too will be the engagement and consultation for the Well-being Plan. The action plan and timeline to move from Assessment to the Well-being Plan will be agreed at the PSB meeting on 7<sup>th</sup> March 2022.



We will encourage all residents and stakeholders to take part in this process to ensure the agreed plan builds the Ceredigion we want, both now and for future generations. These will be scheduled shortly, but will include events and workshops across the County to discuss the possible steps that the PSB should be taking through the Plan as part of our continuing engagement with communities. The ongoing COVID-19 pandemic may have an impact on the format of these sessions, but even in the case of restrictions being in place during 2022, the engagement will be run virtually and alternative methods used.

Following the publication of the Well-being plan, a progress report will be produced annually, highlighting the work that the PSB has undertaken to meet the priorities contained in the Plan.

## 9.4 Developing Understanding

This Assessment presents an initial view of some of the factors behind well-being in Ceredigion. We have tried to take a broad view of the concepts and issues, and have included selected research where we thought that this added to our understanding.

We will be reflective and critical in developing our Assessment, examining how we currently deliver services and how public services fit into the wider network of our communities. This may mean collecting and analysing further data from official sources, carrying out original survey research in our area, designing rapid methods to capture information via digital channels, studying case studies of particular issues, or tracing service user 'journeys', the contacts people have with public services and other bodies.

As well as involving the partners that make up the PSB, the research strategy will look for opportunities for collaboration with other PSBs and Welsh Government, as well as with academic and private sector organisations.

## 9.5 Initial Reflection on the Assessment

Given the importance of the Assessment to improving well-being in the county, a full debrief will be undertaken by the PSB/RPB Network to identify any lessons learned for those undertaking the next round of assessments in 2027. The aim is to strengthen the actual process of producing the Assessment and ultimately the quality of the Assessment itself.

The debrief is due to take place between April and May 2021 following publication of the final version of assessments. While this will formally capture the lessons learned, our initial reflection on the process over the last twelve months provides some useful observations as a starting point for undertaking that process.

Overall, it is recognised that the 2022 Ceredigion Assessment of Local Well-being has been strengthened by listening to, and acting on, the feedback from colleagues both nationally and our experiences locally. In particular, we would point to the greater depth of analysis and understanding of the well-being issues affecting the people and communities of Ceredigion, along with considering the assets as well as the challenges in the county, and crucially projecting further ahead to truly consider the challenges and opportunities for our *Future Generations*.

Some of the specific strengths this time are the explicit identification of key regional issues agreed with colleagues across the region, linking our future scenarios to the national megatrends and the comprehensive approach to the analysis to provide the most complete picture of the state of well-being as possible.

However, we also recognise that there is further work we can undertake to improve our understanding of well-being, and this work will continue as we move from the Assessment to the Well-being Plan. A large part of this focuses on people and communities in Ceredigion and building a more comprehensive picture of the well-being factors affecting *all* groups in our communities. For example, it is the intention to capture more 'lived experiences' of Ceredigion's residents in the future and ensure our engagement activity provides the opportunity for all to take part. These first-hand accounts would strengthen the Assessment, and we see this as a crucial step in continuing to develop our understanding of well-being in Ceredigion.

Linked to this, is additional work to identify and engage with, 'hard to reach' groups in the county, and ensure their voices are heard. The impact of the COVID-19 pandemic on engagement has been challenging over the last eighteen months, but there are plans already in place to strengthen this. These include working with the Coproduction

Network for Wales as a cluster across the West Wales region to take forward well-being projects and build stronger engagement networks. The new Engagement HQ platform will also be rolled out, providing new and innovative ways to engage and record feedback. The development of the Gorwel Well-being platform is another key part of this process by providing the focal point for storing, accessing and analysing well-being related data, either quantitative or qualitative.

## 9.6 Future Plans

Beyond the publication of the Assessment and Local Well-being Plan, we will be working with colleagues regionally across West Wales to keep the assessment process 'live', and our understanding of well-being, up to date. There is an on-going commitment by the PSB to embrace the principles of continuous engagement, and this is reflected regionally in Carmarthenshire and Pembrokeshire.

The Assessment draws on the evidence from national work on megatrends and future scenarios affecting the well-being of future generations in Wales. However, it is recognised that as part of the ongoing work to increase our understanding of well-being in the county, that further and more detailed engagement will be required with partners and stakeholders to identify future potential scenarios. The insights gained from this would be beneficial in how the Ceredigion PSB could respond to the future trends, plus provide the assurance that any new scenarios are identified at an early stage. Some of the Ceredigion PSB partners have already made offers to support this work and facilitate Three-Horizons based workshops to incorporate future trends into the well-being planning phase. The development of the Gorwel platform provides a good opportunity to record this and ongoing engagement around well-being and future scenario planning.

We recognise that while this assessment is broad in its outlook and has provided as comprehensive a picture of well-being as was possible, it does not provide a *complete* picture. We have been able to identify a number of areas where further data and intelligence would aid our understanding, and work on this will be requested by the PSB to support the Well-being Plan and our ongoing understanding of well-being.

Furthermore, a new platform has been developed by the three PSB's in West Wales called "Gorwel", which will be used to support the ongoing work on well-being. It provides a variety of tools to the PSB itself, stakeholders and individuals with an interest in well-being across the region. This includes a central repository for well-being data, interactive dashboards on the core data set, and a place to upload more qualitative data such as engagement and consultation results. It also provides tools to assist with engagement and consultation exercises. The aim is to provide an ongoing and up to date picture of well-being, and to play a central in future Well-being Assessments and Well-being Plans. Gorwel is now live and will be formally rolled out during the autumn of 2021.

In moving forward, the Ceredigion Public Services Board will be using the new Engagement HQ platform along with the Gorwel well-being system to provide greater opportunities for residents and stakeholders to record their lived experiences in Ceredigion. This will provide a more detailed understanding of the issues they face, and subsequently support the development of the Local Well-being Plan.

### Case Study ►

#### Gorwel – Keeping the Engagement Going

There is a commitment in West Wales to ensure that there is a process of continuous engagement on well-being with residents and stakeholders. The newly developed "Gorwel" platform, meaning "Horizon" in English, will play a central role in facilitating that by providing improved opportunities for people and communities to feed back their experiences of well-being in Ceredigion, the challenges they face and what matters most to them. It also provides PSBs and interested parties with up to date well-being data, both quantitative data from the core data set and qualitative data from engagement and consultation events. The aim is to facilitate an ongoing dialogue with the people of Ceredigion, and strengthen our understanding of well-being issues on an ongoing basis.

## **Ceredigion Public Services Board**

<https://www.ceredigion.gov.uk/your-council/partnerships/ceredigion-public-services-board>

# **CEREDIGION** **ASSESSMENT OF** **LOCAL WELL-BEING**

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**Appendices 1-12**

**2022**

# Methodoleg ar y cyd

## Joint Methodology

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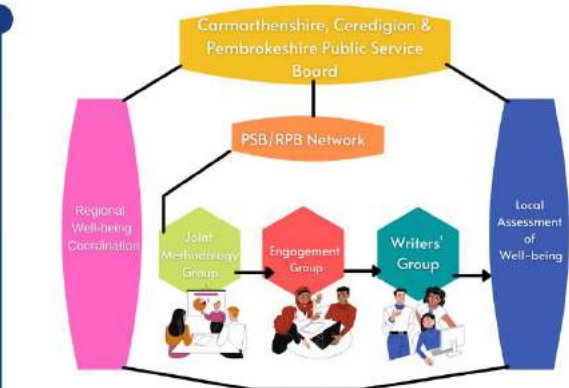
# Assessment of Local Well-being

## JOINT METHODOLOGY SUMMARY

The structure of working groups that will put together the Local Assessment of Well-being.



The Life Stages Approach - used by the PSB to undertake the Local Assessment of Well-being.



The Data Review and Detailed Analysis both form a part of the Local Assessment of Well-being. The Detailed Analysis also feeds directly into the Local Well-being Plan.



The Four Stages to delivering the Assessments of Local Well-being.

Engagement and Consultation will be the key driver for the Local Assessment of Well-being and will involve a variety of groups.



**MARCH 2022**  
**PUBLISH FINAL LOCAL ASSESSMENTS OF WELL-BEING**

# Assessment of Local Well-being Joint Methodology Framework

## Introduction

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This methodology outlines the collective approach to undertaking the Assessments of Local Well-being across the Public Services Board (PSB) areas of Carmarthenshire, Ceredigion and Pembrokeshire during 2021/22. It has been developed in partnership between the PSB organisations. The purpose of the methodology is to guide the three PSB's through the delivery of their Assessment of Local Well-being in consultation with partners, stakeholders, and citizens. It sets out the standardised approach to conduct the data gathering, analysis, engagement and consultation on well-being across the three areas, along with the timescales for completion by March 2022.

## Background

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The Well-being of Future Generations (Wales) Act 2015 (WFG Act) requires each PSB to prepare and publish an Assessment of the state of economic, social, environmental, and cultural well-being in its area no later than a year before it publishes its Local Well-being Plan. The Act identifies seven well-being goals which provide the vision and ambitions for the Wales We Want for today and in the future and recognises the importance of collaboration between bodies in achieving them.

The Assessment of Local Well-being will provide the evidence-base to set the objectives in the 5-year Local Well-being Plan. PSB's are required to set these objectives in a way that accords with the sustainable development principle, i.e., acting in a manner which seeks to "ensure the needs of the present are met without compromising the ability of future generations to meet their own needs." In the context of the current expected timescales of local government elections the assessments must be published by March 2022. The diagram below displays the PSB's planning cycle under the WFG Act.

Fig 1. The Well-being of Future Generations (Wales) Act Planning Cycle



The three PSB’s have agreed to adopt a similar approach to the production of the assessments as last time, by working in partnership and adopting a joint methodology framework. This includes using the ‘life stages’ approach in the assessments, highlighting differences and similarities in experiences of well-being throughout a person’s life. There are five life stages, namely, New Beginnings; Childhood; Youth; Working Age Adults; Older Adults. This approach corresponds to evidence that our personal well-being changes over time.

Fig 2. The Life Stages Approach Adopted by the three PSBs



Public Services Boards are partnerships of public service agencies who work together to improve local services. They include the statutory members of the PSB and other organisations across the partnership. The PSBs have agreed that the PSB/RPB members will work collaboratively on the assessments to ensure that they are shaped using the expertise, knowledge and insight of all partners to avoid duplication and share resources.

The PSB/RPB network will lead on the delivery of the joint methodology, with representatives from PSB organisations forming the Data, Engagement and Writers Group to produce each stage of the assessment, for example, PSB data leads will lead on the data analysis stage. Effective partnership working has never been more important across all sectors - some of the pre-existing challenges in the mid and south-west Wales region have been exacerbated in recent times (e.g., an ageing population, income inequalities, climate change etc.), and new ones have been brought to the fore, such as health inequalities and digitisation. The COVID-19 pandemic is a good example of this.

The second round of assessments will also provide the opportunity to reflect on the findings of the last assessments and the feedback from citizens, stakeholders, and directly from Welsh Government. The last assessments will be used as a baseline for update and refinement by building on the learning from the first round. This includes:

- Greater focus on the **critical analysis and interpretation** of data to inform our well-being priorities.
- **Reflecting the limitations and data gaps** of the assessment and how these may be overcome.
- **Assessing the well-being at a lower level** e.g., communities and localities within the PSB area.
- Incorporate “futures thinking” by **taking account of the long-term needs** of the areas as well as the short-term.
- Ensuring that an **extensive engagement programme** is established which will underpin each stage of the development of the assessments.
- Demonstrate **involvement and collaboration** in developing the assessments with third sector organisations.

The methodology will explain our joint approach to the production of the Assessments of Local Well-being under four stages:

Fig 3. The Four Stages to delivering the Assessments of Local Well-being



## The Methodology

### Data Review



The initial stage in the production of the Assessment of Local Well-being is the data review, which is a comprehensive data gathering and analysis exercise of existing evidence. This step is undertaken in close partnership with PSB members and other relevant organisations and is often referred to as the 'Situation Analysis'.

The aim of the data review is the analysis of cultural, social, economic and environmental well-being in an area, to build an understanding of the area's context, its challenges and the opportunities that exist. Through this approach we will begin to highlight areas that we need to prioritise in order to tackle the challenges that we face now and, in the future, to improve the longer-term well-being of each county. We will achieve this by identifying:

- The **strengths and assets** of our people and communities.
- The **challenges and opportunities** faced both now and in the future.

The assessments will be informed by a wide variety of data, national and local research, and feedback provided to us from partners, stakeholders and citizens through engagement during the summer of 2021. To begin the data review stage, the PSB/RPB will come together as data analysts and researchers across the three areas through the monthly Network meetings, with the overall aim of collating and analysing relevant evidence.

PSBs will draw on the following range of sources available for undertaking the data review, either available nationally or through local sources:

- Data Cymru Core Dataset and Data Catalogue (*available May 2021*)
- Wales Centre for Public Policy briefings on Equalities, Cultural Well-being and the Impact of Covid-19 and Brexit (*initial reports available June 2021 and final report August 2021*)
- Welsh Government Future Trends Report (*initial report available in June 2021*)
- Natural Resources Wales Area Assessments (*available 2021*)
- Audit Wales' national and local reports (*available on an ongoing basis*)
- Local Data from PSB partner organisations through engagement exercise (*to be conducted May 2021*)

Whilst the data review is likely to be largely **quantitative** in nature, such as utilising time-series data and spatial patterns, PSBs will also draw on **qualitative** evidence available through partners and local service providers. We will engage with PSB partners early in the process to identify local data and sources of evidence to inform the assessment, which is likely to be a broader mix of quantitative and qualitative data.

As approved at PSB meetings in February 2021, the role of the three Principal Councils of Carmarthenshire, Ceredigion and Pembrokeshire is to coordinate the process of preparing the assessments. This is the same approach adopted in the previous assessments.

However, PSB partners and other stakeholders have a key role to play in facilitating their production, particularly through the provision of local evidence, taking part in engagement and monitoring progress of the project through to completion. This collaborative approach to assessment production will be between public sector partners, the third sector and others in terms of data provision, analysis and interpretation.

The Assessment of Local Well-being will need to include an analysis of the state of well-being in each community area and across the PSB area as a whole. The Statutory Guidance 'Shared Purpose: Shared Future' requires PSB's to identify geographic Community Areas which comprise of the board's entire area for producing the Assessments of Local Well-being. The guidance sets out what criteria may be used to define the areas:

- Provide a comprehensive coverage of the entire PSB area i.e., they should be contiguous and mutually exclusive areas within the PSB area.
- They should identify social and other differences with a pronounced spatial difference, such as patterns of deprivation, poverty, health inequalities, or the position of the Welsh language.
- They should be large enough to show differences between them and have a sense of identity but not as small as electoral wards.
- They should correspond to the boundaries of Lower Layer Super Output Areas (LSOAs).



In the first round of Assessments the three PSB’s agreed to use the Office for National Statistics Upper Statistical Output Areas (USOA’s) for the Community Areas. Feedback highlighted that this geography was inadequate in assessing the state of well-being at the community level. The PSB/RPB Network will consider the benefits of various options to determine the level of geography required for the Community Areas to allow for a more meaningful analysis. In line with the guidance, which requires “an analysis of the state of well-being in *each* community area”, we will produce community profiles for each of the areas and include as an appendix to the Assessment.

During the first round of Assessments, feedback from Welsh Government identified common themes to strengthen the overall approach taken. These were:

Table 1: How we intend to resolve the issues raised by Welsh Government in the assessments

Issue	Resolution
<ul style="list-style-type: none"><li>• Identify more local community areas and understand the issues within these communities.</li></ul>	<i>Review the local community areas adopted in each assessment.</i>
<ul style="list-style-type: none"><li>• Greater focus on Well-being of individual groups and/or communities across the area.</li></ul>	<i>Produce area profiles for the adopted community areas based on a standard template.</i>
<ul style="list-style-type: none"><li>• Link/map the life stages approach with the Well-being goals.</li></ul>	<i>Diagrammatically evidence the linkages between the five life stages and the Well-being Goals.</i>
<ul style="list-style-type: none"><li>• Analyse the impact of Well-being over short, medium and long term.</li></ul>	<i>The data analysis to look at future trends, to include predictions of likely future trends in the economic, social, environmental and cultural well-being of the area.</i>
<ul style="list-style-type: none"><li>• Identify the gaps in evidence to understand what might be needed in the short, medium and long term.</li></ul>	<i>The assessment will identify any known limitations in the evidence where we need to improve our knowledge and the implications of this for the response analysis.</i>
<ul style="list-style-type: none"><li>• Statement on how we are undertaking the process.</li></ul>	<i>The agreed methodology summary will be included in the assessment.</i>

<ul style="list-style-type: none"> <li>Situational Analysis had too much emphasis on Quantitative work and need more on the Qualitative.</li> </ul>	<i>Writers Group will address the balance between quantitative and qualitative analysis.</i>
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We are aware of the data limitations posed to delivering the assessments of Local Well-being. It is likely that there will be gaps in the data collection across the three PSB’s, particularly for small area statistics. Furthermore, it is possible that the sample size of primary data collected for the Community Areas may be insufficient and thus, not representative of the entire population. To ensure research transparency and credibility, the assessments will highlight these limitations and data gaps, which will in turn identify topic areas which require further knowledge and data gathering.

**Detailed Analysis**



The Assessment of Local Well-being will also include a more detailed form of analysis to develop explanations and explore causes of trends rather than describing patterns and trends. (This is also referred to as ‘Response Analysis’).

Response Analysis is a more detailed form of analysis which uses evidence in a more challenging and evaluative way to explore the factors which drive or cause the patterns and trends identified in the situation analysis. Subsequently, this will inform the selection of priorities for local areas by the PSB, which will in turn inform discussions around the content of the Local Well-being Plan.

Response Analysis tends not to feature as heavily in Assessments of Local Well-being compared to the Situation Analysis, as its main role is in relation to the Local Well-being Plan. However, where evidence permits, the assessments will include Response Analysis. For example, where existing evaluation indicates whether existing services are effective, where data provides a more nuanced understanding of issues and where the wider evidence is clean on what approaches are likely to work. It will also be used to identify a sub-set of topics for each PSB area to analyse in further detail for the preparations of the Well-being Plans.

All organisations involved in the production of the assessments will remain involved in the Well-being Plans process through the identification of responsive actions, through its monitoring and through the delivery of the Well-being Plan over the next five years.

The development of the Digital Information System, expected to go live in June 2021, has been designed to assist in the production and monitoring of Well-being across the PSB areas. It will provide a central repository for all PSB

members, stakeholders and citizens to contribute to the ongoing recording and analysis of evidence relating to Well-being, and ultimately strengthen future Assessments of Well-being and Well-being Plans. This fits with recent advice from Welsh Government and the Future Generations Commissioner which suggests that the assessments should be viewed more as an ‘evolving’ document to be expended as and when new evidence is available. For these reasons, the PSB/RPB Network will continue to work on developing the assessments in the year ahead.

Fig 4. The role of the Data Review and Data Analysis in the Assessment of Local Well-being



**Engagement  
and  
Consultation**



Engagement is the key driver for the Assessment of Local Well-being, allowing us to record and consider views from a range of partners, stakeholders and citizens to gain a truly reflective understanding of the needs of each PSB area.

Effectively involving people and communities is at the heart of improving well-being. Better engagement will lead to greater individual and community empowerment, which will create a greater sense of pride and ownership in our areas and allow us to build social capital.

To that end, we will develop a detailed Engagement Plan to provide a standardised approach to conducting engagement and will have this in place at the beginning of the project in May 2021. The Plan will specify our consultation and engagement techniques to be utilised to complete this element of the assessment and maximize input. The purpose of this stage is to gain a truly reflective and qualitative understanding of the needs of the area(s)

and to ascertain what information gathered during the situation analysis provides an accurate measure of well-being.

Fig. 5 Engagement and Consultation as the Key Driver



A range of engagement techniques will be used to maximise audience reach and to ensure that our engagement is accessible to all. These include, but are not limited to, Surveys, Focus Groups, Stakeholder events and PSB sub-group workshops.

A Well-being survey was successfully conducted as part of the last assessments, and we will run a similar exercise this time, building on the knowledge previously acquired. The online Well-being Survey will be developed jointly by Ceredigion, Carmarthenshire and Pembrokeshire County Councils and other members of the PSB. The hosting Council will provide the results to each county, which will be split based by place of residence. Traditional methods of engagement e.g., by post and phone will also be utilised to ensure that everyone has the opportunity to take part. Other engagement methods, such as, focus groups, stakeholder events and PSB sub-group workshops, will be agreed regionally but delivered locally.

The Social Services and Well-being (Wales) Act 2014 (SSWW) introduced a duty on Local Authorities and Local Health Boards to prepare and publish an assessment of care and support needs of the population. The table below highlights the engagement requirements of the WFC Act and the SSWB Act.

Table 2: Engagement requirements of the Well-being of Future Generations (Wales) Act 2015 and Social Services and Well-being (Wales) Act 2014

Topics	WBFG Act	SSWB Act
Key population groups	Communities in the area Communities of interest in the area Town and community councils  Key groups suggested in line with Equality Act (also vulnerable / disadvantaged children, young people and people with care and support needs)	Carers and people with support needs including children & young people. Physical disability Learning disability Mental health Older people Victims of domestic abuse
Context of 'Well-being'	Economic, social, environmental and cultural	Individual (carers and those with support needs)
Scale of assessment	County and community areas	Region (with county dimension)

As a result of the similarities between the two Acts, where possible, engagement will align to meet both requirements, for example, including questions relating to the Population Needs Assessment within the online Well-being Survey. This will avoid the duplication of work and ‘engagement fatigue’. We will engage with a wide range of people of all ages to reflect the diversity of the community and seek the views of those who could be hard to reach:

- Citizens
- Businesses
- Community groups
- Third sector organisations
- PSB partners
- Trade Unions
- Other public service providers

As part of the Engagement Plan a stakeholder mapping exercise will be undertaken locally to ascertain the groups from the list above that will be engaged with. The engagement phase will end in the Summer of 2021, subsequently an analysis of the findings will be undertaken, aiming to be completed by Autumn 2021.

The PSB’s will consult on the draft assessments with the groups outlined above. The consultation process will ensure that any gaps are filled and that all groups involved are satisfied with the ways in which well-being is being presented. This

will take place between September and December 2021, before being published and copies submitted to the Welsh Ministers, the Commissioner, the Auditory General for Wales and the local authorities overview and scrutiny committee.

To ensure the Assessments are inclusive of everyone, we will work with organisations and citizens who represent these groups (e.g., older people, people with disabilities, unemployed and economically inactive residents) to gain a better understanding of the barriers to participation and how these may be overcome. In addition, the PSB/RPB network are attending training sessions held by Co-production Network for Wales which will help address some of these issues, whilst also providing the opportunity to share best practice on engagement.

The three principal councils are currently testing a new *community engagement system*, which could be used to manage the Assessment of Local Well-being engagement and consultation. Although the system is currently in testing, it would provide a range of features to make the engagement more interactive, provide additional channels and conduct the engagement and offset some of the impacts that the Covid-19 pandemic will have on the engagement phase. It is hoped that the system will be available to support the engagement phase during the spring and summer of 2021.

The Covid-19 pandemic poses certain challenges to engaging with PSB partners, the public and stakeholders due to capacity issues and changes to the way engagement is delivered. Engaging with Public Health Wales on the assessments will be crucial due to their key role in protecting and improving health and well-being across Wales. However, this may be a challenge due to the additional pressure placed on the Health Board working on Covid-19 response. Furthermore, it is likely that engagement and consultation on the assessments will be delivered online. Consequently, we will need to make sure that certain groups' views and opinions (e.g., those who lack digital skills or do not have access to the internet) are not excluded from the engagement process.



## Final Assessment and Next Steps



The next and final element of the assessment process involves evaluating and analysing the findings of the research and engagement to develop a summary of the needs of each PSB area. (This is also referred to as the 'Summative Analysis').

Officers will come together to interpret and assess both the quantitative and qualitative findings to build a comprehensive picture of well-being to inform the next Local Well-Being Plans. The evidence will allow us to identify and prioritise the issues that are most important locally and begin to examine how they can be addressed. This stage will enable PSB's to develop a summary of needs for their area, the PSB's response and to determine the indicators that can be used to monitor these needs going forward.

In particular, the Writers' Group will ensure that the assessment:

- Identifies communities that comprise the area(s).
- Assesses the state of Well-being individually (per community).
- Assesses the state of Well-being collectively (PSB area).
- Includes future trends predictions.
- Demonstrates the links to the seven Well-Being Goals and Sustainable Development Principle of the Well-being of Future Generations Act.

The core purpose of the assessments is to provide the evidence base for the Local Well-being Plans.

### The Next Steps

Following publication of the Assessments of Local Well-being, PSB's will develop and publish their Local Well-being Plan within twelve months of the assessment.

Specific factors to be addressed in the assessment include:

- Outlining how the findings and challenges identified contribute to, or impact on, the national well-being goals and the sustainable development principle.
- Focus on individual communities across the area using area profiles.
- Provide more information of localities and particular communities.
- Specific analysis on which challenges are short, medium or long term, and how these impact on well-being.
- Description of the third sector and its role in well-being.
- The future trends section provides generic description of trends with limited interpretation.

- How individuals and organisations remain involved in the Well-being Plan process and what the Plan is intending to do.

To assist those contributing content and writing the final document, an assessment template will be created with the aim of providing a common format and structure for analysing themes using the agreed Life Stages approach.

## Monitoring and Delivery

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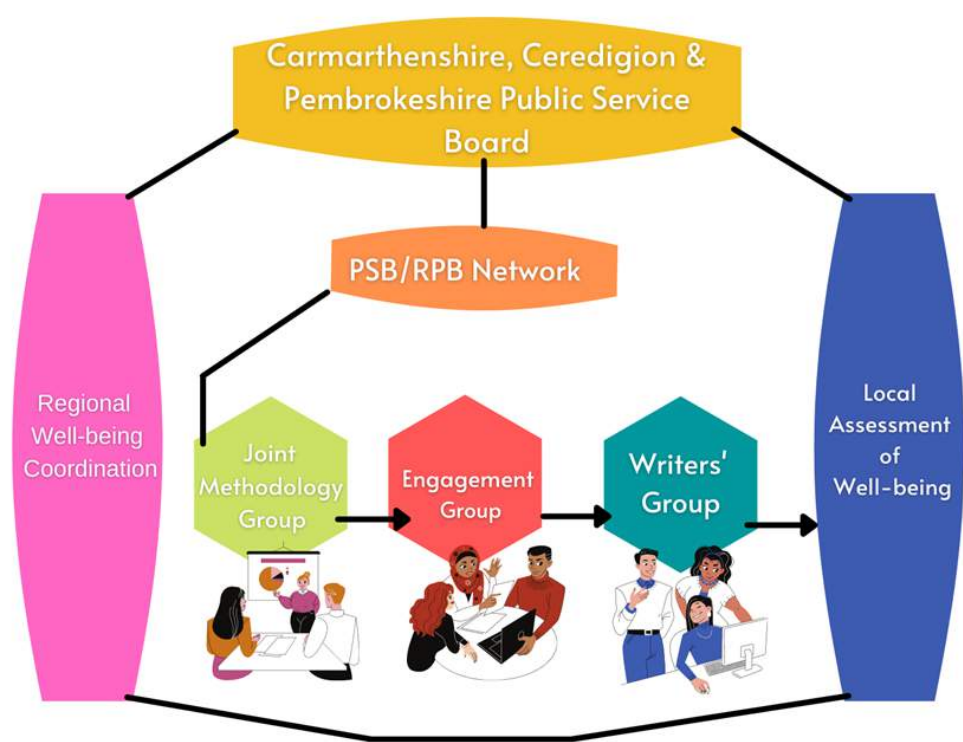
A detailed timeline has been developed, outlining the main deliverables of the assessment up to the publication date in March 2022 (see Appendix 1). A project action plan will also be developed, detailing what needs to be done, when it needs to be done by, who needs to be involved and the resources that will be required. This project action plan will be reviewed, and progress will be monitored at monthly PSB/RPB network meetings.

A bid for PSB Support Grant funding has been submitted to recruit a Regional Well-being Assessment Co-ordinator, which if successful, will play a vital role in co-ordinating the projects, providing analytical support and ensuring that deadlines are met.

Specific working groups will also be established to develop the joint methodology (PSB/RPB Network), engagement plan (Engagement Group) and assessment write-up (Writers' Group). The working groups will comprise of relevant members from across the three PSB's and partners to allow the sharing of information, resources, and best practice.

Public Service Boards will be kept informed of the assessment process via regular updates to full PSB meetings and will be required to make key decisions to guide the project throughout its duration.

Fig 6. The structure of working groups involved in producing the Assessment of Local Well-being



## Conclusion

To conclude, this joint methodology is a practical guide for the three PSB's (Ceredigion, Carmarthenshire, and Pembrokeshire) on undertaking the Assessments of Local Well-being. Producing a comprehensive and thorough analysis of well-being is vital to; PSB's, citizens and organisations, as the assessments will have a key role in determining the priorities in the Local Well-being Plans over the next 5 years. The PSB's have agreed to take a collaborative approach to reap the benefits of partnership working, help alleviate capacity concerns in delivering the assessments and avoid duplicating work. This iteration of the assessments will consider the feedback, information and evidence gained from the last round of assessments.

This methodology sets out opportunities for collaboration under the four stages: data review, detailed analysis, engagement and consultation, and final assessment and next steps. The mixed-method approach uses qualitative and quantitative data from a range of sources, which will enable us to infer causes, understand factors and identify issues that are most important locally. The assessments will adopt an 'engagement led' approach, as it is a crucial source of information for all partners to use, drive change and shape services which meet the needs of our residents now and in the future.

The data and Covid-19 related limitations posed to delivering the Assessments of Local Well-being are identified, such as the lack of local data and accessibility challenges. These challenges will be addressed through; the PSB/RPB network, additional capacity and analytical support from the

Regional Well-being Assessment Co-ordinator, and potential use of the Digital Information System. Furthermore, we hope to gain insights into overcoming barriers to participation and engaging effectively with communities through our active involvement with Co-production Network for Wales.



## 2: Organisations Engaged in the Assessment

The production of the Well-being Assessment has been engagement-led, and has involved gathering the views of Ceredigion's residents through the Regional Well-being Survey, but also engaging with a variety of local and regional groups as part of the engagement exercise through stakeholder events, workshops and presentations. It is particularly important that we engaged with people who are seldom heard or who are marginalised, those with protected characteristics and those who suffer socio-economic disadvantage. We carried out a comprehensive stakeholder analysis with input from all Ceredigion PSB partner organisations and invited all to contribute to the Assessment including our PSB partners, Town and Community Councils and local voluntary groups. A full list of these organisations is listed below.

Stakeholders	
Armed Forces Veterans' Forum	Schools Councils
CAVO	Sons and Daughters of Foster Carers Group
· Covid Comm Support Groups	Third Sector Alliance
· Community & Village Halls	Town and Community Council
· Age Cymru	WWAMH West Wales Action for Mental Health
· Menter Aber	Young Carers' Group
· Whilen y Porthmyn	Youth Clubs
· Menter Aberteifi	Youth Service Forum
· Pentir Pumlumon	
Cered Menter Iaith Fforwm Siriol	
Ceredigion Carers' Alliance	
Ceredigion Citizens' Panel	
Ceredigion Community Safety Partnership	
Ceredigion County Council Corporate Lead Officers	
Ceredigion County Council Elected Members	
Ceredigion Disability Forum	
Ceredigion Local Access Forum	
Ceredigion Local Sports Council	
Ceredigion Carers' Forum	
Cylch Caron Stakeholder Board	
Cynnal y Cardi	
Dysgu Bro	
Family Centres	
· Borth	
· Llandysul	
· Lampeter	
· Tregaron	
Flying Start Locality Groups x3	
Foster Carer Consultation Group	
Give Us Support Group	
Housing Associations	
Hywel Dda University Health Board Stakeholder List	
Landlords' Forum	
LGBTQ+ Forum	
PSB Board Members	
PSB Project Groups x 6	



### 3: Engagement and Consultation Events

The following table provides a list of the engagement events undertaken as part of the Assessment. Full details of the approach to the engagement can be found in Ceredigion Assessment of Local Well-being Engagement Plan. All stakeholder workshops were run using the Three Horizons model to help us all plan better for the longer term by keeping a clear vision and taking future trends into account.

Date	Group	Description
26 <sup>th</sup> May 2021	Ceredigion PSB Enterprise and Innovation Project Group	Presentation followed by workshop seeking views on well-being relating to the current situation, what has changed since the last assessment, what are the challenges and what needs to change in order to achieve the Ceredigion we want in the future.
28 <sup>th</sup> May 2021	Regional Engagement Workshop	Presentation and workshop for all regional PSB partners to record views on how the engagement for the Assessment should be conducted and to explore themes that need to be included in the second round of assessments.
7 <sup>th</sup> June 2021	Ceredigion PSB Colocation and Integration of Frontline Services Project Group	Presentation followed by workshop seeking views on well-being relating to the current situation, what has changed since the last assessment, what are the challenges and what needs to change in order to achieve the Ceredigion we want in the future.
8 <sup>th</sup> June 2021	Ceredigion PSB Resilience Training Project Group	Presentation followed by workshop seeking views on well-being relating to the current situation, what has changed since the last assessment, what are the challenges and what needs to change in order to achieve the Ceredigion we want in the future.
9 <sup>th</sup> June 2021	Corporate Equalities Working Group	Gathered the views of the group across the engagement themes from the perspective of equalities.
11 <sup>th</sup> June 2021	Regional Engagement Workshop	Presentation and workshop for all regional PSB partners to record views on how the engagement for the Assessment should be conducted and to explore themes that need to be included in the second round of assessments.
18 <sup>th</sup> June 2021	Ceredigion PSB Understanding Our Communities Project Group	Presentation followed by workshop seeking views on well-being relating to the current situation, what has changed since the last assessment, what are the challenges and what needs to change in order to achieve the Ceredigion we want in the future.
29 <sup>th</sup> June 2021	Ceredigion PSB Climate Change and Natural Resources Project Group	Presentation followed by workshop seeking views on well-being relating to the current situation, what has changed since the last assessment, what are the challenges and what needs to change in order to achieve the Ceredigion we want in the future.
7 <sup>th</sup> July 2021	Ceredigion Disability Forum	Gather the views of the forum across the engagement themes from the perspective of disability.

Date	Group	Description
June 2021	Ceredigion PSB Social and Green Solutions for Health	Email sent to members of the Social and Green Solutions for Health Project Group Members seeking views well-being relating the current situation, what has changed over the last five years and the challenges when looking ahead. (This group is temporarily on hold during the pandemic period).
10 <sup>th</sup> August 2021	Regional Engagement Survey opens	Regional Well-being Survey opens across the region, available online, in paper format, different languages and easy read. Ceredigion also provided the option of taking telephone answers on request and used its new "Have Your Say" engagement platform as an opportunity for respondents to provide further feedback in an interactive way.
1 <sup>st</sup> September 2021	Carer's Alliance	Gather views across the engagement themes from the perspective of carers in Ceredigion.
16 <sup>th</sup> September 2021	Community Town and Community Councils – North Ceredigion	Gather views across the engagement themes with Town and Community Councils.
20 <sup>th</sup> September 2021	Children and Young People's Services Provider Forum	Online stakeholder engagement event to gather views across the engagement themes from the perspective of younger people.
22 <sup>nd</sup> September 2021	Armed Forces Community	Gather views across the engagement themes from the perspective of armed forces veterans.
5 <sup>th</sup> October 2021	Give Us Support Online Workshop arranged	Gather views across the engagement themes from the perspective of younger people. (RAY Ceredigion is a charity improving the health and wellbeing particularly of those who are most vulnerable and disadvantaged of all ages and abilities).
8 <sup>th</sup> October 2021	Regional Engagement Survey closes	The Regional Well-being Survey closed.

# 4: Data Sources

Alongside the engagement activity, the production of the assessment involved the analysis of a range of quantitative and qualitative data, some of which was made available nationally to Pubic Services Boards, and some was acquired locally to provide local analysis of well-being issues in the county. This included the statutory sources listed in the guidance on the production of well-being assessments, the Core Data Set and Data Catalogue made available by Data Cymru to assist Public Services Boards in the data collection of their assessments, and local sources identified through workshops with PSB partners. The list below shows the primary sources used in the Assessment.

Statutory Data
<b>Future Trends Report Wales 2021 (Public Services Boards version)</b>
<b>Evidence for the third UK Climate Change Risk Assessment (CCRA3): Summary for Wales 2021</b> <i>Assessment of the risks for the United Kingdom of the current and predicted impact of climate change sent to the Welsh Ministers under section 56(6) of the Climate Change Act 2008 (c.27). Refer to the Climate Change Risk Assessment for Wales which provides a national assessment of potential risks and opportunities from climate change facing Wales.</i>
<i>Review of the sufficiency of nursery education provision for the local authority area carried out under section 119(5)(a) of the School Standards and Frameworks Act 1998 (c.31).</i>
<b>Ceredigion Childcare Sufficiency Assessment 2017-2022 &amp; Draft Childcare Sufficiency Assessment 2022-27</b> <i>Assessment of the sufficiency of the provision of childcare in the local authority area carried out in accordance with regulations made under section 26(1) of the Childcare Act 2006 (c.21).</i>
<b>Ceredigion Play Sufficiency Assessment 2019 &amp; Draft Play Sufficiency Assessment 2022</b> <i>Assessment of the sufficiency of play opportunities in the local authority area carried out under section 11(1) of the Children and Families (Wales) Measure 2010.</i>
<b>West Wales Population Assessment 2017 &amp; West Wales Population Assessment 2022 (West Wales Care Partnership)</b> <i>Assessment carried out by the local authority in conjunction with a Local Health Board under section 14 of the Social Services and Well-being (Wales) Act 2014 (the “population assessment” of needs for care and support, support for carers and preventative services).</i>
<b>Dyfed-Powys Police and Crime Commissioner: Police and Crime Plan 2017-22</b> <i>Strategic assessment prepared in accordance with regulations under section 6 of the Crime and Disorder Act 1998 (c.37) relating to reducing crime and disorder in the local authority area.</i>
<b>Alcohol and Drug Misuse Desktop Health Needs Assessment 2019</b> <i>Strategic assessment prepared in accordance with regulations under that section relating to combating substance misuse in the local authority area.</i>
<b>NRW Area Assessment for Ceredigion and Mid-Wales</b> <i>Each area statement under section 11 of the Environment (Wales) Bill 2016, once enacted, which relates to any part of the local authority’s area.</i>
<b>HM Prisons and Probation Service Reducing Reoffending Plan</b> <i>Strategic assessment prepared in accordance with regulations under that section relating to the reduction of reoffending in the local authority area.</i>
Core Data Set (Data Cymru)
% of working age people who are economically active
% 50+ who are employed
% of people qualified to NQF Level 3 or more
% of people qualified to NQF Level 4 or more
% of people with no qualifications
Average gross weekly pay for people who live in the area and work full time (£)
Pounds difference in the average (median) full-time weekly pay between males and females
Pounds difference in the average (median) full-time hourly pay between males and females
Average price of a detached house (£)

Average price of a semi-detached house (£)
Average price of a terraced house (£)
Average price of a flat (£)
Average price of all houses (£)
Number of house sales
Average house price for a first time buyer (£)
% annual change in average house price
Number of new businesses
Number of active business closures
% of new businesses
% of active business closures
Rate of new active businesses per 10,000 working age population
Rate of active business closures per 10,000 working age population
Number of active businesses
Rate of active businesses per 10,000 working age population
% of new businesses surviving three years of trading
Number of completed new build dwellings
% of working age people who are claiming Job Seeker's Allowance
% of Job Seeker's Allowance claimants who are aged 17-24
% of Year 11 school leavers that are NEET (known not to be in employment, full time education or work based training for young people)
% of Year 13 school leavers that are NEET (known not to be in employment, full time education or work based training for young people)
% of people moderately or very satisfied with their jobs
% of people satisfied with local area as a place to live
% of pupils aged 15 who achieved Level 2 threshold
% of pupils aged 15 who achieved Level 2 threshold including a GCSE grade A*-C in English or Welsh first language and Mathematics
% of children living in workless households
% of workless households
Gap between the employment rate of those with a long term health condition and the employment rate of people aged 16 - 64 years
% of low birth weight live single births
Rate of male cancer registrations per 100,000 population
Rate of female cancer registrations per 100,000 population
% of children in need achieving the Foundation Phase Indicator
Rate of under 18 conceptions per 1,000 females aged 15 - 17
Rate of deaths due to cardiovascular diseases per 100,000 people (European age-standardised)
Rate of deaths due to cancer per 100,000 people (European age-standardised)
Number of dwellings improved through Disabled Facilities Grants
Number of Disabled Facilities Grants completed
Gap in years in the life expectancy at birth of males (between the most and least deprived)
Gap in years in the life expectancy at birth of Females (between the most and least deprived)
Healthy life expectancy of males and females at birth Jan 2010 (5 year range)
Gap in years in the healthy life expectancy at birth of males (between the most and least deprived)
Gap in years in the healthy life expectancy at birth of females (between the most and least deprived)
% of all children up to date in the immunisation schedule by age four
Number of HHSRS category 1 hazards found during the year
% of dwellings which are free from hazards
Rate of emergency admissions for hip fractures in people aged 65+ per 100,000 people (European age-standardised)
Rate of households for whom homelessness was successfully prevented for at least 6 months per 10,000 households
Rate of households accepted to be eligible, unintentionally homeless and in priority need per 10,000 households
Number of rough sleepers

% of people living in households in material deprivation
% of people moderately or very satisfied with their jobs
% of people satisfied with their ability to get to/access the facilities and services they need
% of people feeling safe at home, walking in the local area, and when travelling
% of people satisfied with local area as a place to live
Mean mental well-being score for people aged 16 or over
% of people who are lonely
% of adults who reported being active for 150 minutes in the week
% of adults who reported being obese (BMI 30+)
% of adults who reported being overweight or obese (BMI 25+)
% of adults who reported consuming more than 14 units or more of alcohol per week
% of people who called for an ambulance in the last 12 months
Average number of decayed, missing or filled teeth in children aged 5 years
Average number of decayed, missing or filled teeth in children aged 12 years
Rate of all offences per 1,000 people
Number of killed or seriously injured road casualties
Number of individuals assessed for alcohol misuse
Number of individuals assessed for drug misuse
Number of suicide deaths registered
Rate of suicide deaths per 100,000 people
% of adults who reported being a current smoker
% of adults who reported binge drinking alcohol on at least one day in the past week
% of adults who reported eating five or more portions of fruit and vegetables the previous day
% of adults who reported meeting exercise/physical activity guidelines in the past week
% of adults who reported being overweight or obese
Average micrograms (µg) of NO2 at residential dwelling locations per m3
Average micrograms (µg) of PM2.5 at residential dwelling locations per m3
Average micrograms (µg) of PM10 at residential dwelling locations per m3
Ecological footprint per person (global hectares)
Carbon footprint per person (tCO2e)
% of properties with a risk of flooding
% of properties with a high risk of flooding
% of properties with a medium risk of flooding
% of properties with a low risk of flooding
% of properties with a very low risk of flooding
Capacity of renewable energy equipment installed (MW)
% of municipal waste sent for reuse/recycling/composting
Number of people who consider themselves non Welsh
% of people aged 3+ who can speak Welsh
% who feel able to influence decisions affecting their local area
% of people agreeing that they belong to the area; that people from different background get on well together; and that people treat each other with respect
% of people who Volunteer
% of people attending or participating in arts, culture or heritage activities at least 3 times a year
% of people who speak Welsh daily and can speak more than just a few words of Welsh
% of people participating in sporting activities three or more times a week
% of adults who reported meeting exercise/physical activity guidelines in the past week

#### Data Catalogue Sources used in the Assessment (Data Cymru)

Arts Council of Wales
Cadw
Child Poverty Action Group
Citizens Advice Cymru
Data Cymru
Food Sense Wales

National Museum Wales
Natural Resources Wales
Race Council Cymru
Samaritans Cymru
School Health Research Network
Sport Wales
Trussell Trust
Victim Support Cymru
Wales Council for Voluntary Action (WCVA)
Welsh Government Knowledge and Analytical Services

## Other Sources Consulted in the Assessment

Action on Smoking and Health	Smoking and young people
Age UK	Changes to State Pension Age
Age UK	Conditions and illnesses
Age UK	Later life in the United Kingdom 2019
Area 43	Various resources
Arts Council of Wales	Arts Council of Wales Corporate Plan 2018
BBC Wales	GCSE gap widens for children from poorer backgrounds
Bevan Foundation	In its efforts to end child poverty, the Welsh Government has designed a number of schemes to support families with their living costs, such as Free School Meals, the Pupil Development Grant – Access and Healthy Start Vouchers
Biodiversity Partnership	Introducing children to nature
BMJ Journals	Primary care patient and practitioner views of weight and weight-related discussions: a mixed-methods study
British Liver Trust	Various resources
CACI Paycheck	2020 and 2021 income data
Cancer Research UK	Smoking among young adults increased by 25% during first lockdown
Cardiff University	The future of care in Wales: resourcing social care for older adults
Cardiff University; Future Generations Commissioner for Wales; Public Health Wales	Inequality in a Future Wales: Areas for action in work, climate, and demographic change – full report
Cardiff: NSPCC, National Centre for Mental Health, Mind Cymru, Mental Health Foundation, Maternal Mental Health Everyone's Business	From bumps to babies: perinatal mental health care Wales.
Cardigan Bay and Ynys Enill to the Great Orme Coastal Group	Shoreline Management Plan 2
CARE	At Home Group
Care Sourcer	
Careers Wales	Recent destinations by year, school cohort and local education authority from schools in Wales.
Carehome.co.uk	Care home fees and costs: How much do you pay?
Carers UK	Carers Week: worn out unpaid carers uncertain the services they relied on will continue post
CAVO	The Environmental Partnership Grant closes on 30th June 2021.
Census 2011	Lone parent households.
Centre for Disease Control and Prevention	
Ceredigion County Council	Active Travel Report 2019-20
Ceredigion County Council	'Charging for Residential Care and Support. A guide to Financial Assessment and Charges 2021
Ceredigion County Council	Boosting Ceredigion's Economy: A Strategy for Action 2020
Ceredigion County Council	Ceredigion County Council: Ash Dieback Action Plan (ADAP)



Ceredigion County Council	Childcare Sufficiency Assessment: Progress Report – Year 4
Ceredigion County Council	Consultation on Developing a New Ceredigion Economic Strategy 2020
Ceredigion County Council	Cylch Caron Extra Care Housing Scheme: Evidence and Consultation Report
Ceredigion County Council	Economic Update Report
Ceredigion County Council	Special Educational Need (SEN)
Ceredigion County Council	Local Flood Risk Management Strategy 2014
Ceredigion Museum – Aberystwyth	Case studies and initiatives during COVID-19
Ceredigion Youth Services	Who are we and what do we offer?
Channel Mum	Wellbeing of Children – Early Influences
Child Measurement Programme for Wales	Percentage of children, aged 4 to 5 years who are a healthy weight or underweight, trends over the previous 6 years in Betsi Cadwaladr UHB and Wales
Child Poverty Action Group	The cost of a child in 2020
Children’s Commissioner for Wales	Coronavirus and Me Survey Report 2020: Ceredigion
Climate Central	Land projected to be below annual flood level in 2030
CORAM Family and Childcare (2019)	Childcare Survey
Climate Change Risk Assessment (CCRA3)	Evidence for the third UK Climate Change Risk Assessment
Department for Work and Pensions (DWP)	Universal Credit and claimant count statistics
Department of Health and Social Care	The relationship between wellbeing and health
Department of Health and Social Care	UK Chief Medical Officers Physical Activity guidelines
Dyfed Powys Police	Crimes by Community Area.
EMW	Use of shared parental leave
End Child Poverty Coalition	Child poverty in your area 2014/15 – 2019/20
Estyn	Latest Inspection Reports
Estyn	Pupils are happier and healthier when wellbeing is embedded in school life
Forestry Commission	Why Society Needs Nature: Lessons from Research during Covid
Frontier Psychiatry	The influence of the COVID
Hate Hope Charitable Trust	Fear and Hope: Wales. Identity, politics and belonging in today’s Wales.
Healthline	Dementia and Alzheimer’s: What Are the Differences?
Higher Education Statistics Agency	Graduate Salaries’
Higher Education Statistics Agency	HE Student enrolments by HE provider
Higher Education Statistics Agency	HE student enrolments by HE provider and subject of study
HM Land Registry	House Price Index data
Home.co.uk	Ceredigion Market Rent Summary
Housing LIN	Assessment of Specialist Housing and Accommodation Need for Older People in West Wales – for West Wales Care Partnership
Hywel Dda University Health Board	Adult Mental Health
Hywel Dda University Health Board	Annual Report of the Director of Public Health
Hywel Dda University Health Board	A rapid desktop tobacco and smoking health needs
Hywel Dda University Health Board	Pharmaceutical Needs Assessment 2021
Hywel Dda University Health Board	Mental health schemes supporting primary care services, 2021
Institute of Fiscal Studies	We may be in this together, but that doesn’t mean we are in this equally
Keep Wales Tidy	How clean are our streets? All Wales Local Environment Audit and Management System Report 2018
Legatum Institute	UK Prosperity Index 2021
London Economics	The costs and benefits of international higher education students to the UK economy
NatCen Social Research	Culture, sport and wellbeing: findings from the Understanding Society survey

National Assembly for Wales	The cost of caring for an ageing population
National Child Development Study	Social isolation in childhood and adult inflammation
National Education Union & Child Poverty Action Group	Child poverty and education: A survey of the experiences of NEU members
National Institute for Health Research	Lonely young people have an increased risk of mental health problems later: research suggests lockdown could have a long
National Scientific Council on the Developing Child.	The timing and quality of early experiences combine to shape brain architecture: Working paper No. 5
National Survey for Wales	Various indicators
Natural Resources Wales	Ecological and Carbon Footprints of Wales update to 2011
Natural Resources Wales	National Access Forum Written Contributions NAFW 69: 26 June 2021
Natural Resources Wales	Compliance Assessment of Welsh River SACs against Phosphorus Targets
Natural Resources Wales	Mid Wales Area Statement: Sustainable land, water and air
Natural Resources Wales	The Second State of Natural Resources Report (SoNaRR2020)
Natural Resources Wales	Welsh Information for Nature-based solutions
NHS Confederation	Long COVID care in Wales
NHS	Overview: Obesity
NHS Wales	Physical inactivity costs
NOMIS	Annual Population Survey: Qualifications – NVQ.
NOMIS	Health and provision of unpaid care
NOMIS	Labour Market Profile
NOMIS	Mortality Statistics – Underlying cause, sex and age
NOMIS	Provision of unpaid Care
Ofcom	Connected Nations 2019: Wales Report'
Ofcom	Connected Nations Report: update 2=summer 2021
Ofcom	The economic impact of broadband: evidence from OECD countries April 2018
Ofcom	Children and parents: Media use and attitudes report 2019
ONS	Access to gardens and public green space in Great Britain
ONS	Annual Population Survey: workplace employment by Welsh local areas and broad industry
ONS	Children's views on well
ONS	Community Life Survey
ONS	Domestic abuse in England and Wales overview: November 2020
ONS	Earnings and hours worked, place of residence by local authority: ASHE Table 8
ONS	Energy Performance Certificate statistics for new and existing flats and houses
ONS	Estimated proportion of dwellings with an Energy Performance Certificate by main fuel type or method of heating used in central heating
ONS	Exploring the UK's digital divide.
ONS	House price to workplace
ONS	Living longer: caring in later working life
ONS	Personal and economic well
ONS	Population Projections
ONS	Smoking habits in the UK and its constituent countries
ONS	Domestic abuse in England and Wales
Patient Info	Will having a child affect my career?
Princes Trust and the Learning and Work Institute	Facing the Future: Employment prospects for young people after Coronavirus
Public Health England	Excess weight and COVID-19
Public Health Wales	Adolescents using alcohol
Public Health Wales	Adolescents who smoke

Public Health Wales	Adverse Childhood Experiences and their association with chronic disease and health service use in the Welsh adult population.
Public Health Wales	Alcohol and Drug Misuse Desktop Health Needs Assessment for Hywel Dda University Health Board.
Public Health Wales	Alcohol specific admissions European age-standardised rates, persons, Hywel Dda Local Authorities
Public Health Wales	Decayed, missing or filled teeth
Public Health Wales	How are we doing in Wales?
Public Health Wales	Long COVID (Post COVID-19 Syndrome)
Public Health Wales	Percentage of children, aged 4 to 5 years who are overweight or obese, trends over the previous 6 years in Ceredigion and Wales, Child Measurement Programme for Wales, 2012/13
Public Health Wales	The case for action on obesity in Wales, 2018
Public Health Wales	Voices of Carers during the COVID
Public Health Wales	Wales faces unprecedented triple challenge to health and wellbeing
Public Health Wales & NHS Wales	Vaccine Uptake in Children in Wales COVER Annual Report (2018,2019,2020,2021)
Public Health Wales NHS Trust	Uncharted Territory Review
Public Health Wales Observatory	Adults drinking above guidelines, age-standardised percentage, persons aged 16+
SAGE	Digital by Default' and the 'hard to reach': Exploring solutions to digital exclusion in remote rural areas.
School Health Research Network Student Health and Wellbeing Survey	Various indicators
Science Direct	The impact of COVID-19 on pregnant women's experiences and perceptions of antenatal maternity care, social support, and stress reduction strategies
Social Care Data Wales	Conceptions, births and deaths
Sport Wales	School Sport Survey 2018
Sports Wales	Being Active: The benefits for all
Sport Wales	Welsh sport activity levels during the coronavirus pandemic
State Of Nature	State of Nature Report 2019
Stats Wales	Adult lifestyles by local authority and health board, 2021
Stats Wales	Annual Population Survey – Frequency of speaking Welsh by local authority and year
Stats Wales	Assistance for housing improvement by local authority area, activity and measure
Stats Wales	Children in need by local authority and category of need
Stats Wales	Children looked after at 31 March by local authority and location of placement
Stats Wales	Children looked after at 31 March by local authority, number of placements during year and measure
Stats Wales	Children on child protection register by local authority, category of abuse and age group
Stats Wales	Components of population change, by local authority and component
Stats Wales	Disabled facilities grants by local authority area and type of grant
Stats Wales	Key Stage 4 Interim Measures by FSM, from 2018/19
Stats Wales	Migration between Wales and the rest of the UK by local authority, flow, gender and age
Stats Wales	Migration between Wales and the rest of the UK by local authority, flow and period of change
Stats Wales	Number of children and young people who received counselling in Wales by School year age group, Year and Gender

Stats Wales	Number of pupils in primary, middle and secondary school classes by local authority and year group.
Stats Wales	Percentage change on local bus services in Great Britain country by year
Stats Wales	Percentage of local authority road network in poor condition by road type and year.
Stats Wales	Percentage of people satisfied with local area as a place to live by local authority
Stats Wales	Pupils taught Welsh as a first language in primary, middle and secondary schools in year groups 1
Stats Wales	Recorded fly
Stats Wales	Reports of Special Educational Needs (SEN) by local authority and type of need.
Stats Wales	Schools by local authority, region and Welsh medium type.
Stats Wales	Types of alleged abuse by local authority, measure and age of alleged victim
Stats Wales	Type of Agricultural Land (hectares) by Area, 2021
Stats Wales	Welsh language skills by local authority, gender and detailed age groups, 2011 Census
Stats Wales	Welsh Language skills by LSOA, 2011 Census
Stats Wales	Population projections by local authority and year
Stats Wales	Pupils eligible for free school meals by local authority, region and year
Stats Wales	Number of pupils taking free school meals on census day by local authority, region and year
Stockholm Environment Institute and GHS	Ecological and Carbon Footprints of Wales update to 2011
Sustainability	Older people's preferences for housing and environmental characteristics
Sustrans Cymru	Levelling Up Fund: Prospectus.
The Advisory, Conciliation and Arbitration Service	Over a third of businesses report that employee mental health support has got better since the start of the pandemic
The Times/Sunday Times	Good University Guide
The Trussell Trust	Various statistics
UK Government	An Update on Rural Connectivity: Government Response to the Committee's Seventeenth Report of Session 2017
UK Government	EU Settlement Scheme Statistics'
UK Parliament	Paternity Leave
Victim Support	Figures reveal a stark increase in the number of people seeking support for hate crime.
Wales Biodiversity Partnership	Various online resources
Wales Centre for Public Policy	The education response to Coronavirus: Implications for schools in Wales
Wales Centre for Public Policy	Well-being briefing papers on COVID and Brexit, Cultural Well-being, and Equalities Well-being
Welsh Government	A family guide to talking about screen time
Welsh Government	All Wales Breastfeeding Five Year Action Plan 2019
Welsh Government	All Wales Plan 2021-25: Working Together to Reach Net Zero
Welsh Government	All Wales Community Pathway for Long COVID
Welsh Government	Brexit and our land securing the future of Welsh farming, 2018
	Brexit and our land securing the future of Welsh farming – our response, 2021
Welsh Government	Creating a balance between 'Family Time' and 'Screen Time'
Welsh Government	Electric Vehicle Charging Strategy for Wales, 2020
Welsh Government	Energy Generation in Wales 2018
Welsh Government	Examination results in schools in Wales, 2018/19.

Welsh Government	Flying Start Summary Statistics
Welsh Government	Healthy Weight: Healthy Wales
Welsh Government	Labour Market Statistics for Households
Welsh Government	Local Area Summary Statistics Ceredigion, 2014
Welsh Government	Mobility in Wales: Background report for Llwybr Newydd
Welsh Government	Parenting in Wales: Guidance on engagement and support. 2017.
Welsh Government	Remote working
Welsh Government	Substance Misuse deliver plan 2019 to 2022
Welsh Government	Strategic Equality Plan 2020-24: Equality Aims, Objectives and Actions.
Welsh Government	The Future Generations Report 2020: Chapter 3: A Wales of Cohesive Communities
Welsh Government	Llwybr Newydd: the Wales Transport Strategy 2021
Welsh Government	What factors are linked to people speaking the Welsh language?
Welsh Government	Well-being of Wales: 2021
Welsh Government	Welsh Index of Multiple Deprivation, 2019
Welsh Parliament Equality and Social Justice Committee	Minding the future: The childcare barrier facing working parents 2021
West Wales Care Partnership	Carers statistics
West Wales Care Partnership	Older People statistics
West Wales Care Partnership	West Wales Population Assessment
WIMD (Welsh Index of Multiple Deprivation)	Various statistics used
WWF	UK is keen to be green according to the largest ever analysis of consumers' carbon footprints
Young Minds	Coronavirus Impact on young people with mental health needs.
Youth Justice Board	Proven offences by children

## 5: Data Gaps

The production of the assessment has highlighted some gaps in our evidence base, both locally and nationally, where we could benefit from further research and data. These are listed in the table below. The Ceredigion Public Services Board will continue to ensure that the assessment is updated, enhanced and data gaps filled, in order to continually improve and share our understanding of well-being in Ceredigion.

Life Stage / Chapter	Theme	Data Gap
<b>Methodology</b>	Impact of COVID-19 pandemic	The impacts of COVID-19 on well-being in Ceredigion are still being identified, and further research and data is needed to help identify the specific impacts and support the PSB identifying opportunities to better support well-being and priorities for improvement.
<b>New Beginnings</b>	Child immunisations	More recent data required regarding percentage of children up to date with immunisations by 4 years of age by MSOA's. Currently, the most recent data is as of 2012.
	Parental leave	Data required on the uptake of shared leave at a national level, and if possible at a local authority level.
<b>Childhood</b>	Adverse Childhood Experiences	More up to date data is required on Adverse Childhood Experiences, and in particular on the numbers and trends in young carers, to ensure that in the future services can be provided that focus on the issues affecting them.
	Time online and well-being outcomes	Little is known on a local level about the impact of children and young people's screen time and use of new technology, particularly in the wake of the COVID-19 pandemic. There are some concerns shared by both authorities and parents, and as this is likely to be a growing concern due to the proliferation of new technologies and social media platforms, research and data is needed to assist the Public Services Board.
<b>Youth</b>	Out and about as part of the community	The proportion of people attending or participating in arts, heritage and culture activities at least 3 times a year is needed by age group to help assess the trends in younger people's involvement in cultural activities.
	Feeling Safe	Whilst the perception of crime tends to be higher than the reality of crime, it's not entirely clear as to why the wider sense of 'feeling safe' emerged so often during the engagement. In order to fully understand this issue further research is needed.
	Starting Work	There is limited data on the average starting salary for graduates in Ceredigion. This is important for the county in understanding the "pull factors" that result in many younger people choosing to leave to pursue opportunities elsewhere in Wales or the UK.
<b>Adulthood</b>	Biodiversity loss and environmental health	Lack of quantifiable data on biodiversity loss or measures on environmental health impacts at a local and national level.
	Health for the future	More data is needed both nationally and locally on to support intersectional analysis.



	Adult Health	Although alcohol consumption is below average, it has been increasing and may have increased further during the COVID-19 pandemic. More up to date data is needed to assess the impact of the pandemic and the longer trends.
	Adult Health	The COVID-19 pandemic is likely to have affected the well-being and mental health of residents in Ceredigion. Updated data is required for Ceredigion to confirm whether this will unfold, as these findings will be critical in planning for the upsurge of psychological distress that has been predicted to hit mental health services.
	Environmental Issues	Up to date data is required on the ecological footprint of the county to truly assess the longer-term impacts.
	In-Work Poverty	We do not know for certain what the longer term impact of COVID-19 will be on in-work poverty in the county. As this is a key local and regional issue, further work is needed to monitor this impact going forward.
Older People	Suitable Accommodation	More robust data is required regarding the funding of care home residents, to help to assess the needs in the future, and in particular the proportion who are self-funded at a local level.

## 6: Glossary of Terms

Term	Definition
CAVO	The Ceredigion Association of Voluntary Organisations promotes & supports voluntary community action throughout the county of Ceredigion.
Community	A group of people living in the same place or having a particular characteristic in common.
Community Areas	The Community Areas used to assess well-being on a local community basis in the Assessment of Local Well-being were agreed with the Ceredigion Public Services Board in July 2021, and are based on the 9 Middle Layer Super Output Areas in the County.
DFES	Department for Education and Skills.
DPP	Dyfed Powys Police
DWP	Department for Work and Pensions
Free School Meals	Free School Meals are available to children whose family claim certain welfare benefits and financial support.
GCSE	General Certificate of Secondary Education
HDdUHB	Hywel Dda University Health Board
LAC	Looked After Children (LAC) are children who are cared for by the state
LSOA	Lower Layer Super Output Areas (LSOA) are a geographic hierarchy designed to improve the reporting of small area statistics in England and Wales. LSOAs have an average population of 1500 people or 650 households.
MAWWFire	Mid and West Wales Fire and Rescue Service is responsible for providing public safety information, prevention and protection programmes, and emergency response cover for mid and west Wales.
MSOA	Middle Layer Super Output Areas (MSOA) are a geographic hierarchy designed to improve the reporting of small area statistics in England and Wales. Middle Layer Super Output Areas. are built from groups of contiguous Lower Layer Super Output Areas. The minimum population is 5000 and the mean is 7200.
NEET	Not in Education, Employment or Training
NLW	The National Library of Wales, situated in Aberystwyth, is the national legal deposit library of Wales.
NRW	Natural Resources Wales (NRW) is the organisation responsible for the work carried out by the three former organisations, the Countryside Council for Wales, Environment Agency Wales and Forestry Commission Wales. It is also responsible for some functions previously undertaken by Welsh Government. NRW's purpose is to pursue sustainable management of natural resources.
One Voice Wales	One Voice Wales is the principal organisation for community and town councils in Wales, providing a strong voice representing the councils' interests and a range of high quality services to support their work.

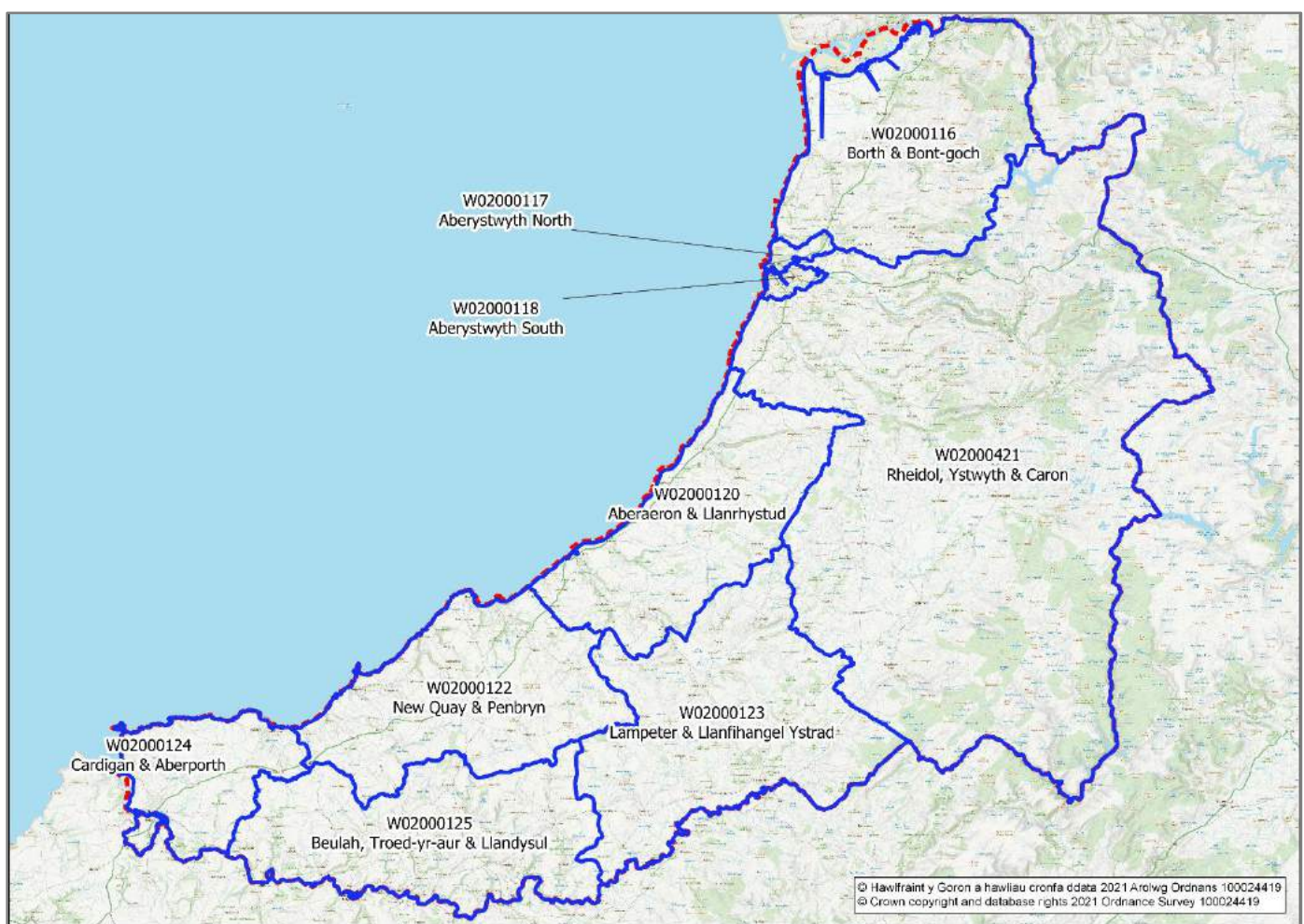
PHW	Public Health Wales (PHW) is the national public health agency in Wales and exists to protect and improve health and wellbeing and reduce health inequalities for people in Wales.
PSB	Public Services Board (PSB) was established by the Well-Being of Future Generations Act Wales 2016 and brings together all public services in the local authority area. The PSB has a collectively responsibility for improving social, economic, environmental and cultural well-being of the area for now and future generations
SHRN	The School Health Research Network (SHRN) is a network of Welsh secondary schools who have joined with researchers and organisations that support young people's health to improve the health and wellbeing of young people by increasing the quality, quantity and relevance of school-based health improvement research in Wales.
SMD	The Social Media Disorder Scale is a short and simple scale to diagnose a disorder in social media use.
Three Horizons Toolkit	The Three Horizons Toolkit is a framework that helps people and groups think and plan for the longer term rather than being so stuck in the immediate situation. It achieves this by keeping a clear vision and taking future trends into account, and this model was used during our engagement events with stakeholders during the summer of 2021.
UNICEF	UNICEF protects the rights of every child in the world.
USOA	Upper Super Output Area's (USOA) are geographical areas with an average population of 32,000 people
WCPP	The Wales Centre for Public Policy works to address key economic and societal challenges through the use of evidence.
Well-being of Future Generations (Wales) Act 2015	The Well-being of Future Generations Act is about improving the social, economic, environmental and cultural well-being of Wales. It requires public bodies think more about the long-term, work better with people and communities and each other, look to prevent problems and take a more joined-up approach. The aim is to help create the Ceredigion and Wales that we all want to live in, now and in the future.
WHO	The World Health Organisation (WHO) works side by side with governments and other partners across the world to ensure the highest attainable level of health for all people
WIMD	Wales Index of Multiple Deprivation (WIMD) is the official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation

## 7: Community Areas in Ceredigion

The Statutory Guidance ‘Shared Purpose: Shared Future’ requires PSBs to identify geographic Community Areas which comprise of the Board’s entire area for the purpose of producing the Assessment of Local Well-being. In preparation for this Assessment, a number of different options were considered to determine the geography level required to allow for a meaningful analysis at community level. This decision was based on knowledge of Ceredigion’s unique landscape and rich social and cultural history.

Ceredigion’s Public Services Board considered seven different geographies, including Census Output Areas, Local GP Areas and Ceredigion’s Six Town Areas. A detailed report titled “**Identifying Community Areas in Ceredigion**” on the options was considered at the Ceredigion PSB meeting on 12<sup>th</sup> July 2021, where the nine Middle Super Output Areas (MSOAs) were agreed as the lower level areas that reflect the economic, social and cultural differences across the county, along with providing comparable statistical information to a lower geographical level. The nine Community Areas used throughout this Assessment are shown in the map below.

**Community Areas of Ceredigion based on the nine Middle layer Super Output Area geography**



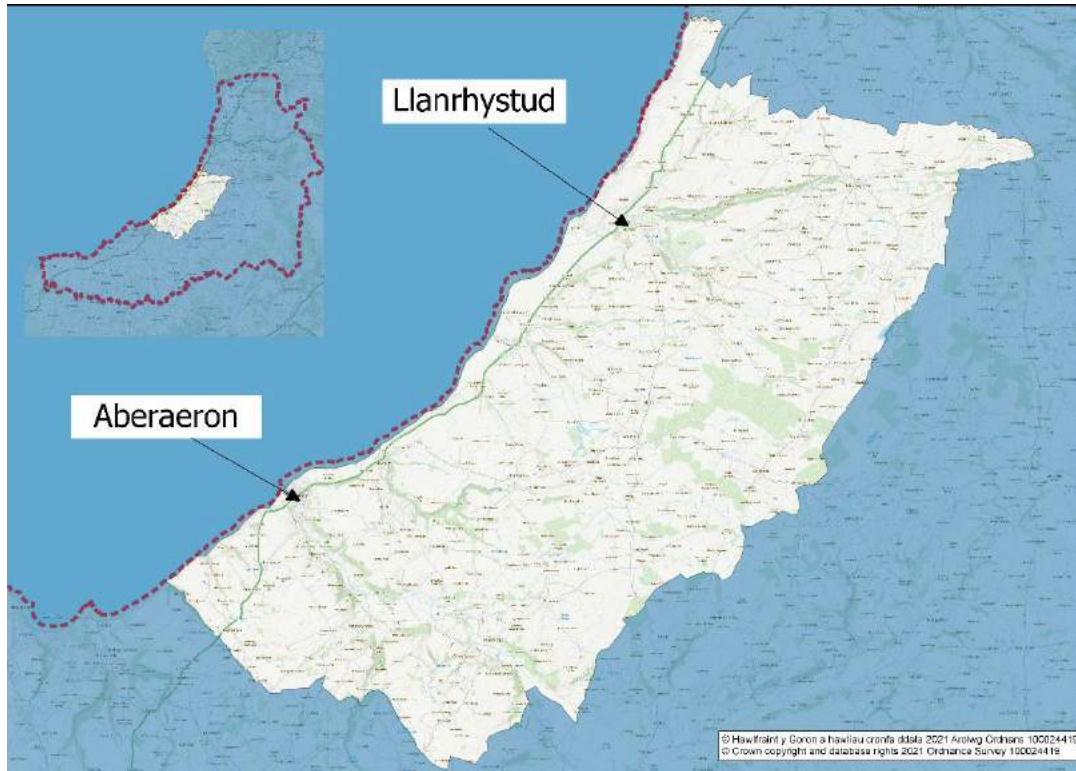
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## 8: Community Area Profiles

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- 8.1 Aberaeron & Llanrhystud
- 8.2 Aberystwyth North
- 8.3 Aberystwyth South
- 8.4 Beulah, Troed-yr-aur & Llandysul
- 8.5 Borth & Bont-goch
- 8.6 Cardigan & Aberporth
- 8.7 Lampeter & Llanfihangel Ystrad
- 8.8 New Quay & Penbryn
- 8.9 Rheidol, Ystwyth & Caron
- 8.10 Ceredigion





## ! Key Headlines

Highest percentage of Welsh speakers.

55.1%

32.1%

Highest percentage 65+ population.

Second lowest percentage of obese children.

7.4%

39%

Highest percentage of poor quality housing in Ceredigion.

Second highest median household income.

£30,820

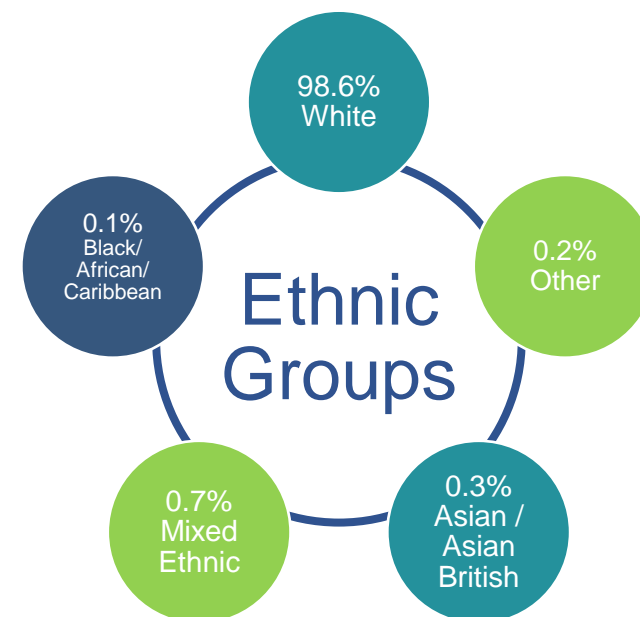
The Aberaeron & Llanrhystud area runs along the very western side of Ceredigion and covers around 173.3km<sup>2</sup>. The area includes one main town, Aberaeron, which is a very attractive popular sea side town. Aberaeron retains its Georgian character with brightly painted houses and includes 248 listed buildings, a focal point for the rural communities. The town offers many hospitality and tourism jobs and although much busier during the summer season, Aberaeron is a holiday destination all year round. To the north of Aberaeron lies Aberarth, Llanon and Llanrhystud, all seaside villages, characterised by pebble beaches and rocky, sea eroded platforms. This area forms part of the 60 mile Ceredigion Coast Path, which runs mostly along the top of soft cliffs on the coastal flats. Llanddeiniol and Llangwryfon are to the north of the area and are mostly made up of farm land with a lot of agricultural activities seen around this area. The A487 coast road is a vital road linking the south with the north and travels along the western boarder of the Aberaeron & Llanrhystud area.



## Population Characteristics:

	Aberaeron & Llanrhystud		Ceredigion	Wales
Mid-year population 2012	7,317	9.6%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>7,113</b>	<b>9.7%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	<b>3,523</b>	<b>49.5%</b>	36,262	1,563,524
Females	<b>3,590</b>	<b>50.5%</b>	36,633	1,606,062
Aged 0-15	<b>981</b>	<b>13.8%</b>	10,774	562,730
Aged 16-64	<b>3,846</b>	<b>54.1%</b>	43,453	1,938,266
Aged 65+	<b>2,286</b>	<b>32.1%</b>	18,668	668,590
Speak Welsh	3,941	55.1%	47.3%	19%
No Skills in Welsh	2,518	35.2%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011



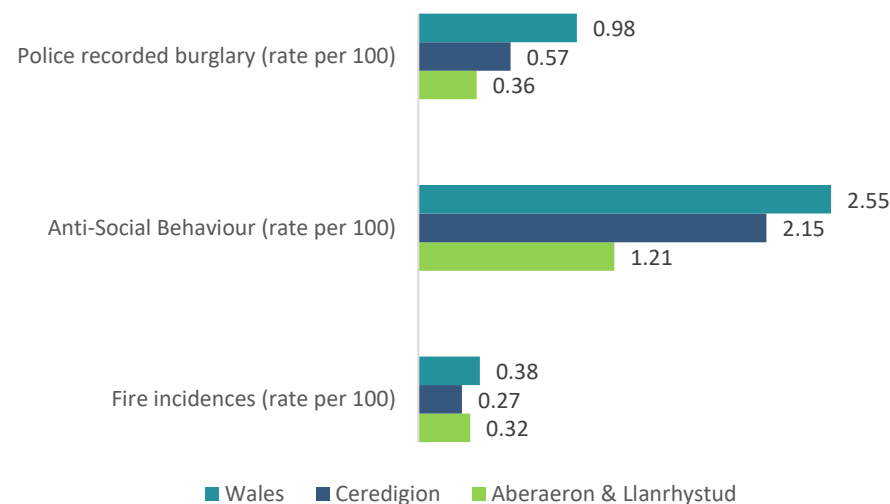
## Health:

	Aberaeron & Llanrhystud	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	<b>13.6</b>	12.7	14.3
Limiting long-term illness (rate per 100)	<b>19.9</b>	20.0	22.7
Premature death (rate per 100,000)	<b>315.5</b>	322.4	382.4
GP-recorded mental health condition (rate per 100)	<b>21.6</b>	19.9	23.2
Cancer incidence (per 100,000)	<b>496.3</b>	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	<b>4.3</b>	4.8	5.5
Children aged 4-5 who are obese (%)	<b>7.4</b>	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019



## Access to Services:



Average public return  
travel time to a food  
shop

**78 (minutes)**

Average public return  
travel time to a GP  
surgery

**95 (minutes)**



Unavailability  
of broadband  
at 30Mb/s

**21.4%**

Source: WIMD 2019



## Physical Environment:

	Aberaeron & Llanrhystud	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	612	914	432
Percentage of addresses with private outdoor space	88%	88%	91%
Households at risk of flooding score	19.1	22.5	-

Source: WIMD 2019 & ONS 2021

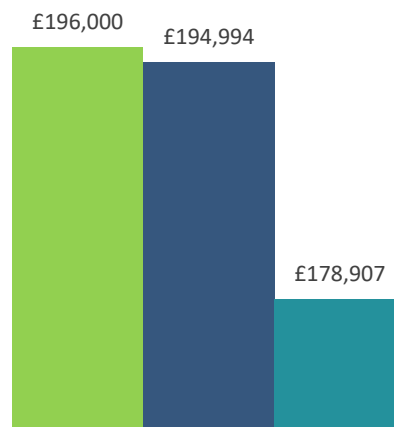


## Housing and living arrangements:

	Aberaeron & Llanrhystud		Ceredigion
	Number	%	
Total households	3,257	-	31,562
All one person households	1,061	32.6%	10,456
All households with dependent children	737	22.6%	7,203
All households aged 65+	934	28.7%	8,261
Average household size (persons)	2.3	-	2.3

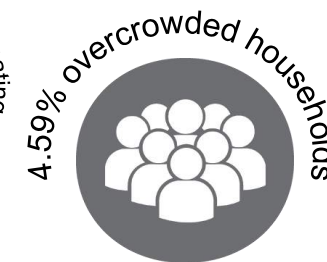
Source: Census 2011

### Average House Prices:



■ Aberaeron & Llanrhystud ■ Ceredigion ■ Wales

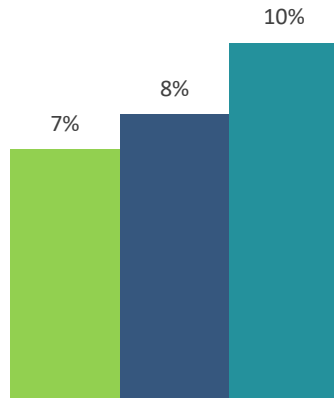
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

## £ Economy & Employment:

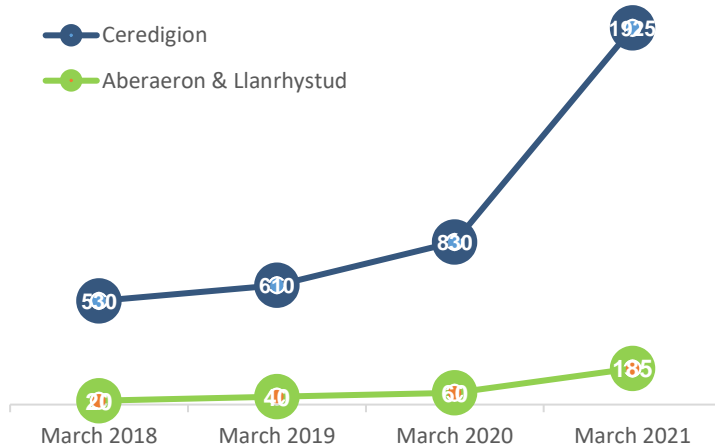
### % of working-age people in employment deprivation:



Aberaeron & Llanrhystud Ceredigion Wales

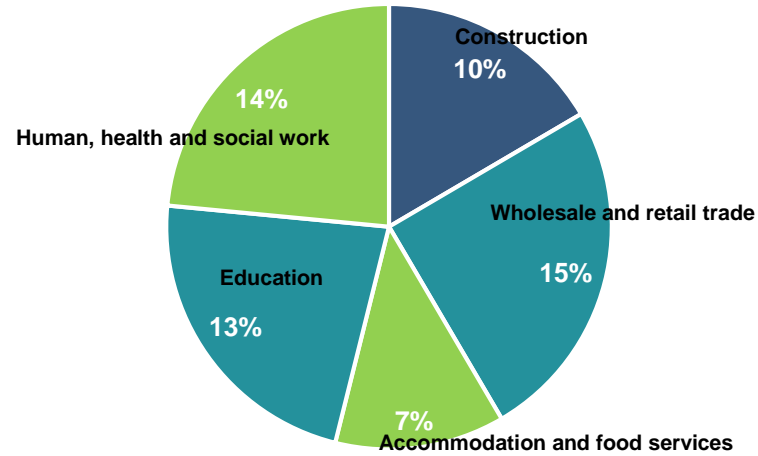
Source: WIMD 2019

### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:



Source: Census 2011.

Source: WIMD 2019



Adults aged 25-64 with no qualifications  
**14.4%**

Key Stage 4 leavers entering Higher Education

**33.5%**



	Aberaeron & Llanrhystud	Ceredigion	Wales
<b>Economically Active</b>	3,562 <b>66.2%</b>	61.1%	65.8%
<b>Economically Inactive</b>	1,822 <b>33.8%</b>	38.9%	34.2%

Source: ONS 2021

### Median Household Income:



Source: CACI Paycheck 2021



## ! Key Headlines

Lowest median income in Ceredigion. **£23,042**

**37.8%**

Highest percentage of people living in poverty.

Lowest percentage of people in income deprivation.

**6%**

**9.5%**

Lowest percentage of 65+ population.

High rates of crime relating to drug offences.

**12.7** per 100 population

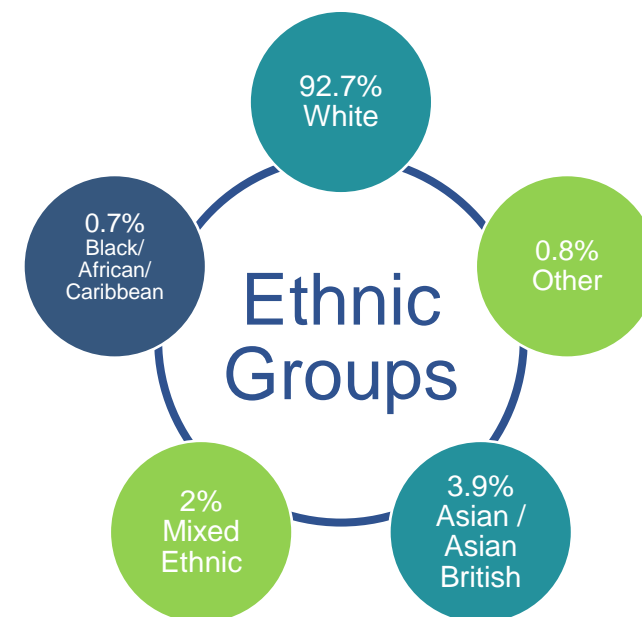
Aberystwyth North is situated on Ceredigion's north-western coast and covers approximately 5.7km<sup>2</sup> of the county. Aberystwyth north includes part of the largest town in Ceredigion, Aberystwyth. The area is attractive and has a historic and cultural character of national importance. It serves an extensive rural area but also benefits from an established tourist trade and large student population. This area is home to Aberystwyth North's Beach, Constitution Hill and the Cliff Railway, considerable assets in terms of recreation and tourism. Aberystwyth North is an important administrative educational centre, being home to a number of institutions of local and national importance including Aberystwyth University, the National Library of Wales, Aberystwyth Arts Centre and Bronglais District Hospital. The area also includes a part of the Waunfawr community, which is within the Faenor Ward. Waunfawr is an attractive place to live due to its close proximity to the University, Comprehensive School and local amenities. The community offers a relatively wide range of employment opportunities within the private and public sector, such as, retail, light manufacturing, catering, health trusts and the University.



## Population Characteristics:

	Aberystwyth North		Ceredigion	Wales
Mid-year population 2012	10,351	16.6%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>9,001</b>	<b>12.3%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	4,819	53.5%	36,262	1,563,524
Females	4,182	46.5%	36,633	1,606,062
Aged 0-15	624	6.9%	10,774	562,730
Aged 16-64	7,520	83.5%	43,453	1,938,266
Aged 65+	857	9.5%	18,668	668,590
Speak Welsh	2,706	27.4%	47.3%	19%
No Skills in Welsh	6,377	64.5%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011

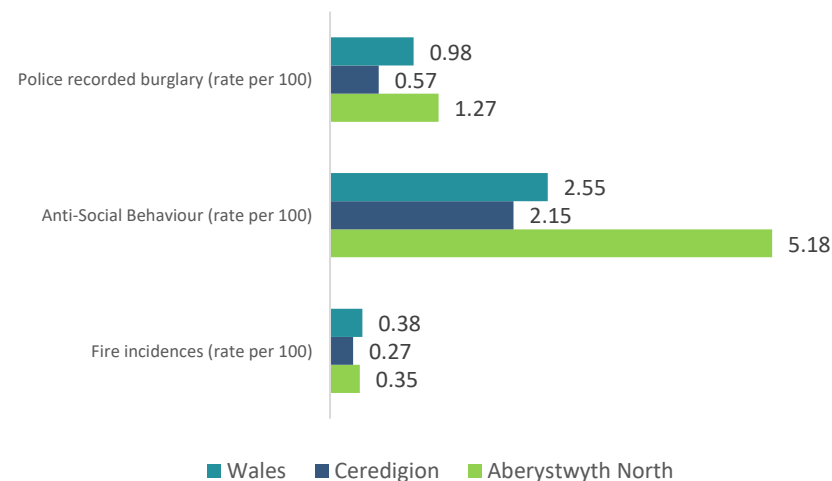
## Health:

	Aberystwyth North	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	13.0	12.7	14.3
Limiting long-term illness (rate per 100)	19.2	20.0	22.7
Premature death (rate per 100,000)	371.7	322.4	382.4
GP-recorded mental health condition (rate per 100)	21.4	19.9	23.2
Cancer incidence (per 100,000)	581.7	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	5.5	4.8	5.5
Children aged 4-5 who are obese (%)	7.3	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019



## Access to Services:



Average public return  
travel time to a food  
shop

**21 (minutes)**

Average public return  
travel time to a GP  
surgery

**23 (minutes)**



Unavailability  
of broadband  
at 30Mb/s

**9.4%**

Source: WIMD 2019



## Physical Environment:

	Aberystwyth North	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	579	914	432
Percentage of addresses with private outdoor space	78%	88%	91%
Households at risk of flooding score	36.1	22.5	-

Source: WIMD 2019 & ONS 2021

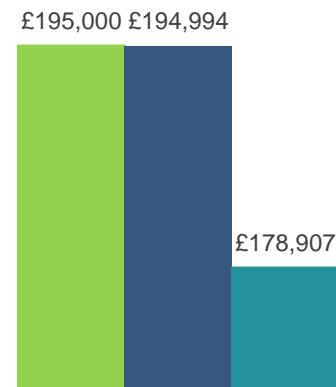


## Housing and living arrangements:

	Aberystwyth North		Ceredigion
	Number	%	
Total households	3,321	-	31,562
All one person households	1,378	41.5%	10,456
All households with dependent children	352	10.5%	7,203
All households aged 65+	562	16.9%	8,261
Average household size (persons)	2.3	-	2.3

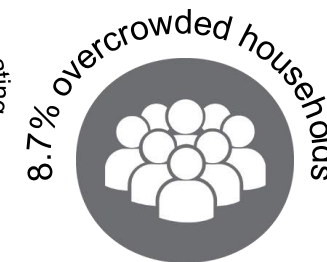
Source: Census 2011

### Average House Prices:



■ Aberystwyth North ■ Ceredigion ■ Wales

Source: ONS, Median House Prices 2020

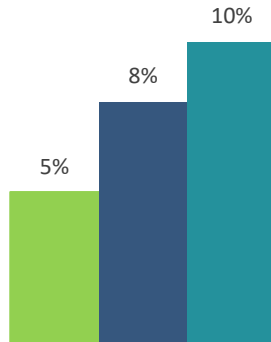


Source: WIMD 2019 & Census 2011



## £ Economy & Employment:

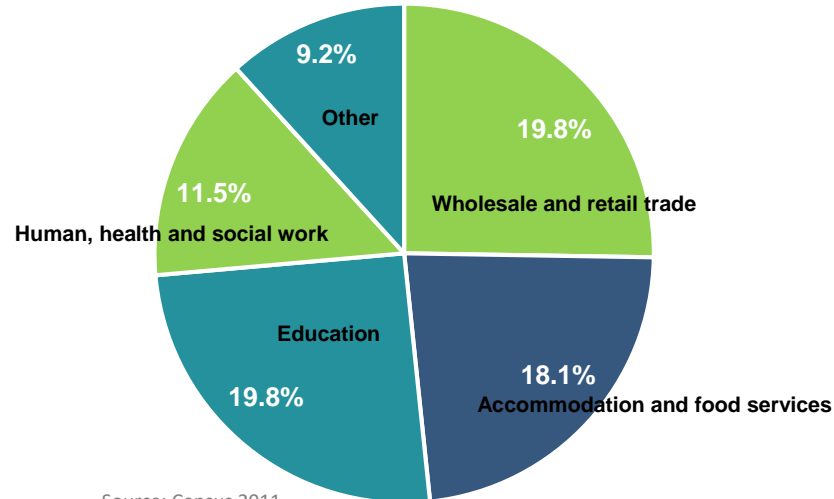
### % of working-age people in employment deprivation:



■ Aberystwyth North ■ Ceredigion ■ Wales

Source: WIMD 2019

### Top 5 Industries of Employment:



Source: Census 2011.

Source: WIMD 2019

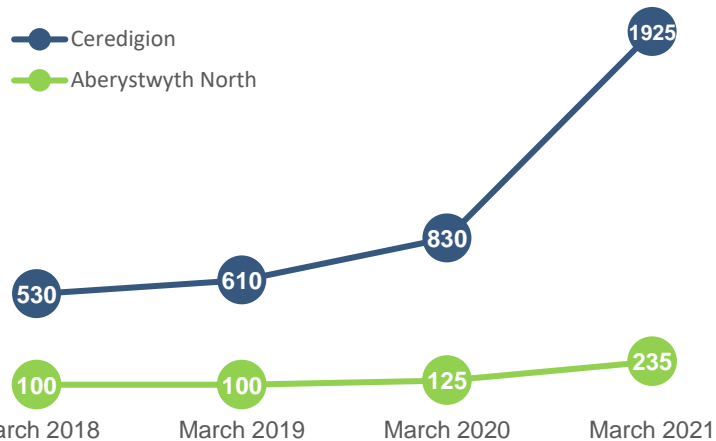


Adults aged 25-64 with no qualifications  
**7.6%**

Key Stage 4 leavers entering Higher Education  
**37.5%**



### Claimant Count:



Source: ONS 2021

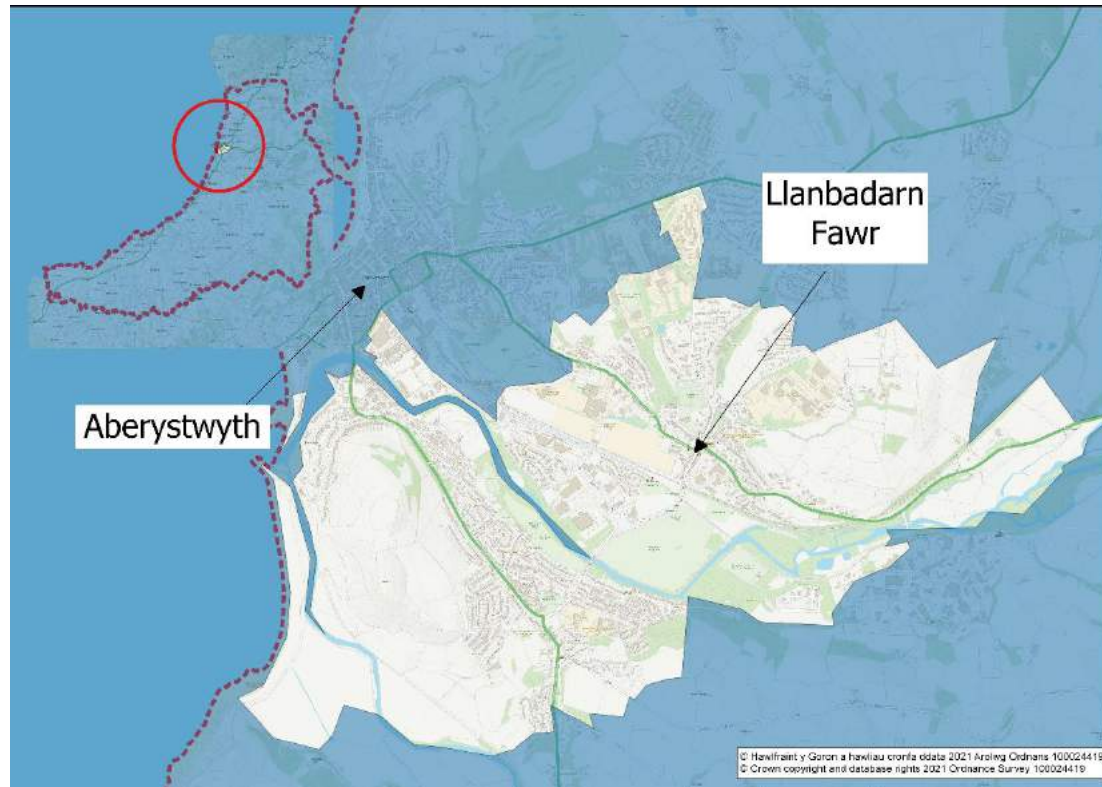
Source: ONS 2021

	Aberystwyth North		Ceredigion	Wales
Economically Active	4,068	45.5%	61.1%	65.8%
Economically Inactive	4,878	54.5%	38.9%	34.2%

### Median Household Income:



Source: CACI Paycheck 2021



## ! Key Headlines

Highest percentage of live single births less than 2.5kg.

5.9%

3.7%

Lowest percentage of unavailability of broadband at 30Mb/s.

Highest rates of violence against the person offences.

357 offences

23.6 per 100 population

Highest rates of GP-recorded mental health condition.

Lowest average distance to nearest Park, Public Garden or playing field.

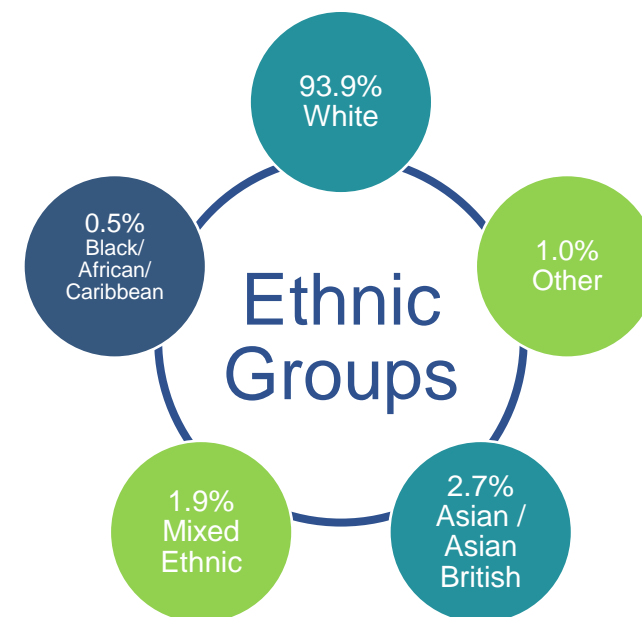
367m

Aberystwyth South is situated on Ceredigion's north-western coast and covers a fairly small area, of the county, around 5.9km<sup>2</sup>. Aberystwyth South includes Penparcau, Llanbadarn Fawr, and a part of the Waunfawr settlement which are all largely built up areas classed as desirable places to live, due to their proximity to the town centre and education opportunities. There is one Welsh medium secondary school in the area and 3 primary schools. Aberystwyth University, Llanbadarn Campus is also situated within Aberystwyth South. Because of this, there are a significant amount of educational jobs in the area. The river Ystwyth reaches the sea at the very south of Aberystwyth South and the river Rheidol flows through the centre of the area, before reaching the sea towards the north. The area is also home to Pen Dinas which is a large hill upon which an extensive Iron Age Celtic hillfort of international significance is situated. The area surrounding and Pen Dinas itself offers many attractive walking opportunities and wildlife habitats, especially along the river, which attracts many to the area.

## Population Characteristics:

	Aberystwyth South		Ceredigion	Wales
Mid-year population 2012	7,674	10.1%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>6,629</b>	<b>9.1%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	3,276	49.4%	36,262	1,563,524
Females	3,353	50.6%	36,633	1,606,062
Aged 0-15	1,157	17.5%	10,774	562,730
Aged 16-64	4,297	64.8%	43,453	1,938,266
Aged 65+	1,175	17.7%	18,668	668,590
Speak Welsh	3,773	50.8%	47.3%	19%
No Skills in Welsh	2,792	37.6%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011

## Health:

	Aberystwyth South	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	14.2	12.7	14.3
Limiting long-term illness (rate per 100)	21.6	20.0	22.7
Premature death (rate per 100,000)	366.4	322.4	382.4
GP-recorded mental health condition (rate per 100)	23.6	19.9	23.2
Cancer incidence (per 100,000)	617.8	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	5.9	4.8	5.5
Children aged 4-5 who are obese (%)	12.4	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019

■ Wales ■ Ceredigion ■ Aberystwyth South

## Access to Services:



Average public return travel time to a food shop

**24 (minutes)**

Average public return travel time to a GP surgery

**32 (minutes)**



Unavailability of broadband at 30Mb/s

**3.7%**

Source: WIMD 2019

## Physical Environment:

	Aberystwyth South	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	367	914	432
Percentage of addresses with private outdoor space	86%	88%	91%
Households at risk of flooding score	26.6	22.5	-

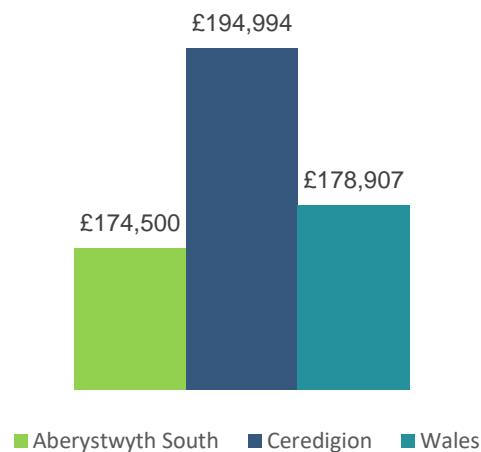
Source: WIMD 2019 & ONS 2021

## Housing and living arrangements:

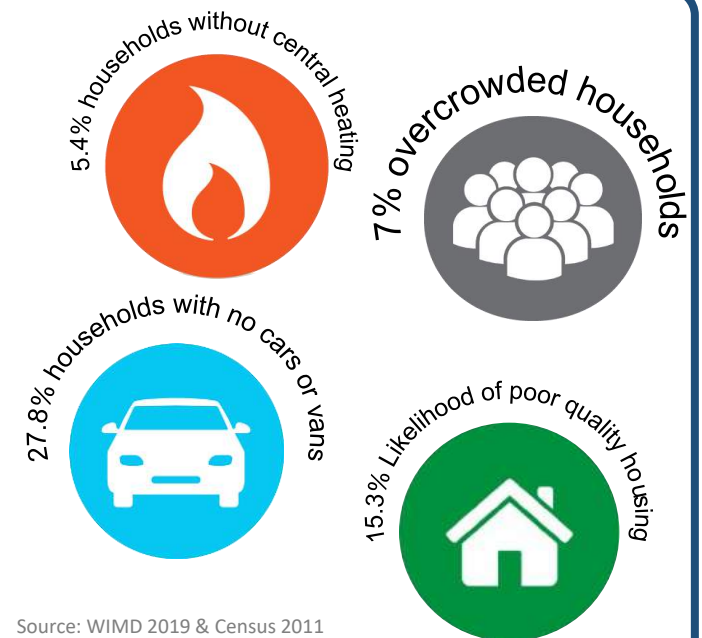
	Aberystwyth South		Ceredigion
	Number	%	
Total households	2,840	-	31,562
All one person households	933	32.9%	10,456
All households with dependent children	742	26.1%	7,203
All households aged 65+	620	21.8%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

### Average House Prices:



Source: ONS, Median House Prices 2020

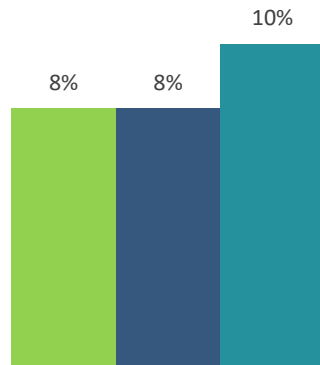


Source: WIMD 2019 & Census 2011



## £ Economy & Employment:

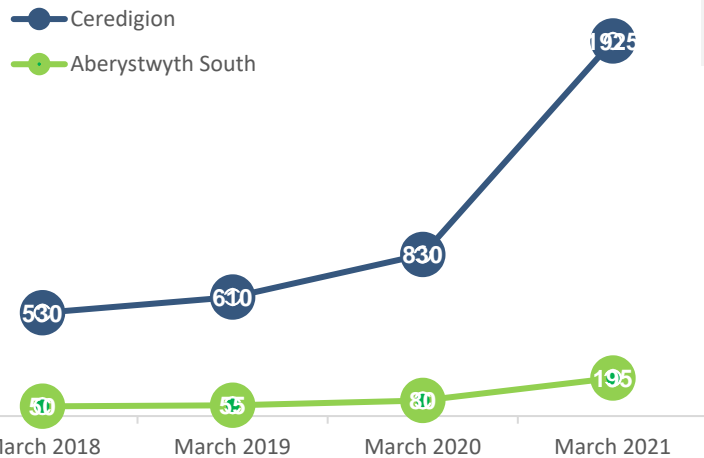
### % of working-age people in employment deprivation:



■ Aberystwyth South ■ Ceredigion ■ Wales

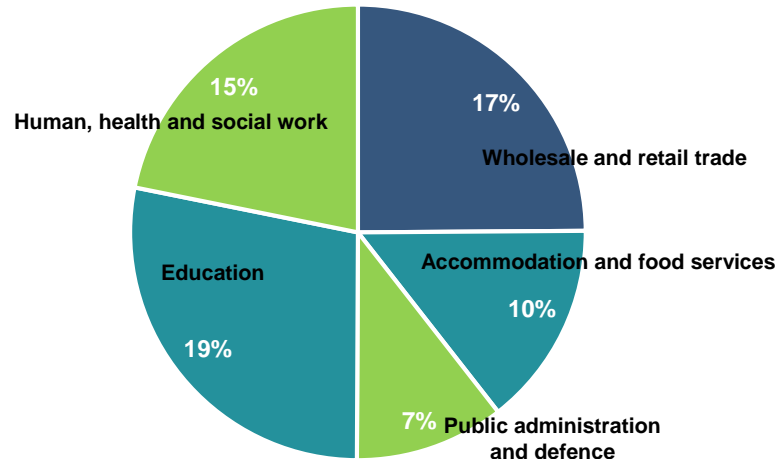
Source: WIMD 2019

### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:



Source: Census 2011.

Source: WIMD 2019



Adults aged 25-64 with no qualifications  
**16%**

Key Stage 4 leavers entering Higher Education

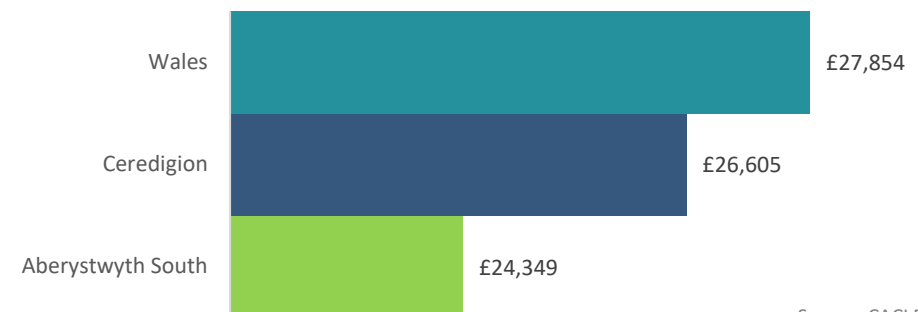
**28.4%**



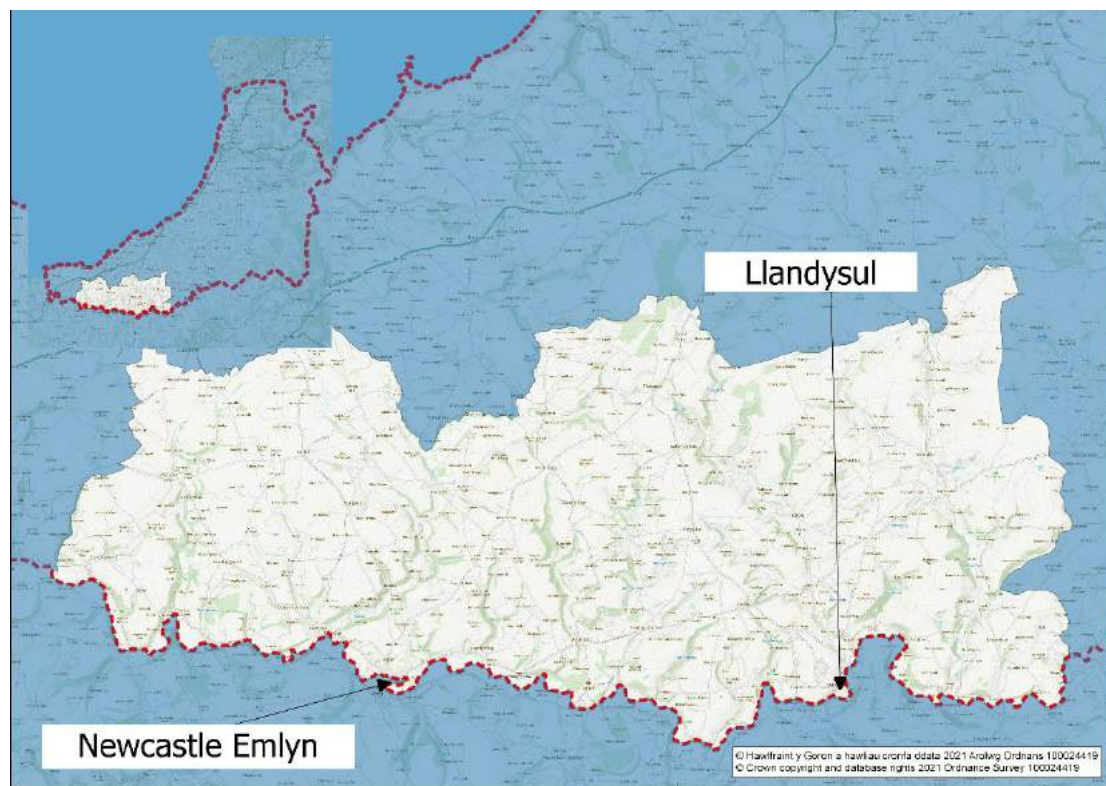
	Aberystwyth South		Ceredigion	Wales
Economically Active	3,522	58.0%	61.1%	65.8%
Economically Inactive	2,552	42.0%	38.9%	34.2%

Source: ONS 2021

### Median Household Income:



Source: CACI Paycheck 2021



## ! Key Headlines

Highest percentage of people that can speak, read and write Welsh.

45.9%

140  
minutes

Average return travel time to sports facility highest in Ceredigion.

Lowest rate of police reported burglary in Ceredigion.

0.26 per  
100 population

13.8%

Highest percentage of children aged 4-5 who are obese in Ceredigion.

Highest return travel time to a GP surgery in Ceredigion.

119  
minutes

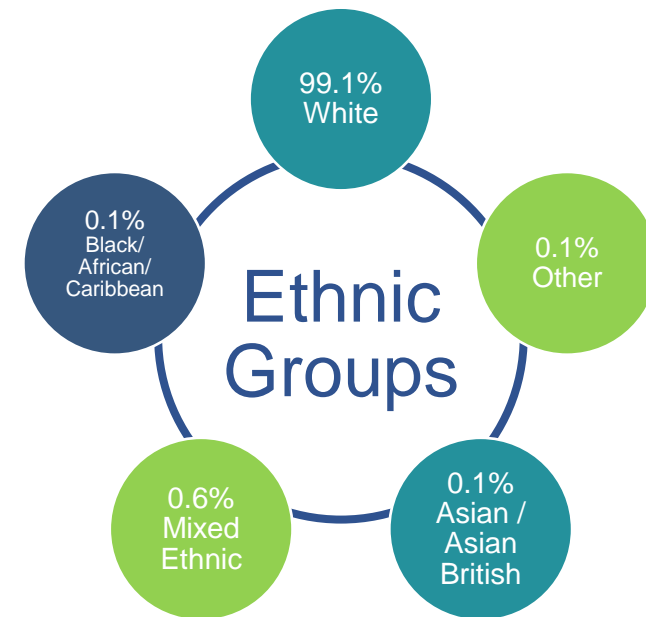
The Beulah, Troed-yr-aur & Llandysul area is home to one of Ceredigion's main towns, Llandysul and also includes part of Newcastle Emlyn. This community area is around 177.7km<sup>2</sup> and is situated to the south east of the county. The area is a largely rural area with fairly dispersed settlements. Ysgol Bro Teifi is situated within the area which is an 'all age school' educating pupils from ages 3 to 18 years old. The Gomer Press printing and publishing company is situated to the north of Llandysul, and this is the largest publishing house in Wales. A fair amount of its residents are employed in educational industries but human, health and social work along with wholesale and retail industries are the most popular.



## Population Characteristics:

	Beulah, Troed-yr-aur & Llandysul		Ceredigion	Wales
Mid-year population 2012	7,380	9.7%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>7,420</b>	<b>10.1%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	3,628	48.9%	36,262	1,563,524
Females	3,792	51.1%	36,633	1,606,062
Aged 0-15	1,103	14.9%	10,774	562,730
Aged 16-64	3,999	53.9%	43,453	1,938,266
Aged 65+	2,318	31.2%	18,668	668,590
Speak Welsh	3,988	54.6%	47.3%	19%
No Skills in Welsh	2,684	36.8%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011

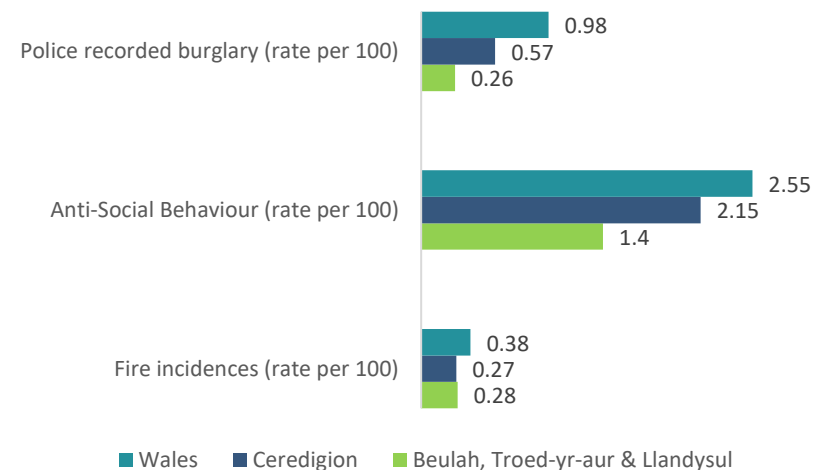
## Health:

	Beulah, Troed-yr-aur & Llandysul	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	12.4	12.7	14.3
Limiting long-term illness (rate per 100)	21.2	20.0	22.7
Premature death (rate per 100,000)	300.9	322.4	382.4
GP-recorded mental health condition (rate per 100)	19.9	19.9	23.2
Cancer incidence (per 100,000)	617.1	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	5.2	4.8	5.5
Children aged 4-5 who are obese (%)	13.8	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019

## Access to Services:



Average public return travel time to a food shop

**98 (minutes)**

Average public return travel time to a GP surgery

**128 (minutes)**



Unavailability of broadband at 30Mb/s

**27.0%**

Source: WIMD 2019

## Physical Environment:

	Beulah, Troed-yr-aur & Llandysul	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	1114	914	432
Percentage of addresses with private outdoor space	91%	88%	91%
Households at risk of flooding score	11.5	22.5	-

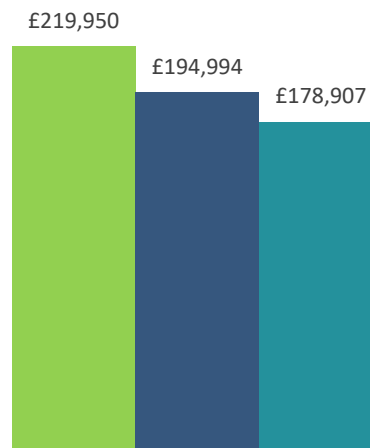
Source: WIMD 2019 & ONS 2021

## Housing and living arrangements:

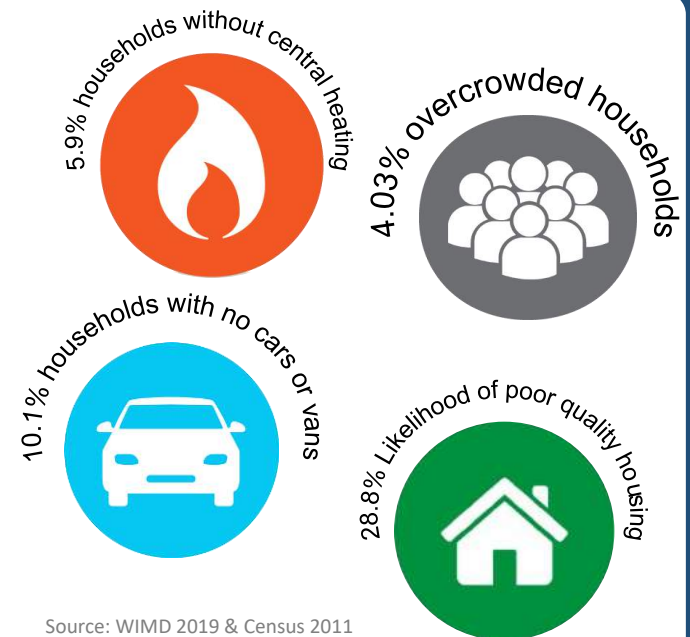
	Beulah, Troed-yr-aur & Llandysul		Ceredigion
	Number	%	
Total households	3,308	-	31,562
All one person households	1,032	31.2%	10,456
All households with dependent children	833	23.4%	7,203
All households aged 65+	916	27.8%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

### Average House Prices:



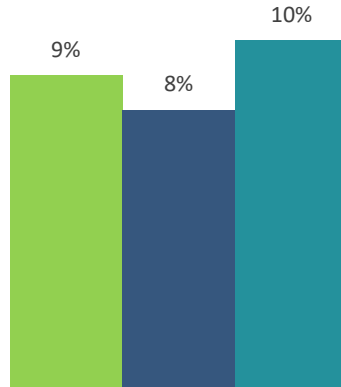
■ Beulah, Troed-yr-aur & Llandysul ■ Ceredigion ■ Wales  
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

## £ Economy & Employment:

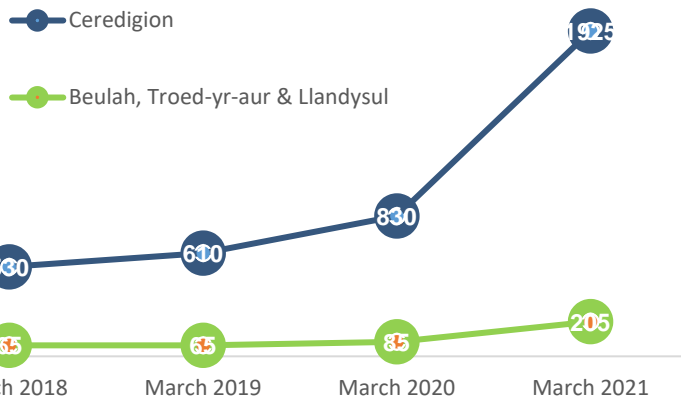
### % of working-age people in employment deprivation:



■ Beulah, Troed-yr-aur & Llandysul ■ Ceredigion ■ Wales

Source: WIMD 2019

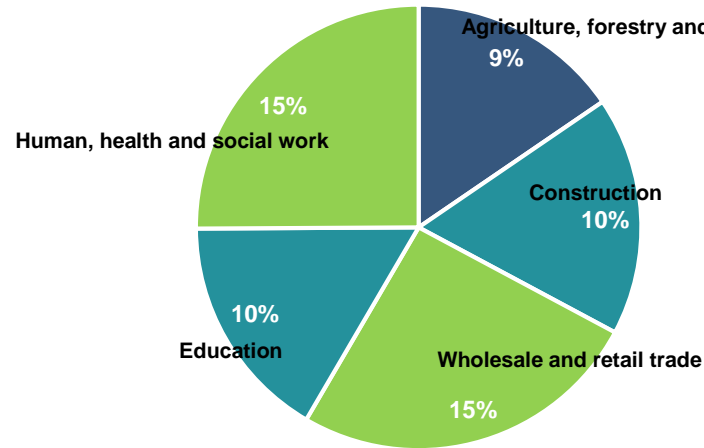
### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:

Source: WIMD 2019



Source: Census 2011.



Adults aged 25-64 with no qualifications  
**15.6%**

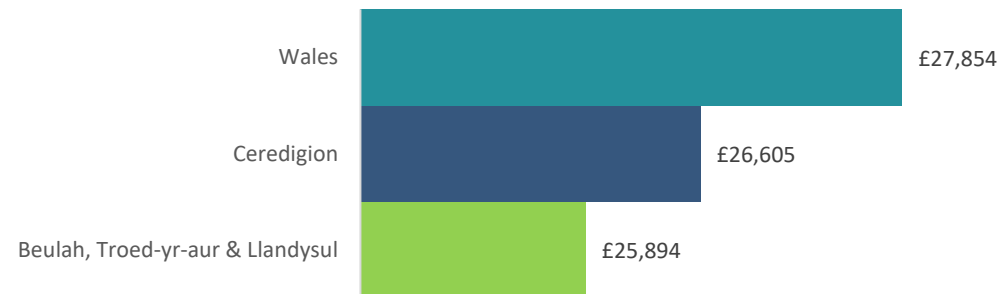
Key Stage 4 leavers entering Higher Education  
**29.2%**



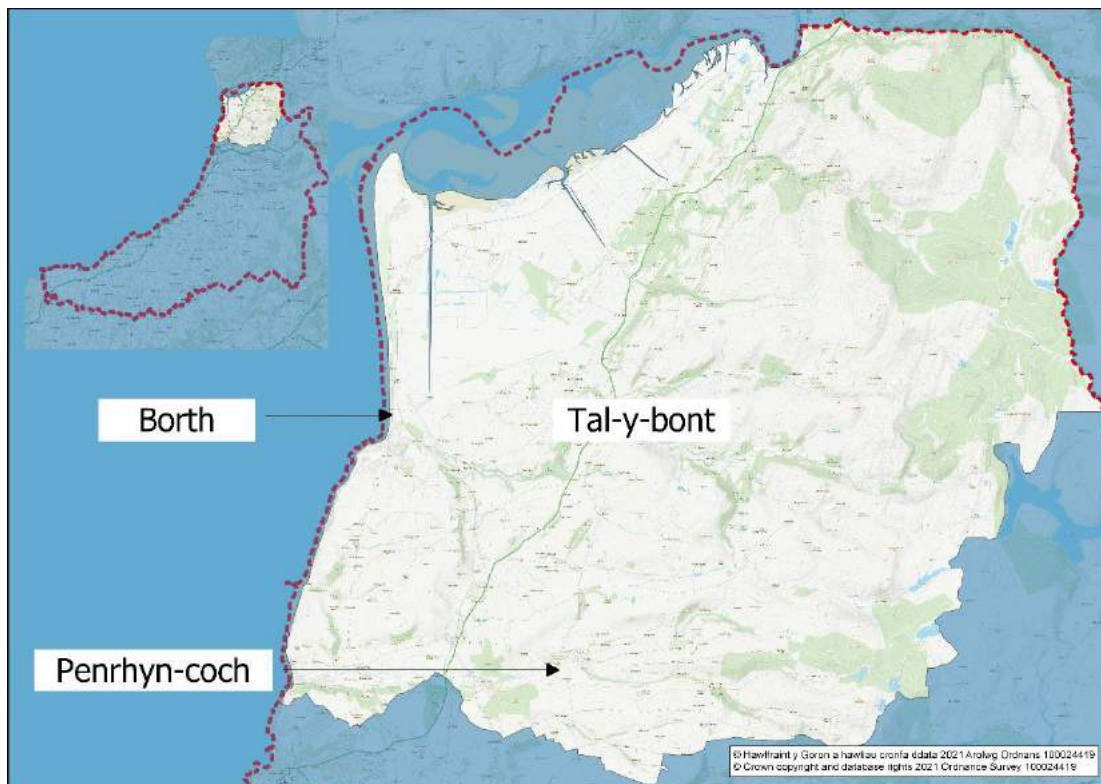
	Beulah, Troed-yr-aur & Llandysul	Ceredigion	Wales
Economically Active	3,460 <b>62.7%</b>	61.1%	65.8%
Economically Inactive	2,056 <b>37.3%</b>	38.9%	34.2%

Source: ONS 2021

### Median Household Income:



Source: CACI Paycheck 2021



## ! Key Headlines

Highest median incomes  
in Ceredigion.

£31,273

25.6%

Lowest percentage of  
people living in poverty.

Lowest rates of crime  
relating to drug offences.

1.1 per 100  
population

3.1%

Lowest live single births  
less than 2.5kg.

Highest percentage of  
households with private  
outdoor space

92%

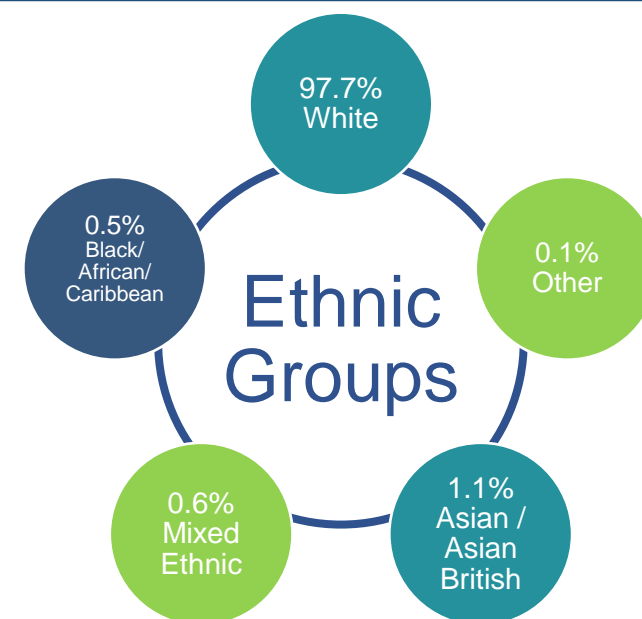
Borth & Bont-goch is one of the largest community areas, covering around 195.5km<sup>2</sup> at the very north of the county. The area includes the town of Borth, a very popular tourist seaside town, situated to the West of the area. As a consequence, Borth offers many jobs in hospitality and accommodation. The village of Tal-y-bont lies almost centrally in the Borth and Bont-goch area, with neighbouring Bow Street and Llandre to the south and south west. These settlements are all popular living places, with Bow Street now having its own train station, connecting the area to Aberystwyth and the national train line. The east of the Borth and Bont-goch area is largely rural, with houses, mainly farms sparsely dispersed throughout. Many forestries are situated across the area, offering attractive walking spots. Ynyslas, part of the Dyfi National Nature Reserve, is situated at the very top of the Borth and Bont-goch area looks out at Aberdoverly and is home to the largest sand dunes in Ceredigion. The sand dunes are hot spots for a variety of wildlife, which attract visitors. The A487 runs straight through the middle of the area and is a key road, linking the south of the county with the north.



## Population Characteristics:

	Borth & Bont-goch		Ceredigion	Wales
Mid-year population 2012	7,582	10.0%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>7,466</b>	<b>10.2%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	3,632	48.6%	36,262	1,563,524
Females	3,834	51.4%	36,633	1,606,062
Aged 0-15	1,232	16.5%	10,774	562,730
Aged 16-64	4,345	58.2%	43,453	1,938,266
Aged 65+	1,889	25.3%	18,668	668,590
Speak Welsh	3,773	50.8%	47.3%	19%
No Skills in Welsh	2,792	37.6%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011

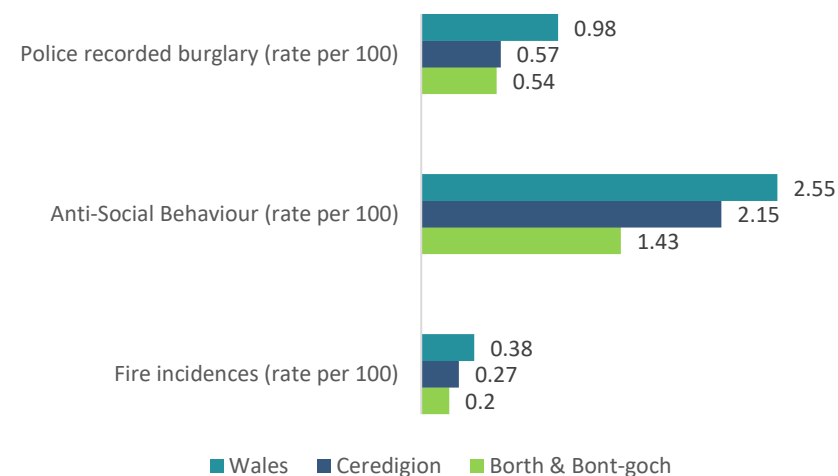
## Health:

	Borth & Bont-goch	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	12.9	12.7	14.3
Limiting long-term illness (rate per 100)	18.3	20.0	22.7
Premature death (rate per 100,000)	281.7	322.4	382.4
GP-recorded mental health condition (rate per 100)	20.8	19.9	23.2
Cancer incidence (per 100,000)	504.3	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	3.1	4.8	5.5
Children aged 4-5 who are obese (%)	11.5	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019

## Access to Services:



Average public return travel time to a food shop

**42 (minutes)**

Average public return travel time to a GP surgery

**66 (minutes)**



Unavailability of broadband at 30Mb/s

**13.9%**

Source: WIMD 2019

## Physical Environment:

	Borth & Bont-goch	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	1571	914	432
Percentage of addresses with private outdoor space	92%	88%	91%
Households at risk of flooding score	25.9	22.5	-

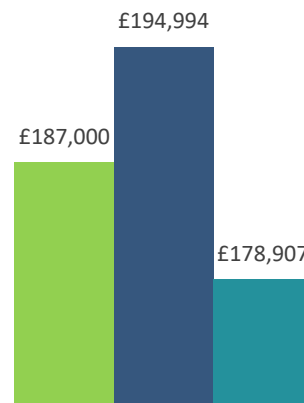
Source: WIMD 2019 & ONS 2021

## Housing and living arrangements:

	Borth & Bont-goch		Ceredigion
	Number	%	
Total households	3,291	-	31,562
All one person households	1,009	30.7%	10,456
All households with dependent children	908	27.6%	7,203
All households aged 65+	784	23.8%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

### Average House Prices:



■ Borth & Bont-goch ■ Ceredigion ■ Wales

Source: ONS, Median House Prices 2020

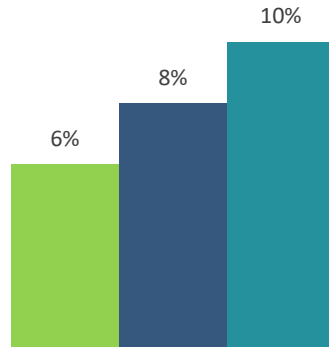


Source: WIMD 2019 & Census 2011



# £ Economy & Employment:

## % of working-age people in employment deprivation:



■ Borth & Bont-goch ■ Ceredigion ■ Wales

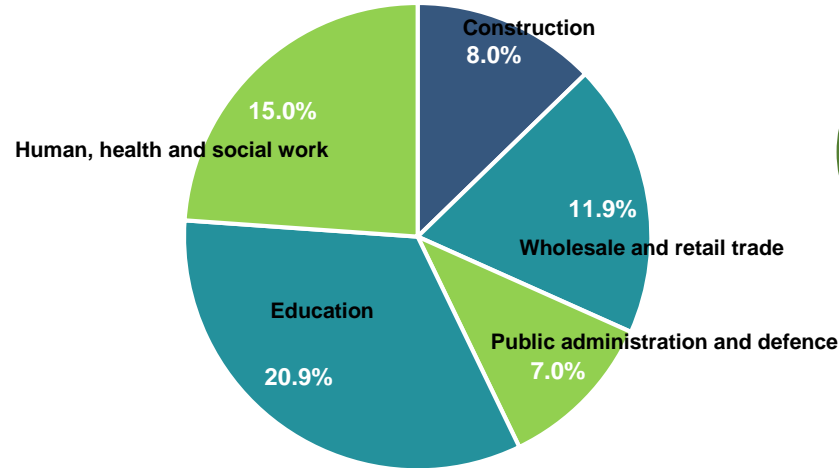
Source: WIMD 2019

## Claimant Count:



Source: ONS 2021

## Top 5 Industries of Employment:



Source: Census 2011.

Source: WIMD 2019



Adults aged 25-64 with no qualifications  
**9.9%**

Key Stage 4 leavers entering Higher Education

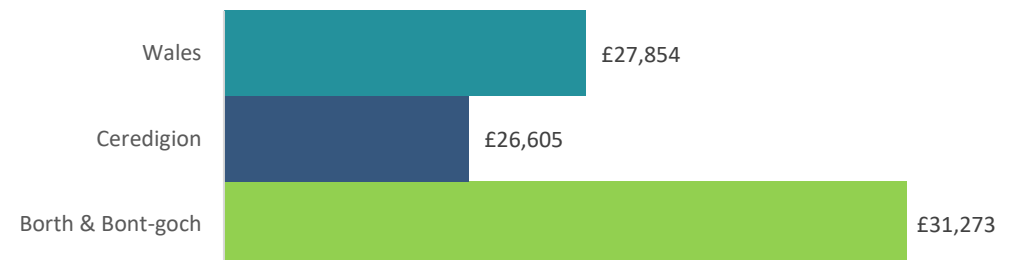
**33%**



	Borth & Bont-goch		Ceredigion	Wales
Economically Active	3,899	69.9%	61.1%	65.8%
Economically Inactive	1,680	30.1%	38.9%	34.2%

Source: ONS 2021

## Median Household Income:



Source: CACI Paycheck 2021

# Cardigan & Aberporth



## ! Key Headlines

Highest percentage of population in income deprivation.

19%

240

Highest number of lone parent households with dependent children.

Highest rate of people with a limiting long-term illness.

22.8 per 100 population

38%

Highest percentage of one person households.

Lowest percentage of households without central heating.

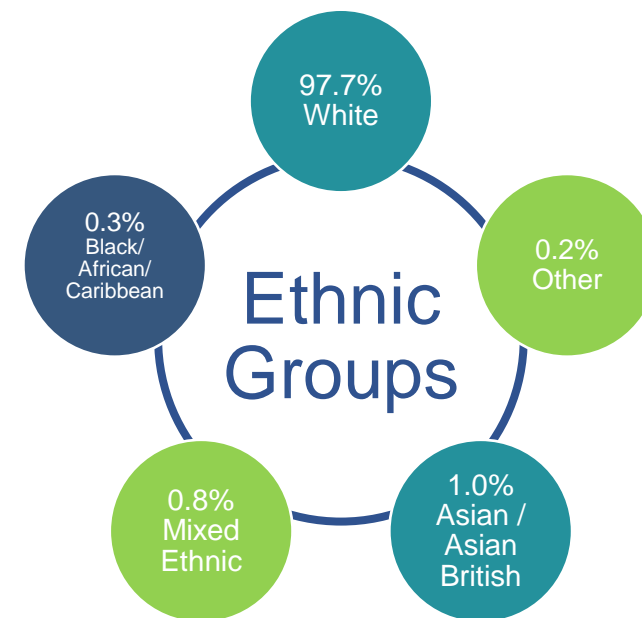
4.3%

The Cardigan and Aberporth area is situated at the very southern tip of Ceredigion and covers around 78.6km<sup>2</sup>. Although the area is one of the smallest community areas in Ceredigion, it includes the second largest town in Ceredigion, Cardigan. It has a range of public and private sector employment opportunities and includes national health and further education institutions. It is well represented in the arts with the Theatre Mwldan and Small Worlds Theatre. Cardigan has a particular tourist appeal due to its built heritage spanning centuries of history and recently restored 12th Century Cardigan Castle. The area includes the Gwbert area, a very attractive area of Cardigan Bay that draws many tourists because of its popular walking spots and spectacular views. Aberporth lies to the north of the area and is another area that attracts many tourists and second home buyers. The western part of the area is largely made up of coastal cliffs and hills, home to many birds and other wildlife. The A487 runs through the area and is key to connecting north and south Wales. The A487 runs through the villages of Penparc and Blaenannerch.

## Population Characteristics:

	Cardigan & Aberporth	Ceredigion	Wales
Mid-year population 2012	8,801	11.6%	75,932
<b>Mid-year population 2020</b>	<b>8,873</b>	<b>12.2%</b>	<b>72,895</b>
Males	4,342	48.9%	36,262
Females	4,531	51.1%	36,633
Aged 0-15	1,422	16.0%	10,774
Aged 16-64	4,778	53.8%	43,453
Aged 65+	2,673	30.1%	18,668
Speak Welsh	4,456	52.0%	47.3%
No Skills in Welsh	3,036	35.5%	42.4%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011

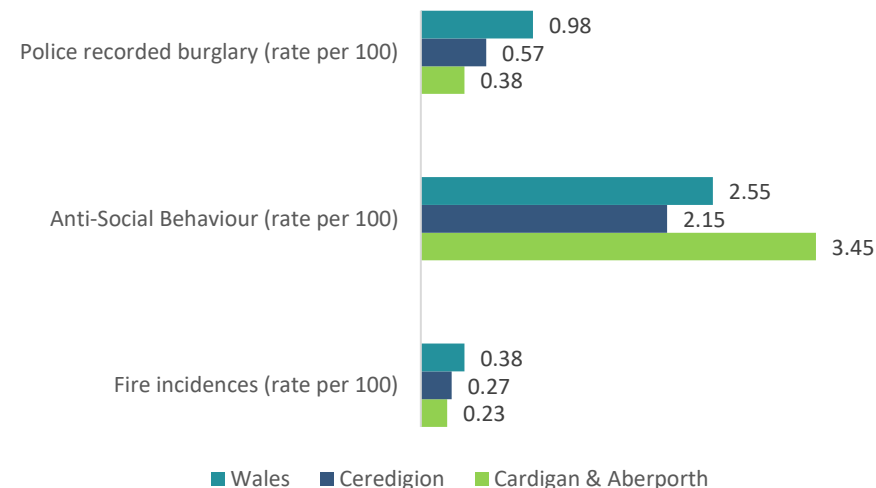
## Health:

	Cardigan & Aberporth	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	12.6	12.7	14.3
Limiting long-term illness (rate per 100)	22.8	20.0	22.7
Premature death (rate per 100,000)	397.8	322.4	382.4
GP-recorded mental health condition (rate per 100)	18.4	19.9	23.2
Cancer incidence (per 100,000)	576.8	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	5.3	4.8	5.5
Children aged 4-5 who are obese (%)	11.1	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019

## Access to Services:



Average public return travel time to a food shop

**41 (minutes)**

Average public return travel time to a GP surgery

**61 (minutes)**



Unavailability of broadband at 30Mb/s

**9.5%**

Source: WIMD 2019

## Physical Environment:

	Cardigan & Aberporth	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	648	914	432
Percentage of addresses with private outdoor space	91%	88%	91%
Households at risk of flooding score	17.1	22.5	-

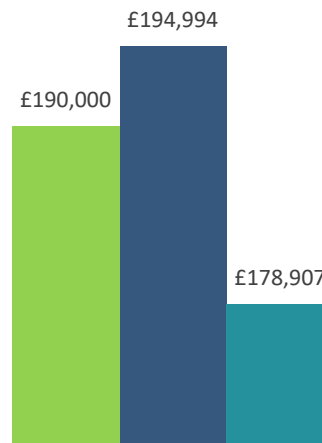
Source: WIMD 2019 & ONS 2021

## Housing and living arrangements:

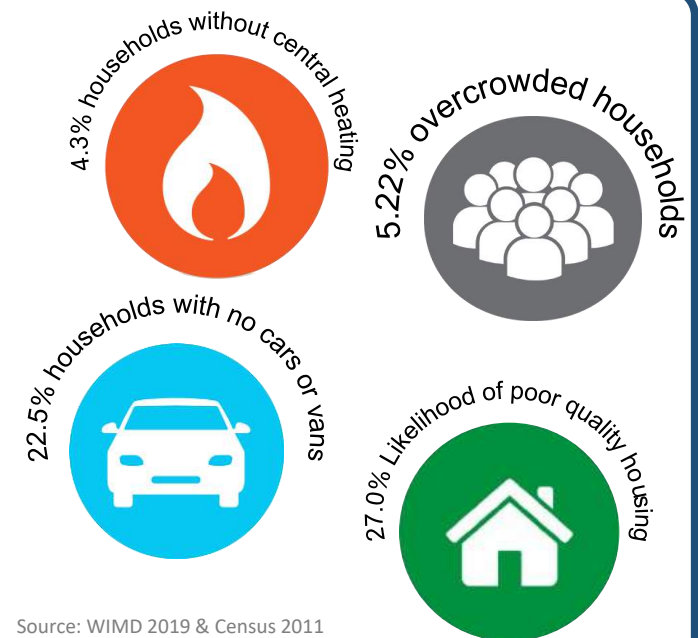
	Cardigan & Aberporth		Ceredigion
	Number	%	
Total households	4,165	-	31,562
All one person households	1,587	38.0%	10,456
All households with dependent children	965	23.2%	7,203
All households aged 65+	1,309	31.4%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

### Average House Prices:



■ Cardigan & Aberporth ■ Ceredigion ■ Wales  
Source: ONS, Median House Prices 2020

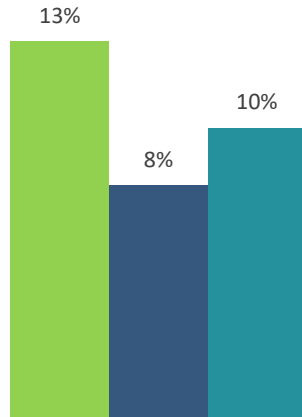


Source: WIMD 2019 & Census 2011



## £ Economy & Employment:

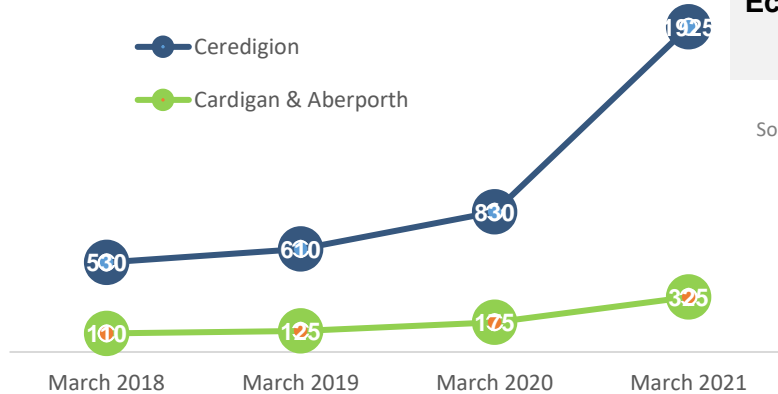
### % of working-age people in employment deprivation:



■ Cardigan & Aberporth ■ Ceredigion ■ Wales

Source: WIMD 2019

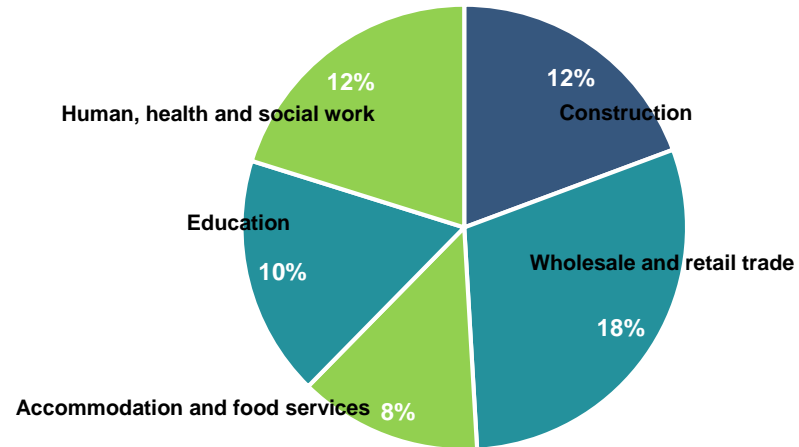
### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:

Source: WIMD 2019



Source: Census 2011.



Adults aged 25-64 with no qualifications  
**18.3%**

Key Stage 4 leavers entering Higher Education

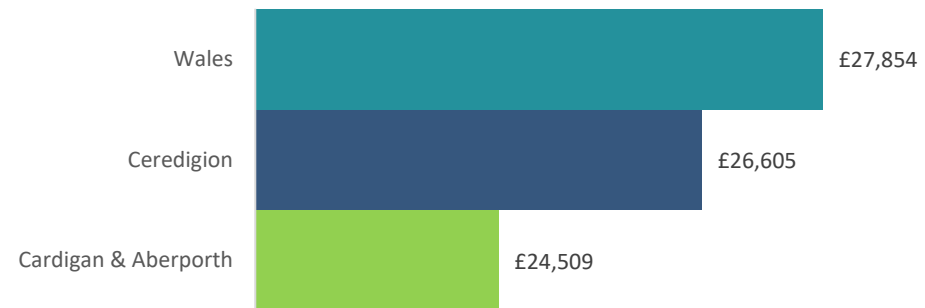
**31.0%**



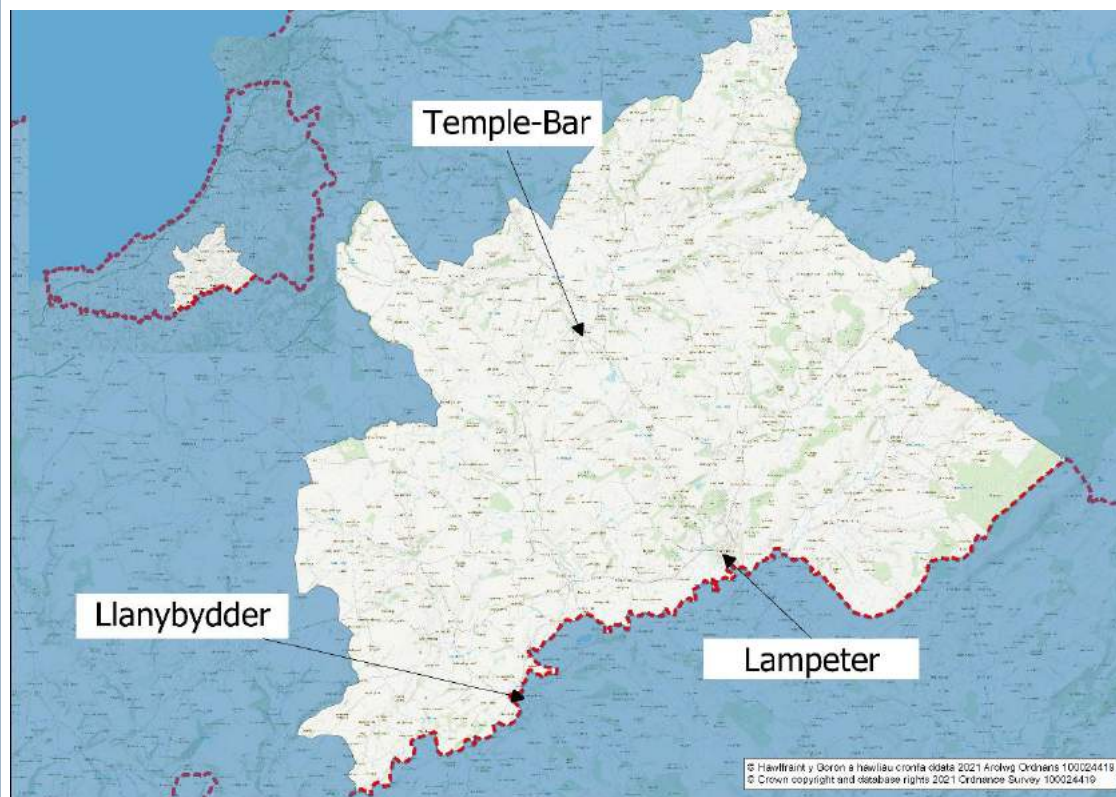
	Cardigan & Aberporth	Ceredigion	Wales
Economically Active	3,813 <b>60.4%</b>	61.1%	65.8%
Economically Inactive	2,495 <b>39.6%</b>	38.9%	34.2%

Source: ONS 2021

### Median Household Income:



Source: CACI Paycheck 2021



## ! Key Headlines

Lowest Average House prices in Ceredigion.

£165,000

6.8%

Second highest percentage of households without central heating.

Second lowest median household incomes.

£24,328

0.22 per 100 population

One of the lowest rates of fire incidents in Ceredigion.

One of the highest households at risk of flooding score.

24.4

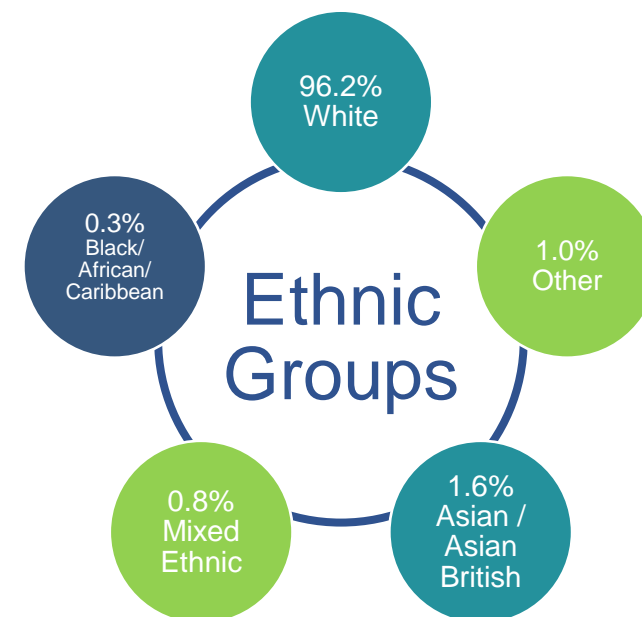
Lampeter & Llanfihangel Ystrad is situated to the south east of the county, is a fully in-land area and is approximately 226.7km<sup>2</sup>. One of Ceredigion's main towns of Lampeter is situated within the area. The area is well-known for being home to a large number of Polish migrants. There is one 'all age school' in the area, Ysgol Bro Pedr, which educates children from ages 3 to 18 years old. Lampeter University, is the oldest academic institution in Wales, which offers a wide range of humanities courses. One of the most popular industries of employment is therefore education, with wholesale and retail trade also being popular, likely because of the opportunities in Lampeter town. The area stretches across to the West of the county and includes the villages of Ystrad Aeron, Dihewyd, Trefilan, Talsarn and Nantcwnlle. Llanwnnen is to the south of Lampeter town and Llanfair Clydgoau is to the north. The area surrounding Lampeter town is largely very rural and made up of a hilly topography which includes many woodlands.



## Population Characteristics:

	Lampeter & Llanfihangel Ystrad		Ceredigion	Wales
Mid-year population 2012	8,522	11.2%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>8,191</b>	<b>11.2%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	<b>4,086</b>	<b>49.4%</b>	36,262	1,563,524
Females	<b>4,145</b>	<b>50.6%</b>	36,633	1,606,062
Aged 0-15	<b>1,430</b>	<b>17.5%</b>	10,774	562,730
Aged 16-64	<b>4,626</b>	<b>56.5%</b>	43,453	1,938,266
Aged 65+	<b>2,136</b>	<b>26.1%</b>	18,668	668,590
Speak Welsh	4,240	52.4%	47.3%	19%
No Skills in Welsh	3,168	39.2%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011



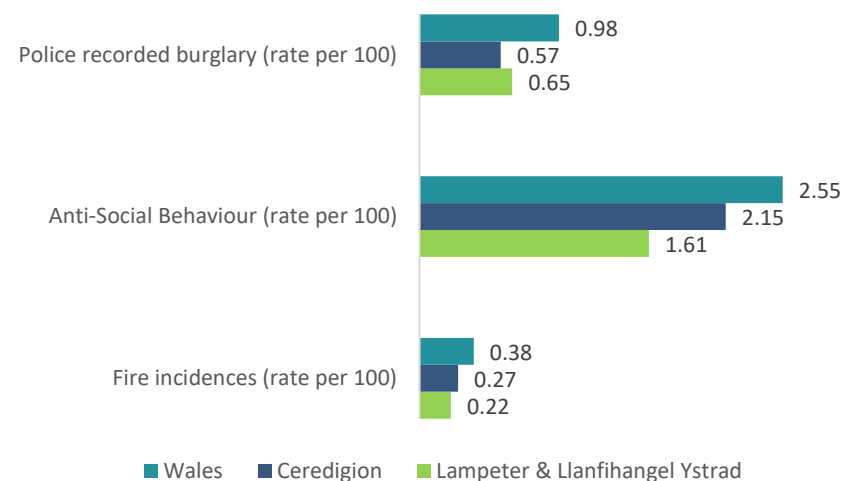
## Health:

	Lampeter & Llanfihangel Ystrad	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	<b>12.5</b>	12.7	14.3
Limiting long-term illness (rate per 100)	<b>20.4</b>	20.0	22.7
Premature death (rate per 100,000)	<b>344.0</b>	322.4	382.4
GP-recorded mental health condition (rate per 100)	<b>19.0</b>	19.9	23.2
Cancer incidence (per 100,000)	<b>523.6</b>	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	<b>5.2</b>	4.8	5.5
Children aged 4-5 who are obese (%)	<b>9.2</b>	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019



## Access to Services:



Average public return  
travel time to a food  
shop

**85 (minutes)**

Average public return  
travel time to a GP  
surgery

**96 (minutes)**



Unavailability  
of broadband  
at 30Mb/s

**25.6%**

Source: WIMD 2019



## Physical Environment:

	Lampeter & Llanfihangel Ystrad	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	660	914	432
Percentage of addresses with private outdoor space	88%	88%	91%
Households at risk of flooding score	24.4	22.5	-

Source: WIMD 2019 & ONS 2021

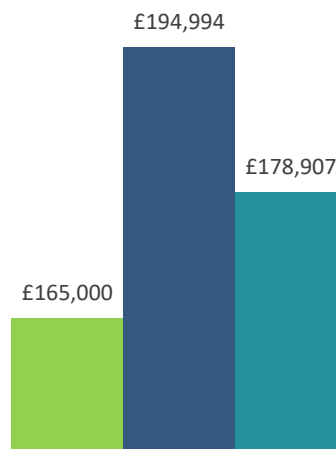


## Housing and living arrangements:

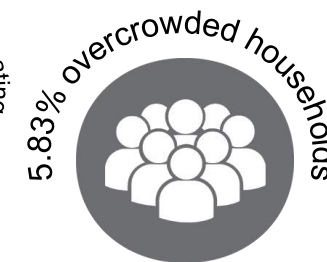
	Lampeter & Llanfihangel Ystrad		Ceredigion
	Number	%	
Total households	3,432	-	31,562
All one person households	1,093	32.0%	10,456
All households with dependent children	833	24.0%	7,203
All households aged 65+	916	26.7%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

### Average House Prices:



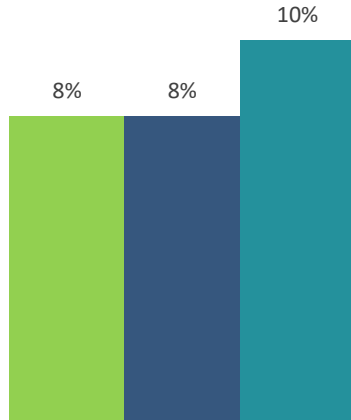
■ Lampeter & Llanfihangel Ystrad ■ Ceredigion ■ Wales  
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

## £ Economy & Employment:

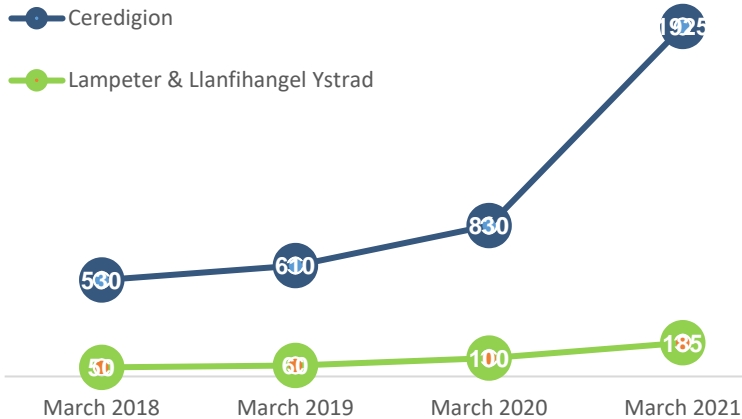
### % of working-age people in employment deprivation:



■ Lampeter & Llanfihangel Ystrad ■ Ceredigion ■ Wales

Source: WIMD 2019

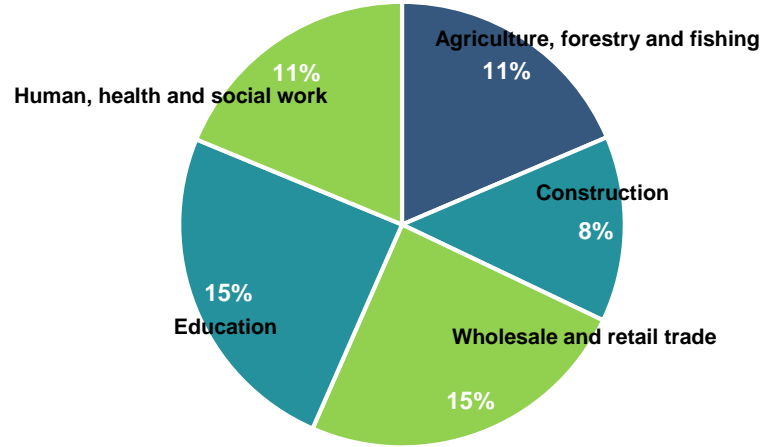
### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:

Source: WIMD 2019



Source: Census 2011.



Adults aged 25-64 with no qualifications  
**16.8%**

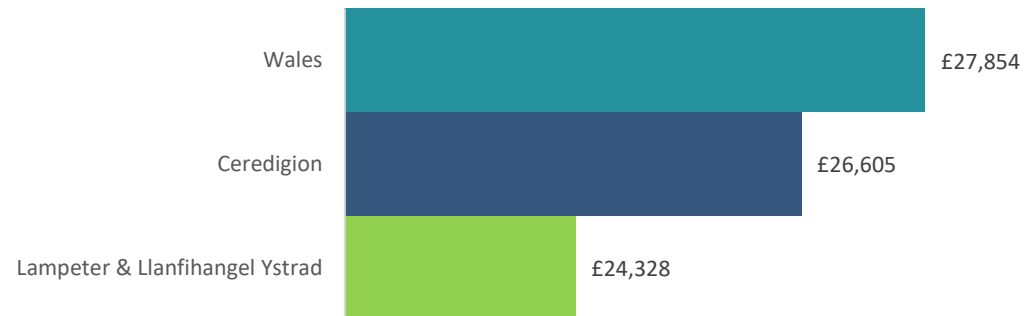
Key Stage 4 leavers entering Higher Education  
**33.6%**



	Lampeter & Llanfihangel Ystrad	Ceredigion	Wales
Economically Active	3,868 <b>62.2%</b>	61.1%	65.8%
Economically Inactive	2,348 <b>37.8%</b>	38.9%	34.2%

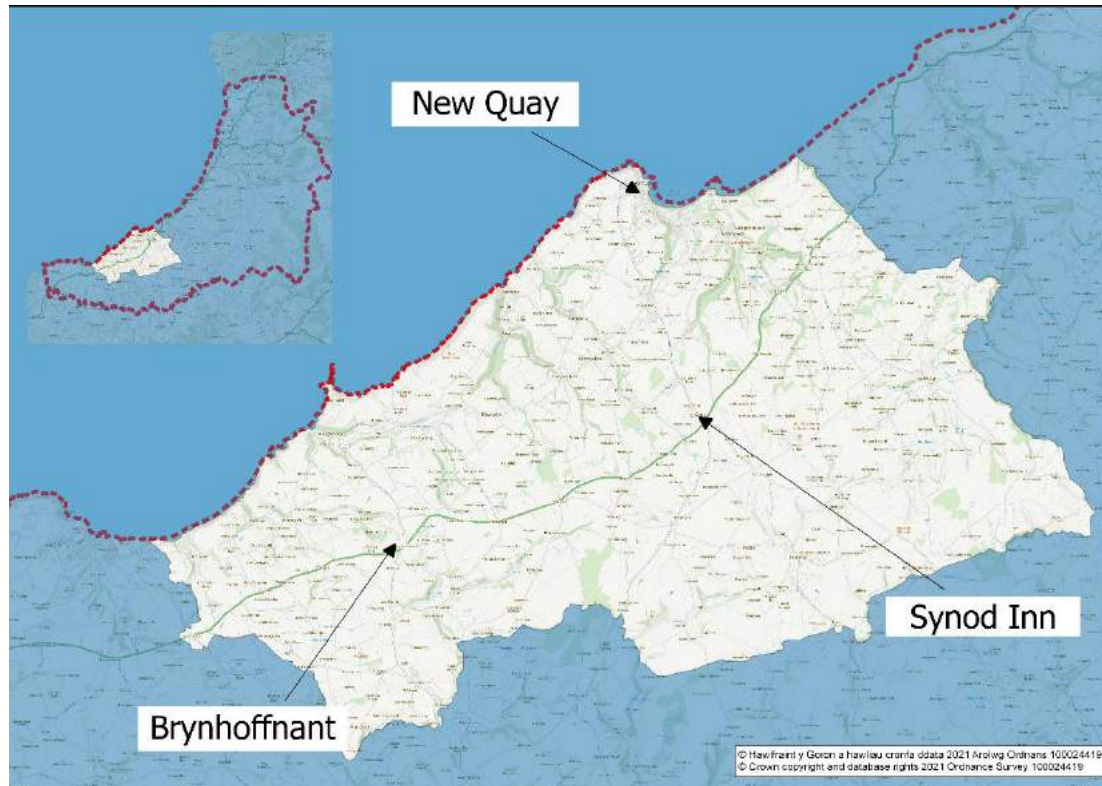
Source: ONS 2021

### Median Household Income:



Source: CACI Paycheck 2021

# New Quay & Penbryn



## ! Key Headlines

One of the lowest number of crime rates for drug offences.

1.2 per 100 population

133

Lowest rates of violence against the person offences.

Lowest rates of GP-recorded chronic condition in Ceredigion.

10.6 per 100 population

£235,000

Highest average house prices in Ceredigion.

Lowest rates of GP-recorded mental health condition.

14.5 per 100 population

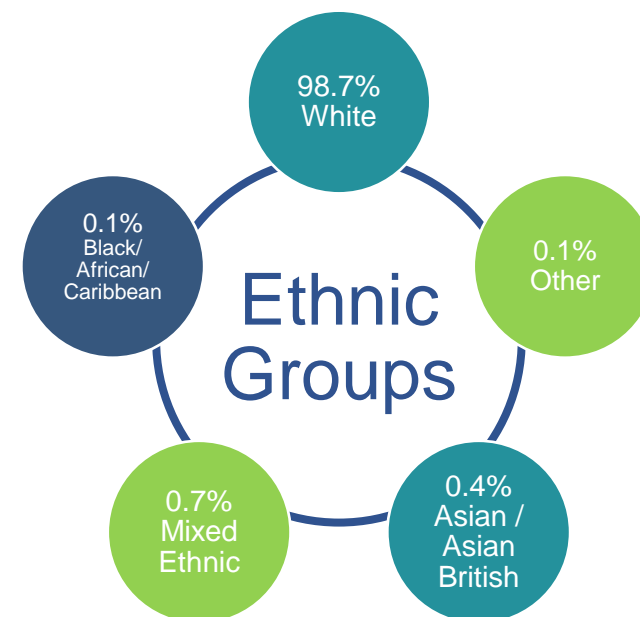
New Quay & Penbryn is situated along the coast in the south of Ceredigion. New Quay is a small seaside town, which is an extremely popular tourist destination. Quay West Caravan Park is situated just slightly to the north of New Quay and is a very important part of the local economy. It is no surprise that the most popular industries of employment are wholesale and retail trade and accommodation and food services in the New Quay and Penbryn area. Llangrannog is to the south of New Quay and is a popular sea side village which attracts many tourists. Llangrannog is also home to one of the Urdd's camps which offers activity holidays, family holidays, educational courses and children's summer camps. To the East of New Quay are the villages of Plwmp and Synod Inn. The A487, which is a key road linking south and north Wales also runs almost directly through the New Quay and Penbryn area.



## Population Characteristics:

	New Quay & Penbryn		Ceredigion	Wales
Mid-year population 2012	6,696	8.8%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>6,579</b>	<b>9.0%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	3,310	50.3%	36,262	1,563,524
Females	3,269	49.7%	36,633	1,606,062
Aged 0-15	929	14.1%	10,774	562,730
Aged 16-64	3,609	54.9%	43,453	1,938,266
Aged 65+	2,041	31.0%	18,668	668,590
Speak Welsh	3,168	48.6%	47.3%	19%
No Skills in Welsh	2,683	41.1%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011

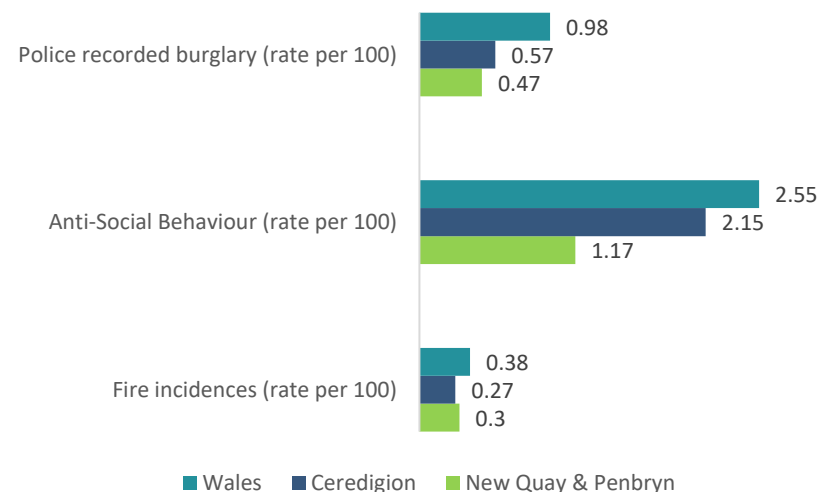
## Health:

	New Quay & Penbryn	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	10.6	12.7	14.3
Limiting long-term illness (rate per 100)	19.0	20.0	22.7
Premature death (rate per 100,000)	283.2	322.4	382.4
GP-recorded mental health condition (rate per 100)	14.5	19.9	23.2
Cancer incidence (per 100,000)	537.3	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	3.5	4.8	5.5
Children aged 4-5 who are obese (%)	9.5	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019



## Access to Services:



Average public return  
travel time to a food  
shop

**97 (minutes)**

Average public return  
travel time to a GP  
surgery

**104 (minutes)**



Unavailability  
of broadband  
at 30Mb/s

**26.1%**

Source: WIMD 2019



## Physical Environment:

	New Quay & Penbryn	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	1163	914	432
Percentage of addresses with private outdoor space	88%	88%	91%
Households at risk of flooding score	20.5	22.5	-

Source: WIMD 2019 & ONS 2021

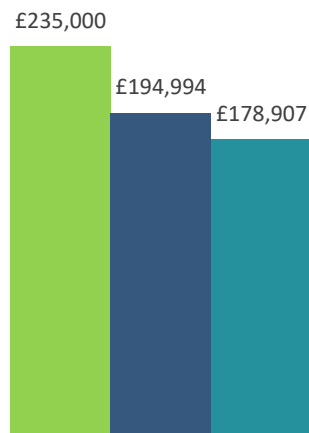


## Housing and living arrangements:

	New Quay & Penbryn		Ceredigion
	Number	%	
Total households	2,921	-	31,562
All one person households	854	29.2%	10,456
All households with dependent children	653	22.3%	7,203
All households aged 65+	850	29.0%	8,261
Average household size (persons)	2.3	-	2.3

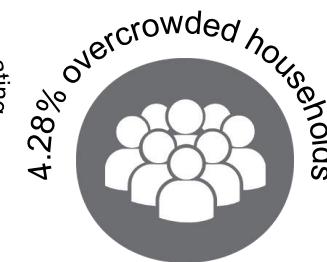
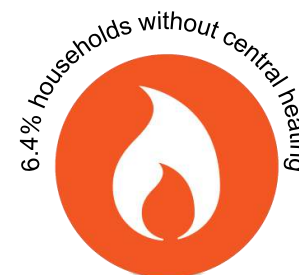
Source: Census 2011

### Average House Prices:



■ New Quay & Penbryn ■ Ceredigion ■ Wales

Source: ONS, Median House Prices 2020

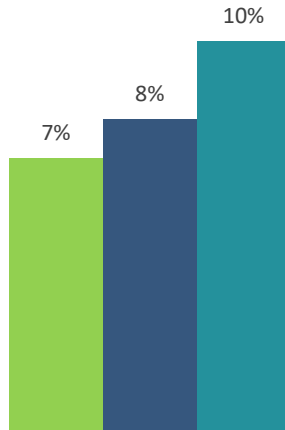


Source: WIMD 2019 & Census 2011



## £ Economy & Employment:

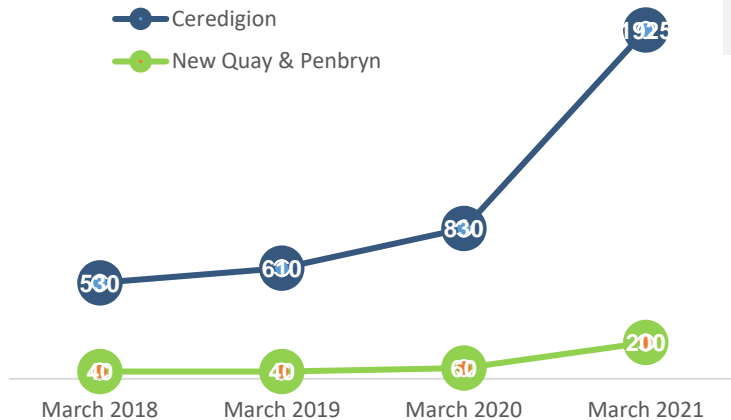
### % of working-age people in employment deprivation:



■ New Quay & Penbryn ■ Ceredigion ■ Wales

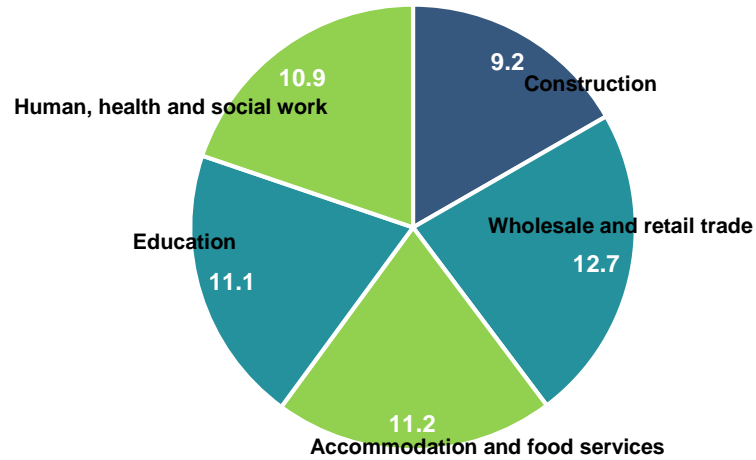
Source: WIMD 2019

### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:



Source: Census 2011.

Source: WIMD 2019



Adults aged 25-64 with no qualifications  
**16.6%**

Key Stage 4 leavers entering Higher Education

**30.0%**



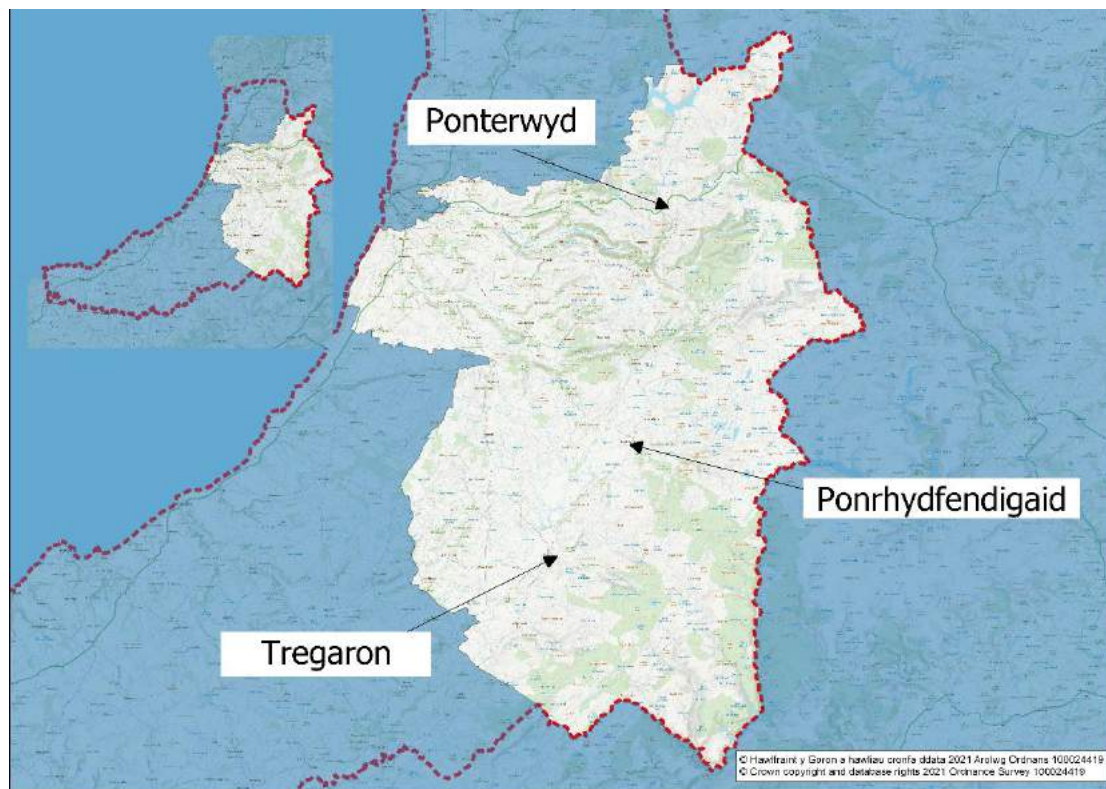
	New Quay & Penbryn		Ceredigion	Wales
Economically Active	3,134	63.7%	61.1%	65.8%
Economically Inactive	1,786	36.4%	38.9%	34.2%

Source: ONS 2021

### Median Household Income:



Source: CACI Paycheck 2021



## ! Key Headlines

Average return travel time to public library highest in Ceredigion.

131 minutes

18.3 per 100 population

Lowest rate of people with limiting long-term illness.

Highest percentage of unavailability of broadband at 30Mb/s in Ceredigion.

31.2%

11.54

Lowest rate of households at risk of flooding.

Lowest rates of anti-social behaviour.

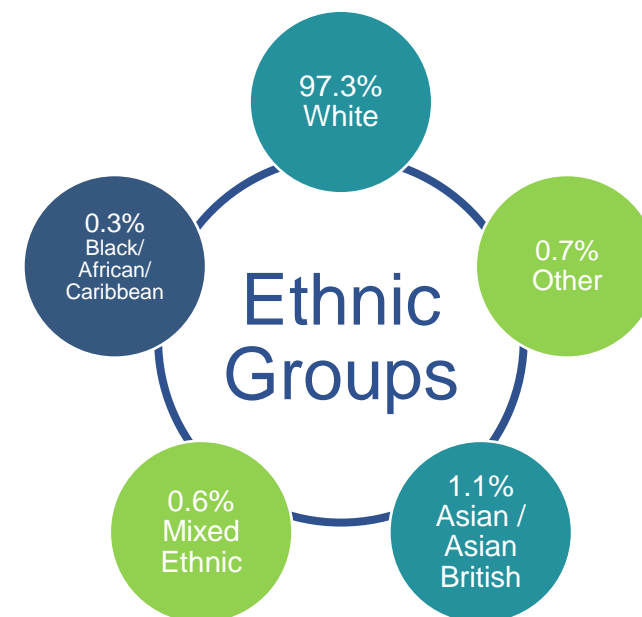
0.98 per 100 population

Rheidol, Ystwyth & Caron is by far the largest community area in Ceredigion, covering approximately 758.2km<sup>2</sup> of the county and stretching across most of the eastern border. The area is largely rural and includes part of the Cambrian Mountains, a largely unspoiled and rugged landscape, dotted with farms and small rural communities. The smallest town in Ceredigion, Tregaron, is situated in the foothills of the Cambrian Mountains and is the chosen site of the 2022 National Eisteddfod of Wales. The Cors Caron National Nature Reserve is situated to the north of Tregaron, which includes three raised bogs, and is home to a mix of unique habitats and a variety of wildlife. The area includes the agricultural villages of Ponrhydfendigaid and Ponrhydygroes. The north of the area includes a part of the A44 which links Ceredigion with east Wales and the midlands, this road runs through Goginan and Ponterwyd. To the south of Ponterwyd lies Devils Bridge, this village is famous for the Devils Bridge Falls, which is a popular tourist attraction. The west of the area lies along the coast and includes a part of the A487 coastal road which runs through Llanfarian and Rhydyfelin, popular areas on the outskirts of Aberystwyth.

## Population Characteristics:

	Rheidol, Ystwyth & Caron		Ceredigion	Wales
Mid-year population 2012	11,609	15.3%	75,932	3,049,971
<b>Mid-year population 2020</b>	<b>11,623</b>	<b>15.9%</b>	<b>72,895</b>	<b>3,169,586</b>
Males	<b>5,686</b>	<b>48.9%</b>	36,262	1,563,524
Females	<b>5,937</b>	<b>51.1%</b>	36,633	1,606,062
Aged 0-15	<b>1,896</b>	<b>16.3%</b>	10,774	562,730
Aged 16-64	<b>6,433</b>	<b>55.3%</b>	43,453	1,938,266
Aged 65+	<b>3,294</b>	<b>28.3%</b>	18,668	668,590
Speak Welsh	6,213	54.7%	47.3%	19%
No Skills in Welsh	4,025	35.4%	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011



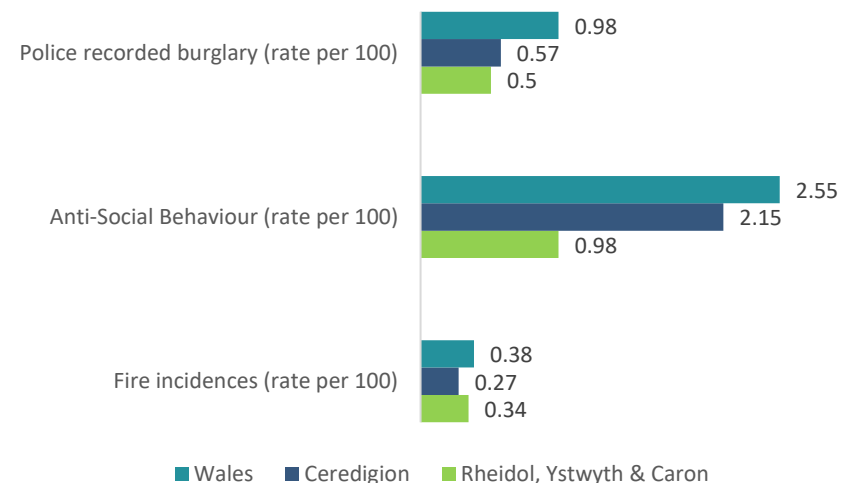
## Health:

	Rheidol, Ystwyth & Caron	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	<b>12.8</b>	12.7	14.3
Limiting long-term illness (rate per 100)	<b>18.3</b>	20.0	22.7
Premature death (rate per 100,000)	<b>285.2</b>	322.4	382.4
GP-recorded mental health condition (rate per 100)	<b>19.9</b>	19.9	23.2
Cancer incidence (per 100,000)	<b>505.4</b>	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	<b>4.7</b>	4.8	5.5
Children aged 4-5 who are obese (%)	<b>10.5</b>	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019



## Access to Services:



Average public return  
travel time to a food  
shop

**83 (minutes)**

Average public return  
travel time to a GP  
surgery

**103 (minutes)**



Unavailability  
of broadband  
at 30Mb/s

**31.2%**

Source: WIMD 2019



## Physical Environment:

	Rheidol, Ystwyth & Caron	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	1512	914	432
Percentage of addresses with private outdoor space	90%	88%	91%
Households at risk of flooding score	25.6	22.5	-

Source: WIMD 2019 & ONS 2021

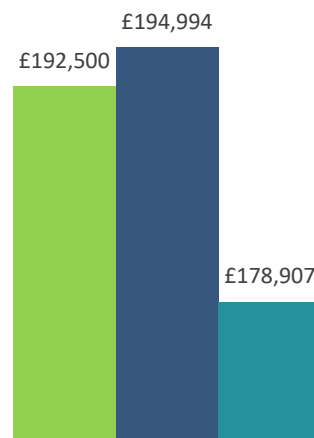


## Housing and living arrangements:

	Rheidol, Ystwyth & Caron		Ceredigion
	Number	%	
Total households	5,027	-	31,562
All one person households	1,509	30.0%	10,456
All households with dependent children	1,272	25.3%	7,203
All households aged 65+	1,366	27.2%	8,261
Average household size (persons)	2.3	-	2.3

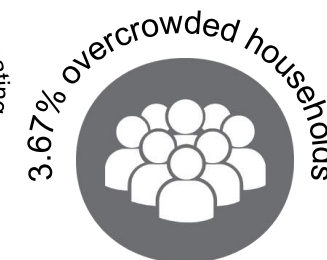
Source: Census 2011

### Average House Prices:



■ Rheidol, Ystwyth & Caron ■ Ceredigion ■ Wales

Source: ONS, Median House Prices 2020

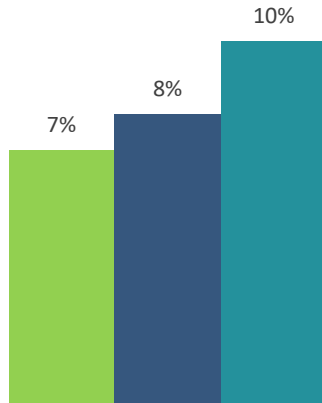


Source: WIMD 2019 & Census 2011



## £ Economy & Employment:

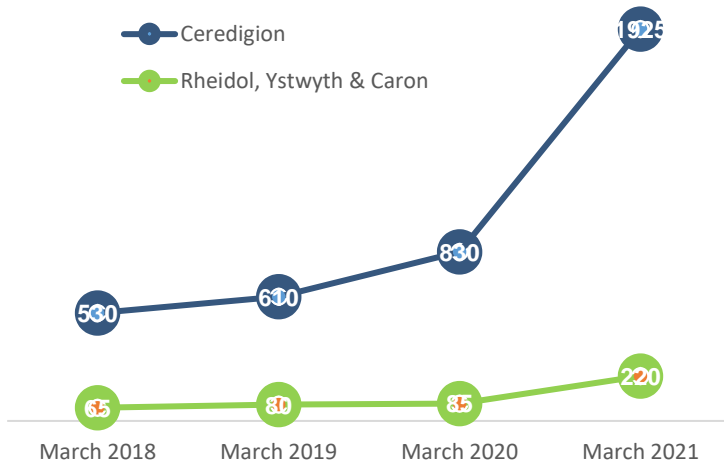
### % of working-age people in employment deprivation:



■ Rhiedol, Ystwyth & Caron ■ Ceredigion ■ Wales

Source: WIMD 2019

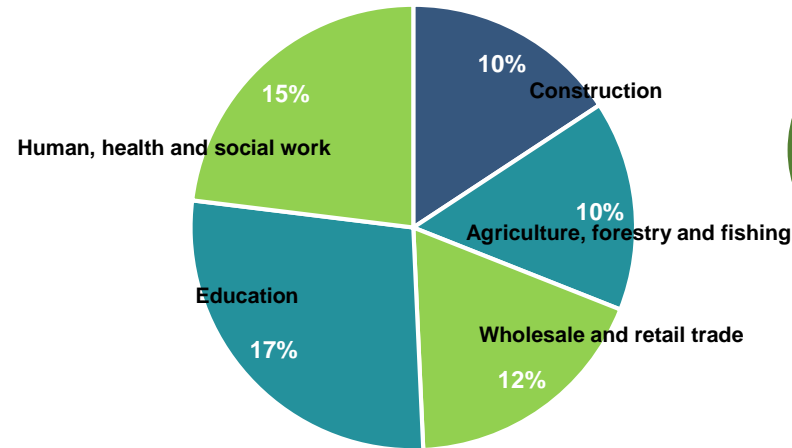
### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:

Source: WIMD 2019



Source: Census 2011.



Adults aged 25-64 with no qualifications  
**13.2%**

Key Stage 4 leavers entering Higher Education

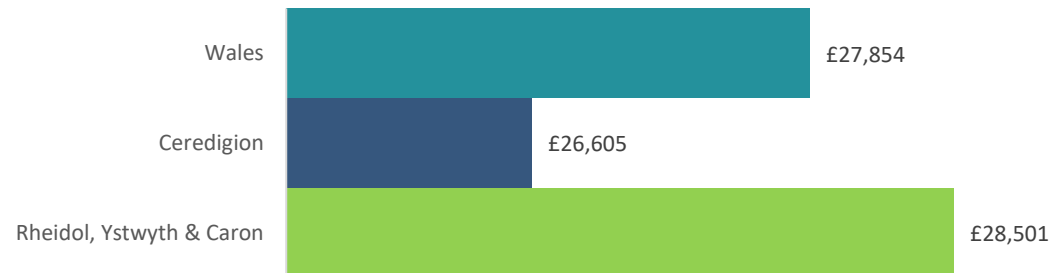
**34.5%**



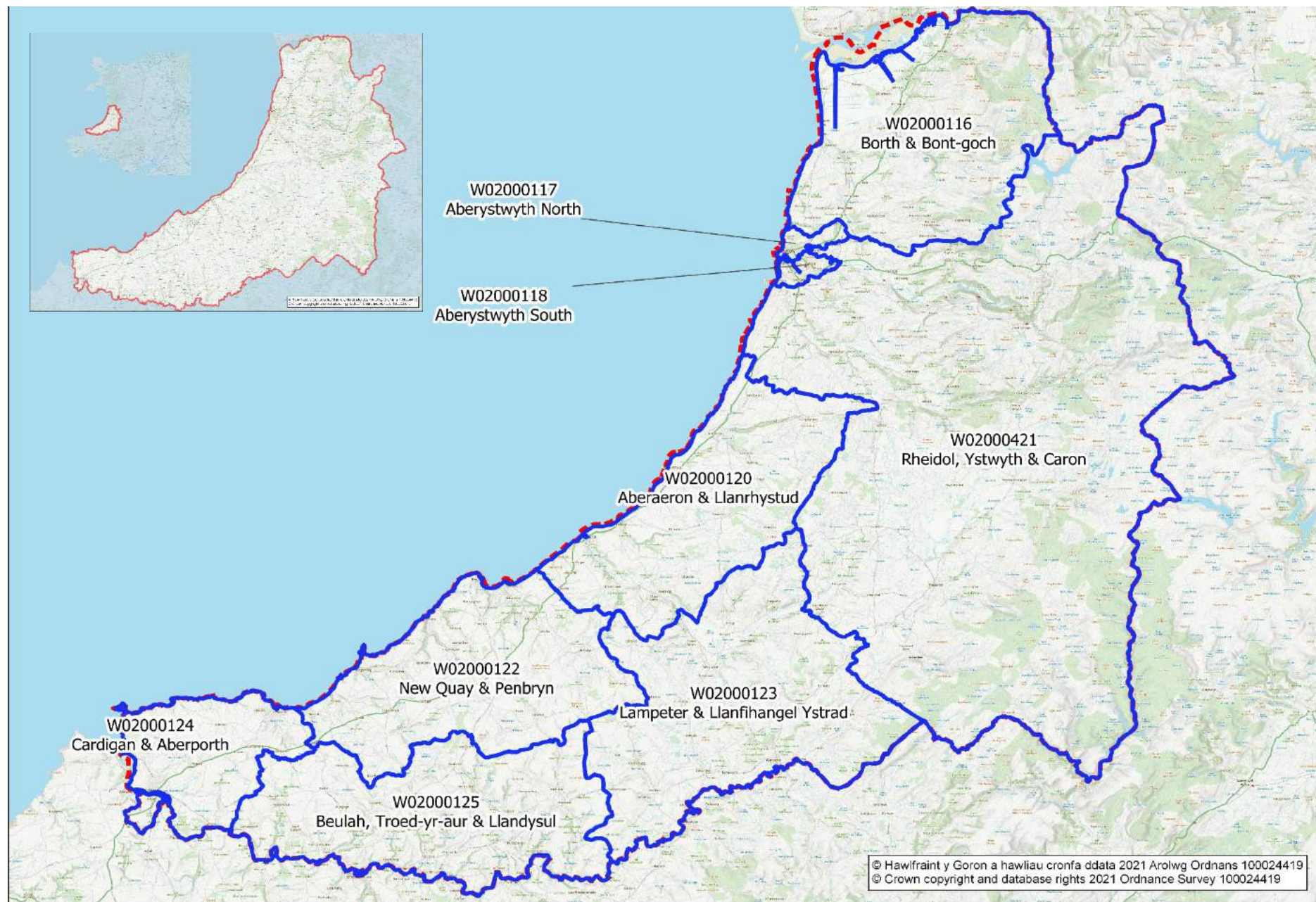
	Rheidol, Ystwyth & Caron	Ceredigion	Wales
<b>Economically Active</b>	5,738 <b>67.8%</b>	61.1%	65.8%
<b>Economically Inactive</b>	2,724 <b>32.2%</b>	38.9%	34.2%

Source: ONS 2021

### Median Household Income:



Source: CACI Paycheck 2021

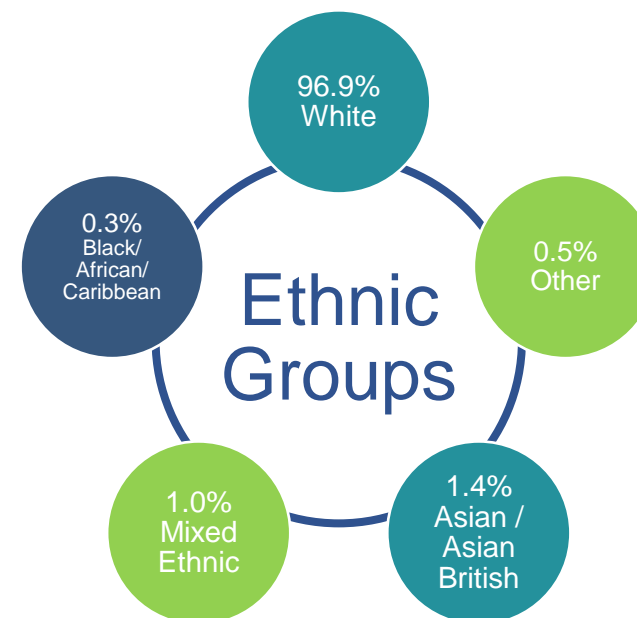




## Population Characteristics:

	Ceredigion		Wales
Mid-year population 2012	75,932	2.5%	3,049,971
<b>Mid-year population 2020</b>	<b>72,895</b>	<b>2.3%</b>	<b>3,169,586</b>
Males	36,262	<b>49.7%</b>	1,563,524
Females	36,633	<b>50.3%</b>	1,606,062
Aged 0-15	10,774	<b>14.8%</b>	562,730
Aged 16-64	43,453	<b>59.6%</b>	1,938,266
Aged 65+	18,668	<b>25.6%</b>	668,590
Speak Welsh	34,964	47.3%	19%
No Skills in Welsh	31,286	42.4%	73.3%

Source: ONS, MYE: 2012 & 2020 & Census 2011



Source: Census 2011

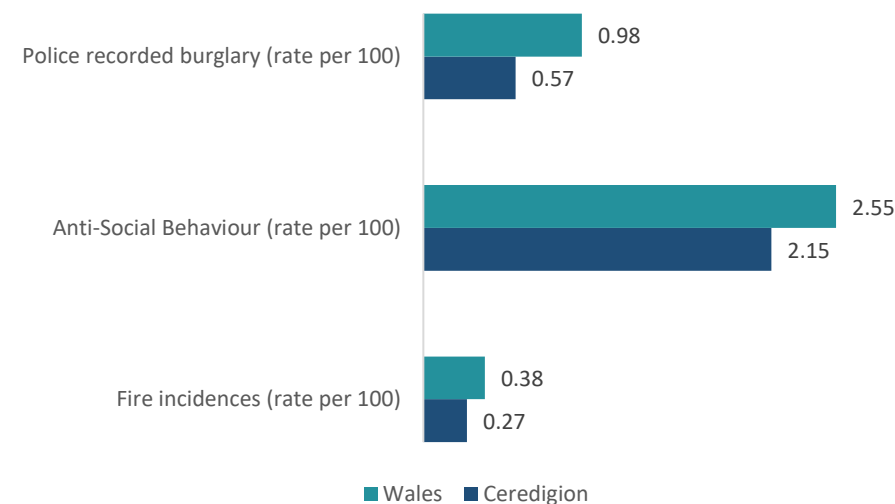
## Health:

	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	12.7	14.3
Limiting long-term illness (rate per 100)	20.0	22.7
Premature death (rate per 100,000)	322.4	382.4
GP-recorded mental health condition (rate per 100)	19.9	23.2
Cancer incidence (per 100,000)	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	4.8	5.5
Children aged 4-5 who are obese (%)	10.5	11.8

Source: WIMD 2019



## Community Safety:



Source: WIMD 2019

## Access to Services:



Average public return travel time to a food shop

**64 (minutes)**

Average public return travel time to a GP surgery

**80 (minutes)**



Unavailability of broadband at 30Mb/s

**19.3%**

Source: WIMD 2019

## Physical Environment:

	Ceredigion	Wales
Average distance to nearest Park, Public Garden, or Playing Field (m)	914	432
Percentage of addresses with private outdoor space	88%	91%
Households at risk of flooding score	22.5	-

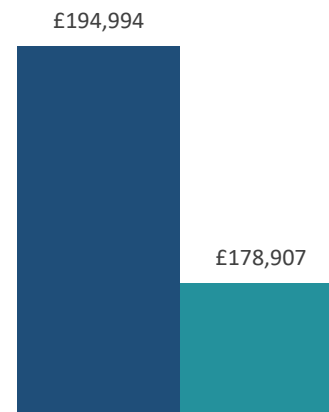
Source: WIMD 2019 & ONS 2021

## Housing and living arrangements:

	Ceredigion	
	Number	%
Total households	31,562	-
All one person households	10,456	33.1%
All households with dependent children	7,203	22.8%
All households aged 65+	8,261	26.2%
Average household size (persons)	2.3	-

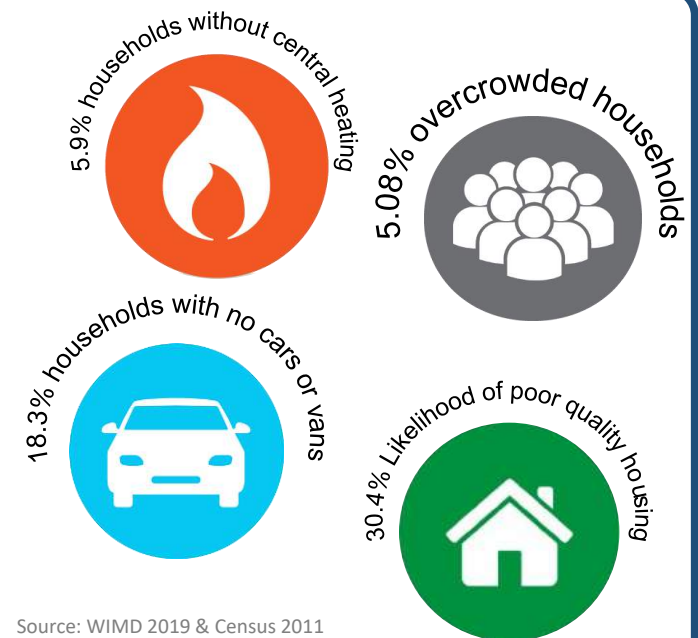
Source: Census 2011

### Average House Prices:



■ Ceredigion ■ Wales

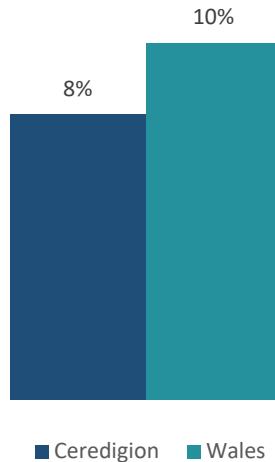
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

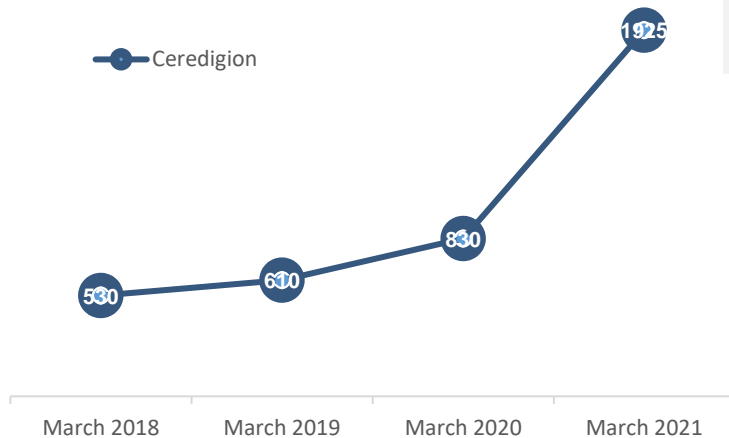
## £ Economy & Employment:

### % of working-age people in employment deprivation:



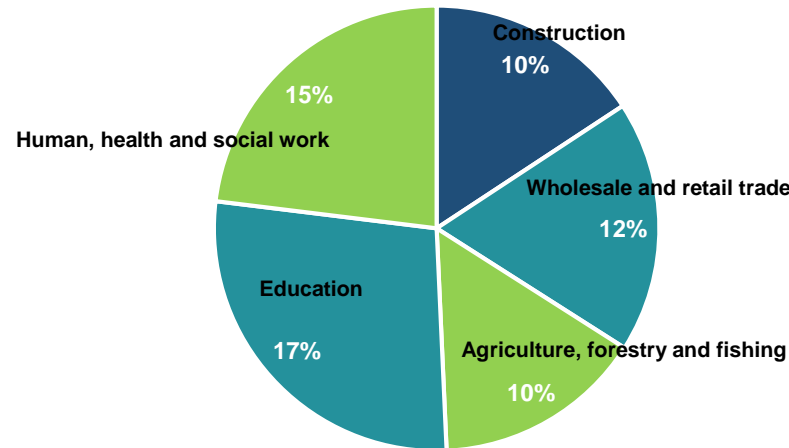
Source: WIMD 2019

### Claimant Count:



Source: ONS 2021

### Top 5 Industries of Employment:



Source: Census 2011.

Source: WIMD 2019



Adults aged 25-64 with no qualifications  
**14.4%**

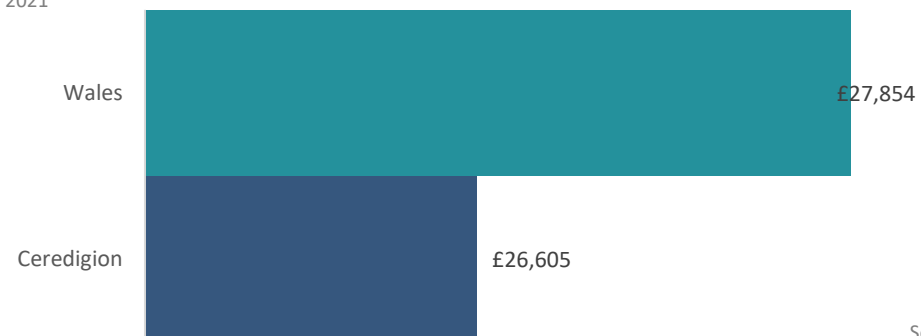
Key Stage 4 leavers entering Higher Education  
**32.2%**



	Ceredigion		Wales
Economically Active	35,064	61.1%	65.8%
Economically Inactive	22,341	38.9%	34.2%

Source: ONS 2021








### Median Household Income:


























Source: CACI Paycheck 2021

































































## 9: National Well-being Indicators

The 46 National Indicators measure progress towards delivering the seven National Well-being Goals. Ceredigion's Assessment of Local Well-being has considered the indicators in its production and in particular where they assist our understanding of well-being in the County, and references can be found throughout this document. The following table provides a summary of the latest results for reference and the Well-being Goals that it supports.


















	A prosperous Wales		A Wales of cohesive communities
	A resilient Wales		A Wales of vibrant culture and thriving Welsh language
	A healthier Wales		A globally responsible Wales
	A more equal Wales	N/A	Data not available at county level

National Well-being Indicators		Ceredigion	Wales	Date of result	Goals						
					1	2	3	4	5	6	7
1	Percentage of live single births with a birth weight of under 2,500g	5.5%	6.1%	2020	.	.			.	.	.
2	Healthy life expectancy at birth including the gap between the least and most deprived	6.7 Female 9.3 Male	18.2 Female 18.7 Male	2010-14	.	.			.	.	.
3	Percentage of adults who have fewer than two healthy lifestyle behaviours	10.80% (2019/20)	7.41%	Q4 2020/21	.	.					.
4	Levels of nitrogen dioxide (NO2) pollution in the air	4	9	2019				.	.	.	
5	Percentage of children who have fewer than two healthy lifestyle behaviours	N/A	12.31%	2017/18	.	.				.	.
6	Measurement of development of young children	N/A	7 in 10 Pupils at a stage of development consistent with or greater than their age in personal & social development, well-being and cultural diversity	2019		.	.				.
7	Average capped 9 points score of pupils, including the gap between those who are eligible or are not eligible for free school meals	N/A	74.9% (A*-C)	2019/20		.	.		.		.
8	Percentage of adults with qualifications at the different levels of the National Qualifications Framework	86.9% Level 2+ 72.9% Level 3+ 51.6% Level 4+ 4.8% None	80.9% Level 2+ 62.3% Level 3+ 41.4% Level 4+ 7.3% None	2020		.			.	.	.
9	Gross Value Added (GVA) per hour worked (relative to UK average)	70.22	84.10	2019		.	.	.	.	.	.

National Well-being Indicators		Ceredigion	Wales	Date of result	Goals						
					1	2	3	4	5	6	7
10	Gross Disposable Household Income per head	£16,673	£17,100	2018	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
11	Percentage of businesses which are innovation-active	N/A	34%	2016-18	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
12	Capacity (in MW) of renewable energy equipment installed	266	4,059	2019	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
13	Concentration of carbon and organic matter in soil (gC per Kg)	N/A	107.6	2013-16	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
14	The Ecological Footprint of Wales (Mgha = million global hectares)	N/A	10.05	2011	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
		3.59 (gha/c)	3.28 (gha/c)								
15	Amount of waste generated that is not recycled, per person	226 kg	180 kg	2018/19	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
16	Percentage of people in employment, who are on permanent contracts (or on temporary contracts, and not seeking permanent employment) and who earn more than 2/3 of the UK median wage	N/A	70.7%	2020	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
17	Gender pay difference	-£3.08	£0.59	2020	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
18	Percentage of people living in households in income poverty relative to the UK median: measured for children, working age and those of pension age	32.4% All ages (2020)	30.6% Children	2017-20	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
		32.9% All ages Wales (2020)	22.35% Working age								
19	Percentage of people living in households in material deprivation	11%	13%	2019/20	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
20	Percentage of people moderately or very satisfied with their jobs	N/A	82%	2019/20	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
21	Percentage of people in employment	73.3%	72.2%	31 Mar 2021	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
22	Percentage of people in education, employment or training, measured for different age groups	N/A	88.9% 16-18yrs 84.3% 19-24yrs	2019	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
23	Percentage who feel able to influence decisions affecting their local area	18%	19%	2018/19	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
24	Percentage of people satisfied with their ability to get to/ access the facilities and services they need	70%	80%	2018/19	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
25	Percentage of people feeling safe at home, walking in the local area, and when travelling	89%	71%	2018/19	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
26	Percentage of people satisfied with local area as a place to live	94%	85%	2018/19	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

National Well-being Indicators		Ceredigion	Wales	Date of result	Goals						
					1	2	3	4	5	6	7
27	Percentage of people agreeing that they belong to the area; that people from different backgrounds get on well together; and that people treat each other with respect	58%	52%	2018/19	•						
28	Percentage of people who volunteer	30%	26%	2019/20	•	•	•	•			
29	Mean mental well-being score for people	N/A	51	2018/19	•	•			•	•	•
30	Percentage of people who are lonely	N/A	15%	2019/20	•	•				•	•
31	Percentage of dwellings which are free from hazards	N/A	82%	2017/18	•					•	•
32	Number of properties (homes and businesses) at medium or high risk of flooding from rivers and the sea	513 River 557 Tidal	20,518 River 9,792 Tidal	2019	•					•	•
33	Percentage of dwellings with adequate energy performance	N/A	47%	2017/18				•	•	•	
34	Number of households successfully prevented from becoming homeless per 10,000 households	32	405	2019/20		•				•	•
35	Percentage of people attending or participating in arts, culture or heritage activities at least three times a year	66%	71%	2019/20	•	•					•
36	Percentage of people who speak Welsh daily and can speak more than just a few words of Welsh	36%	10%	2019/20	•	•	•	•			
37	Percentage of people who can speak Welsh	47.3%	19.0%	2011	•	•	•	•			
38	Percentage of people participating in sporting activities three or more times a week	34%	32%	2019/20	•						•
39	Percentage of museums and archives holding archival/heritage collections meeting UK accreditation standards	N/A	59% Museums 86% Archives	2019	•	•	•	•	•		
40	Percentage of designated historic environment assets that are in stable or improved conditions	79% Monuments 76.6% Listed Buildings	59% Monuments 76% Listed Buildings	2020/21	•		•	•	•		
41	Emissions of greenhouse gases within Wales (MtCO2e)	N/A	77.0	2019				•	•	•	
42	Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)	N/A	34	2011				•	•	•	
43	Areas of healthy ecosystems in Wales (ha)	N/A	640,827	2018				•			

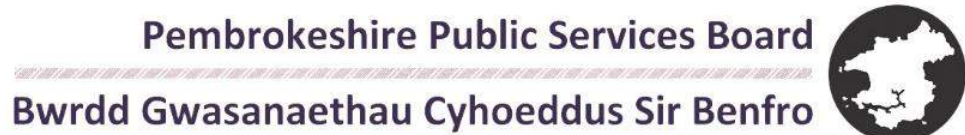


National Well-being Indicators		Ceredigion	Wales	Date of result	Goals						
					1	2	3	4	5	6	7
44	Status of Biological diversity in Wales	Indicator under development					•	•			
45	Percentage of surface water bodies, and groundwater bodies, achieving good or high overall status	N/A	40%	2019	•			•			
46	The social return on investment of Welsh partnerships within Wales and outside of the UK that are working towards the United Nations Sustainable Development Goals	Indicator under development									

## 10: Regional Framework for Engagement and Consultation

# Regional Framework for Engagement and Consultation

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**Awdur** / Author: Carmarthenshire, Ceredigion & Pembrokeshire  
Regional Working Group

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# Assessment of Local Well-being: Regional Framework for Consultation and Engagement

## 1. Introduction

The Regional Engagement and Consultation Framework aims to provide a standardised approach to conducting the engagement and consultation activity for the Assessment of Local Wellbeing across the three PSB areas of Carmarthenshire, Ceredigion, and Pembrokeshire. Our 'engagement led' approach to the Assessment ensures the views of our citizens are the main drivers for producing the document and placing them at the heart of the next Well-being Plan. The regional approach to engagement and consultation provides opportunity to gather locally held views and priorities (attitudinal data), contextualise and probe salient quantitative findings and plug any gaps in the analysis.

## 2. Background

Well-being Assessments and Population Assessments are requirements of the Well-being of Future Generations (Wales) Act 2015, and Social Services and Well-being (Wales) Act 2014, respectively.

Engagement and Consultation is a critical source of information - it provides **qualitative data** which will help us to understand people's lived experiences, attitudes, and stories. Furthermore, this process will help identify gaps in the data and point to those groups that may be 'hidden' in numbers (for example, the homeless community). It will also complement the **quantitative data** gathered, resulting in deeper and more 'nuanced' insights. Fig 1. shows the four stages of producing the Assessments.

**Fig 1. The four stages to delivering the Assessments of Local Well-being**



A sound Well-being Assessment or Population Assessment is built on data of both varieties (qualitative and quantitative) and the relationship is dynamic – the data might suggest that an issue is a concern but the qualitative data will confirm or deny if it is a concern to citizens, and equally whether people’s perceptions are backed up by the data. An effective combination of these during the data analysis will help establish the Assessments as having a high degree of policy relevance, particularly in the context of driving Well-being Plans.

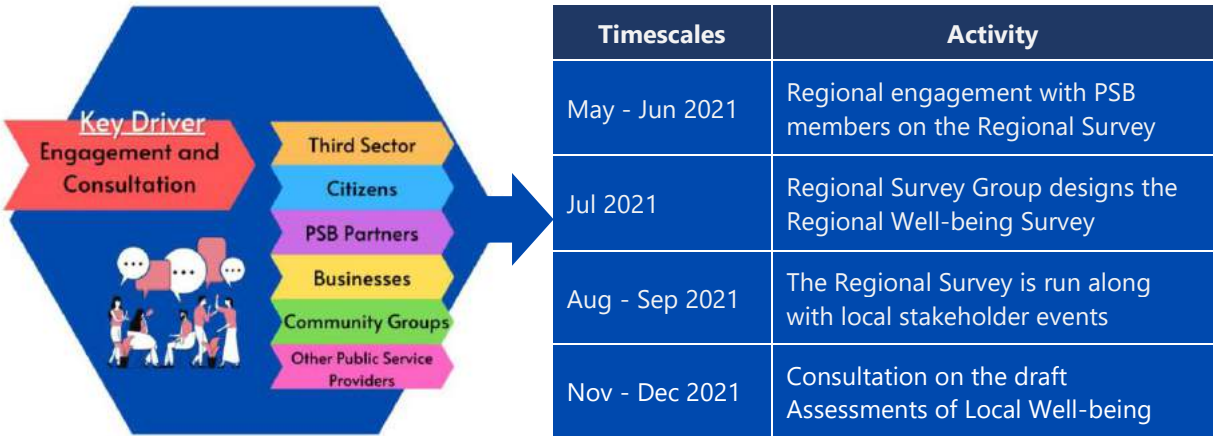
3. Regional Approach to Engagement and Consultation

Effectively involving people and communities is at the heart of improving well-being. Therefore, engagement and consultation will be the key driver during this round of assessments, and will be conducted in two steps – the initial engagement and then the consultation on the draft Assessment of Local Well-being.

Engagement work with partners, stakeholders and citizens will take place during August-September 2021. Subsequently, an analysis of the findings will be undertaken with the aim of completing the first set of draft Assessments by the autumn of 2021.

Consultation on the draft Assessments will be conducted between November and January 2021, before being revised and published in late March 2022. The Assessment will be the corner-stone in the building of the next Well-being Plans by May 2023. Fig 2 displays the activities and timescales to deliver the engagement and consultation for the Assessments. A more detailed timeline outlining the main deliverables of the Assessments up to the publication date in March 2022, is included at Appendix 1.

Fig 2. Delivering the West Wales Engagement Led Approach



The regional approach to engagement and consultation will enable partners to both take advantage of combining resources at a regional level, but also providing the flexibility to deploy them locally to capture bespoke local data:

**Combine resources regionally**

- Planning - including agreeing this Regional Framework document, the Joint Methodology and the overall timescales for production.
- Sharing capacity - including the process of recruiting a Regional Well-being Coordinator, liaising with the Local Government Partnership Team on progress and applying for Coproduction Network for Wales’ support.
- Delivery of ‘set piece’ engagement exercises that can be delivered at scale - including the running of PSB Member engagement workshops to capture their views across the three PSB areas, and also designing and running of the regional well-being survey.

**Use a common format with own resources and deploy locally**

- The identification of pre-existing relevant consultation data.
- Delivery of engagement exercises to a standard format but undertaken on a county basis, for example the stakeholder toolkit for running local stakeholder events.

**3.1 Linking the Future Generations and the Social Services and Well-being Acts**

The table below demonstrates how the Social Services Well-being (Wales) Act requirements are similar to those of the Well-being of Future Generations Act (Wales) 2015 Act. Where possible, opportunities will be taken to align the engagement and consultation activity to meet the requirements of both legislation. This may be through combining engagement activity, the sharing of expertise or simply through coordinating both so they complement each other.

**Table 1: Engagement requirements of the Well-being of Future Generations (Wales) Act 2015 and Social Services and Well-being (Wales) Act 2014**

	WFG Act	SSWB Act
Key population groups	Communities in the area; communities of interest in the area; town and community councils  Key groups suggested in line with Equality Act (also vulnerable / disadvantaged children, young people and people with care and support needs)	Carers and people with support needs including children & young people; physical disability; learning disability; mental health; older people; victims of domestic abuse
‘Well-being’ definition	Economic, social, environmental and cultural	Individual (carers and those with support needs)
Scale of assessment	County and community areas	Region (with county dimension)



### 3.2 Standards

We will adopt the following National Principles and Standards into our engagement work and activities:

- The *National Principles for Public Engagement in Wales* - the Principles were developed by Participation Cymru and have been endorsed by the Welsh Government.
- *Children and Young People's National Participation Standards*
- *Five Principles of Co-production* - co-production is an asset-based approach to public services that enables people providing and people receiving services to share power and responsibility, and to work together in equal, reciprocal and caring relationships.

### 3.3 Core Engagement Themes

Engagement will focus on the attitudes, feelings and experiences of well-being of different groups across the three PSBs areas, especially in terms of:

- Social well-being
- Economic well-being
- Environmental well-being
- Cultural well-being

Similar to the last round of assessments, we will be adopting the 'life stages model', which allows a unique insight into the differences and similarities in experiences of well-being throughout a person's life. There are five life stages, namely New Beginnings, Childhood, Youth, Working Age Adults and Older Adults, see Fig 3. This approach corresponds to evidence that our personal well-being changes over time and provides the following specific benefits:

- It provides a way of integrating across themes by focusing for example in considering the relationship between deprivation, housing quality and health.
- Using it in the engagement and consultation provides a detailed understanding of well-being for individuals and their public service needs.

**Fig 3: The Life Stages Approach Adopted by the three PSBs**



### 3.4 Stakeholder Engagement

Gathering the views of the local community, particularly the harder to reach groups and those with protected characteristics is of vital importance to undertaking the assessments. This time, specific provision also needs to be made in view of the Covid-19 pandemic to ensure the engagement remains inclusive and that those citizens unable to contribute online or remotely, are catered for. As such, a comprehensive stakeholder analysis has been carried out to identify the common set of groups to engage with, including the following:

Core Stakeholder List		
Chambers of Trade	Youth councils / groups	Homelessness Forum/ groups
Town and Community Councils	Student unions	Religious groups
Community enterprise groups	50+ Fora	Covid-19 support groups
Service user and carer groups	Family centres / parents	Hywel Dda Stakeholder List
Trade Unions	Schools / schools councils	Red Cross
Citizens' panels	Sports associations	Landlords Forum
Carers Fora	Governing bodies	Adult community learning organisations
PSB partner organisations	Businesses and tourist venue	Supporting People Forum
Disability / access groups	Armed Forces Veterans Forum	Strategic Housing Partnerships
Dementia actions groups	Foster carer groups	Third Sector Organisations
Tenant associations	Young carers groups	Young Farmers Clubs
Other equality groups	Mental Health groups/ forum	Youth Clubs
Charities helping carers and those with support needs	Flying Start Locality Groups	Carers' Register
After schools clubs	Religious Groups	Community and Sports Groups
Family Centres	Further and Higher Education	GP Surgeries
Housing Associations / RSLs	Community Papers	Parent Teacher Associations
Private Sector Nurseries / Play Schemes	School Governors	WI
Community Safety Partnerships	Gypsy and Traveller Network	Local Action Group
Covid Community Support Groups	Age Cymru	Hywel Dda Stakeholder List

### 3.5 Recent Relevant Consultation

One of the key sources available to PSBs are recent consultations, a sample list for Ceredigion is shown below:

- Mid and West Wales Regional Strategic Plan (2017-2020)
- Strategic Equality Plan (2020-2024)
- Aberystwyth University Research: The impact of Covid-19
- Building a healthier future after Covid – Hywel Dda
- Economic Impact Update Report
- Boosting Ceredigion's Economy: A Strategy for Action

- Nature re-connecting
- Local Development Plan Consultation
- Public Engagement on Waste
- Welsh Government consultation on the Curriculum for Wales Enabling Pathways guidance
- Physical Activity Strategy Consultation
- Welsh Government Race Equality Action Plan consultation

The gap analysis in the light of recent consultations will vary per county. It is suggested that engagement activity specific to each county will reflect and address this variation.

### 3.6 Engagement Options

Technique	Description	Considerations	Scale of delivery	Timescales
<b>Regional Wellbeing Survey</b>	<p>Collecting qualitative and quantitative data via a regional survey. Paper and online copies will be available (incl. easy read and plain text). Online submissions to be encouraged, but paper survey available on a request basis.</p> <p>Links to online survey circulated to all stakeholders identified in the Core Stakeholder List.</p> <p>Telephone service will be provided to ensure that everyone has the opportunity to take part whilst we remain in lockdown and with social distancing measures in place. (Ceredigion only)</p>	<ul style="list-style-type: none"> <li>▪ Cost</li> <li>▪ Time – each county to coordinate dissemination and input of surveys</li> <li>▪ Inclusion of demographic Qs to disaggregate / cross-tab results.</li> <li>▪ Ensure that the paper survey methods are Covid-19 risk assessed and comply with Local Authority guidelines.</li> <li>▪ Ensure that methods are available to citizens who do not have digital access.</li> <li>▪ Survey fatigue</li> </ul>	Regional	<ul style="list-style-type: none"> <li>i) Preparatory work (survey design &amp; sampling) July 2021</li> <li>ii) Delivery (response time, data input &amp; mailout on request) – 26<sup>th</sup> July to 9<sup>th</sup> August</li> <li>iv) Aim to run Regional Well-being Survey 10<sup>th</sup> August to 8<sup>th</sup> October 2021 <u>9 weeks</u></li> <li>iii) Analysis – 11<sup>th</sup> October to 29<sup>th</sup> October</li> </ul>
<b>Stakeholder Events</b>	Inviting key stakeholders to interactive stakeholder events to debate and discuss pertinent issues in groups. Held via video conference. Utilise quick polls and key discussion questions.	<ul style="list-style-type: none"> <li>• Target audience</li> <li>• Attendance</li> <li>• Stakeholder toolkit</li> <li>• Access to those without digital access</li> </ul>	Common approach agreed regionally and delivered local	<ul style="list-style-type: none"> <li>▪ Lead-in time of 3 weeks (publicity, setting agenda)</li> </ul>
<b>Focus Groups</b>	Focus groups from PSB organisations to sense check the draft Assessment of Well-being and gather expert views.	<ul style="list-style-type: none"> <li>• Attendance</li> <li>• Focus Group membership</li> <li>• Capacity of all PSB Member organisations</li> </ul>	Local	<ul style="list-style-type: none"> <li>• Once events listed and format established, reactive approach can be taken.</li> </ul>
<b>‘Piggy-backing’ events &amp; meetings</b>	Join meetings virtually which have already been established.	<ul style="list-style-type: none"> <li>▪ Identifying suitable events / meetings</li> </ul>	Local	<ul style="list-style-type: none"> <li>• Once events listed and format established, reactive approach can be taken</li> </ul>

<b>Engagement HQ</b>	An interactive engagement platform. If in place in time, Engagement HQ offers an attractive online opportunity for people to engage with the Assessment of Well-being. Tools include forums, ideas, places and stories.	<ul style="list-style-type: none"> <li>• Success of trial</li> <li>• Timeliness</li> </ul>	Regional	<ul style="list-style-type: none"> <li>• Dependent on whether the software is available in time and the success of the trial.</li> </ul>
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### 3.7 Clarification on Conducting the Regional Well-being Survey:

The **Regional Engagement Working Group**, comprising of 'engagement leads' from PSB organisations across the three areas, will be setup in May/June 2021 and run workshops to record partners views on how the engagement and consultation should be conducted for this round of assessments, along with views on the themes that should be included.

The **Regional Survey Group**, consisting of the engagement leads for the local authorities and any PSB members interested in being involved in the detail of survey design, will meet during July 2021 to consider the feedback from PSB Members and develop the Regional Well-being Survey and stakeholder engagement activities. The survey itself will be hosted by Carmarthenshire County Council but analysed by individual PSBs. The structure of the West Wales PSB groups is contained in Appendix 2 for reference.

Individual partners will manage the dissemination and data input of **paper/physical returns** for their area/organisation. (Physical returns include the easy-read and plain text versions of the survey).

Successful engagement and consultation relies on **effective communication**. Although the content will be developed centrally, individual partners will maximise the opportunities to publicise the regional survey and stakeholder events through existing local channels. Mechanisms include free council papers, websites, social media and any others used by individual organisations.

### 3.8 Regional and Local Approach

At the local (county) level, Councils will take the lead on running the Regional Well-being Survey but will fully engage with all PSB partners. The three Authorities will share best practice and ideas through the Regional Survey Group in relation to the proposed approach, in the interests of learning and improved practice. The distinction between those activities delivered regionally and locally is shown overleaf:

Agreed regionally, delivered regionally:

- Agree to undertake standard Regional Well-being Survey (authorities to determine the methods of dissemination)

Agreed regionally, delivered locally (per PSB area):

- Map and engage existing meetings and events ('piggybacking') – delivered according to common format (with scope for county variation)
- Stakeholder event – deliver according to common format (with scope for county variation)

Agreed locally, delivered locally:

- Undertake gap analysis of existing recent consultation to help determine issues of county-specific engagement and consultation interest
- Develop list of local stakeholders
- Implement communications plan for engagement and consultation opportunities

## 4. Action Plan

The Action Plan to deliver **the Regional Well-being Survey** and the **Stakeholder Engagement Events** is outlined below.

What	How	When (completion)	Who	Comment
<b>Overall approach to the engagement and consultation for the Assessment of Local Well-being</b>	Agreed through each of the PSBs	February 2021	All	Agreement to will in partnership with regional colleagues which will enable the sharing of resources, capacity and expertise across the three counties.
<b>Identify engagement leads from PSB member organisations</b>	Leads identified through organisational contacts	1- 21 May 2021	All	To establish the appropriate contacts to be involved in the Regional Engagement Working Group
<b>Regional Engagement Working Group Meetings</b>	Workshops held with all PSB Members' engagement leads	28 May 2021 & 11 June 2021	All	To seek views on the overall approach to engagement this time and the themes that should be included in the survey
<b>Regional Survey Group</b>	Workshops held with LA engagement leads and PSB member engagement leads who wish to be involved in survey design	8 July 2021 & 9 July 2021	All	Smaller working group tasked with designing and delivering the Regional Well-being Survey based on the feedback from PSB Members to include – survey design, agreement of themes, agreement of questions and timescales.
<b>Agree common format for stakeholder engagement sessions</b>	Workshops held with LA engagement leads and PSB member engagement leads who wish to be involved in stakeholder event design	8 July 2021 & 9 July 2021	All	To be agreed at the Regional Survey Group to include agreement of common format, arrangements for recording information from engagement sessions and agree arrangements for collating engagement reports.
<b>Build the Regional Well-being Survey</b>	Using SNAP surveys and hosted by Carmarthenshire County Council	July 2021	All	Translating the agreed survey from the Regional Survey Group into SNAP ready for 'go live'.
<b>Run Regional Well-being Survey</b>	Live SNAP survey available online and physical formats and advertised locally	10 <sup>th</sup> August to 8 <sup>th</sup> October 2021	All	The SNAP survey goes live online and paper copies (easy read, plain text) are available if required, and the survey is advertised locally.

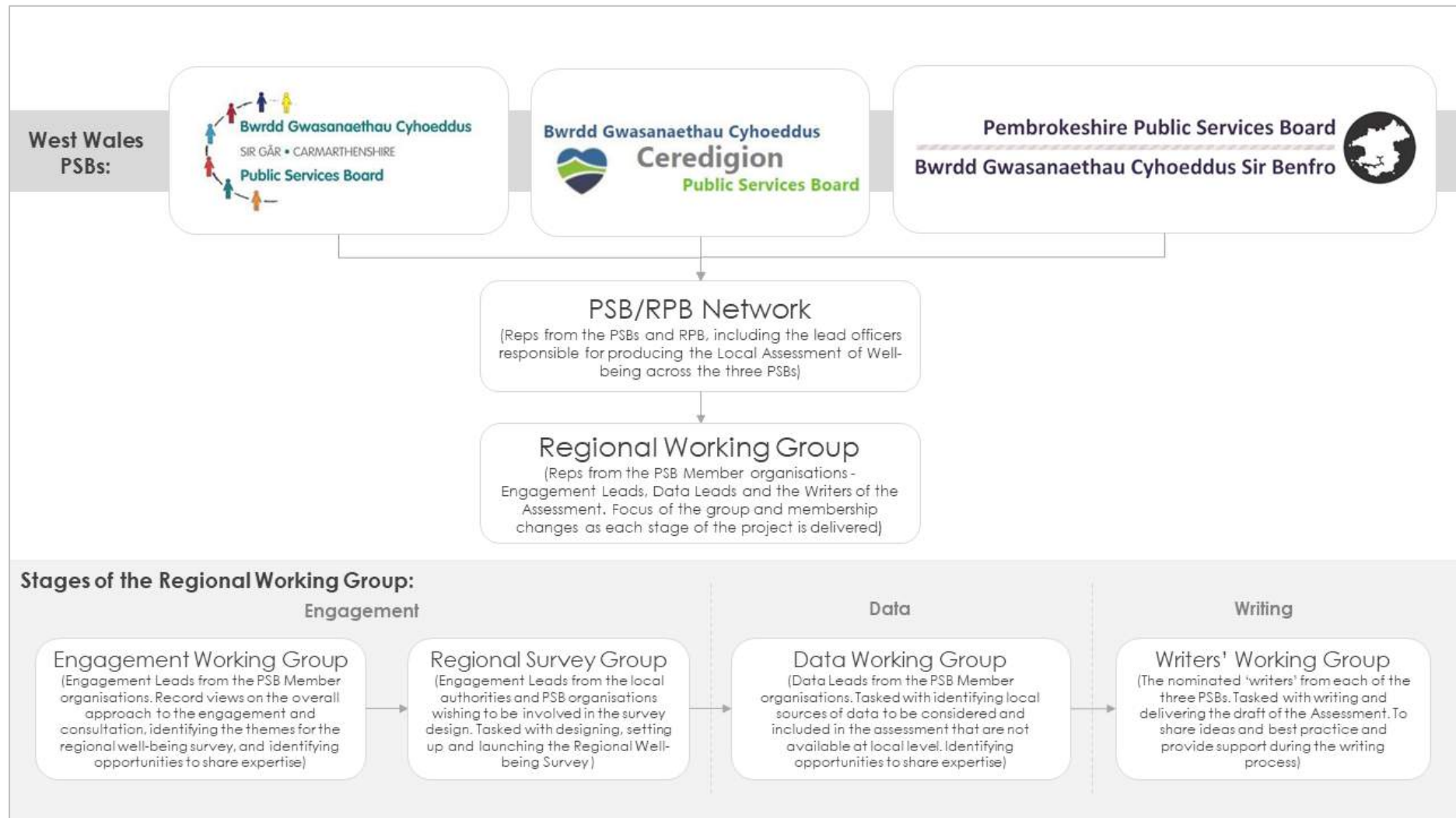


What	How	When (completion)	Who	Comment
<b>Deliver engagement sessions to identified stakeholder meetings</b>	Using the agreed common format for stakeholder events	August to September 2021	All	Events are held across the three PSB areas alongside the Regional Well-being Survey, and are delivered either by PSB Member organisations.
<b>Deadline for all stakeholder engagement feedback reports</b>	Engagement reports to be fed back to the engagement lead in each LA	15 October 2021	All	The feedback reports in the common format are collated ready for analysis by each LA.
<b>Formal consultation on Wellbeing Assessment report</b>	Document on partner websites Publicity – press releases and social media	November to January inclusive	All	This will be coordinated locally by each LA but aim is to consult at the same time.

## Appendix 1 - Timeline



## Appendix 2 – West Wales PSB Group Structure



# 11: Regional Well-being Survey Engagement Feedback Report



## Ceredigion Public Services Board Well-being Survey

### Engagement Feedback Report

November 2021



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## Background

Between 10<sup>th</sup> August and 8<sup>th</sup> October 2021, the Ceredigion Public Services Board (PSB) engaged with residents on well-being in the county to complete the Assessment of Local Well-being. The survey was conducted on a regional basis, along with Carmarthenshire and Pembrokeshire, and the questions were standardised to allow for identification of wider regional issues affecting West Wales.

## Response Rate

There were a total of **405** responses to the survey, **39** in Welsh, **366** in English. There were also **741** written comments and suggestions made, and although it's not possible to include them all verbatim in this report, it does provide a selection to demonstrate the differing viewpoints.

## Methodology

Due to the ongoing COVID-19 health pandemic, the survey was made available online and advertised through PSB partners networks and social media. Paper copies were also available, along with an easy read version, and respondents could also provide their responses via the telephone on request. A stakeholder list was created to ensure all partners and local groups were informed of the survey.

The PSB will use the feedback of residents, businesses and other groups to help inform the Assessment of Local Well-being and subsequently the five year Well-being Plan.

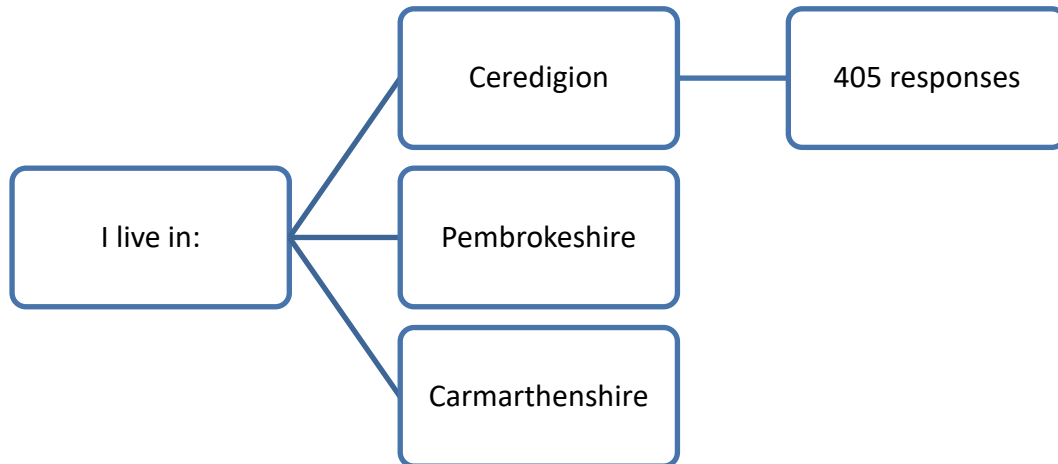
It is important to note that the Well-being Survey was only one part of the engagement activity designed to support the Assessment of Local Well-being. In addition, there were also a number of workshops held with various groups across the county, and hosted by PSB partners. The aim of these were to delve into more detail the issues affecting well-being in the county and to their groups. The structure of these sessions used the Three Horizons approach to futures thinking where the first question discussed where we are here and now, the second discussed the transitional period between where we are now and where we want to get to, and the final question discussed where we want to get to, i.e. the Ceredigion we want to create in the future. Further details of the approach taken to the engagement can be found in the Regional Methodology and the Engagement Toolkit.

The paragraphs that follow provide a summary of the findings.

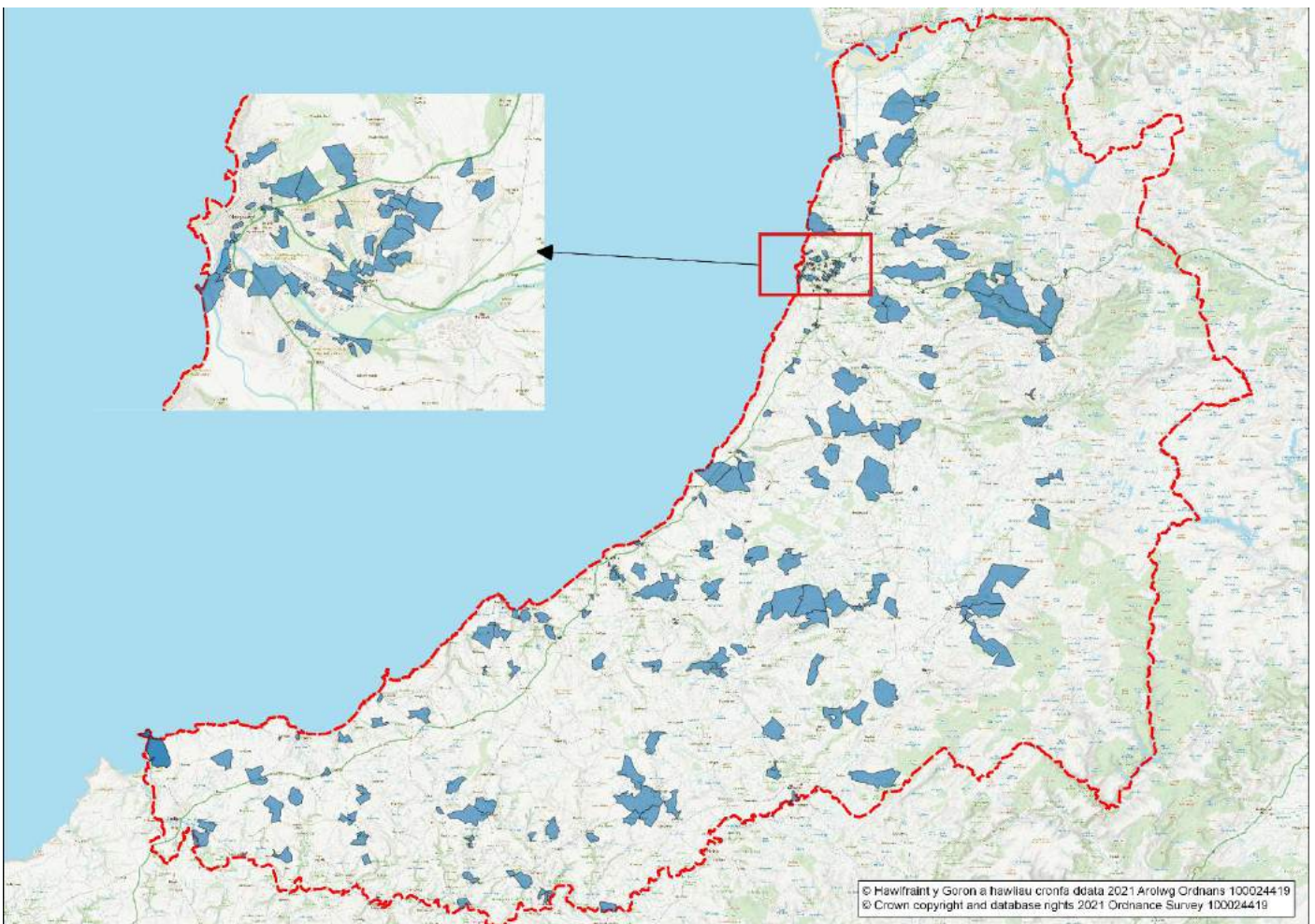


## Q1. I live in Ceredigion

The first question respondents were asked on our Well-being Survey, was which county they lived, to differentiate data between the regions. Out of 1,333 responses, 405 (30%) said that they lived in Ceredigion.

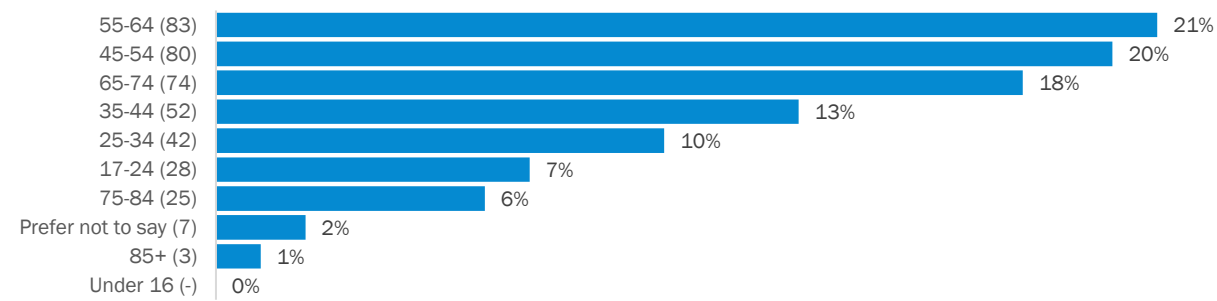


## Q2. Please specify your home postcode without using any spaces (e.g. SA154EA)



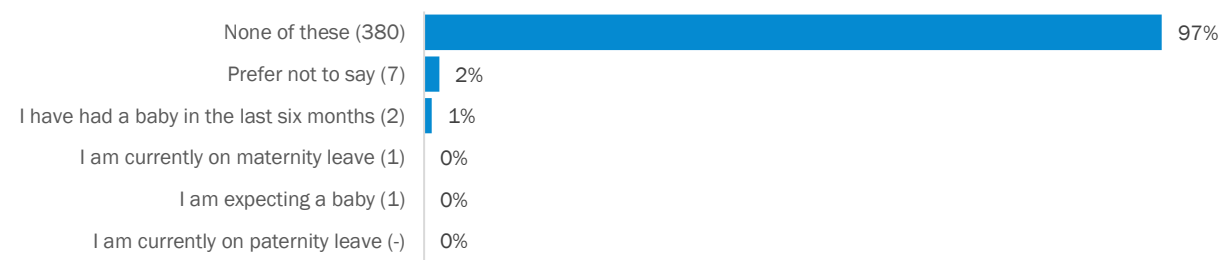
The map above demonstrates where responses have come from in Ceredigion. The second question of the Survey asked respondents to note down their full postcode. A total of approximately 225 different postcodes were noted down for this question. Even though there were 405 responses in total, we must take into account that some people may live in the same postcode area. It is clear from looking at the map above that responses have come from all areas across Ceredigion.

**Q3. What is your age group?**



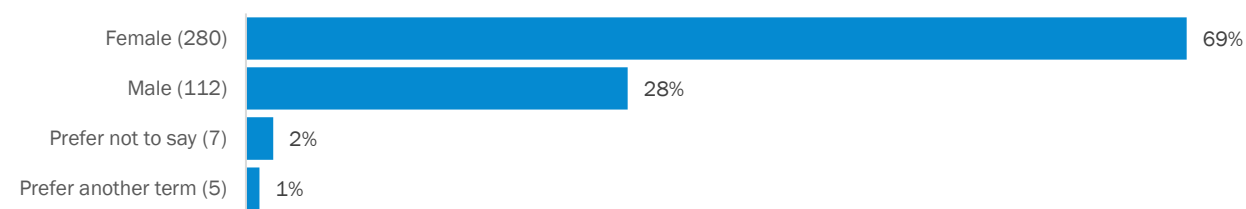
The majority of respondents to our Well-being Survey were aged between 55 and 64 years of age (21%). Very close behind this was the 45 to 54 age group (20%). 18% of responses were from those aged 65 to 74 and 13% from those aged 35 to 44. Just 1% of responses were from those aged 85+. 2% of respondents preferred not to say what their age group was. There were no responses from under 16 year olds, although there were other surveys that were more suitable for this age group.

**Q4. Pregnancy and maternity/paternity: Please indicate if any of the following apply to you?**



Most of the respondents to the survey (97%) were not pregnant, hadn't had a baby in the last six months and weren't on maternity or paternity leave. 2% of respondents preferred not to say and 1% of respondents had a baby in the last six months.

**Q5. Sex: How would you describe yourself:**

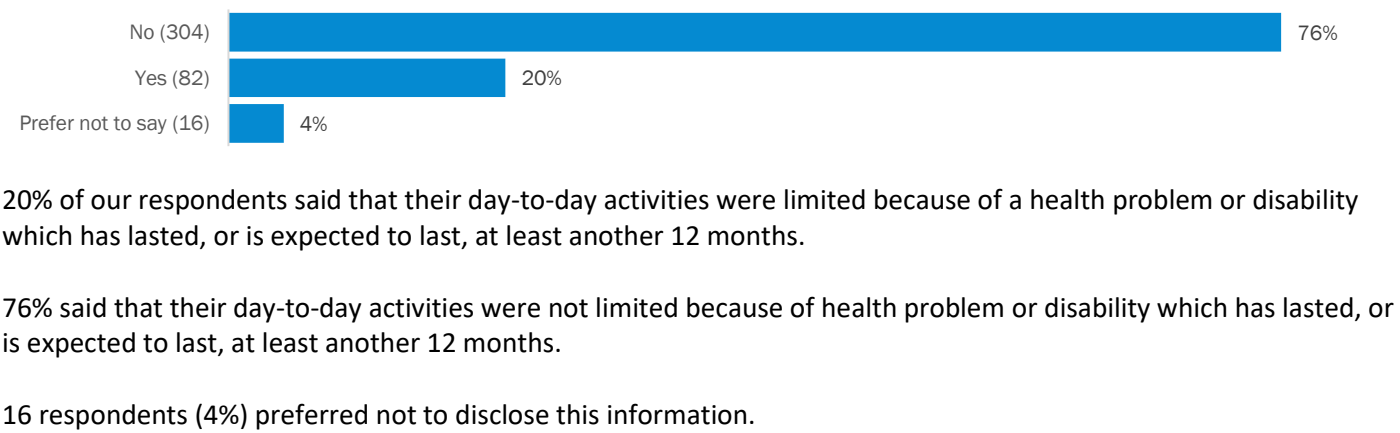


**Please specify 'prefer another term'**

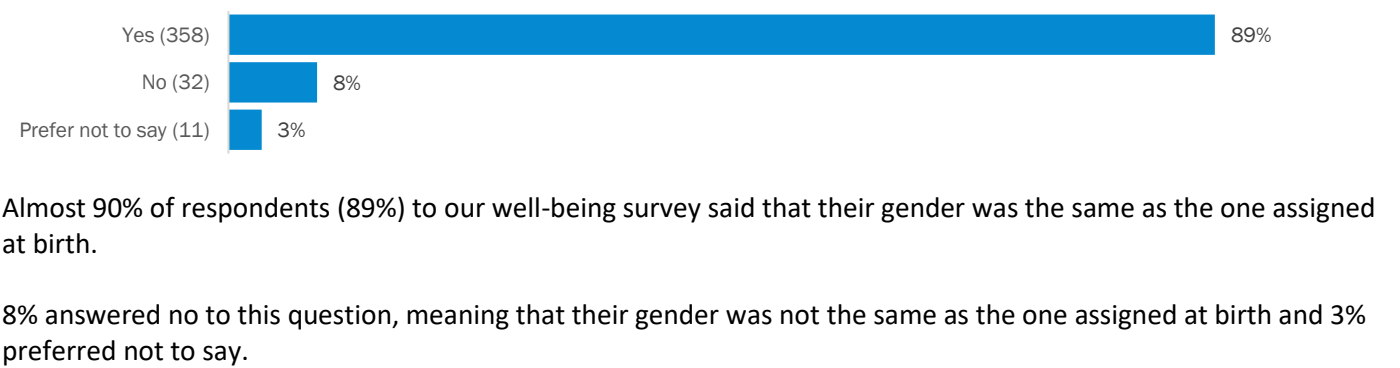
- Genderfluid
- Genderfluid
- Nonbinary
- Gender Fluid (they/Them)
- Genderfluid

The majority of respondents to our Well-being Survey described themselves as female (69%) with 28% describing themselves as male. 2% of respondents preferred not to say how they'd described themselves and 1% preferred another term. The majority of those who preferred another term noted 'Genderfluid' as the term they preferred.

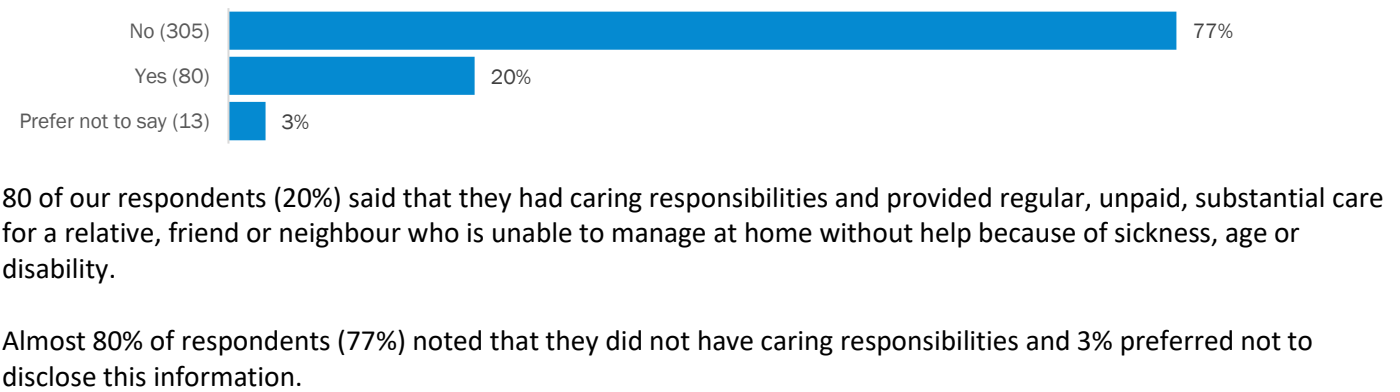
**Q6. Disability: Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least another 12 months?**



**Q7. Gender reassignment: Is your present gender the same as the one assigned to you at birth?**



**Q8. Caring Responsibilities: Do you provide regular, unpaid, substantial care for a relative, friend or neighbour who is unable to manage at home without help because of sickness, age or disability?**



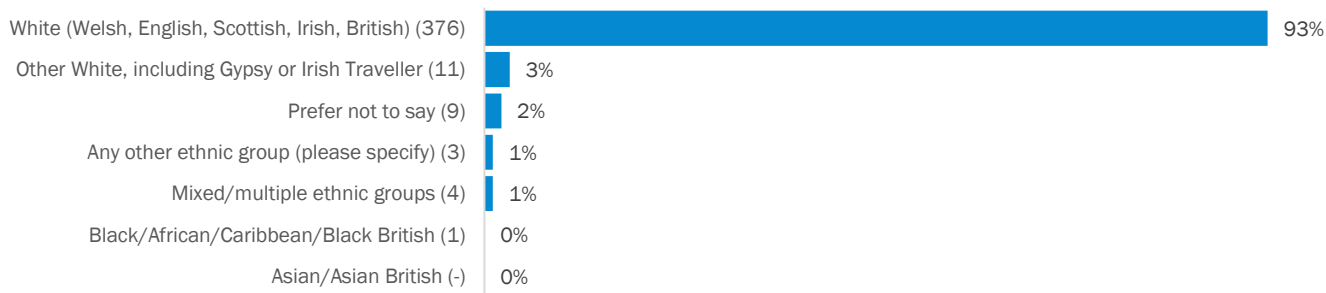
Q9. Sexual Orientation: What is your sexual orientation?



Most respondents to our Well-being Survey noted that they were heterosexual/straight (82%). 7% preferred not to say.

5% of respondents said they were bisexual, 2% said they were a gay woman/lesbian or other and just 5 respondents (1%) said they were a gay man.

Q10. Ethnic Group: What is your ethnic group?



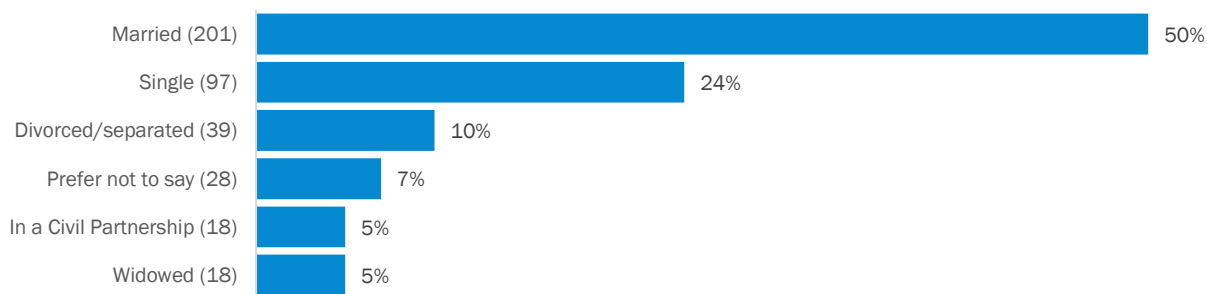
Please specify 'any other ethnic group'

- Northern Irish
- Greek, Jewish welsh
- Welsh Canadian with history of British ethnic family (Scottish, Irish, English and Welsh) only

Over 90% of respondents noted that they identified as being ‘White (Welsh, English, Scottish, Irish, British)’ (93%). 3% noted that they identified as ‘Other white, including Gypsy or Irish Traveller) and 2% preferred not to say. Just 4 respondents or 1% said that they identified as mixed/multiple ethnic groups.

3 respondents or 1% identified as another ethnic group and noted how they identified which can be seen in the list above.

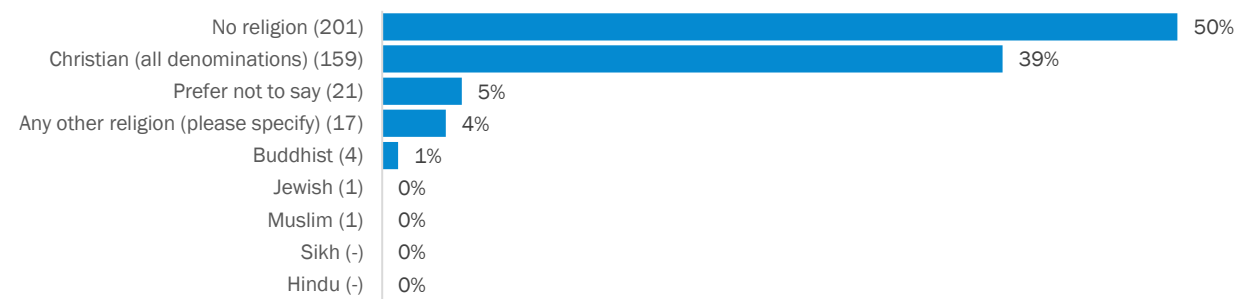
Q11. Marriage and civil partnership: Are you?



Exactly half of the respondents to our Well-being Survey said that they were married (50%). Second to this was ‘single’ with 97 respondents noting this (24%). 10% of respondents noted that they were divorced or separated and 7% preferred not to say.

Equally 10% of respondents were either in a civil partnership (5%) or widowed (5%).

Q12. Religion: What is your religion?

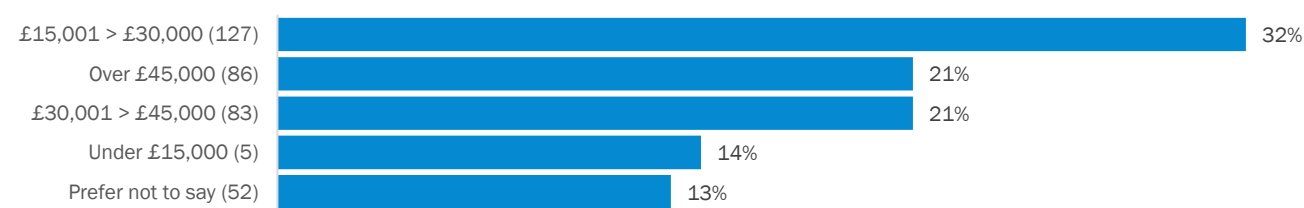


Please specify any other religion:

- Pagan
- Spiritualist
- Pagan
- Pagan
- Pagan
- Quaker
- Pagan
- Roman Catholic
- Panentheist
- Pagan
- Pagan
- Pagan
- Tolkienism
- Spiritual
- Pagan
- Letsism
- Spiritualism

Half of our respondents noted that they had no religion (50%) and 39% said they were Christian (all denominations). 5% respondents preferred not to say and 4% noted another religion, which the responses for can be seen in the list above. 4 respondents (1%) said they were Buddhist.

Q13. Household Income: Approximately how much income comes into your household each year?



Most of our respondents noted their household income as between approximately £15,001 and £30,000 (32%). Second to this was household income of over £45,000 (21%) and £30,001 to £45,000 (21%). 14% of respondents not their households income as being under £15,000 and 13% of respondents preferred not to disclose this information.

**Q14. Welsh Language: Can you understand, speak or write Welsh?**



Over half of our respondents said that they could understand spoken Welsh (54%). Able to speak Welsh and able to read Welsh both received 44% of votes, whilst 38% said they could write Welsh. 37% of respondents chose ‘none of the above’ meaning that they cannot understand, speak, read or write in the Welsh language.

**Q15. What is your main language?**



English was the main language of the most of the respondents to our Well-being Survey (81%). Welsh was the main language for 17% of respondents and 2% listed another language, which can be seen in the list below.

**Please specify your other 'main language':**

- German
- English but Learning Welsh slowly
- German
- German
- Prefer not to say
- Polish
- Russian
- Main language English. Basic Welsh

**Q16. Do you volunteer?**

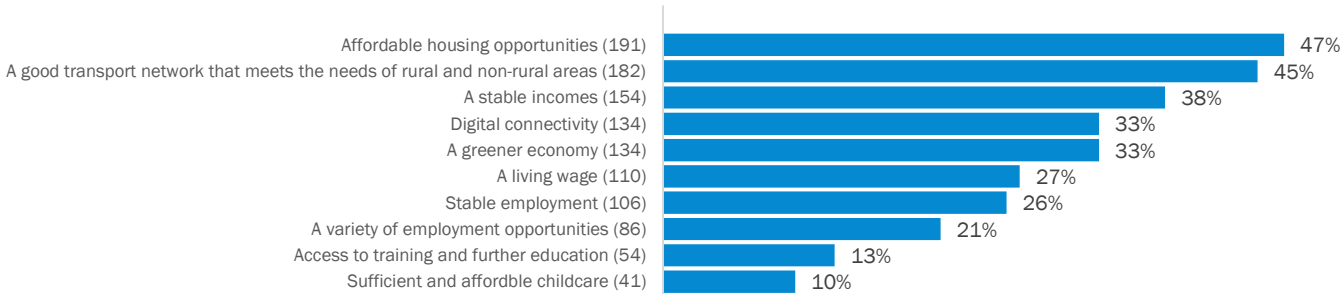


The majority of our respondents noted that they do not volunteer (66%). With this said 34% said they do volunteer.





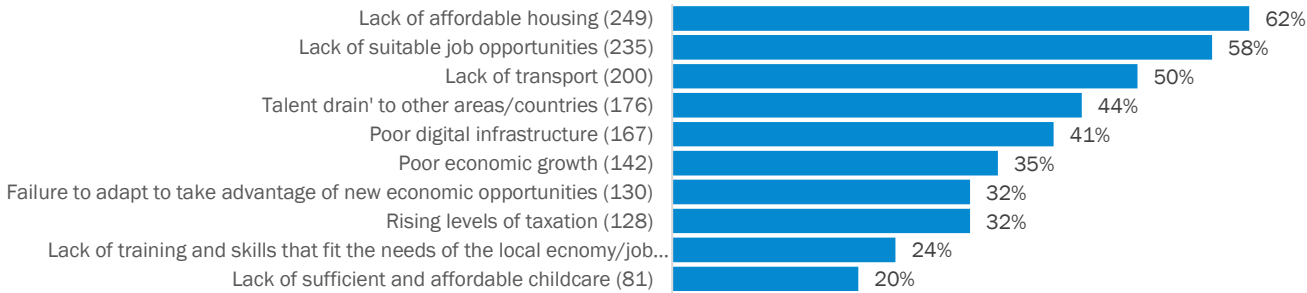
Q18. Which three things do you value most in a prosperous community?



The top three answers respondents chose when asked which three things they valued most in a prosperous community were affordable housing opportunities (47%), shortly followed by a good transport network that meets the needs of the rural and non-rural areas (45%) and a stable income (38%).

The least common answer to this question was sufficient and affordable childcare (10%). We know that childcare prices are on the rise. The majority of our responses to this survey have come from people over the age of 45, and they are less likely to need sufficient and affordable childcare.

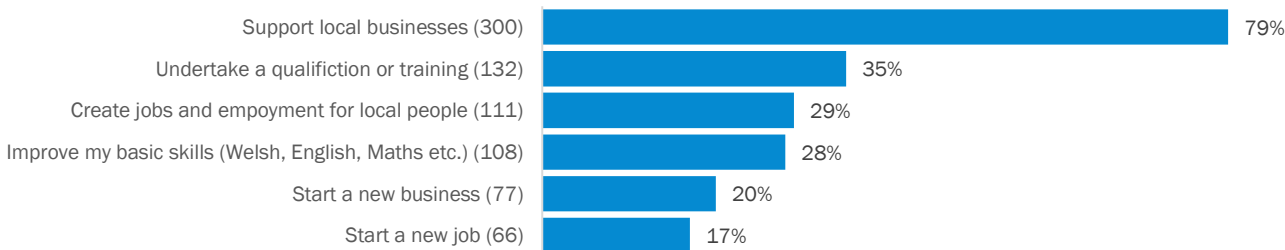
Q19. Looking ahead, what concerns you the most about prosperity in the county?



Thinking about the future, lack of affordable housing (62%) was the thing that concerned respondents the most about prosperity in the county, with lack of suitable job opportunities coming second (58%). These responses relate to our findings in the Assessment itself, house prices have been rising and the cost of living has also been increasing. There needs to be more affordable houses in Ceredigion but also job opportunities that correlate with high house prices and high costs of living.

According to our survey the thing that least concerned our respondents about future prosperity was lack of sufficient and affordable childcare, but this was still chosen by 20% of respondents. Again, the age demographics of respondents will have had an effect on this topic.

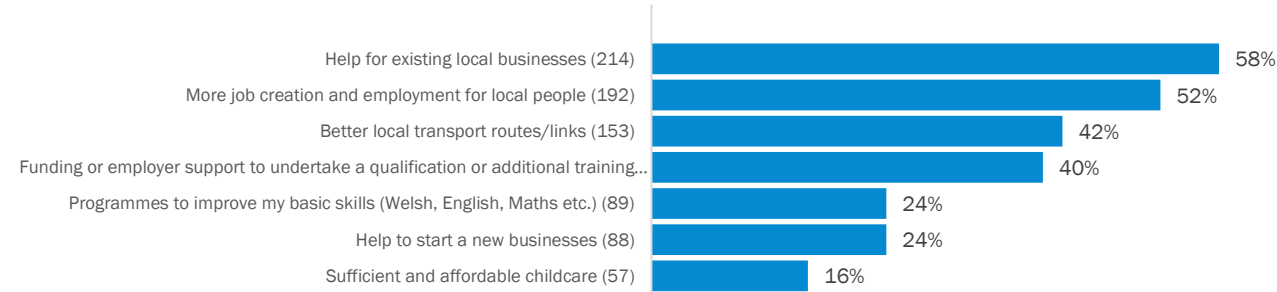
Q20. What would you consider doing to improve your own or your community's economic circumstances?



When asked what would you consider doing to improve their own or communities economic circumstances, by far the most popular answer was support local businesses (79%). This is a recurring theme seen throughout the Well-being Survey. We know that Ceredigion has many opportunities to buy and sell all kinds of produce locally and respondents want to do more of this.

Quite far behind this, the second most popular answer was undertake a qualification or training (35%).

Q21. What support would need to be in place to do these things?



Coinciding with the above responses, it is no surprise that when asked about what support would need to be in order, help for existing local businesses came out on top (58%). Secondly, was more job creation and employment for local people (52%). Again, quite surprisingly, sufficient and affordable childcare was the least popular response (16%), but this could be due to the demographics of respondents and because we’ve seen in increase in those being able to work flexibly.

Q22. Any other comments

There were 51 written comments provided by respondents for this section of the survey, 13% of total respondents. No clear trends came from these responses as a lot of different topics were mentioned.

One thing that was mentioned possibly slightly more often than anything else was digital connectivity. We know that around 12% of households in Ceredigion do not have access to the internet. Additionally, we know that there are many not-spots in Ceredigion that have difficulty receiving a reliable phone and internet connection.

Another topic mentioned was more opportunities to access further training and education. Ceredigion has an ageing population, we know that the older generations often find worth and a sense of purpose if they complete courses or training to improve their skills.

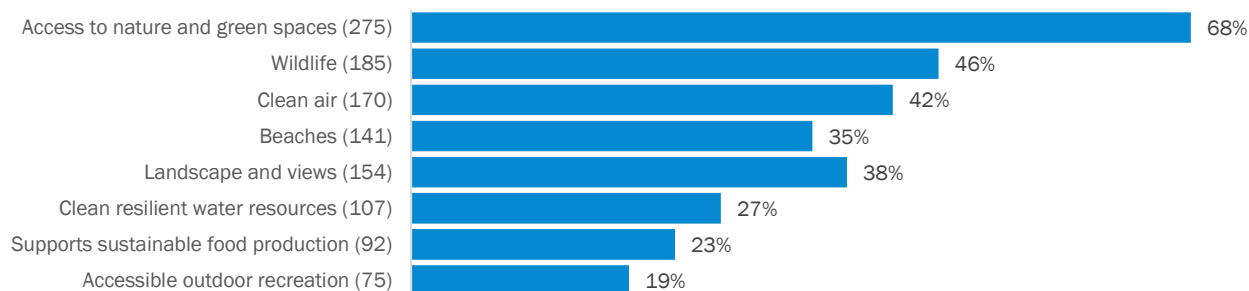
Supporting local businesses also comes out in these written responses with a participant noting that we cannot continue as we are and must make changes so that people can support businesses locally.

Below are a sample of comments taken from the 51 written responses provided for this section of the survey.

Sample comments	
“A prosperous Ceredigion relies heavily on good digital connectivity. Why are some rural parts of the county still without any digital connections at all.”	“Better digital connectivity – I’d either be working remotely out of county (job level and opportunities) or starting a business reliant in better connectivity and public transport links.”
“Flexible opportunities to access learning outside of working hours.”	“Opportunities for varied and interesting education both academic and practical.”
“More investment is needed in local businesses start up, as well as the arts, to help improve social mobility.”	“We must think about new ideas on how to support local businesses instead of continuing to do the same thing.”
“Raise living wages or force landlords to charge rent that is affordable.”	“Decent healthcare, public transport, bring back the markets.”

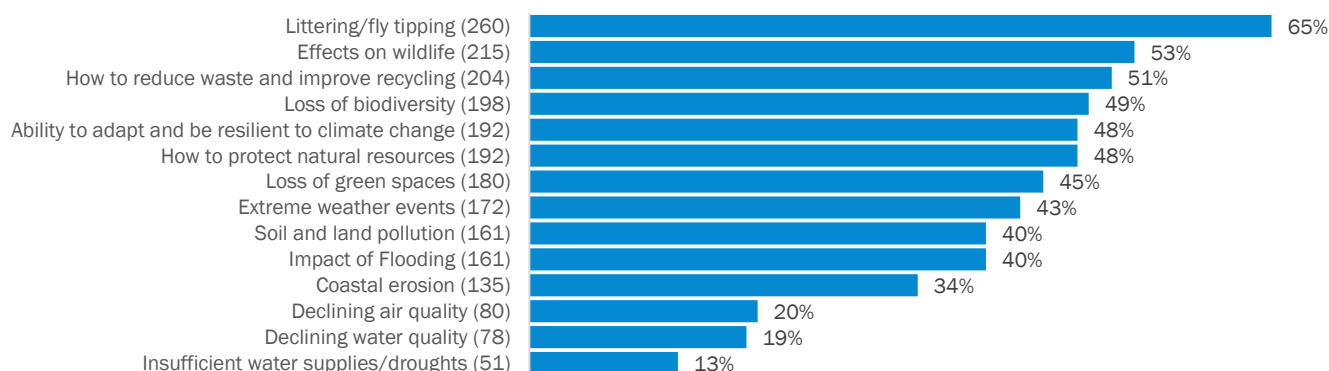


## Q23. Which three things do you value the most about your local environment??



Respondents to our Well-being Survey noted that access to nature and green spaces was by far one of the three things they valued most about their local environment (68%). In second and third position were wildlife (46%) and clean air (42%).

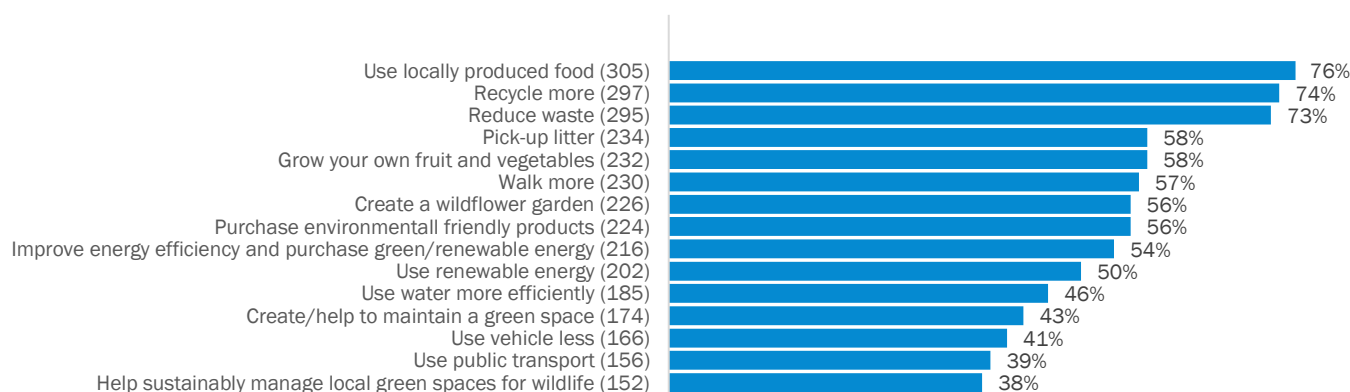
## Q24. Looking ahead, what concerns you the most about your local environment?



Quite surprisingly the thing that concerned our respondents the most about their local environment in future was littering/fly tipping (65%), we are now far more aware of the effects littering/fly tipping can have on our environment and wildlife. This also coincides with the fact that the second most selected answer was effects on wildlife (53%). Our awareness around how things that we as humans can affect our wildlife and the future of habitats.

The least popular answer was concerns around insufficient water supplies/droughts (14%).

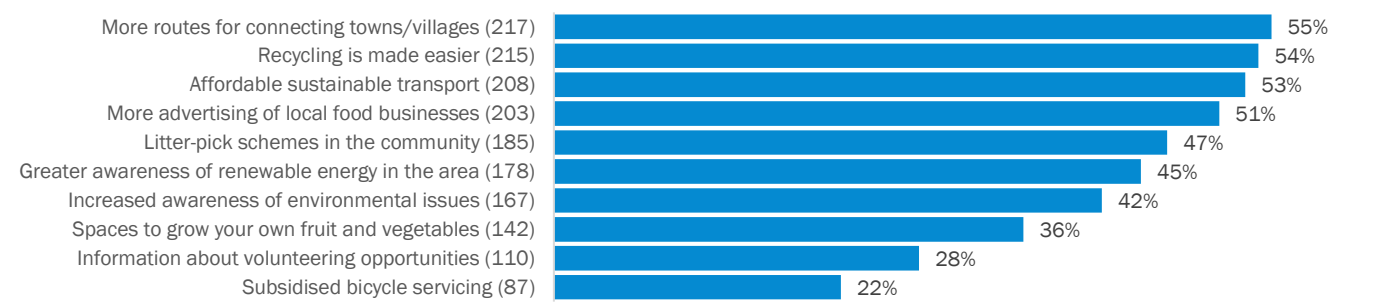
## Q25. What would you consider doing to improve your local environment?



When asking what our respondents would consider doing to improve their local environment, there were three clear stand out top answers. Use locally produced food (76%), recycle more (74%) and reduce waste (73%) were the top

answers. Respondents were given the option to choose all options that applied from the list, as seen above and it is clear that many respondents chose multiple options as the lowest chosen answer which was help sustainably manage local green spaces for wildlife still received 38% of votes.

Q26. What support would need to be in place to do these things?



Respondents believed that the support that would need to be in place to enable them to do the above things were to have more routes for connecting towns/villages (55%), for recycling to be made easier (54%) and affordable sustainable transport (53%). Ceredigion has an excellent track record for recycling but respondents believe that there are things that could be done to make the process easier. We know that transport to and from the most rural areas of Ceredigion are quite poor, therefore it is no surprise that the majority of respondents want more routes to connect areas and affordable sustainable transport.

Q27. Any other comments

A total of 65 respondents provided a written comment for this section of the Well-being Survey, 16% of total respondents. The topic mentioned most was how transport links could be improved in Ceredigion. As previously mentioned transport links between rural areas is known to be fairly poor and increasing the amount of public transport available would make things much easier for some.

Not only this, many comments relate to improving roads in and out of the county. Ceredigion’s roads are mostly B and C roads with only one dual carriageway in the County. Respondents believe that things would be safer and easier if roads were improved.

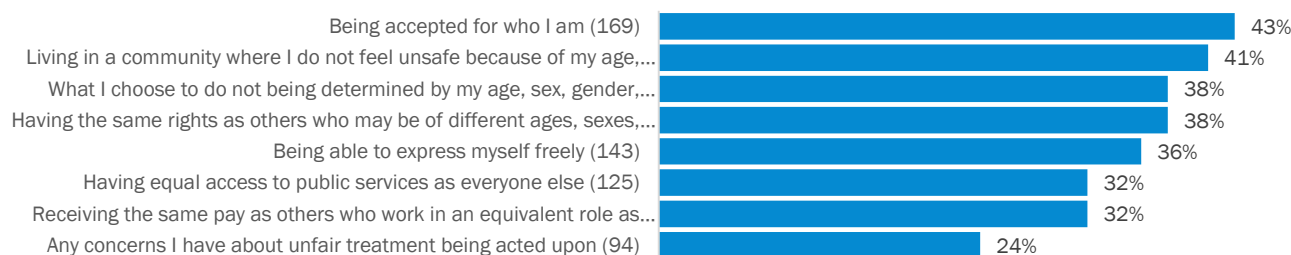
Additionally, maintaining and improving cycle paths and cycle routes away from vehicle traffic would mean that people are more likely to choose greener transport.

The samples below have been taken from the 65 written comments provided by respondents in this section of the Well-being Survey.

Sample comments	
“I already do most of these things – lack of public transport is my biggest issue as I cannot manage without my car currently although I would use a bus if there was a bus.”	“There is no public transport available apart from Bwcabus, although very valuable, is not a regular bus service.”
“Maintain the cycle paths which nobody does.”	“Existing cycle routes are not maintained. Separate cycle paths away from traffic.”
“Better roads out of the County.”	“Maintenance of existing rights of ways, i.e. Bridleway and footpaths. Many are overgrown, inaccessible / difficult to use. This is due to ground conditions (boggy/overgrown/difficult to open gates).”
“I already do most of these things – lack of public transport is my biggest issue as I cannot manage without my car currently although I would use a bus if there was a bus.”	“There is no public transport available apart from Bwcabus, although very valuable, is not a regular bus service.”

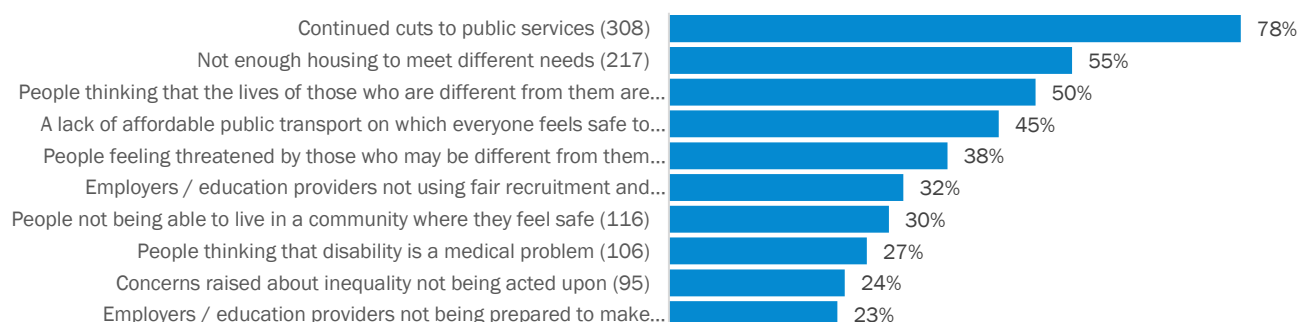


## Q28. Which three things do you value the most about living in a society which strives to be equal for all?



Our Well-being Survey asked which three things our respondents valued the most about living in a society which strives to be equal for all. The top three answers were, being accepted for who I am (43%) and living in a community where I do not feel unsafe because of my age, sex, gender, race, background, belief or disability / non disability (41%). It should be noted that, as seen in the graph above all responses to this question were fairly evenly distributed.

## Q29. Looking ahead, what concerns you the most about your community becoming fairer for everyone?



By far the thing that concerned our respondents the most about their community becoming fairer for everyone in future was the continued cuts to public services (78%). Public services are something that everyone uses, it is a clear concern to our respondents that there could be cuts to public services, which may affect how easily we can access these services in future.

Two other concerns were not enough housing to meet different needs (55%) and people thinking that the lives of those who are different from them are less valuable than their own (50%). Housing to meet different needs is a theme seen often throughout the responses to our Well-being Survey. As we have an ageing population and the number of people aged 65+ will increase in future we may see an increased need for housing that meets the needs of older people.

## Q30. What would you consider doing to help make things fairer for everyone in your community?



The responses to the question what would you consider doing to help make things fairer for everyone in your community were all fairly evenly selected. For example, the least selected option for this question was campaign for equality, diversity and inclusion (39%) and the most selected options were raise a concern about unfair treatment (63%) and report a hate crime (63%).

Q31. What support would need to be in place to do these things?



Respondents noted that being confident that raising concerns of unfair treatment / reporting a hate crime would not have negative consequences for me or my family (56%) was the most popular thing that needed to be in place to enable them to do the above. This could mean that respondents need to be made aware of the opportunities on how to report a hate crime or unfair treatment and to be ensured that there would be no negative consequences from this.

Q32. Any other comments

There were just 27 written responses to this section of the Well-being Survey, relating to an Equal Ceredigion, just 7% of all respondents.

There were no clear themes that could be identified from these written comments. Although, a few comments did relate to how people feel that they are not treated equally as a non-Welsh speaker. Recurring themes such as suitable housing and affordable housing were also mentioned in the written comments.

Unfortunately some of our written comments from our respondents do also note that they have been subject to hate crimes, abuse and bullying. But, on the other hand there are comments which note that they live in a friendly, accepting community. It is clear that there are some disparities between communities.

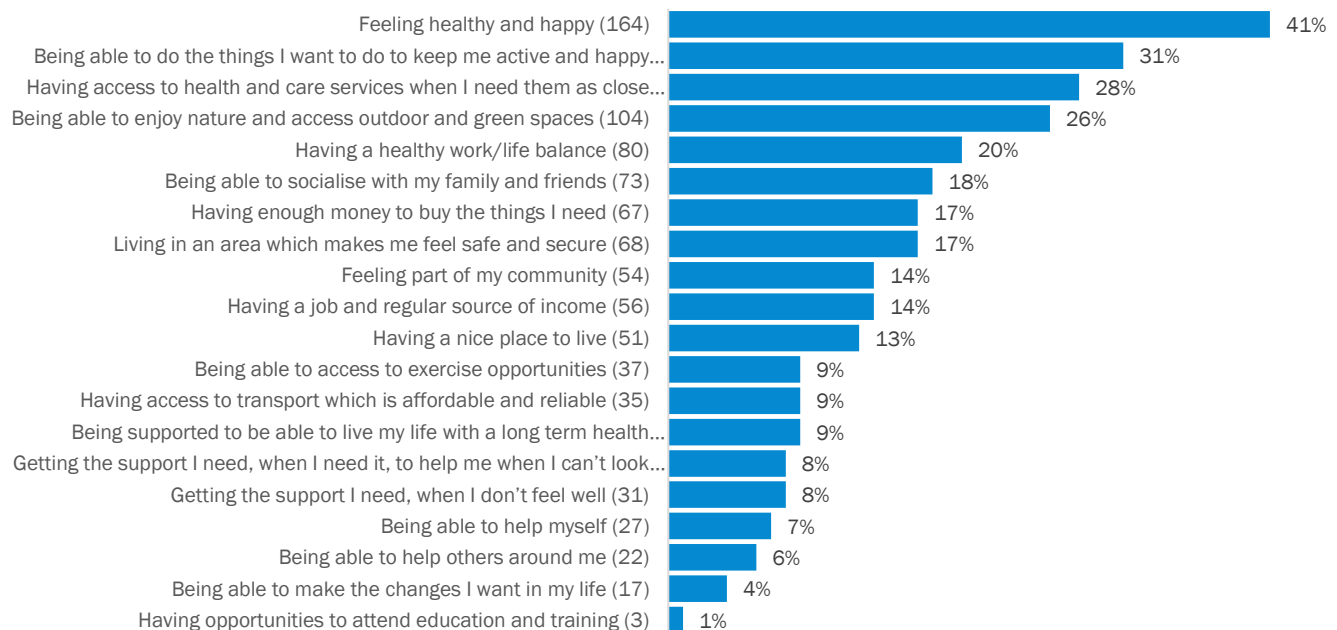
Below are a sample of comments taken from the 27 written responses from this section of the Well-being Survey.

Sample comments	
"I am concerned that as a non-Welsh speaker the LA is prejudiced against my needs."	"There is a constant 'Anti-English' sentiment underlying much of the politics and some policies in place in West Wales."
"Access to housing that meets the need of my mental health condition."	"I am disabled and have been victimised and bullied all my life and living here has not changed anything. I cannot go shopping without some form of intimidation, health appointments are the same."
"I live in an inclusive village that welcomes and supports all well."	"In my job I often feel discriminated against for being English."
"Very nasty people live in this village and I have suffered criminal damage and abusive behaviour."	"If we really want to build a fairer society we need to ensure that there are house available for all."





## Q33. Which three things do you value the most in relation to your physical health and/or mental well-being?



The three things that our respondents valued the most in relation to their physical health and/or mental well-being were feeling healthy and happy (41%), being able to do the things I want to do to keep me active and happy (31%) and having access to health and care services when I need them as close as possible to home or available through technology (28%).

## Q34. Thinking ahead over the next ten years, what concerns you the most about being able to stay physically and/or mentally well?



When thinking ahead over the next ten years, not having access to healthcare or other support that I need, as close to home as possible or available through technology was the thing that concerned our respondents the most (56%). This is no surprise when we consider that Ceredigion is a very rural county, for example average travel times to a GP surgery are very high. As well as this, we know that Ceredigion's 65+ population is going to continue increasing, as we get older we are more likely to have some sort of health issue, this could put increasing pressures on our healthcare services, making it difficult to access.

Secondly our respondents were concerned about not being able to spend time outdoor or in nature and green spaces, in future (52%). This could be due to worries over climate change and/or developments reducing the amount of outdoor, green spaces available or because of worries around getting older and not being able to get out as much.

**Q35. Looking ahead, what could you do to improve your own physical and/or mental wellbeing?**

211 (52%) respondents answered the open-ended question which asked what they could do to improve their own physical and/or mental well-being, with a written response.

“Exercise more” or similar comment on taking exercise, staying active or keeping fit was mentioned by 37% of respondents.

17% commented on staying connected or socialising with friends, family or community groups, with comments including “getting to know more people locally...” and “...meet with friends”.

The next most prevalent theme was looking after own wellbeing with 9% commenting on this, including “self-care”, self-motivation or personal time management and text answers including “help myself more...” and “make time for myself...”.

This was followed by improved work/life balance (7%), accessing green space or spending time outdoors (6%) and improving or maintaining a healthy diet (6%).

Below are some sample comments taken from these open-ended responses.

Sample comments	
“Exercise even more in social settings”.	“Stay connected”.
“Exercise more”.	“Better work life balance, increased self-care – exercise and managing weight”.
“Join more exercise classes”.	“Walk in green spaces more”.
“Socialise with people”.	“Better balance of work and relaxation”.

**Q36. What, if anything, would need to be in place for you to do these things?**

189 (47%) gave a text answer for the question what, if anything would need to be in place to enable them to do the above.

13% of these respondents commented a greater availability of or access to leisure and exercise classes that are appropriate, affordable or free. Comments included “better access to gyms in the more rural areas...”, “more exercise classes...” and “access to facilities at a reasonable cost”.

13% commented on better or improved access to healthcare services (including primary care, secondary care, mental health services and dental services) such as “...a better health service...”, “regular free health and dentistry checks” and “better access to GP...”.

A comment relating to support – being listened to and supported, improved social care support, or support from employers, was given by 8% of those giving a text answer to this question.

Better personal time management, self-motivation or willpower (comments related to the individual or ‘self’) was mentioned by 7%.

5% of those in Ceredigion who gave a text answer to this question mentioned local community groups, activities or courses. 5% commented on money, including more money, security of income and higher wages or pension.

Below are some sample comments taken from the written responses given to this question.

Sample comments	
"Facilities to remain open and well-maintained."	"Better access to GP. More opportunities to discuss ways to improve my health with health professionals, and have regular health checks."
"More classes locally available so I can join in, get fit and meet people."	"Care and support when it's needed."
"Access to low cost gym and health facilities."	"A close community of support."
"Better provision of services."	"Self-motivation."

### Q37. Any other comments

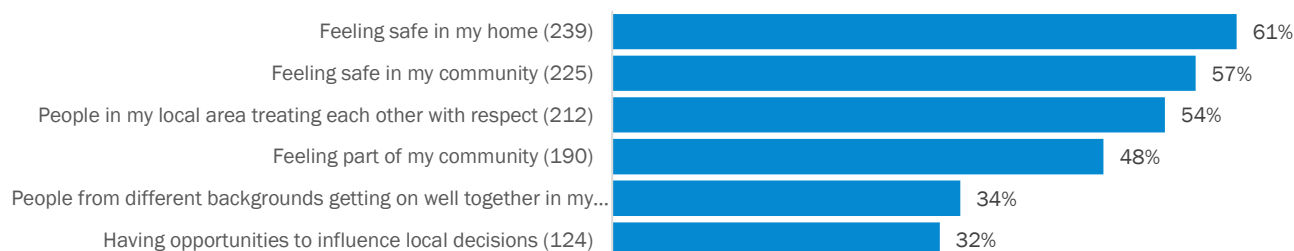
When asked for any other comments, this was less commonly answered than the previous two questions with 59 (15%) text responses. It was felt that the answers to this question were predominantly a reiteration of previous points, very specific/ personal or very broad/ unrelated to the topic of health and well-being. Therefore, there were no clear themes and no further analysis was performed on the answers to this question.

Below are a sample of comments taken from the written responses to this section of the Well-being Survey.

Sample comments	
"Get the leisure centres and swimming pools open again."	"The health service needs to be better funded."
"Sport and exercise facilities and opportunities are greatly lacking."	"Have more green spaces in housing developments."
"Importance of green spaces to exercise and promote good mental health."	"I need to improve my diet and learn how to budget better."

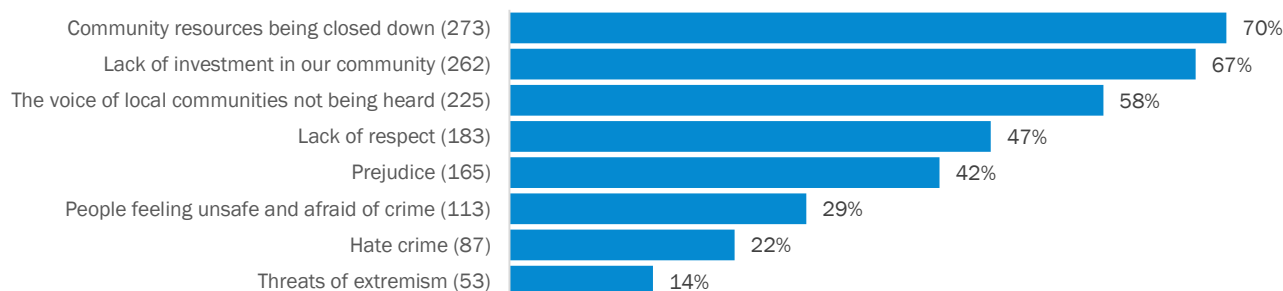


## Q38. Which three things do you value the most in relation to the community that you live in?



When asked which three things they valued the most in relation to the community that they lived in, the majority of respondents said feeling safe in their home (61%). A close second to this was feeling safe in their community (57%). The third most popular answer was people in their local area treating each other with respect (54%).

## Q39. Looking ahead, what concerns you the most about community cohesion?



Community resources being closed down (70%) was the thing that concerned our respondents the most about community cohesion. Lack of investment in our community was the second most common thing that concerned our respondents (67%). The COVID-19 pandemic has had major effects on community resources and funding for such things, and the pandemic is likely to continue having an effect on these thing in future. Our respondents think that investing in our communities and ensuring that resources are not closed down are most important.

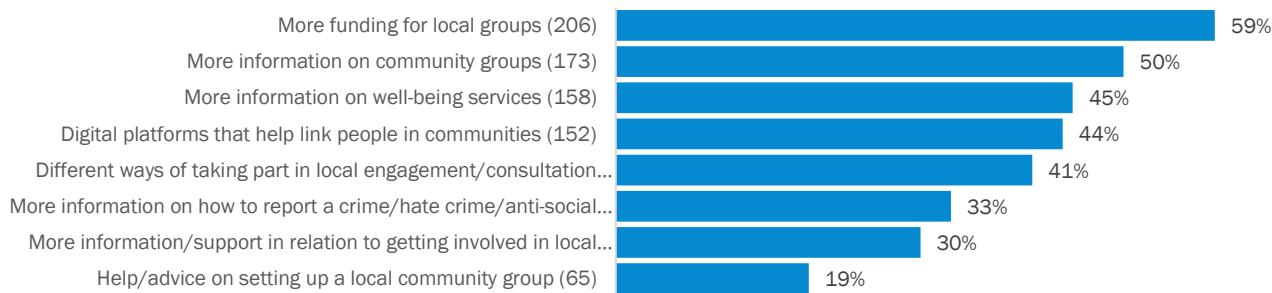
At the other end of the scale threats of extremism was the thing that concerned respondents the least (14%).

## Q40. What would you consider doing to help achieve good community cohesion in your neighbourhood?



Respondents are most likely to check on their neighbours (60%), use their skills/knowledge/experience to help others in their community (58%) and take part in community event (56%) in order to help achieve good community cohesion in their neighbourhood. Ceredigion is known to having fairly good community cohesion and known for having high percentages of people feeling safe in their communities and feeling like people in their communities get on well. This is reflected in these responses.

Q41. What support would need to be in place to do these things?



In order for respondents to be able to do the things noted in the question above, more funding for local groups (59%) and more information on community groups (50%) were noted most. Local and community groups are one way that we can ensure cohesive communities in Ceredigion where people are coming together to discuss matters and resolve where possible.

Help/advice on setting up a local community group was the least common answer (19%).

Q22. Any other comments

26 (6%) respondents supplied this section of the Well-being Survey with a written comment. Again, there was a variety of topics discussed in the open-ended comments and no clear front runner.

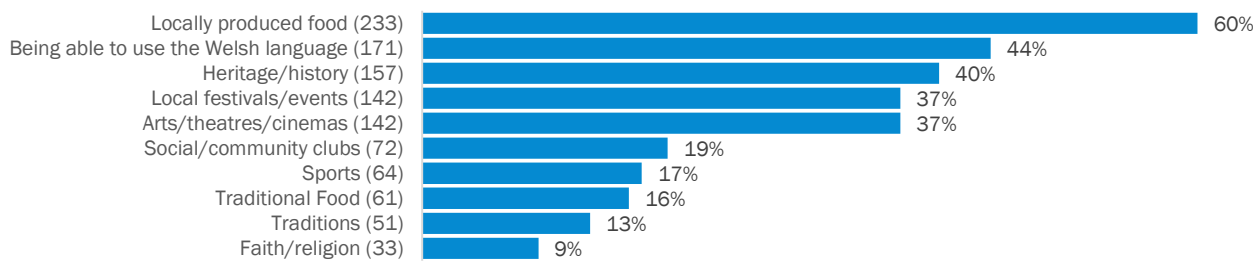
A fair few of the written comments for this section note that the respondents are already doing the things noted in the previous questions. This said, respondents are calling for more opportunities locally to be made available to them, so they can do more. One comment mentions that there is no community hall in their village, a space like this could be essential to ensure that the area has good community cohesion, where people can discuss matters.

Additionally, time is something that people struggle with, with a few comments noting that if they have a full-time job and children it can be difficult to do more things in our communities to be cohesive.

Sample comments	
"Again, I do a lot of these things already."	"Somewhere for our community to get together. There is no community hall in the village."
"I already do a lot for my local community."	"More time – full-time job (where I support others), family duties and supporting member of my family by caring means that I don't have much time to volunteer."
"I do all the above already as does my family."	"More time – as a parent who works full time it's difficult to make time for anything else. There is a huge resource in recently retires people that we could call upon to help with community resilience."
"There are things I used to do but I can't now. I contributed when I could."	"I already run community groups I can't do more!"

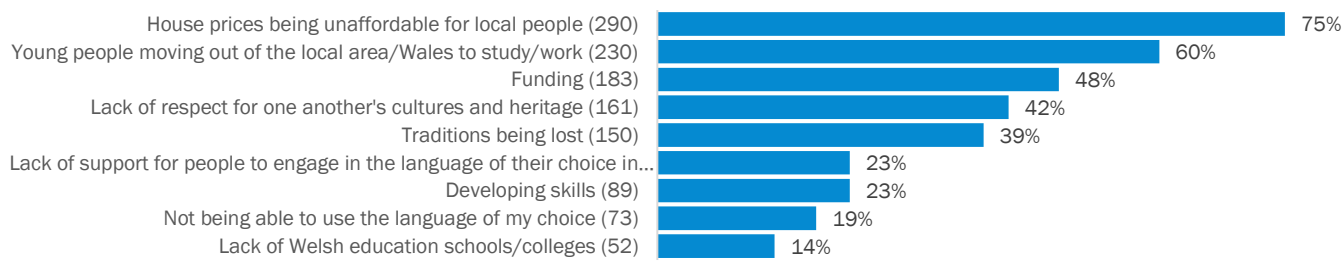


Q43. Which three things do you value the most in relation to your County's vibrant community and thriving Welsh language?



When asked which three things our respondents value the most in relation to the County’s vibrant community and thriving Welsh language, the top three answers were as followed. Locally produced food (60%), being able to use the Welsh language (44%) and heritage/history (40%). Faith/religion was the least selected answer (9%).

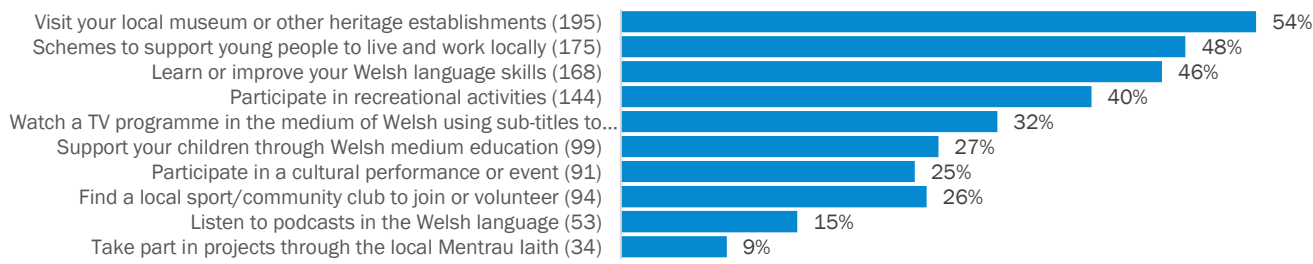
Q44. Looking ahead, what concerns you the most about your County's vibrant community and thriving Welsh language?



By far the thing that most concerned our respondents about the County’s vibrant community and thriving Welsh language in future was house prices being unaffordable for local people (75%). Coming second was young people moving out of the local area/Wales to study/work (60%).This does not come as a surprise as Ceredigion has seen a sharp increase in house prices, we know that if people cannot afford to buy a house here, they are very likely to move elsewhere.

The thing that concerned respondents the least was lack of Welsh education schools/colleges (14%). Ceredigion’s education system is one of its major assets, a majority of Ceredigion’s schools are Welsh medium or bilingual and therefore it isn’t out of the ordinary for respondents being less concerned about this.

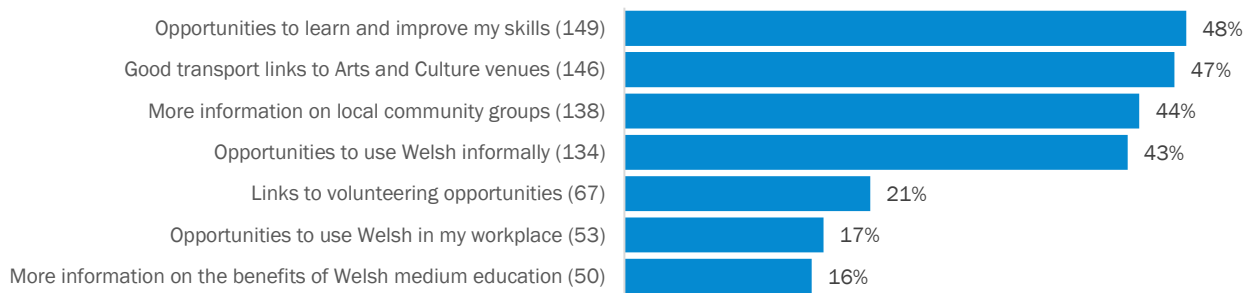
Q45. What would you consider doing to help achieve a vibrant community with a thriving Welsh language?



In order to help achieve a vibrant community with a thriving Welsh language, our respondents are most likely to visit their local museum or other heritage establishments (54%), closely followed by schemes to support young people to live and work locally (48%). Again, this relates to the concerns around local people moving elsewhere because of unaffordable house prices. Respondents were least likely to take part in projects through the local Mentrau Iaith (9%).



Q46. What support would need to be in place to do these things?



According to our respondents, the support needed to enable us to do the above would be opportunities to learn and improve skills (48%) and good transport links to Arts and Culture venues (47%). In Ceredigion, there has been a decrease in the number of people participating in arts, culture or heritage activities at least three times a year, providing good transport links to such events could alleviate this. Additionally, more information on local community groups (44%) and opportunities to use Welsh informally (43%) were also ranked highly as things that would need to be in place to do the above.

Q47. Any other comments

When asked for any other comments, there were 56 written responses in total. 14% of all respondents to this survey have provided a written comment for this section. These written comments mentioned a variety of topics. This said, a majority of comments (around 23%) related to issues with the non-Welsh speaking community. It is clear that some of our respondents do not feel welcomed in their community because they are either non-Welsh speakers or Welsh learners. Some respondents also feel that there is too much emphasis on the Welsh language and that English should be valued just as much.

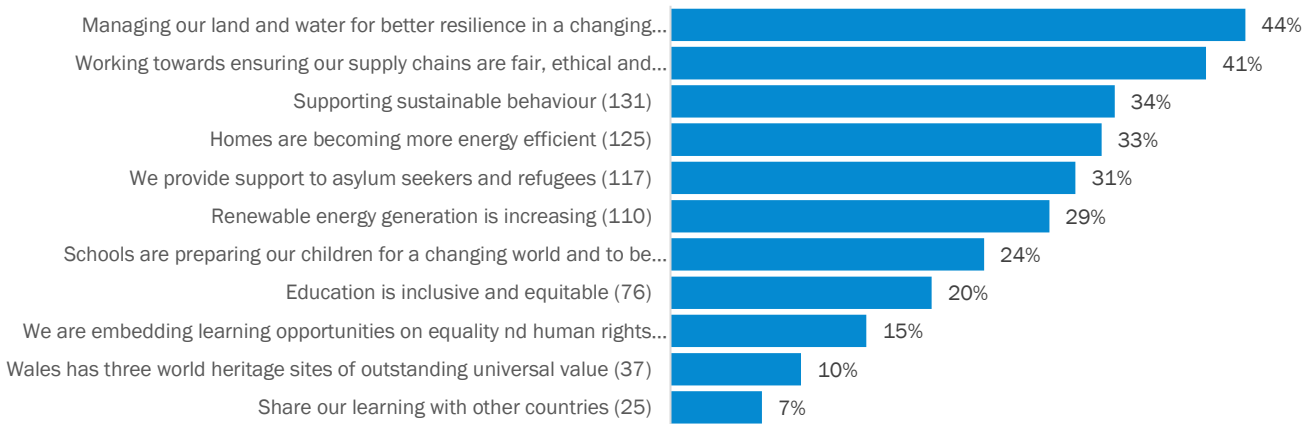
Additionally, many comments related to needing more opportunities to learn the Welsh language in Ceredigion, and specifically opportunities for adults to learn the Welsh language. Learning a new language can be daunting prospect and as mentioned in some comments being able to learn Welsh in less formal environments would be beneficial. Some written comments relate to not having enough opportunities to use the Welsh language, Welsh learners can often feel less confident to speak Welsh around fluent Welsh speakers and more encouragement is needed.

Below are a sample of comments taken from the 56 written comments.

Sample comments	
“Need more support and access to learning Welsh and free courses.”	“I would really like to learn Welsh, it would be great if this could be done at a local level e.g community hall or local pub, rather than going to a college or doing an online course. By doing it at a local social venue it becomes easier to practice among the local Welsh speaking community and would develop better social cohesion.”
“Run Welsh events in local Community Centres e.g The Hub in Penparcau, it’s a Wellbeing space. I find it frustrating that I can’t use Welsh in my community and that it’s difficult to walk to other communities safely.”	“Respect for Welsh learners.”
“Learning Welsh is becoming a necessity however given that I am not good at language, I need to be able to make the time to learn.”	“Free Welsh lessons.”
“To value English as much as Welsh.”	“It’s equally important to remember that choosing not to speak Welsh should be a valued option.”

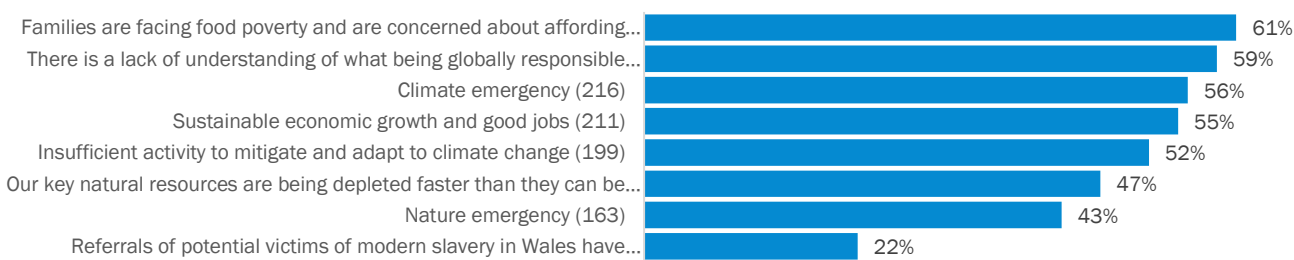


Q48. Which three things do you value the most in your county's global responsibility?



When asked in our Well-being Survey what three things do you value the most in your county’s global responsibility, the top three answers were; managing our land and water for better resilience in a changing climate (44%), working towards ensuring our supply chains are fair, ethical and sustainable (41%) and supporting sustainable behaviour (34%).

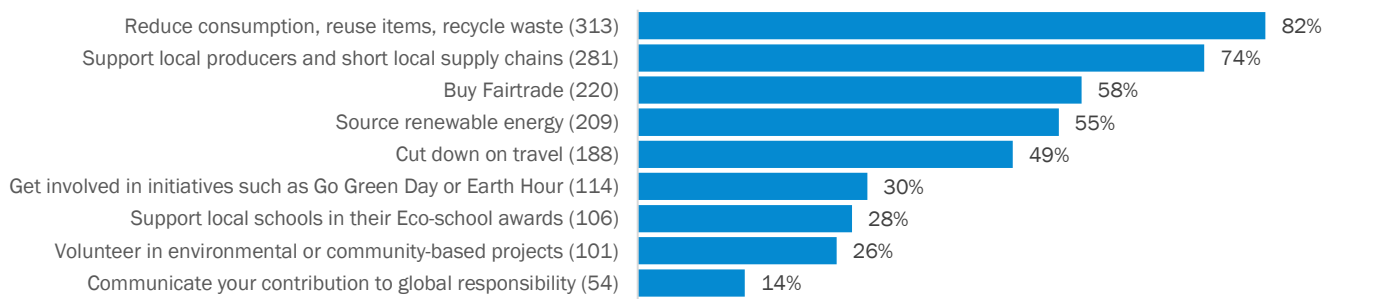
Q49. Looking ahead, what concerns you the most about your county's global responsibility?



When referring to a globally responsible Ceredigion, the thing that concerns our respondents most about the future is that families are facing food poverty and are concerned about affording food (61%). We know that poverty is increasing in Ceredigion and specifically child poverty has seen one of the biggest increases. It is clear that our respondents are aware of these changes and fear that this could only get worse in future.

Closely following the above was that there is a lack of understanding of what being globally responsible means (59%). The thing that respondents were least concerned about was that the referrals of potential victims of modern slavery in Wales have increased in recent years, although it should be noted that this still had 84 votes (22%).

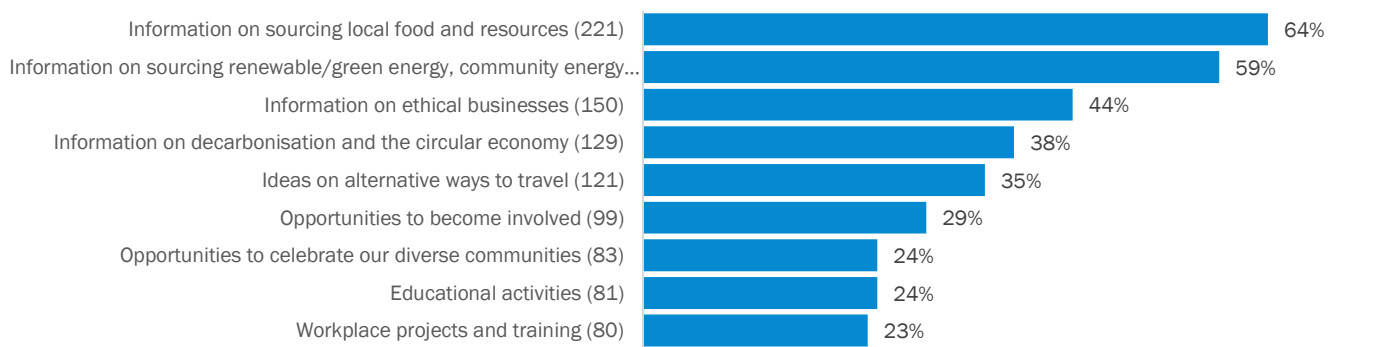
**Q50. What could you do to help your community be globally responsible?**



To help their community be globally responsible, the vast majority of respondents noted that they would reduce consumption, reuse items and recycle waste (82%). Ceredigion already has a good track record of levels of reducing, recusing and recycling items, continuing to do this and/or increasing this will be beneficial for Ceredigion.

Secondly, respondents would support local producers and short local supply chains (74%). We know that Ceredigion has a rich food culture and there are many opportunities for people to buy locally. Respondents were least likely to communicate their contribution to global responsibility (14%).

**Q51. What support would need to be in place to do these things?**



By far the most common thing that respondents believed would need to be in place in order to do the things above were have more information on sourcing local food and resources (64.4%) and information on sourcing renewable/green energy, community energy opportunities and energy from waste possibilities (59.2%). It is clear that more emphasis is need on advertising opportunities to do these thing in Ceredigion.

**Q52. Any other comments**

A total of 55 written comments were provided for this section of the survey, 14% of all respondents. By far, the most common written comments related to buying local produce. As noted previously, we know that Ceredigion has a very rich food culture and it is important to support the local businesses in order to be more globally responsible.

Additionally, making local produce more affordable to people was also mentioned many times in the written comments. We know that the general cost of living is increasing and with this food prices are rising. There is a lot of competition from supermarket chains that sell produce at a much lower cost. If local produce is more affordable, people are more likely to buy it.

A few comments from this section also related to cycle paths being improved and being more accessible across the County. We know that being more globally responsible can be done by using greener transport, but roads and paths need to be safe in order to do this.

Below are some sample comments taken from the 55 written responses for this section of the survey.

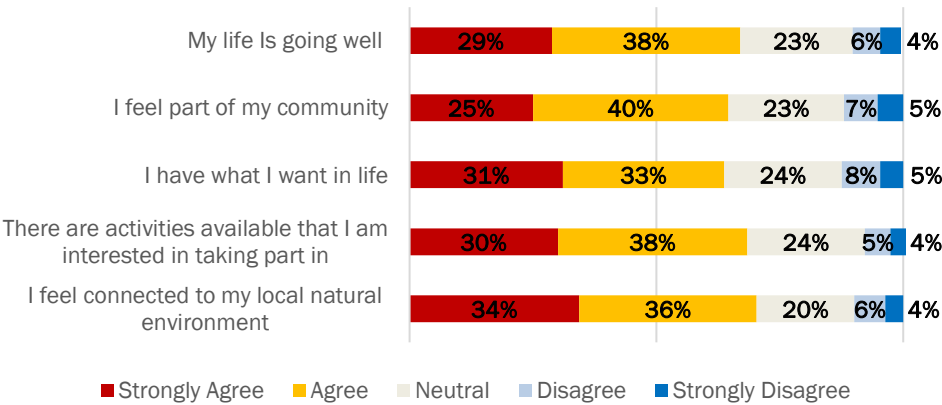
Sample comments	
"In order to support local businesses and fair trade enterprises prices need to be competitive."	"Lack of local meat and vegetables, support local businesses."
"Supporting local is essential, but must compete with Tesco/Asda/Morrisons."	"Support and promote local farmers to produce our food. Promote organic which is good for our health and the environment."
"Affordable local produce."	"Instead of just providing info – incentivise these things! Money is a barrier to being able to e.g. buy locally produced foods – it's cheaper in Lidl."
"More cycle paths or shared use paths are essential for encouraging more people to walk/ cycle."	"We definitely need safer roads for cyclists here."

# SCHOOLS SURVEY

As part of our engagement with the public we engaged with primary and secondary school pupils in Ceredigion on our **Schools Survey** to ensure that the voices of future generations were represented. Overall, we had 212 responses to the schools survey, 156 completed the survey in English and 58 participated in Welsh. The survey was structured around the four well-being themes; economic, social, environmental and cultural well-being. The following section provides an overview of the main results.

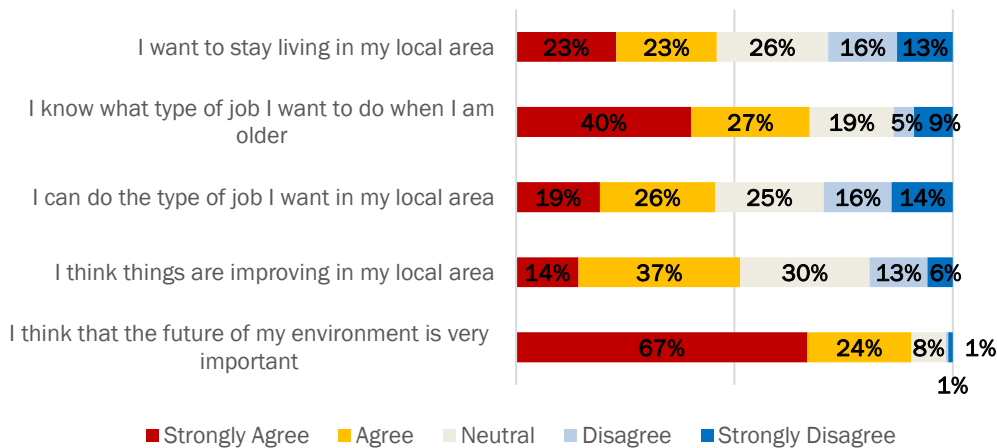
When pupils were asked questions on how their life was going, the answers that gained the most positive response were in relation to **general well-being** and the **environment**. The majority of respondents (71%) felt that *their life is going well*, 11% neither agreed nor disagreed with this statement, whilst 8% of respondents disagreed with the statement. Similarly, 71% of respondents felt *connected to the environment*, 10% were unsure, whilst 9% did not feel any connection. Respondents felt less strongly about there **being activities available that they were interested in**, 67% felt that there were, 24% neither agreed nor disagreed, whilst 9% disagreed.

## Q.2 Your life now



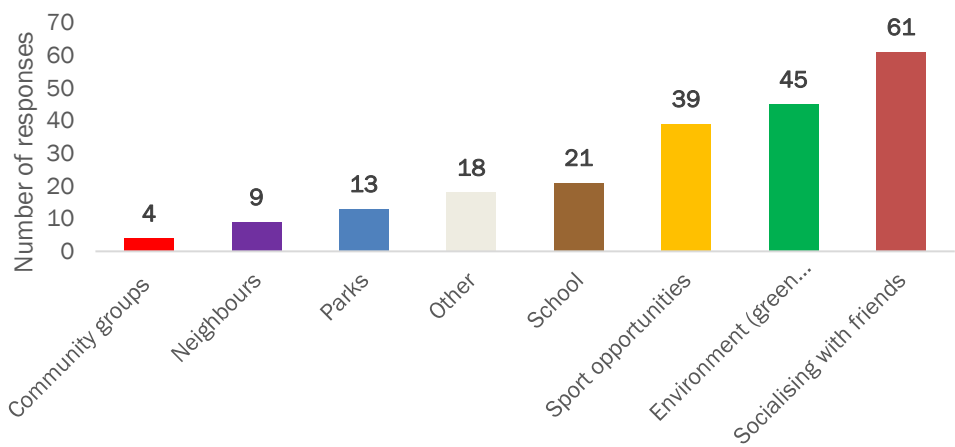
Interestingly, Welsh respondents felt more optimistic about their life in general, compared to those who participated in English. This was particularly acute when respondents were asked if they *felt part of their community*, 77% of Welsh respondents either strongly agreed or agreed with this statement, whilst just over half (59%) of English respondents agreed. This trend is also seen in national surveys, such as the National Survey for Wales, which could be due to a number of factors. For example, respondents may feel connected to their area through using the Welsh language in everyday life.

### Q.3 Your life in the future



When pupils were asked questions in relation to their life in the future, again, the value of the **environment** was reflected very strongly, with 91% of participants agreeing that the *future of the environment is very important*. Overall, this statement gained the highest proportion of agreement amongst participants. Over half of the respondents (67%) knew the **type of job** they wanted to do, however, only 45% believed that they could work their desired job in their local area. There were variations in responses when pupils were asked if they wanted to **stay living in their local area**, just under half wanted to stay (46%), whilst 26% were unsure and 29% wanted to leave

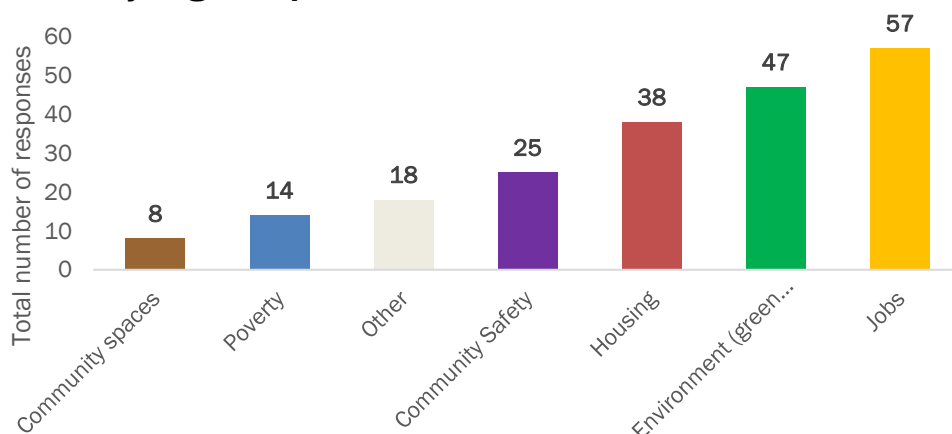
### Q.4 What are the best things about your community?



Out of the eight options provided, on average, **socialising with friends** was noted by participating pupils as the best thing about their community, with 61 respondents selecting this answer. This was followed by the **environment** (45 responses), **sports opportunities** (39 responses) and **school** (21 responses). **Community groups**, **neighbours** and **parks** were less valued by participants. In Ceredigion, we know that there the provision of parks and play spaces needs improving (particularly in the more rural communities), which may have influenced the findings.

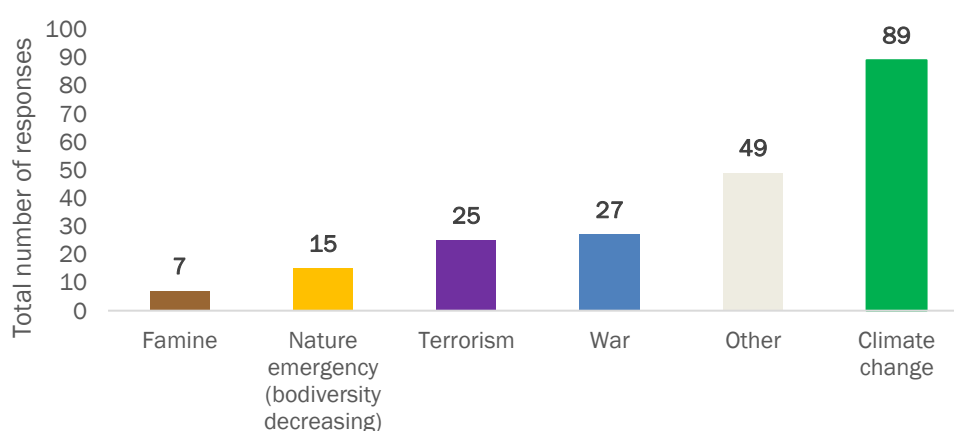


### Q.5 What are your biggest concerns about your local area as you grow up?



Pupils participating in the survey were most concerned about **jobs** in their local area in the future, with 57 respondents selecting this response. This is a common theme across our engagement with the public (during the general well-being survey and the stakeholder events), whereby the lack of job opportunities and high paid jobs were identified as key challenges by the participants. Following on from jobs, were concerns relating to the **local environment** and **housing**, again, these concerns were raised throughout our engagement with the public. Participants were less concerned about the future of **community spaces** and **poverty** in their local area.

### Q.6 What are the biggest challenges facing the world right now?



When asked about the biggest challenges facing or world at present, **climate change** was by far the most common response, 89 participants identified this as the greatest challenge. This indicates that pupils participating in the survey were more concerned about the impact of climate change on a global scale, than on a local scale. The 'other' category was the second most common response, the majority of comments in this section related to the impact of **COVID-19**. This was followed by **war** (27 responses) and **terrorism** (25 responses).

# STAKEHOLDER EVENTS

## Background

Between July and October, Ceredigion Public Services Board (PSB) held stakeholder events to capture the views of the local community on well-being, particularly the harder to reach groups and those with protected characteristics. Six stakeholder events were held with the following groups; Ceredigion Disabled Peoples Forum, Ceredigion Children & Young Peoples Services Provider Forum, Give Us Support (RAY Ceredigion), Equalities Working Group, Ceredigion Carers Alliance and the Armed Forces Community. There was approximately 90 people that participated in the stakeholder events. The sessions were centred on the four pillars of well-being; social, economic, environmental and cultural well-being. This summary provides an overview of the discussions at each of the events, highlighting the key issues raised and includes some sample commentary.

## Ceredigion Disabled People's Forum

A stakeholder event was held virtually with Ceredigion Disabled Peoples Forum on the 7<sup>th</sup> of July 2021, thirteen people attended to give their views on well-being issues specifically relating to disabilities in Ceredigion. Capturing the voices of people with disabilities was key to ensuring that everyone's voices are heard in the Assessment, as it will help us to plan and design services to meet future needs over the next 5 years.

### Overview of main points raised during the stakeholder event with the Ceredigion Disabled Persons Forum

Accessibility;  
parking, level  
access; public  
transport;  
venues;  
footpaths

Better paid  
and  
permanent  
jobs

High number  
of second  
homes

Improvement  
of waste  
disposal and  
collection  
services

More  
affordable  
prices for  
cultural  
activities

**Accessibility** was by far the most discussed topic during the session. The disabled community expressed the need for better access to the towns, shops, footpaths (particularly the Aberaeron to Llanerchaeron path), disabled toilets, nightclubs, restaurants and certain venues such as Aberystwyth Art Centre. The lack of adequate public transport, the Safe Zones (introduced in Ceredigion to keep people safe as businesses re-opened after the first lockdown), lack of level access and scarcity of disabled parking were barriers to accessing these venues and services. Participants also highlighted that shopping locally was important to them, and suggested whether local deliveries (which started in lockdown) could be encouraged as online shopping was far easier than going in to town.

## Ceredigion Children & Young People Services Provider Forum

**Ceredigion Children & Young People Services Provider Forum** virtual stakeholder event was held on the 20<sup>th</sup> of September 2021, twenty-eight people participated in this event, voicing their opinion on well-being issues specifically related to children and young people's services in Ceredigion. It is positive that this session was very well attended, particularly as the Assessment and subsequent Local Well-being Plan will need to ensure that the needs of our younger population and future generations are met.

## Key points raised in relation to well-being during the Children and Young People Services Provider Forum stakeholder event

Better  
employment  
opportunities

More leisure  
activities for  
young people

Better public  
transport  
networks

Positive impact  
of cultural  
events on the  
Welsh  
language

High cost of  
living

This event provided an important insight into the key challenges and assets of Ceredigion in relation to children and young people. The need for **greater employment opportunities** in Ceredigion to retain the younger population was prevalent throughout the session. Participants highlighted that better paid and higher skilled jobs were required, in addition to jobs with career progression (instead of seasonal work at minimum wage). Participants were concerned about the **high cost of living** for younger people, particularly because it makes it difficult for them to afford a house in their local area.

The **lack of and affordability of leisure activities for younger people** was a common concern, participants noted that community pubs are declining, arts and cultural activities are often too expensive, and that there was a lack of community spaces for people to meet within rural areas. A suggestion was put forward to utilise the village halls to provide activities in rural areas, the Arts of Well-being Compassionate Communities Project was used as a good example of a well-received event.

The lack of **public transport networks** shared concern amongst the attendees, who expressed deep dissatisfaction with the recent reduction of the T1 bus service which has prevented some of the children and younger people accessing their services. The need to improve the rural transportation link was a priority for them.

Cultural events such as the Eisteddfod, Royal Welsh and Young Farmers Clubs were seen as being very **important to the maintenance of the Welsh language and thriving culture** of Ceredigion. Participants raised their concerns about the **high levels of littering** and suggested integrating environmental activities into the school curriculum on the damaging impacts of littering. However, it was made very clear through the school's well-being survey that children and young people have a great appreciation for the environment in Ceredigion.

## Give Us Support

A stakeholder event was held face-to-face with **Give Us Support** (GUS) on the 5<sup>th</sup> of October 2021, which was facilitated by RAY Ceredigion. Four attendees contributed to the discussion on young people's well-being in Ceredigion. This session was structured slightly differently compared to the other stakeholder events to help facilitate the discussion, whereby 3-4 questions were asked on each well-being theme. The following provides an overview of the key results.

On the whole, the young people in attendance did not want to stay living in their local area. Participants wanted to **seek work or education opportunities** (University/ Apprenticeships) outside of the county or move to be closer to their family. Future concerns were raised over **poverty, finding a job and housing**. On the whole, the young people participating felt that they were part of their community, however, again, the **lack of activities and spaces to socialise** locally was a common concern.

The future of **community safety** was raised as a concern by half of the young people in attendance. A comment included, "Feel safe now but worried about my safety in the future". This concern was shared across the different forms of engagement on well-being (stakeholder events, PSB workshops, well-being survey and Have Your Say Ceredigion).

The majority of the young people in attendance felt that they were **connected to their local environment**. Concerns were raised on the future of the environment because of the impact of COVID-19 pandemic, global warming, over-population and littering.

#### Key points raised at the Give Us Support stakeholder event



### Youth Council

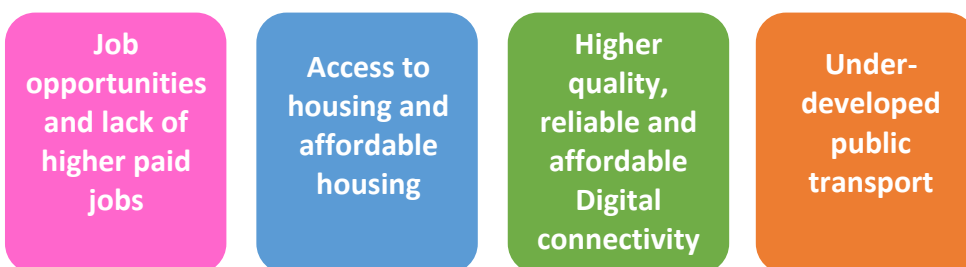
The **Youth Council** held their stakeholder event with 17 young people in attendance. The following provides an overview of the key points raised during the event.

**Job opportunities, housing, transport, digital connectivity** and **future needs** were the topics which stimulated the greatest discussion during the stakeholder event. Again, job opportunities in Ceredigion were viewed as largely negative, the **lack of higher paid jobs** and opportunities available were raised as concerns. Housing was seen in a similar light, **unaffordable housing, long waiting-list for council housing, lack of understanding on the buying process** and **lack of support for younger people to buy**, were some of the concerns raised.

Again, the younger people in attendance felt that the **public transport network is underdeveloped**, which limits job opportunities. Greater availability of bus times, better bus networks in the rural communities and a rail network linking the north to the south of Ceredigion were put forward as suggestions.

When asked about their future needs, **better quality, consistent and more affordable digital connectivity** was the most prevalent answer given. Increasing the **minimum wage** was also highlighted, in addition to **improving transport links** to enable better access to job opportunities.

#### Key points raised at the Youth Council stakeholder event



### Corporate Equalities Working Group

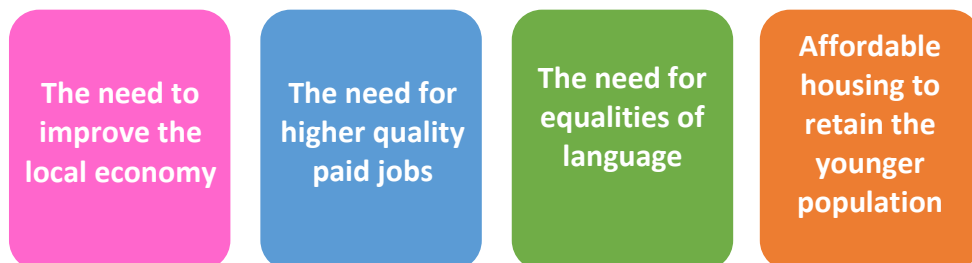
A stakeholder event was held with the **Corporate Equalities Working Group** on the 9<sup>th</sup> of July 2021, nine people attendant this event to give their views on well-being in Ceredigion in terms of equalities.

Overall, participants felt that **equalities has improved** in Ceredigion since the last Assessment of Local Well-being. This was expressed largely as a result of the new services that the local authority has put in place, these included but were not limited to; establishment of Porth Y Gymuned, creation of a larger Community Cohesion Team and development of Well-being Centre. However, it was felt that the pandemic has had a significant negative impact on

play and social opportunities for children and young people, especially for people with disabilities. In order for Ceredigion to become a more equal place, the Corporate Equalities Group would like to see more **affordable housing, affordable and accessible transport, better disability access and flexible working**.

The top concern was in relation to improving the local economy to create **higher paid and higher skilled jobs** to retain the younger population and address the **ageing population** crisis.

#### The key future challenges to well-being and equalities identified by the Corporate Equalities Working Group

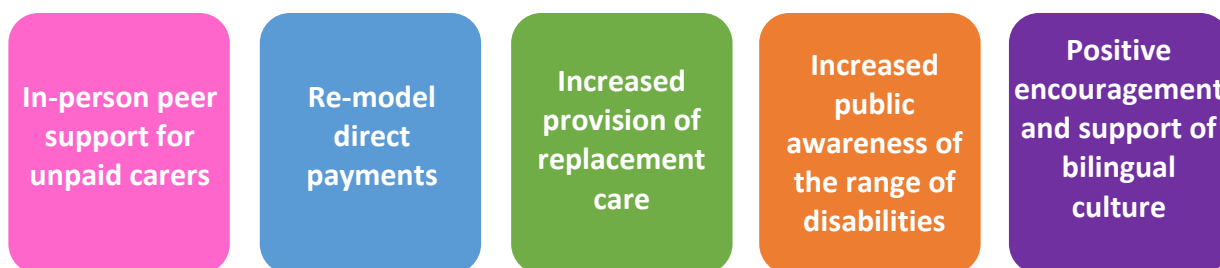


### Ceredigion Carers' Alliance

The PSB ran a stakeholder event with **Ceredigion Carers Alliance** on the 8<sup>th</sup> of September 2021. Eleven members of the Carers Alliance contributed their views on what needs to change to secure well-being for future generations. The **lack of replacement care** and the detrimental impact on unpaid carer's ability to work, attend training and spend time with family was raised as a significant concern. Again, the need for **appropriate and affordable housing** was highlighted as it not only impacts the cared for but also the unpaid carer. The Carer Alliance members expressed their deep concerns on the **limited earning ability** of unpaid carers, as often working hours are reduced, or work is discontinued altogether. Not only does this limit their earning potential in the present time, but in the future due to the loss of earnings through their pension. Allowing unpaid carers to **access services in their language of choice** is a realm important to them.

Again, **greater accessibility** to the natural environment was important to members, a suggestion was made to provide beach wheelchairs that would allow the cared for person to use. The **impact of climate change and extreme weather** on the cared for persons economic well-being was raised, for example, hotter summers has meant that carers are finding it challenging to keep those they care for cool, many reporting an increase in energy costs.

#### Key suggestions put forward to secure the well-being of carers and cared for person in the future



### Armed Forces Group

A regional stakeholder event was held with the **Armed Forces Group** so that members had the opportunity to voice their views on what needs to change to secure the well-being of future generations.

Again, the need for **higher paid jobs** in West Wales was raised, often the jobs veterans seek are lower paid in the community than what was paid for their skill set in the Armed Forces. Members highlighted need for **greater support and advice on transferring from the Armed Forces into the local labour market** (e.g. advice on how to fill in CV's,

types of suitable jobs available). **Integrating back into the community** was important to veterans, as was the appreciation for the environment and outdoor spaces. Members felt that there needed to be **more investment in useable outdoor spaces** in their local communities.

Need for  
higher paid  
jobs

Greater  
support for  
veterans  
joining the  
local labour  
market

Importance  
of integrating  
back into the  
community

More  
investment in  
useable  
outdoor spaces

## Town and Community Councils

**Housing affordability** is a major challenge for the young and old – house prices are rising significantly in the county and local people are concerned about second homes. There is a shortage of suitable housing for first time buyers and last time buyers who will buy for the last time. There are no options for older people to buy smaller houses that are cheaper to run. Many older people experience housing poverty.

Impact on **Welsh language and culture** as a result of properties being bought up by those from outside Ceredigion and not local people. Important that the Welsh language is protected for future generations, and one of helping to do that is to celebrate the language.

**Job opportunities** – a greater variety of jobs are required in the county, along with larger sized businesses. Business support – greater support to entrepreneurs and smaller businesses is needed.

**Green economy** - there's opportunities in Ceredigion to develop a green economy. Need to focus on the agriculture economy and look at different structures within Ceredigion.

**Environment** – people value the environment in communities. Cleanliness and waste collection is very important. We also need to keep water and land clean. Attitudes to the local environment are an asset - people are very proud of the environment in Ceredigion and want to be a part of it.

**Population change** – greater partnership working is needed to keep people in the county.

**Feeling safe** - Many people don't feel safe within their community, particularly in Aberystwyth which doesn't feel as safe as what it did ten years ago. Anti-social behaviour has become a big concern within communities in Ceredigion, particularly drug misuse in Aberystwyth. However, many people have felt safer in Ceredigion during the pandemic rather than in other areas.

### Key points raised at the Town and Community Council events

Housing  
affordability  
for younger  
people and  
local people

Protecting the  
Welsh  
language for  
future  
generations

High number  
of second  
homes

Improvement  
of waste  
disposal and  
collection  
services

More  
affordable  
prices for  
cultural  
activities



# HAVE YOUR SAY CEREDIGION

Our Have your Say Ceredigion site offered participants the option to write and comments on 'ideas' for Ceredigion.

By far the thing that was mentioned the most here was the **loss of green spaces** in Ceredigion and how this could affect many different things. Some of the things that concerned people around the loss of green spaces were the loss of biodiversity, wildlife, flowers. Additionally, green spaces can provide an area for someone to walk, exercise and improve their mental health.

Another 'idea' mentioned was that **empty properties** could either be used to help businesses start up or could be used instead of building new housing developments and therefore losing green spaces.

## Key suggestions put forward to secure the well-being of carers and cared for person in the future

Loss of Green  
Spaces

Use of Empty  
Properties

# PROTECTED CHARACTERISTICS

## Young People (17-24 year olds)

Young people aged between 17 and 24 year olds made up 7% of all responses to our Well-being Survey, there were 28 responses from this age cohort in total.

In order to help make things fairer for all, young people would be most likely to talk to someone from a different background, belief and/or who is a disabled person (75%), compared to 56% of all respondents. Additionally, younger people would be more likely to report a hate crime (71%) compared to 63% of total respondents.

Many of the other responses from younger people corresponded to what the top responses were throughout the survey. This said, younger people were more likely to consider recycling more (79%) compared to 74% of total respondents, in order to improve their local environment. Younger people were less likely to consider reducing waste (64%) compared to 73% of all other respondents.

## Welsh Language (those who can understand spoken Welsh)

Over half (54%) of respondents to our Well-being Survey noted that they could understand spoken Welsh, 215 respondents. 147 respondents said that they could **not** speak, read, write or understand Welsh (37%).

There were differences between these two groups in some answers, especially those around the Welsh language. Over 53% of the respondents who could understand spoken Welsh said that they would consider participating in schemes to support young people to live and work locally in order to achieve a vibrant culture and thriving Welsh language, this is compared to 30% of those who could not speak, read, write or understand Welsh.

19% of respondents who could understand spoken Welsh believed that a lack of Welsh education school/colleges was something that concerned them the most about the county's vibrant culture and thriving Welsh language, in future. This is compared to 3% of those who could not speak, read, write or understand Welsh.

## Ethnic Groups

11 respondents (3%) said that their ethnic group was 'Other white, including Gypsy or Irish Traveller', 4 (1%) respondents were mixed/multiple ethnic groups, 3 identified as being another ethnic group (Northern Irish, Greek Jewish Welsh, White Canadian) and 1 respondents (0%) said their ethnic group was Black/African/Caribbean/Black British.

Similar trends are seen in the results from the ethnic minorities as is seen in the overall survey results. For example, the majority of respondents from ethnic minorities said that they would consider reducing waste (89%), recycling more (89%) and use locally produced food (89%) to improve their local environment.

72% of responses from ethnic minorities said that prejudice was something that concerned them the most about their community in future, compared to 42% of total respondents. 72% of responses from ethnic minorities also noted that they would like to learn or improve their Welsh language skills, compared to 46% of total respondents.

## Respondents with a disability or health problem

Out of the 405 survey respondents, 82 (20%) had a health problem or disability which limits their day-to-day activities. Overall, the top three answers provided by respondents with a disability or health related problem were similar to the total responses, however, in some areas, such as the economic and health sections, the order of the most common responses varied.

Respondents with a disability or health problem placed a higher value on *a good transport network* (54%) compared to 45% total respondents. Public transport can be a lifeline to people with disabilities and health problems, as some may not own a car or won't be able to drive. We know that public transport in Ceredigion has experienced service cuts in recent years and some routes have been discontinued, which has disproportionately affected this group. This group were also more concerned about *not being able to get support when unwell and unable to look after themselves* (52%), compared to 33% total respondents. This is unsurprising, as people with disabilities or health problems may already have a greater awareness of their health implications, and how these may deteriorate as they get older.

## **Pregnancy and Maternity**

1 respondent noted that they were expecting a baby, 2 respondents noted that they had a baby in the last six months and 1 respondents noted that they were currently on maternity leave.

Unsurprisingly, the majority of these respondents (3 out of 4 or 75%) noted that sufficient and affordable childcare was something that would need to be in place in order for them to improve their prosperity, compared to just 16% of total respondent's. Additionally, the majority of these respondents (75%) noted that schools preparing our children for a changing world and to be leaders of change was one of the top three things they valued the most about being globally responsible, compared to 24% of all respondent's.

## **Gender**

Our well-being survey had significantly more female participants compared to males. Out of the 405 survey respondents, 280 (69%) were female, 112 (28%) were male, whilst 5 (1%) preferred another term.

When considering a prosperous community, male participants placed a greater value on income security than females, with 48% selecting a stable income compared to 34% of females. In terms of healthcare, more males (54%) were concerned about not being able to access healthcare or other support, as close to home as possible or available through technology, than females (33%).

The majority (80%) of respondents who preferred another term for their gender were concerned about employer/education providers not being prepared to make reasonable adjustments for employees of different ages, sexes, gender, races, background, beliefs and/or who are disabled, in future. This is compared to 24% of females and 16% of males. 100% of the respondents that preferred another term for their gender, valued people in their local area treating each other with respect more than males (50%) and females (50%).

## **Gender Reassignment**

32 respondents (8%) noted that their gender was not the same gender as was assigned at birth. Many of the responses from this group did reflect the overall results from the well-being survey. There were some anomalies in terms of being equal and in terms of community cohesion, as discussed below.

In terms of making things fairer for all, those who noted that their gender was not the same gender as was assigned at birth were more likely to report a hate crime (72%) compared to 58% of total respondents. Coinciding with this, this characteristic were more likely to raise a concern about unfair treatment (66%) compared to all respondent's (56%), in order to make things fairer for all.

In order to achieve good community cohesion, those who noted that their gender was not the same gender as was assigned at birth, thought that more information on well-being services was needed in Ceredigion (53%), compared to 39% of total respondents.

## **Sexual Orientation**

A total of 41 respondents noted that they were not heterosexual/straight. There were 21 respondents (5%) who noted that they were bisexual, 7 respondents (2%) were gay women/lesbian, 8 respondents (2%) said other and 5 respondents (1%) said they were a gay man.

In order to achieve good community cohesion, those who noted that they were not heterosexual/straight were far more likely to challenge negative stereotyping (71%) compared to 43% of total respondents. Additionally, these respondents thought that we should appreciate and positively value the diversity of people's backgrounds and circumstances more (63%) compared to 42% of all responses.

63% of respondents who noted that they were not heterosexual/straight that they would need to feel confident that raising concerns of unfair treatment/reporting a hate crime would not have negative consequences for them or their family, in order to make things fairer for all, compared to 51% of all responses. Also in terms of striving to be equal to all, those who were not heterosexual/straight were more likely to want to talk to someone from a different background, belief and/or who is a disabled person (73%), compared to 52% of all respondents.

### **Marriage and Civil Partnerships**

Half of respondent's to the survey, noted that they were married (50%), 24% noted that they were single, 10% were divorced/separated, 5% were in a Civil Partnership and 5% were widowed.

One area where there were some differences between these groups were regarding a healthier Ceredigion. Those who were widowed were most concerned about not having access to healthcare or other support, as close to home as possible or available through technology (61%), this is compared to 57% of those who were married or in a civil partnership, 56% of those who were divorced or separated and 40% of those who were single.

### **Religion and Beliefs**

Most of our respondents noted that they either had no religion (50%) or that they were Christian (all denominations) (29%). 1 respondents said that they were Jewish (0%), 1 said that they were Muslim (0%), 4 respondents (1%) noted that they were Buddhist and 17 respondents said that they were part of another religion (4%).

The majority of respondents who noted that they were either Jewish, Muslim, Buddhist or other (74%) said that being accepted for who they are, was one of the things they valued most about living in an equal society, this was compared to 41% of those who noted that they were Christian or had no religion.

Additionally, in order to achieve good community cohesion, 42% of those who were Christian or had no religion would challenge negative stereotyping, compared to 65% of those who noted that they were either Jewish, Muslim, Buddhist or other.



# 12: Feedback from Project Group Workshops

During May and July 2021 a series of workshops were held with Ceredigion's PSB Project Groups as part of the preparations for the Assessment of Local Well-being. These sessions included interactive polls and discussion questions. The aim was to record initial feedback on well-being themes in the county, identify data sources and also seek views in preparing for the engagement and writing of the Assessment. These sessions were successful and a summary of the main findings are listed below.



## ENTERPRISE & INNOVATION

- **Housing Affordability** - Rising house prices means it's difficult for local people to buy homes.
- **Economy** the economy will see challenges due to **demographic change** and in particular the ageing population and outward migration of young people.
- **Skills shortages** could hold businesses back and the construction sector, in particular, is predicted to see a skills shortage.
- **Better paid jobs** are needed in the economy to provide opportunities for young people to remain in the area.
- **Talent drain** – concern that skilled people from local areas are moving elsewhere.
- Remote locations may struggle to access **high speed broadband** which could hold back businesses in these areas, specifically farmers and food producers.
- There is an over-reliance on the **public sector** in Ceredigion, and more **private sector** businesses need to be created, particularly medium and large sized businesses.
- **Tourism sector** has improved since the COVID-19 pandemic. Visitors are coming to Ceredigion more often for shorter breaks.
- Private sector essential for creating **job opportunities** for young people and keep them in the area.
- More businesses are **trading online** and customers more conscious about how they can **support and buy locally**.
- A potential 'benefit' of COVID-19 was identified as the heightened **awareness of mental well-being** in the work place and that businesses have been supporting their staff more.



## CLIMATE CHANGE & NATURAL RESOURCES

- Senior engagement in **sustainability** has improved.
- The declaration of the **Climate Emergency** has recognised importance of the situation.
- Decline in the sense of being **part of the community** mainly due to COVID-19 restrictions.
- There is increased **anxiousness** within communities due to COVID-19 and more concerns around **behaviour and health**.
- **Public transport is deteriorating** – people who don't own a vehicle cannot rely on public transport.
- Species and **biodiversity loss** is a major problem.
- **Phosphate levels** in the Teifi is a concern but this has been recognised and means that action is being taken.



- The declaration of the **nature emergency** by the Senedd is positive.
- The increase in **extreme weather events** such as increase in temperatures will mean we need to think more about keeping houses cool in summer as well as insulating during the winter.
- **Population change** - challenge to rebalance age distribution of population, i.e. retraining opportunities and skills to keep people in the county.
- Achieving **Carbon Neutral** by 2030 will involve huge financial costs.
- **Rising sea levels** could mean that some areas are under water in 40 years' time.



## CO-LOCATION AND INTEGRATION OF FRONTLINE SERVICES

- **Early Yeas support** and in particular midwifery is successful in Ceredigion.
- **Accessible and affordable childcare** has become increasingly important the COVID-19 pandemic, and the Childcare Hubs that were created for key workers' children highlighted this.
- Employers are more understanding of **childcare issues** following COVID-19 and employers are now more willing to be flexible with staff regarding around childcare needs.
- There are **less childcare opportunities** following COVID-19 - 4 after schools clubs have closed parents working from home need to be more flexible.
- **Recruitment problems** mean that there are less childcare workers and some parents/children are being turned away.
- The pandemic has also highlighted that **carers' level of pay** does not reflect their duties.
- There are **many skilled young people** in Ceredigion, but not able to get to jobs that they are qualified to do. For example, long waiting lists for driving tests means people do not have a license and which is essential in Ceredigion.



## RESILIENCE TRAINING

- There is a greater awareness of **employee well-being** following COVID-19.
- **Access to rural services** has improved during the COVID-19 pandemic as services are now being delivered online, which is a benefit particularly for particularly for younger people. For example, the delivery of online learning (e-sgol), increases accessibility for children wanting to join certain lessons and provides more flexibility of working.
- **Flexible working** has improved as people can now work at times which are more suited to their home-life, positively impacting on individual well-being. There is also a greater acceptance that flexible working can benefit an organisation and does not impact negatively on productivity.
- **Social media** is being used as a platform for people to use to gain better support in relation to well-being issues.
- **Working remotely** has made it more challenging to support people who are struggling with their mental health. It is more difficult for people to reach out for support and also for managers to notice any issues.
- **Social media** and digitization is both positive and negative. Children in particular are using mobile devices and social media more than they used to instead of going outside to play.



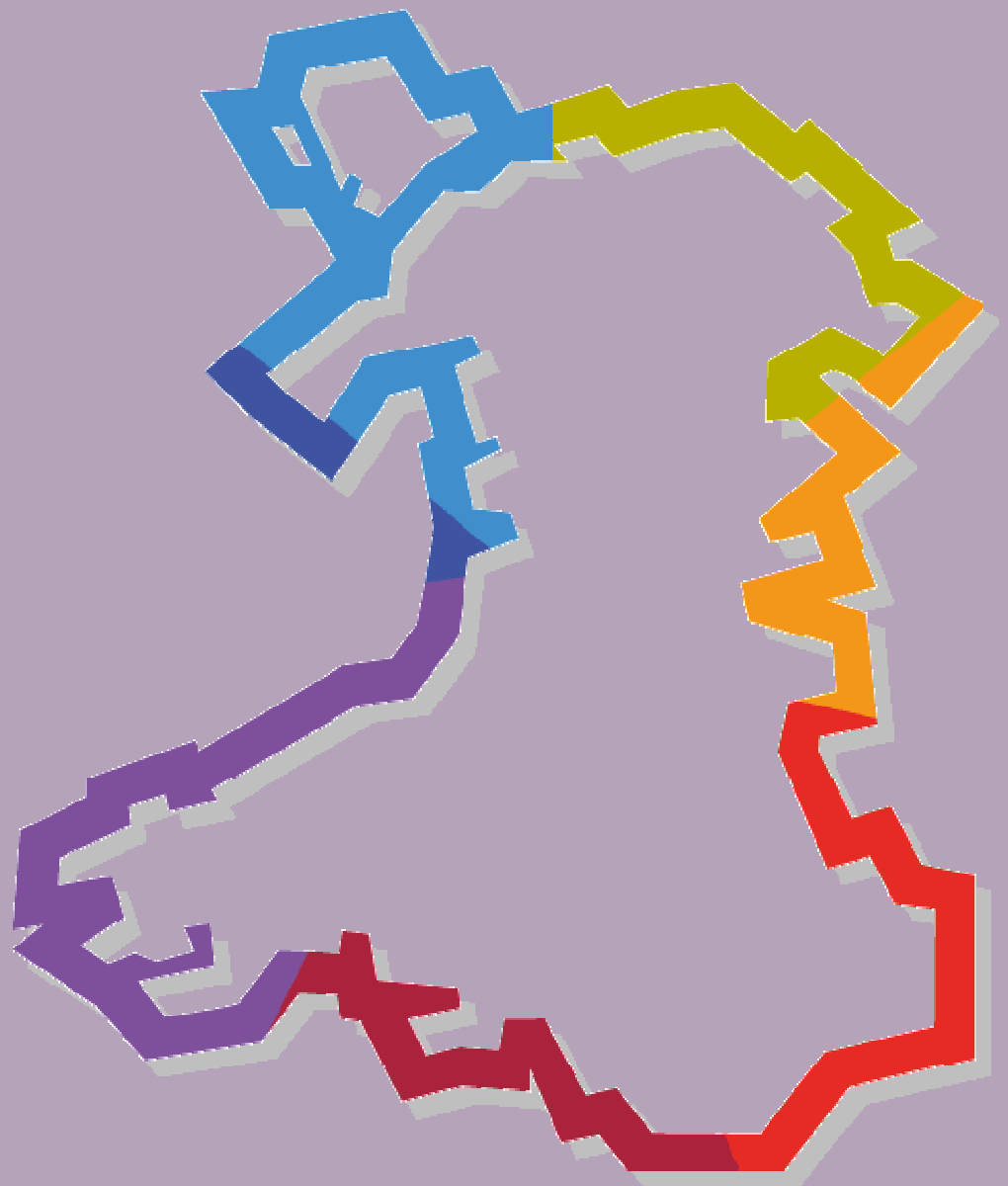
## UNDERSTANDING OUR COMMUNITIES

- The COVID-19 pandemic has been positive in **bringing people and communities together**.
- The increasing use of **social media** can be seen negatively or positively.
- Issue like COVID-19 and Brexit have had an impact on **community cohesion**, as people with strong opinions are voicing them and community tensions can rise as a result.
- **Loss of jobs and lack of financial security** as a result of COVID-19.
- **Access to services** - COVID has highlighted the issue of **rurality** and those who are '**digitally excluded**'.
- **Mental Health** is a concern as people are feeling more **isolated** and there is increased **anxiety** around things going back to normal after COVID-19. Concern also around delays in **healthcare** as a result of the pandemic.
- Good **community cohesion** requires spaces where people from different backgrounds can come together.
- Ceredigion has an **ageing population** and it is likely that **healthcare needs will increase**. This is combined with a decrease in the working age population. There are concerns around how the health sector will cope.
- **Environmental concerns** around climate change the need to protect the environment.
- **Housing affordability** – The lack of housing in Ceredigion and particularly the lack of affordable houses for young people is causing young people to move out of the county. People buying second homes in more rural areas are causing community cohesion concerns.



# Pembrokeshire

## Well-being Assessment





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Status: **Final Version**

Approved by PSB: **15/03/22**

Publication date: **May 2022**

An **Easy Read Version** of this document is available upon request from Pembrokeshire County Council. **Mae'r eitem hon ar gael yn Gymraeg hefyd / This item is also available in Welsh**



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# FOREWORD

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I am delighted to introduce the second Well-being Assessment for Pembrokeshire produced by Pembrokeshire's Public Services Board (PSB).

Pembrokeshire's PSB is a statutory partnership established through requirements set out in the Well-being of Future Generations (Wales) Act. The Act requires that key public and third sector organisations in each local authority area come together and form a PSB and work collaboratively to improve the economic, environmental, social and cultural well-being of its area and the communities which comprise the area.

The Well-being Assessment looks at the key issues for people and communities in Pembrokeshire, across all facets of well-being, through analysis of key data, information sources and research, engagement with citizens and stakeholders, and consideration of future trends.

The PSB is required to produce its next Well-being Plan by May 2023. The Well-being Assessment is a crucial part of this process in that it provides the evidence base which enables the PSB to identify, prioritise and agree the objectives for the next Well-being Plan, and the actions we think we should take to improve well-being in Pembrokeshire.

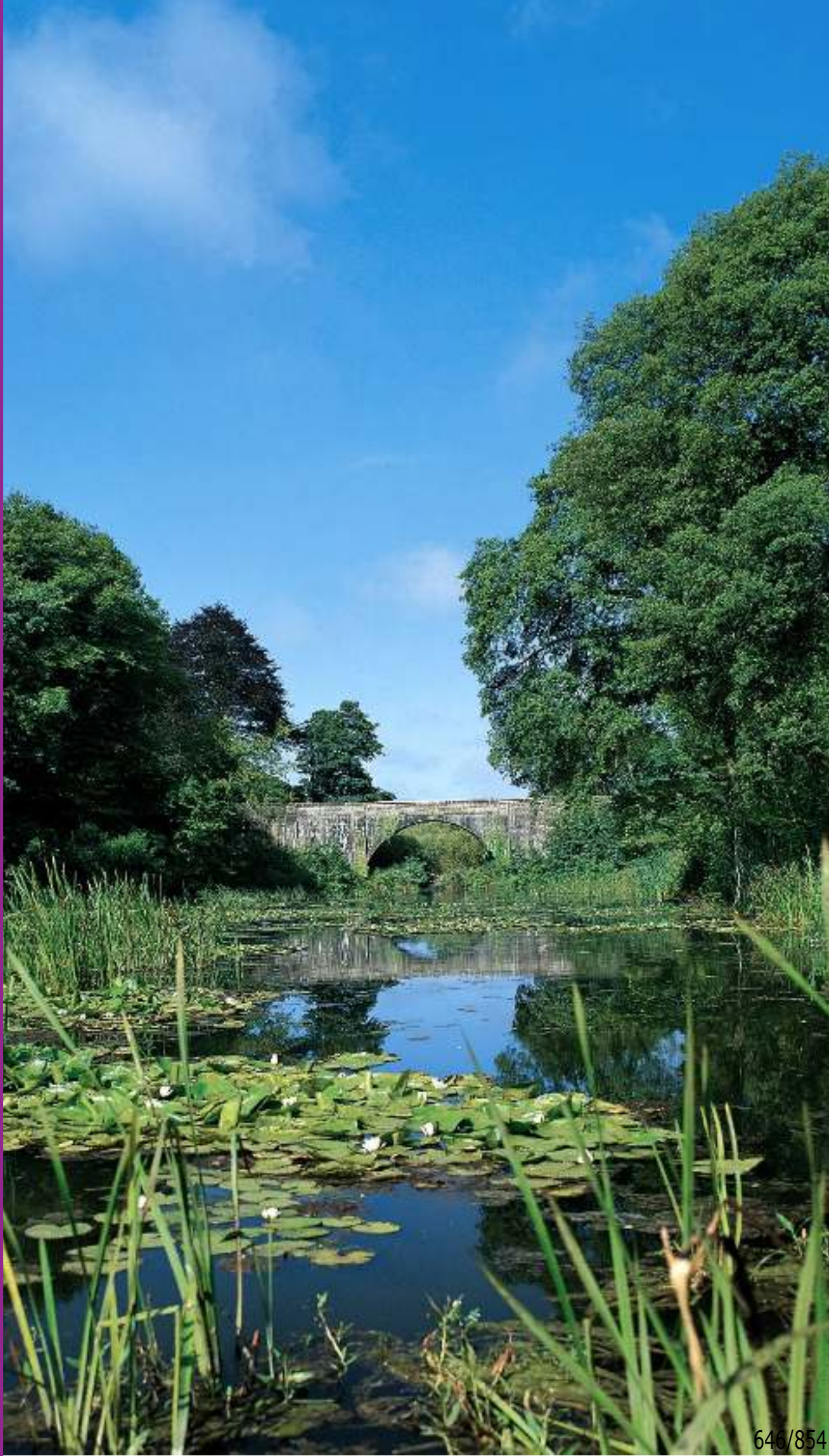
If you would like more information about the Well-being Assessment, Well-being Plan or more generally about PSB working, please contact Nick Evans, Corporate Policy and Partnerships Manager at [nicholas.evans@pembrokeshire.gov.uk](mailto:nicholas.evans@pembrokeshire.gov.uk) or visit the Pembrokeshire PSB web pages here: [Public Services Board - Pembrokeshire County Council](#)

Tegryn Jones

**Chair of Pembrokeshire Public Services Board**

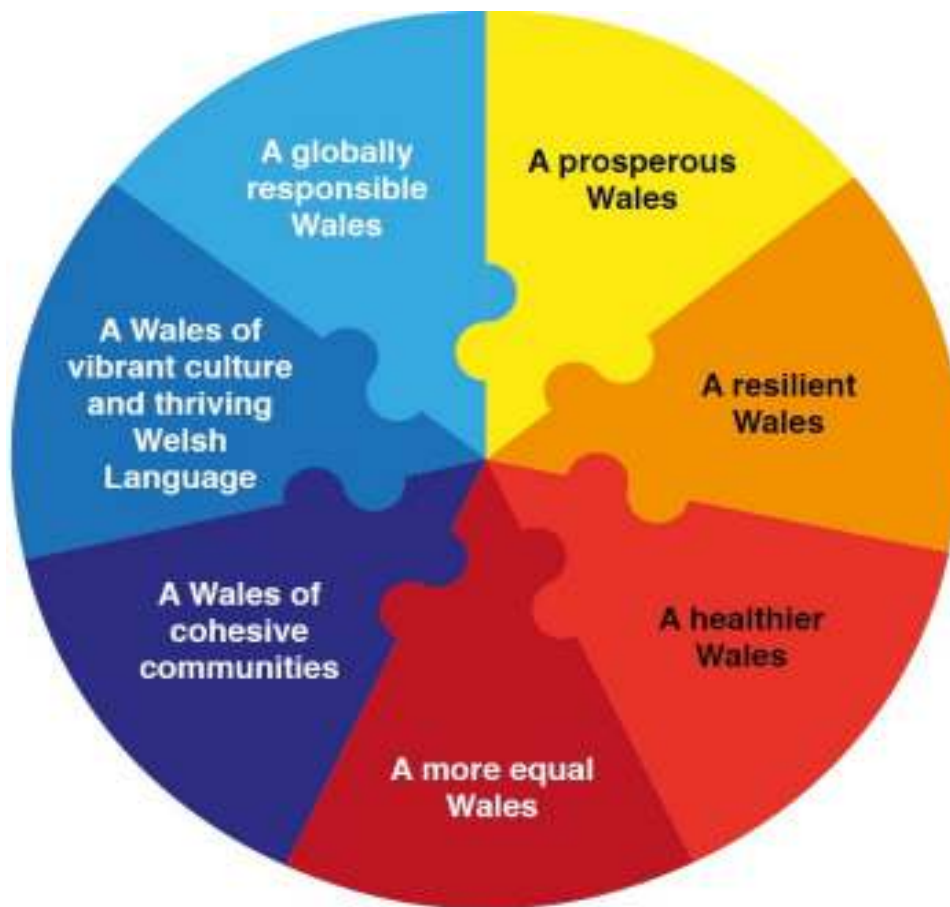


# INTRODUCTION



# Well-being of Future Generations (Wales) Act

The Well-being of Future Generations (Wales) Act 2015 is Welsh Government's flagship legislation designed to make Wales a better place to live. The Act establishes **7 national Well-being Goals** which set out the vision for what Wales aspires to look like now and in the future.



National Well-being Goal	Description
<b>A PROSPEROUS WALES</b>	An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing



	people to take advantage of the wealth generated through securing decent work.
<b>A RESILIENT WALES</b>	A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).
<b>A HEALTHIER WALES</b>	A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
<b>A MORE EQUAL WALES</b>	A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).
<b>A WALES OF COHESIVE COMMUNITIES</b>	Attractive, viable, safe and well-connected communities.
<b>A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE</b>	A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.
<b>A GLOBALLY RESPONSIBLE WALES</b>	A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

## Public Services Board (PSB)

The Well-being of Future Generations Act requires that a PSB is established in each local authority area. As required under the Act, Pembrokeshire's PSB brings together

key organisations to work collectively to improve the economic, environmental, social and cultural well-being of people and communities in the county.

While the focus of Pembrokeshire PSB’s work is local, the national Well-being Goals provide the overarching framework for its work. By aligning local activity with these Goals, the PSB can make a contribution to improving the well-being of Wales as a whole.






Pembrokeshire’s PSB is comprised of senior representatives from the following organisations and sectors:

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>• Pembrokeshire County Council</li><li>• Mid and West Wales Fire and Rescue Service</li><li>• Pembrokeshire Coast National Park Authority</li><li>• Pembrokeshire Association of Voluntary Services</li><li>• PLANED</li><li>• Public Health Wales</li><li>• Job Centre Plus</li><li>• Town and Community Councils</li></ul> | <ul style="list-style-type: none"><li>• Hywel Dda University Health Board</li><li>• Natural Resources Wales</li><li>• Dyfed-Powys Police</li><li>• Port of Milford Haven</li><li>• Pembrokeshire College</li><li>• Police and Crime Commissioner</li><li>• National Probation Service</li><li>• Welsh Government</li></ul> |
|--|--|

## Sustainable Development

Sustainable development is the underlying key principle of the Well-being of Future Generations Act. One of the simplest ways of thinking about what this means in practice is that we should always look to work in ways which ensure that the needs of present generations are met without compromising the ability of future generations to meet their future needs.

A key feature of this approach is to demonstrate a commitment to what is known as ‘the 5 ways of working’ - also known as the ‘Sustainable Development principle’ - in all of the PSB’s work, as set out below.

	<b>Long term</b>	The importance of balancing short-term needs with the needs to safeguard the ability to also meet long-term needs
	<b>Integration</b>	Considering how the public body's well-being objectives may impact upon each of the well-being goals, on their objectives, or on the objectives of other public bodies
	<b>Involvement</b>	The importance of involving people with an interest in achieving the well-being goals, and ensuring that those people reflect the diversity of the area which the body serves
	<b>Collaboration</b>	Acting in collaboration with any other person (or different parts of the body itself) that could help the body to meet its well-being objectives
	<b>Prevention</b>	How acting to prevent problems occurring or getting worse may help public bodies meet their objectives

## What is the Well-being Assessment?

Put simply, the PSB is required to do three things under the Well-being of Future Generations Act:

- Produce a Well-being Assessment (once every 5 years)
- Produce a Well-being Plan (once every 5 years), which should set out Well-being Objectives and the actions the PSB will take to achieve them
- Produce an Annual Plan reporting on progress made to meet its Well-being Objectives

This is the second Well-being Assessment produced by the PSB since the introduction of the Act. Its purpose is to provide a clear picture of what matters to people in terms of individual and community well-being, considered through a broad lens of economic, environmental, social and cultural factors. It is informed by data, research and evidence gathering, from listening to people and stakeholders, and

through consideration of future trends and the things which we can realistically project might happen tomorrow, which we need to start planning for today.

In short, the Well-being Assessment is the evidence base for the Well-being Plan. This makes it an extremely important and valuable document, as this is the starting point for the PSB in identifying and determining what it will do over the next 5 years to improve the well-being of people and communities in the county.

## Producing the Well-being Assessment

### General methodology

The Well-being Assessment has been produced through a collaborative approach at both a local and regional level. As was the case with the first assessment in 2017, Pembrokeshire's PSB has worked closely with colleagues in Carmarthenshire and Ceredigion PSBs to plan and prepare the assessments in order to share resources and expertise, build capacity, and to provide a broadly consistent approach across the region, which is beneficial given the number of partners who are represented on more than one PSB.

The regional Public Services Board/Regional Partnership Board (RPB) Lead Officers Network provided oversight of the process on behalf of the respective PSBs and the RPB, and planned and co-ordinated work to ensure a thorough and comprehensive approach towards producing the assessments. This involved establishing a number of sub-groups consisting of key stakeholders and experts to oversee specific elements of activity, such as:

- the Joint Methodology Sub Group
- the Regional Engagement Group & Survey Sub-Group
- the Regional Data Analysis & Writing Group

A Regional Joint Methodology Framework was developed to set out the general principles which would underpin the production of the assessments across the three counties. More information on this can be found at Appendix 1.

Similarly, a Regional Engagement and Consultation Framework was produced to establish a common approach to undertaking engagement and consultation at a regional level. More information on this can be found at Appendix 2.



While the common regional approach has proved valuable in establishing consistent principles and reducing duplication, it is still incumbent on each PSB to produce its own individual assessment and therefore flexibility is built into the process to ensure the specific local needs of PSBs can be met.

As an example of this, a Pembrokeshire PSB Engagement Group has been established to plan and deliver activities at a local level. This group is Chaired by the vice-chair of the PSB and has strong representation from the third sector and other key stakeholders.

## How is the assessment structured?

We have amended our approach following feedback we received from producing our first Well-being Assessment. At that time, we provided a brief synopsis of the broad themes of well-being, with the main body of the document focussed on individual life stages, and how different facets of well-being influenced an individual's sense of well-being depending on where they were on their life journey. We then explored in a separate section the issue of future trends and what things will likely influence well-being looking at a longer-term horizon.

Some of the feedback we received commented that this did not present the information in a fully integrated manner and that by focussing solely on life stages there was an insufficient focus on some of the broader population or community impacts of macro issues such as the environment, climate change, health and the economy and how these, and other issues, cut across all life stages and therefore need to be considered as such.

Having reflected on these comments we have decided to present our information in a more integrated way this time in an attempt to provide a fuller, more informed picture of how elements of well-being can be considered at a whole population, community and individual level. To this end, we present the information as follows:

### 1. Contextual / scene-setting information

- Pembrokeshire in context
- The impact of Covid-19
- Poverty as a cross-cutting issue

These opening sections set the context for the assessment.

The first of these provides an understanding of 'place' and establishes the broad demographic and population profile and characteristics of the county.

The second of these recognises the impact the Covid-19 pandemic has had at a broad level in the county. The world is a very different place to what it looked like when we produced our first Well-being Assessment five years ago, and the pandemic has fundamentally changed the way we think, work, operate and plan for the future. It would be remiss not to highlight the impact this has had as we are, at the time of writing, still very much living in a Covid-19 world and will continue to do so for the foreseeable future.

The third section provides a spotlight on poverty in Pembrokeshire at a broad level. It has become apparent that the issue of poverty is more concerning than perhaps we have previously recognised and our understanding of poverty in Pembrokeshire is becoming more developed. Poverty is a clear cross-cutting issue and the seriousness of the current situation demands a specific focus. This section draws out some of the key messages, which has prompted a re-think in our approach towards addressing the challenges presented by poverty, to the extent that we think it is too important an issue to wait until the production of our next Well-being Plan in 2023 to take action. Work is already underway to identify what the PSB can do collectively to tackle some of these issues and to this end the PSB meeting held on January 25 2022 had a specific focus on poverty. The PSB agreed the need to set up a multi-agency working group to see how partners in Pembrokeshire can work better together to tackle the issue of poverty in the county.

## 2. Exploration of 'big themes'

As we move into the main body of the assessment, each section has a primary focus on a 'big theme' issue, with consideration of the whole population or community, but also draws out the particular impacts as we see them for certain life stages as appropriate. This level of analysis is more useful or applicable for some themes than others. Each section also incorporates the views of people received from our survey and engagement work as relevant to the theme and also includes consideration of any future trends or projections that we are aware of as it relates to a particular theme.

The 'big themes' we have focussed on are:

- Health and Social Care
- Economy
- Housing
- Environment and climate change
- Education and learning
- Safe, cohesive and resourceful communities
- Culture and leisure

## Defining Community Areas

The Act requires the PSB to define specific community areas in Pembrokeshire as it is important we try to understand not only what well-being means to Pembrokeshire people as a whole but also to particular communities in Pembrokeshire. The PSB has flexibility to determine what these community areas should be though guidance suggests that they should be larger than ward level but not too large to render any community level analysis meaningless.

For our first assessment, we adopted a pragmatic approach and identified 3 broad "Community Areas" based on a statistical geography known as Upper Super Output Areas (USOAs). Purely for the purposes of that exercise we named these 'Mid & North Pembrokeshire', 'Mid & West Pembrokeshire' and 'South Pembrokeshire'. At the time we noted that the process had proved challenging, as in less populated, more rural areas such as Pembrokeshire the underlying factors influencing well-being are often commonly shared across the area as a whole. The approach was useful in understanding some strong cultural and linguistic differences across the three areas but lacked the more granular understanding of some of the differences which might be identified through analysis at a lower level geography.

We committed to reviewing the approach as part of the first assessment and feedback we received emphasised the need to look at things differently. Accordingly the PSB has explored a number of potential candidate geographies to see which might be most useful based on the data that is available. While no one solution is perfect, the PSB agreed that on balance the most useful community geography to use is that of Mid Layer Super Output Areas (MSOAs).

Using this approach, there are 16 community areas in Pembrokeshire as highlighted on the map below in blue. There are benefits to using MSOAs in that they are designed to have reasonably consistent population totals, which in the case of Pembrokeshire usually equates to around 7,000 people. This consistency in population size reduces unwanted statistical effects that result from geographies with varied population sizes such as Town and Community Councils. Notwithstanding this, there remain some disadvantages, with Haverfordwest split into north and south, Milford split between the town itself and Milford West, Hubberston and Hakin, and Pembroke town being split in two with each part incorporated into a broader area, which includes some peripheral villages. The table below the map shows which towns or villages comprise each MSOA.



	FriendlyNm	Survey area	
W02000126	Northeast Pembrokeshire	North Pembrokeshire	Boncath Cilgerran Clydau Crymych Eglwysrw Manordeifi Nevern

			St. Dogmaels
W02000127	Fishguard Area	North Pembrokeshire	Cwm Gwaun Dinas Cross Fishguard and Goodwick Newport Pencaer Puncheston Scleddau
W02000128	Northwest Pembrokeshire	North Pembrokeshire	Brawdy Hayscastle Letterston Llanrhian Mathry Solva St. David's and the Cathedral Close Wolfscastle
W02000129	East Pembrokeshire	Rural and south coast	Ambleston Clynderwen Llandissilio West Maenclochog Mynachlog-Ddu New Moat Rudbaxton Spittal Wiston Uzmaston, Boulston and Slebech
W02000130	Haverfordwest North	Main town	Haverfordwest (pt)
W02000131	Haverfordwest South & Merlin's Bridge	Main town	Haverfordwest (pt) Merlin's Bridge
W02000132	Narberth Area	Rural and south coast	Lampeter Velfrey Llanddewi Velfrey Llawhaden Martletwy Narberth Templeton
W02000133	West Pembrokeshire	Rural and south coast	Camrose Dale Herbrandston Johnston Marloes and St. Brides Nolton and Roch

			St. Ishmael's The Havens Tiers Cross Walwyn's Castle
W02000134	Neyland Area	Rural and south coast	Burton Freystrop Hook Llangwm Llanstadwell Neyland Rosemarket
W02000135	Milford Haven East	Main town	Milford Haven (pt)
W02000136	Saundersfoot / Kilgetty Area	Rural and south coast	Amroth East Williamston Jeffreyston Kilgetty/Begelly Saundersfoot
W02000137	Milford Haven West	Main town	Milford Haven (pt)
W02000138	Pembroke Dock	Main town	Pembroke Dock
W02000139	Pembroke East & Carew	Split 50/50 Main town and Rural and south coast	Carew Cosheston Lamphey Manorbier Pembroke (pt)
W02000140	Pembroke West & Angle Peninsula	Split 50/50 Main town and Rural and south coast	Angle Hundleton Pembroke (pt) Stackpole and Castlemartin
W02000141	Tenby Area	Rural and south coast	Penally St. Florence St. Mary Out Liberty Tenby

Throughout the assessment, these profiles have been used as Pembrokeshire's 'community areas' where the relevant data is available to support our understanding of the strengths and differences between areas within the county. It should be noted that data sets built on other geographies (be they regional, county or lower level) are used at various stages throughout the assessment to supplement this approach



where data is not currently available at a MSOA level or where it makes more sense to present the data using a different profile.

As we develop our approach we will look to build more detailed information around our MSOA profiles.

## Data and evidence gathering

Pembrokeshire's PSB worked with colleagues in Carmarthenshire and Ceredigion as part of the Regional Data Analysis and Writing group to understand well-being in the three counties. A wide range of local, regional and national sources were considered. PSB partners have also sourced and made available local level data to support our understanding of specific themes.

By working collaboratively across the West Wales region, we have also been able to identify cross-boundary well-being issues across the three PSB areas, such as climate change, child poverty and housing affordability. The identification of these regional issues will support regional well-being planning across West Wales following publication of the assessments in 2022.

It is worth highlighting some caveats when considering the data we have collected and used. The outcomes from the 2021 census will likely not be available until the middle of next year and therefore there are times when we are relying on census information from 2011. Such findings can only be seen as broadly indicative given the time which has lapsed since those figures were released.

The Covid-19 pandemic also presents some issues in terms of our understanding of data. Recent datasets reflect a particular moment in time and it is not yet clear the extent to which the pandemic has distorted these figures and whether we can expect these to be transitory or if they reflect deeper underlying factors. Similarly many datasets 'lag' with the reporting period often relating to a period of a number of years preceding the release of data. In such cases it is difficult to say with certainty what impact Covid will have had in terms of a contemporary position, other than to say its impact will generally have resulted in a situation having become worse.

## Engagement and consultation

The views of our citizens and stakeholders are central to developing our understanding of well-being and what really matters to people. They hold equal, if not more, weight with the datasets we have available, as they reflect the lived experiences of people in the county and provide greater nuance and context than that simply offered through quantitative analysis of data.

In preparation for the engagement, workshops were held with regional PSB partners in May and June to explore their ideas on how to conduct the engagement and the actual content of the regional Well-being Survey and stakeholder events. The engagement activities were developed based on these views, some examples of which were the desire to include more open-ended questions in the Well-being Survey, run the Well-being Survey in September after the summer holidays and conduct a specific schools survey to record responses from younger people.

In line with the agreed joint methodology, engagement was undertaken in the following ways:

- A joint regional engagement survey was developed and made available via partner website, and in hard copy format. As well as being available in English and Welsh, the survey was translated into Arabic, Polish, Romanian and Easy Read
- The survey was structured around the seven Well-being Goals. We asked four key questions under each goal: three key things; looking ahead what concerns you most; what would you consider doing to address the goal, and what support might you need to do this
- A separate, joint regional young people's engagement survey was also developed
- In addition to the joint regional engagement survey, an virtual ideas white board was set up at [www.haveyoursay.pembrokeshire.gov.uk](http://www.haveyoursay.pembrokeshire.gov.uk)
- A joint regional engagement session toolkit, which could be used either for facilitated sessions or for self-run sessions with / by local groups was developed



Information was sent directly to Town and Community Council clerks, Council Members and made available to employees via the Intranet and direct email. It was also shared with those on the Council's 'Have your say' and MyAccount databases.

The Council's communications team issued two press releases to the local media on the 1st and 30th September. This information was also shared on partners' social media sites and in various partner newsletters and publications.

A summary report of all engagement activity can be found at Appendix 3 and a full detailed report is available electronically on request. Key headline findings from all of the engagement activity has been incorporated into relevant sections as appropriate.

## Application of Sustainable Development Principle

As set out earlier, the PSB is required to apply the sustainable development principle to our planning and decision-making and we have adhered to the five ways of working throughout the delivery of this assessment. The table below provides examples of how and where this has been done, and how we will continue to do so.

 <p><b>Long term</b></p>	<ul style="list-style-type: none"> <li>• Forward planning undertaken by the well-established Regional PSB/RPB lead officers network</li> <li>• Development and roll-out of 'Gorwel' – this is a bespoke data information repository which has been commissioned by the 3 PSB's and is currently in the testing stage. In time this will support our understanding of gaps in our knowledge and data over the longer term</li> <li>• Horizon Scanning Training – will support the 3 PSBs with a greater understanding of future trends and projections and how to adequately plan for these</li> <li>• Well-being Survey – included questions on futures thinking based around the 7 national well-being goals</li> </ul>
 <p><b>Integration</b></p>	<ul style="list-style-type: none"> <li>• Structure of the assessment supports an integrated understanding of how issues affect people at a population, community and</li> </ul>



### **Involvement**

individual level; including consideration of future trends

- Planned collective 'visioning' session for PSB partners looking at what kind of place we want Pembrokeshire to be in the year 2040; will support greater integration and alignment between the PSB's objectives and the objectives of individual partner organisations, creating a sense of shared purpose and direction
- Opportunities for the broad involvement of citizens and stakeholders in the development of this work through various routes
- Establishment of Pembrokeshire Engagement Network
- Plans to re-establish the Pembrokeshire Co-production Network to support the development of the Well-being Plan
- Ongoing citizen engagement across the region currently being explored through the RPB, work which PSBs are contributing to so as to ensure that engagement becomes a built-in, continuous process rather than a one-off set-piece event



### **Collaboration**

- Assessment process planned and delivered through a strong collaborative approach at both a local and regional level, involving many key partners and stakeholders, including the RPB
- Development of regional well-being survey across PSB partners
- Collaboration with the RPB and Hywel Dda Health Board in the design of the survey to ensure questions included to support production of Population Assessment; removing duplication and creating closer alignment
- Regional Well-being Co-ordinator in post to work across the 3 PSB areas supporting work to produce the assessment, utilising WG PSB funding



### **Prevention**

- Outcomes from assessment point to number of potential areas where preventative work can be undertaken, to be taken forward at either a local

or regional level e.g. climate change, poverty, housing, accessibility

- Working in partnership as a region making best use of resources and expertise, preventing opportunities for missing evidence, data gaps or lack of capacity

This is Pembrokeshire's second Well-being Assessment we will continue to look to strengthen areas where we know there are gaps in our current analysis. There are broader areas for improvement and deepening our understanding where we need to do more work.

It should be noted that the timing for producing a Well-being Assessment is set out in legislation, and therefore it should be viewed as presenting a picture at a precise moment in time. As such, and because of ongoing uncertainties presented by the ongoing Covid-19 pandemic and other factors, it is important that the findings from the assessment are reviewed and updated regularly to take into account new information which will emerge over the next few years, so that our response will always be the most appropriate.

# EXECUTIVE SUMMARY





## Summary of Key Findings

The responses gathered from the various forms of engagement for the assessment have been considered alongside analysis of various sources of data and research. Clear themes have been identified in our county, which will allow us to target areas of need when we move from the assessment to planning phase over the course of the next year.

### Pembrokeshire in context

Young people's participation in democracy needs to be strengthened.

Welsh language use is increasing in the county.

Pembrokeshire is amongst the least ethnically diverse areas in Wales.

Democratic representation in Pembrokeshire, particularly within the Council, is not diverse.

Pembrokeshire has an ageing population, which will have impacts on public services and the local labour market.

Broadband provision is crucial to the economic development of the county.

Public transport in rural areas is a barrier to accessing services and employment opportunities.

### Covid-19

The Covid-19 pandemic is ongoing and creates uncertainty moving forward.

To date, vaccination rates in the county have been good.

Covid-19 has exacerbated issues such as mental health, loneliness and health inequalities.

Covid-19 has fundamentally changed the way some of us work.

### Poverty

Child poverty rates in Pembrokeshire are unacceptable.

In-work poverty is an increasingly common problem.

The cost of living is rising across the UK, with more working families experiencing poverty.

## Economy

Job satisfaction for people living in Pembrokeshire is high.

In some sectors, the wages in Pembrokeshire are comparatively low in relation to our neighbouring counties.

Pembrokeshire's town centres need to adapt to changing retail patterns.

Tourism is a crucial part of Pembrokeshire's economy.

Realising Pembrokeshire's ambition to become the green energy capital of the UK.

Young people have told us that they are not confident that they will be able to live and work in Pembrokeshire in the future.

The importance of digital connectivity is a priority for carers and people with a disability.

The agricultural sector will need to adapt to changing environmental regulations and support mechanisms.

Accessible and affordable childcare can be a barrier to parents returning to work.

The longer-term impacts of Covid-19 and Brexit are yet to be fully understood.

## Health and Social Care

From a survey of our residents, affordability and accessibility to leisure services can be a barrier to healthy behaviours.

Rates of smoking in Pembrokeshire are above the average in Wales.

Evidence points to an increase in hazardous and harmful alcohol consumption. We will need to monitor this trend as we come through the pandemic.

Evidence points to an increase in parental drinking having an impact on young people.

Rates of low birth weight babies have fallen and are lower than the Welsh average.

Childhood immunisation rates have been on a downward trend over the last several years.

Rates of diagnosis of dementia are projected to significantly increase over the coming years.

Population projections suggest that the number of people aged 80 or over will increase significantly by 2040.

There are year on year increases in the demand for domiciliary care packages.

The number of unpaid carers is increasing and likely underestimated by official figures.

Waiting lists for diagnostic and therapy services have increased significantly, this is likely due to the pandemic and will be monitored.

## Housing

Availability and affordability of housing in Pembrokeshire is felt to be a barrier to staying in the county by young people.

There are a significant number of second homes in the county, particularly in rural areas.

There is a lack of affordable homes in the county.

The need for affordable homes is projected to increase.

We are seeing an increasing number of families presenting as homeless in the county.

The growing ageing population is and will continue to put pressure on the demand for specialist accommodation.

## Environment

Climate change and the nature emergency are the defining issues of our time. Climate change and the nature emergency cannot be considered separately.

Sustainable management of our land and soils is vital for food production, storing carbon, reducing flood risk and improving air and water quality.

Climate change will increase the significant number of properties, communities, infrastructure and key services at risk of flooding.

Pollutants, in particular nitrate, phosphorus and sediments, are having a detrimental impact on water quality, habitats and species diversity.

Pembrokeshire's valuable habitats and species store carbon, reduce flood risk, help prevent coastal erosion and maintain healthy soils.

Pembrokeshire has the highest recycling rates in Wales.

Survey respondents highlighted the importance of improving energy efficiency and using green energy sources.

## Education

The pandemic has had a significant impact on young people's education.

Educational attainment for Pembrokeshire learners needs to improve, in particular for those on Free School Meals and those more able.

Although progress is being made, school reorganisation and surplus places remain an issue.

There is an opportunity to increase skills levels especially through apprenticeships.

There has been an increase in the number of Welsh medium schools in Pembrokeshire.

## Safe, Cohesive and Resilient Communities

Pembrokeshire has low levels of crime and disorder compared to other areas in Wales.

There is an increase in public order offences (committed via social media or other digital means) and violence against the person.

There is an increase in antisocial behaviour, particularly in our main towns.

Domestic abuse related crimes are increasing.

There is an increase in drug abuse, particularly in our main towns.

The response from Pembrokeshire's communities in relation to the pandemic was outstanding.

Volunteering numbers in Pembrokeshire is increasing though the majority are over 65.

## Culture and Leisure

There is evidence that levels of health impacts our resident's ability to take part in cultural events.

Public transport networks impact upon people's ability to attend arts and culture events.

People who regularly attend arts and culture events report higher levels of well-being

Welsh language speakers report that the ability to use Welsh informally and in the work place has a positive effect on their well-being.

Pembrokeshire has the highest number of blue flag beaches and green coast awards in Wales.

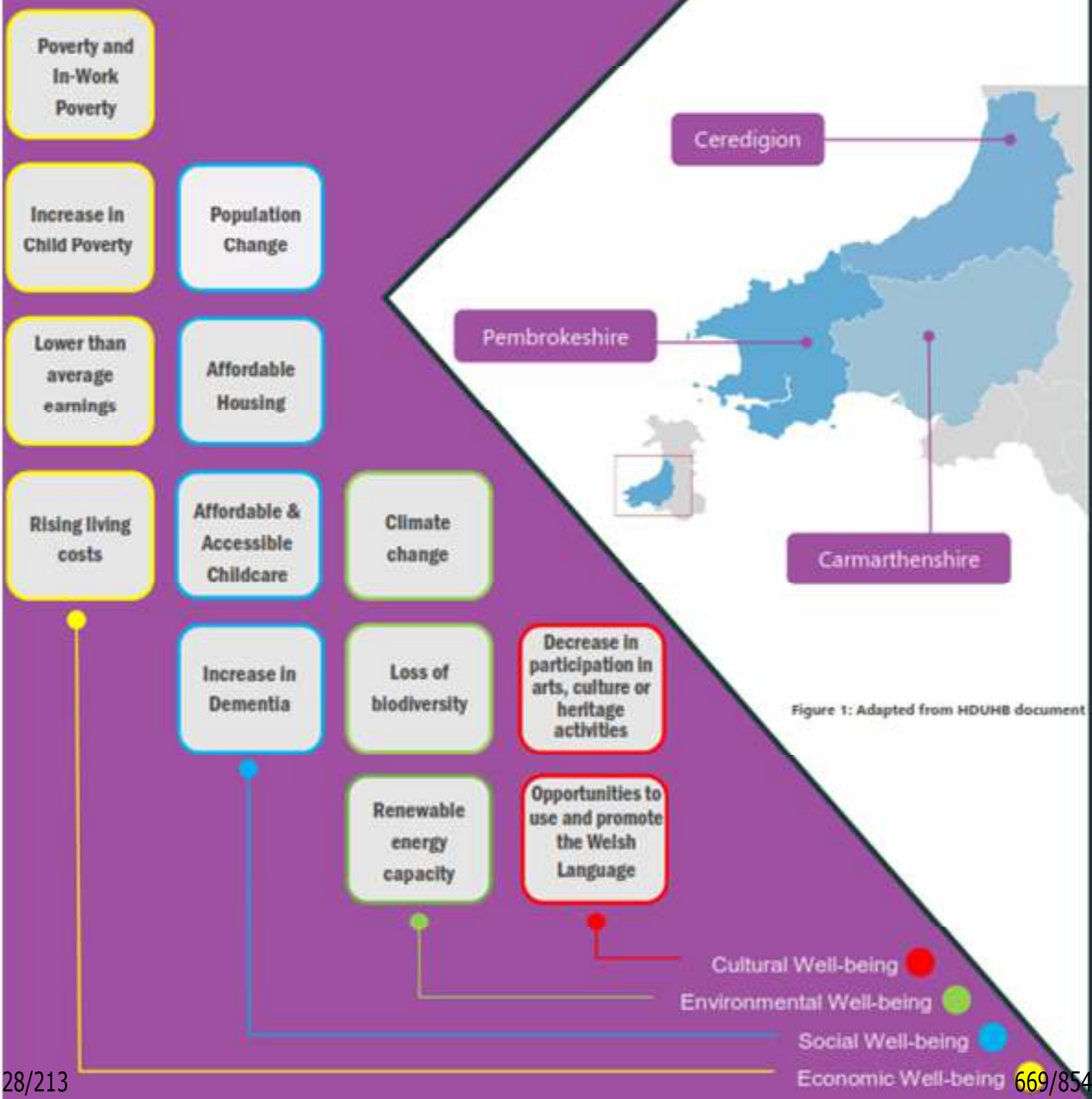
The presence of the National Park has a positive impact on the well-being of young people in the county, with many citing it as the best thing about Pembrokeshire.

# KEY REGIONAL WELL-BEING THEMES

The collaborative working we have undertaken during the production of this assessment with regional partners has given rise to a number of cross-boundary or regional issues affecting the whole of the West Wales Region. Pembrokeshire has regional partners in West Wales - Ceredigion and Carmarthenshire.

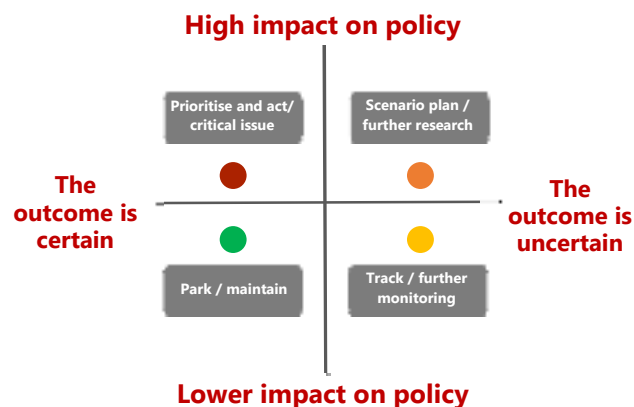
The Regional Data Group, responsible for the analysis and writing of this round of assessments, has identified the following key regional themes based on the data available, the results of the regional well-being survey and the findings of the stakeholder events conducted during the summer of 2021. The aim is to help clarify the collective challenges we face now and in the future.

West  
Wales  
Region





We have used the *PSB Futures Impact/Certainty Matrix* to provide an indicative assessment of the main themes identified in the assessment. The aim is to provide context to the findings by providing an initial assessment based on the core data set and the engagement conducted during the summer of 2021. The matrix assesses the themes according to the level of **priority** and their **certainty** of happening, as defined in the sample to the right.



Description	Park or Maintain	Track/ Further monitoring	Scenario plan/ Further research	Prioritise/ Critical issue for area
<b>Pembrokeshire in context</b>				
Young people's participation in democracy needs to be strengthened.			●	
Use of the Welsh language is increasing in the county.	●			
Pembrokeshire is amongst the least ethnically diverse areas in Wales.		●		
Democratic membership in Pembrokeshire, particularly within the Council, is not diverse.				●
Pembrokeshire has an ageing population which will have impacts on public services and the local labour market			●	
Broadband provision is crucial to the economic development of the county.			●	
Public transport in rural areas is a barrier to accessing services and employment opportunities.				●
<b>Covid-19</b>				
The Covid-19 pandemic is ongoing, and we will continue to monitor the impacts on Pembrokeshire.		●		
To date, vaccination rates in the county have been good.		●		
Covid-19 has exacerbated issues such as mental health, loneliness and health inequalities.			●	
Covid-19 has fundamentally changed the way some of us work.			●	
<b>Poverty</b>				
Child poverty rates in Pembrokeshire are unacceptable.				●
In-work poverty is an increasingly common problem.				●
The cost of living is rising across the UK, with more working families experiencing poverty.				●

Economy				
Job satisfaction for people living in Pembrokeshire is high.	●			
In some sectors, the wages in Pembrokeshire are comparatively low in relation to our neighbouring counties.			●	
Pembrokeshire's town centres need to adapt to the changing retail patterns.			●	
Tourism is a crucial part of Pembrokeshire's economy.		●		
Realising Pembrokeshire's ambition to become the green energy capital of the UK.			●	
Young people have told us that they are not confident that they will be able to live and work in Pembrokeshire in the future.				■
The importance of digital connectivity is a priority for carers and people with a disability.			●	
The agricultural sector will need to adapt to changing environmental regulations and support mechanisms.			●	
Accessible and affordable childcare can be a barrier to parents returning to work.				■
The longer-term impacts of Covid-19 and Brexit are yet to be fully understood.			■	
Health and Social Care				
From a survey of our residents affordability and accessibility to leisure services can be a barrier to healthy behaviours.			●	
Rates of smoking in Pembrokeshire are above the average in Wales.			●	
Evidence points to an increase in hazardous and harmful alcohol consumption. We will need to monitor this trend as we come through the pandemic.			●	
Evidence points to an increase in parental drinking having an impact on young people.			●	
Rates of low-birth-weight babies have fallen and are lower than the Welsh average.	●			
Childhood immunisation rates have been on a downward trend over the last several years.			●	
Rates of diagnosis of dementia are projected to significantly increase over the coming years.				●
Population projections suggest that the number of people aged 80 or over will increase significantly by 2040.		●		
The number of unpaid carers is increasing and likely underestimated by official figures.		●		
Waiting lists for diagnostic and therapy services have increased significantly, this is likely due to the pandemic and will be monitored.			●	

Housing				
Availability and affordability of housing in Pembrokeshire is felt to be a barrier to staying in the county by young people.			●	
There are a significant number of second homes in the county, particularly in rural areas.			●	
There is a lack of affordable homes in the county.				●
The need for affordable homes is projected to increase.			●	
We are seeing an increasing number of families presenting as homeless in the county.				●
The growing ageing population is and will continue to put pressure on the demand for specialist accommodation.			●	
Environment				
Climate change and the nature emergency are the defining issues of our time. Climate change and the nature emergency cannot be considered separately.				●
Sustainable management of our land and soils is vital for food production, storing carbon, reducing flood risk and improving air and water quality.			●	
Climate change will increase the significant number of properties, communities, infrastructure and key services at risk of flooding.			●	
Pollutants, in particular nitrate, phosphorus and sediments, are having a detrimental impact on water quality, habitats and species diversity.			●	
Pembrokeshire's valuable habitats and species store carbon, reduce flood risk, help prevent coastal erosion and maintain healthy soils.			●	
Pembrokeshire has the highest recycling rates in Wales.	●			
Survey respondents highlighted the importance of improving energy efficiency and using green energy sources.			●	
Education				
The pandemic has had a significant impact on young people's education.			●	
Educational attainment for Pembrokeshire learners needs to improve, in particular for those on Free School Meals and those more able.				●
Although progress is being made, school reorganisation and surplus places remain an issue.		●		
There is an opportunity to increase skills levels especially through apprenticeships.			●	
There has been an increase in the number of Welsh medium schools in Pembrokeshire.	●			
Safe, Cohesive and Resilient Communities				
Pembrokeshire has low levels of crime and disorder compared to other areas in Wales.		●		
There is an increase in public order offences (committed via social media or other digital means) and violence against the person.			●	

There is an increase in antisocial behaviour, particularly in our main towns.			●	
Domestic abuse related crimes are increasing.				●
There is an increase in drug abuse, particularly in our main towns.			●	
The response from Pembrokeshire's communities in relation to the pandemic was outstanding.	●			
Volunteering numbers in Pembrokeshire is increasing though the majority are over 65.		●		
Culture and Leisure				
There is evidence that levels of health impacts our resident's ability to take part in cultural events.			●	
Public transport networks impact upon people's ability to attend arts and culture events.			●	
People who regularly attend arts and culture events report higher levels of well-being.	●			
Welsh language speakers report that the ability to use Welsh informally and in the workplace has a positive effect on their well-being.		●		
Pembrokeshire has the highest number of blue flag beaches and green coast awards in Wales.	●			
The presence of the National Park has a positive impact on the well-being of young people in the county, with many citing it as the best thing about Pembrokeshire.	●			

# PEMBROKEHIRE IN CONTEXT





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# PEMBROKESHIRE IN CONTEXT

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## Overview

Pembrokeshire is situated at the south-west tip of Wales and covers an area of approximately 1600 sq km, of which roughly 615 sq km has National Park status. The county is renowned for its outstanding natural beauty and high quality environment, its coastline, wildlife and rich habitats. The coastal path is walkable from one end of the county to the other and is 186 miles long. Its beaches are recognised for the quality of bathing water, safety and accessibility. Away from the coast and beaches, land rises towards the Preseli hills in the north east of the county. Outside of the main towns, the county is comprised of many villages and hamlets and agriculture dominates the landscape. Milford Haven estuary is one of the deepest natural harbours in Britain and this natural advantage has led to it being the largest port in the UK for the import/export of energy products.

Pembrokeshire is a mainly rural county though about half of the population live in the main towns clustered around the Haven and its tidal estuary. Even within the larger towns, population sizes are relatively small and are not particularly densely populated.

Pembrokeshire has a unique history, which differentiates it from other parts of Wales. South Pembrokeshire has Norman influences (and subsequently a large number of Norman churches) and the 'Landsker line' separates south Pembrokeshire from the north. This has resulted in specific differences within the county, many of which can still be seen in the present day, particularly culturally and around the use of the Welsh language. The north of the county is much more similar from a cultural and language perspective to the rest of West Wales, with the south and southwest of the county being considered as 'anglicised' and commonly referred to as 'little England beyond Wales'.

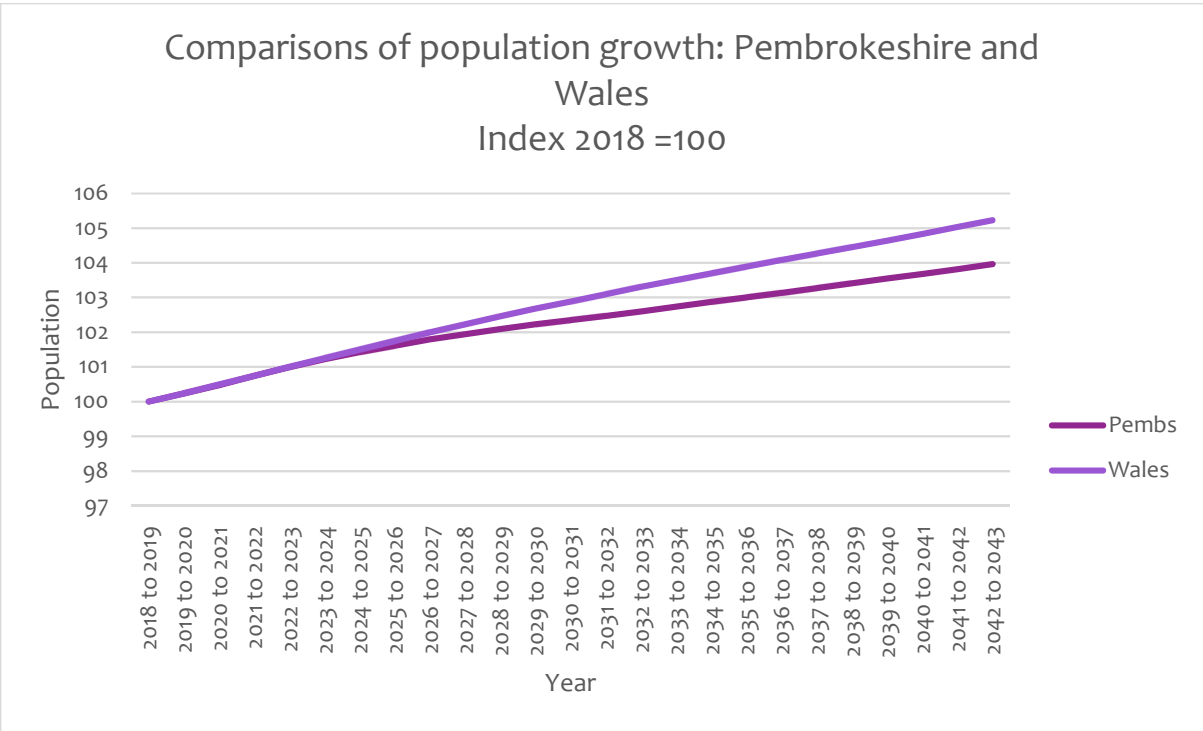


# Key population and demographic data

## Age structure

The latest population estimate for Pembrokeshire is approximately 126,000 and based on the most recent (2018) Welsh Government projections our population will increase gradually over the next 10 years or so to around 130,000 (an increase of roughly 3%) before plateauing and then gradually declining. The number of births are expected to increase at a negligible rate (1,056 to 1,080), while the numbers of deaths is expected to rise from around 1,628 to approximately 2,015 over a similar period, with the difference widening as time goes on. Any increase in the population, therefore, is entirely based on projected levels of in-migration.

The graph below shows the rate of projected population growth for Pembrokeshire compared with Wales as a whole. While it clearly shows Pembrokeshire population will increase, the population of Wales as a whole is expected to increase at a greater rate.



The age profile of the population shows significantly fewer 20-39 year olds and more people over the age of 55 than the UK as a whole. Historically this has been driven by significant out-migration of those aged 18-20 to seek higher education opportunities outside of Pembrokeshire. The most recent estimates suggest that there may now

be net in-migration of young people to Pembrokeshire though we will need to wait until the publication of the 2021 census to understand this further.

Pembrokeshire has a relatively ageing population compared with the rest of the UK. Age structure and profile is an important consideration for provision of services in the county as it has a clear impact on how many people are in paid employment, the general population health, the number of younger people requiring school places, as well as the number of people with protected characteristics living in an area.

The table below shows that proportionately more younger people (0-19 & 20-34) tend to live in urban areas. By contrast, people age 50+ are far more likely to live in rural areas and coastal towns and villages, and are less likely to live in main towns.

Historical analysis has shown that there is a slow, but long-term trend towards proportionately fewer younger people living in rural areas.

Community	Age 0-19	Age 20-34	Age 35-49	Age 50-64	Age 65-79	Age 80+	Total
<b>Northeast Pembrokeshire</b>	19%	13%	15%	24%	22%	6%	8,474
<b>Fishguard Area</b>	20%	14%	15%	22%	22%	8%	10,090
<b>Northwest Pembrokeshire</b>	18%	16%	15%	23%	21%	7%	7,656
<b>East Pembrokeshire</b>	20%	14%	16%	23%	20%	8%	7,312
<b>Haverfordwest North</b>	26%	22%	18%	19%	11%	4%	7,193
<b>Haverfordwest South &amp; Merlin's Bridge</b>	23%	17%	17%	20%	16%	7%	7,210
<b>Narberth Area</b>	19%	14%	15%	24%	21%	7%	6,925
<b>West Pembrokeshire</b>	20%	13%	15%	23%	21%	7%	8,475
<b>Neyland Area</b>	20%	13%	16%	24%	20%	7%	8,651
<b>Milford Haven East</b>	23%	18%	16%	20%	16%	6%	7,545
<b>Saundersfoot/Kilgetty Area</b>	18%	13%	13%	24%	23%	9%	8,562
<b>Milford Haven West</b>	25%	20%	16%	19%	14%	6%	7,693
<b>Pembroke Dock</b>	24%	20%	16%	20%	16%	5%	9,747
<b>Pembroke East &amp; Carew</b>	18%	12%	15%	24%	24%	8%	7,742
<b>Pembroke West &amp; Angle Peninsula</b>	24%	16%	16%	21%	17%	5%	7,432
<b>Tenby Area</b>	18%	13%	15%	22%	22%	10%	6,044
<b>All Pembrokeshire</b>	22%	16%	16%	23%	20%	7%	126,751

## Area in hectares and density

The following table shows the area, in hectares, of each community area and their population density. Population figures are taken from the 2011 Census. Compared with the rest of MSOAs in England and Wales, many of Pembrokeshire's communities are sparsely populated with half of the 16 areas in the 10% least densely populated areas in England and Wales. The most densely populated area in Pembrokeshire, Haverfordwest North, is still below the England and Wales median.

Community	Area (Hectares)	people per ha	Relative position to England and Wales
<b>Northeast Pembrokeshire</b>	28,531	0.29	10# decile
<b>Fishguard Area</b>	19,680	0.50	10# decile
<b>Northwest Pembrokeshire</b>	20,725	0.36	10# decile
<b>East Pembrokeshire</b>	22,977	0.29	10# decile
<b>Haverfordwest North</b>	402	17.27	6# decile
<b>Haverfordwest South &amp; Merlin's Bridge</b>	991	7.02	8# decile
<b>Narberth Area</b>	15,502	0.42	10# decile
<b>West Pembrokeshire</b>	18,452	0.43	10# decile
<b>Neyland Area</b>	4,763	1.79	9# decile
<b>Milford Haven East</b>	908	7.62	8# decile
<b>Saundersfoot/Kilgetty Area</b>	7,103	1.20	9# decile
<b>Milford Haven West</b>	633	11.03	7# decile
<b>Pembroke Dock</b>	632	15.44	7# decile
<b>Pembroke East &amp; Carew</b>	7,886	0.98	10# decile
<b>Pembroke West &amp; Angle Peninsula</b>	10,008	0.70	10# decile
<b>Tenby Area</b>	2,681	2.39	9# decile
<b>All Pembrokeshire</b>	161,874	0.76	

## Welsh language

The following information is taken from the 2011 Census which is remains the only source of information to allow ready comparison of communities across Wales. This shows that six of the 16 communities have relatively high proportions of people who have Welsh language skills compared with the rest of Wales. It also shows that Northeast Pembrokeshire is a real strong-hold of the Welsh language.

Since this time, information gathered from fieldwork for the 2021 Census suggests that the overall proportion of Welsh speakers in Pembrokeshire has increased.

In contrast with the rest of Wales, recent significant investment in Welsh medium language education has meant that Welsh language skills have expanded rather than staying stable or contracting.

<b>Community</b>	<b>No skills in Welsh</b>	<b>Can speak, read and write Welsh</b>	<b>Decile of Welsh MSOAs: No skills in Welsh</b>	<b>Decile of Welsh MSOAs: Can speak, read and write Welsh</b>
<b>Northeast Pembrokeshire</b>	37%	43%	10 decile	1 decile
<b>Fishguard Area</b>	49%	27%	9 decile	2 decile
<b>Northwest Pembrokeshire</b>	53%	23%	9 decile	2 decile
<b>East Pembrokeshire</b>	56%	26%	9 decile	2 decile
<b>Haverfordwest North</b>	78%	10%	7 decile	4 decile
<b>Haverfordwest South &amp; Merlin's Bridge</b>	78%	9%	7 decile	5 decile
<b>Narberth Area</b>	70%	15%	8 decile	3 decile
<b>West Pembrokeshire</b>	79%	9%	7 decile	5 decile
<b>Neyland Area</b>	82%	8%	5 decile	7 decile
<b>Milford Haven East</b>	86%	6%	2 decile	10 decile
<b>Saundersfoot/Kilgetty Area</b>	81%	8%	6 decile	6 decile
<b>Milford Haven West</b>	86%	6%	2 decile	9 decile
<b>Pembroke Dock</b>	85%	6%	4 decile	9 decile
<b>Pembroke East &amp; Carew</b>	83%	8%	5 decile	7 decile
<b>Pembroke West &amp; Angle Peninsula</b>	83%	7%	4 decile	8 decile
<b>Tenby Area</b>	82%	8%	5 decile	7 decile
<b>All Pembrokeshire</b>	73%	14%		

## Equalities

In common with other predominantly rural Welsh Counties, Pembrokeshire is not a particularly diverse place in terms of ethnicity or other equality communities that are at higher risk of discrimination. The percentage of people who are from a Black, Asian and minority ethnic origin in 2021, based on the National Survey, is estimated at 1.3%, one of the lowest figures in Wales, though this is based on a small sample.

Data from Pupil Level Annual School Census for 2021 shows that 3% of children aged over 5 years are from a Black, Asian and minority ethnic origin, lower than the median average for Wales. Accurate statistics will be available from the 2021 Census, and we might reasonably anticipate that the percentage of people who are from a Black, Asian and minority ethnic origin will have increased. However, it is unlikely that Pembrokeshire's relative position will have changed significantly.

Compared with the rest of Wales, a comparatively high proportion of people in Pembrokeshire are from a Gypsy Traveller background and Pembrokeshire has one of the highest number of Traveller site pitches in Wales – 174 caravans in 2020 out of a total of 1,092 in Wales.

Data on Hate Crimes collated by Victim Support for Dyfed Powys suggests that a high proportion of incidents continue to relate to race.

We do not have reliable information on the proportion of the population that identify as Lesbian, Gay or Bi-sexual. Like many other Counties, there are a number of third sector organisations that focus on information, advice and support for this community. The accuracy of figures from the National Survey on the size of Pembrokeshire's LGB community is questionable. However, it is probable that the proportion of people living in Pembrokeshire who are LGB is lower than the national average. The 2021 Census will have information on sexuality. The sexual orientation question, which has not been asked in previous censuses, is voluntary and will only be asked of those aged 16 years and over.

Qualitative research suggests that for adults, whilst discrimination was an issue in the past, there has been a perceptible change in attitudes. However, incidents of hate crime relating to sexuality still occur in Pembrokeshire.

We do not have reliable figures for the number of people in the Trans community. However, we are aware of a local support group and members of it have attended our equalities forum (this includes membership of a wide range of public and third sector organisations).

Qualitative research was undertaken to look at community cohesion across South West & Mid Wales in 2020. Focus groups with representatives of the following sectors of the community: Communities of Interest, Black, Asian and Minority Ethnic (BAME) communities; EU (non-Welsh) citizens; Rural and isolated; First language

Welsh speakers; Gypsy / Traveller Communities; Syrian Refugees; LGBTQ+ people, disabled people and/or people with health conditions; young people.

The results of the consultation showed overall positive opinions towards the current community cohesion in Mid and South West Wales. 77% of the interviewees referred to community cohesion as good, rising to 92% if we include interviewees who referred to community cohesion as good but requiring improvement. However, when interviewees and participants to focus groups were asked to expand further and justify their position on community cohesion in Mid and South West Wales, they tended to recognise potential for improvement and were quick to identify what they at perceived as “tensions”, or “problems”.

Brexit is perceived as having a negative impact on community cohesion in Mid and South West Wales. Results from survey question about the impact of Brexit on community cohesion revealed that 63.7% of participants believe that the Brexit referendum has had a negative impact on community cohesion. Brexit was discussed and portrayed as having had a negative impact on community cohesion in 7 out of 10 of our focus groups. In our interviews, 61% of the interviewees described Brexit has having had a negative impact on community cohesion.

The consultation showed positive attitudes towards the impact of Covid-19 on community cohesion. However, qualitative feedback demonstrated concerns about the longevity of the positive impacts, with concerns around different rising negative impacts. 67.3% of survey respondents believed that community cohesion had either improved (40%) or not changed (27.3%) since the beginning of the pandemic. However, qualitative data showed that most people had concerns about positive impacts being short lived and revealed concerns about different risks and threat to community cohesion, such as an increasing socio-economic divide, increased exclusion of already marginalised communities, decrease in opportunities to socialise, resentment due to Covid-19 rules infringement, heightened tension with ‘incomers’, and increased aggressivity online towards certain communities.

The main effects of Brexit on community cohesion in Mid and South West Wales have been identified as:

- Insecurity around human rights post Brexit
- Increased feelings of insecurity around potential tensions after the withdrawal period



- Increased tension between people of differing political views
- Increased feelings of exclusion and an increased perception of a lack of personal safety due to an increase in racist and xenophobic rhetoric.

The main effects of Covid-19 lockdown on community cohesion in Mid and South West Wales have been identified as:

- An initial positive impact on community cohesion due to ability to participate more on a local level
- Increased feelings of insecurity around the future
- Increased exclusion of more vulnerable and isolated members of the community
- Increased tension between groups with previously tense relationships
- A compounded negative effect on community cohesion due to the combination of Brexit and the Covid-19 lockdown.

## Elections

The Council considered a report on diversity in democracy at its 9 December 2021 meeting. This report is in the context of work to increase the diversity of people standing for public office in Pembrokeshire. There is a real risk that if the membership of Councils (including Town and Community Councils) does not reflect the diversity of the communities they serve, these bodies will become out of touch. This work is being undertaken in conjunction with Welsh Government and the Welsh Local Government Association.

Currently, Pembrokeshire County Council's membership does not reflect the communities it serves, particularly with respect to

- Gender (over 80% of members are men)
- Age (40% of members are aged between 55 and 64 and very few are aged under 45)
- Race – the Council has never had a councillor from a Black, Asian or minority ethnic background.
- Tenure (under 10% of members rent their home)

In addition, a relatively high proportion of seats were uncontested in elections held since the council's inception in 1995. In the last three elections, 20% of seats were uncontested – though, in general, different seats were uncontested at each of these elections.

## Engagement of young people

In May 2021, elections were held for both the Welsh Government as well as for Police and Crime Commissioners. The franchise for these two elections was different; 16 & 17 year olds as well as qualifying foreign nationals could vote in Welsh Government elections but not for the Police and Crime Commissioner elections.

Around 70% of the total number of votes cast at this election were made in person with the remainder by postal ballot. For those votes cast in person, the difference between the number of votes cast at the Welsh Government and Police and Crime Commissioner election is likely to closely mirror the number of 16 & 17 year olds that voted as there are few qualifying foreign national voters.

The poll verification figures show the numbers of votes cast for each election for each polling station. Each polling station's electoral register can be mapped with a reasonable degree of precision to MSOA areas. Mid-Year estimates of single year of age are available for each MSOA allowing approximate turn-out rates for people who voted in person for each MSOA to be calculated. It should be stressed that these figures are estimates, and the total number of 16 & 17 year olds in some communities is small so small discrepancies in the fit between polling stations and MSOAs can be amplified.

<b>Community</b>	<b>Estimate % voted in person 18+</b>	<b>Estimate % voted in person 16 &amp; 17</b>
<b>Northeast Pembrokeshire</b>	45%	39%
<b>Fishguard Area</b>	36%	32%
<b>Northwest Pembrokeshire</b>	40%	34%
<b>East Pembrokeshire</b>	44%	61%
<b>Haverfordwest North</b>	24%	23%
<b>Haverfordwest South &amp; Merlin's Bridge</b>	29%	24%
<b>Narberth Area</b>	39%	47%
<b>West Pembrokeshire</b>	37%	35%
<b>Neyland Area</b>	35%	22%
<b>Milford Haven East</b>	26%	13%
<b>Saundersfoot/Kilgetty Area</b>	36%	28%
<b>Milford Haven West</b>	25%	14%
<b>Pembroke Dock</b>	26%	16%

<b>Pembroke East &amp; Carew</b>	40%	32%
<b>Pembroke West &amp; Angle Peninsula</b>	30%	18%
<b>Tenby Area</b>	31%	32%
<b>All Pembrokeshire</b>	34%	29%

The figures indicate that the percentage of young people voting is a little lower than for those aged 18+, but not by a large margin. This is a more positive picture than commonly assumed.

The figures show that turnout in person tends to be lower in urban areas, especially in larger towns. In these communities, the number of young people voting tends to be lower especially in Milford Haven and Pembroke Dock. By contrast, in more rural areas the proportion of 16 & 17 year olds voting is sometimes higher than for those aged 18+.

## Accessibility

### *Broadband provision*

Accessibility to services, including broadband, is a key issue in some communities in Pembrokeshire. One of the most important services when planning for the future is the availability of broadband, as consistent and fast internet services have the potential for Pembrokeshire to overcome its relative peripherality. Whilst percentages will have changed (as will the expectations of how many Mb/s constitutes fast broadband) the table below shows that rural areas, especially the north of Pembrokeshire, were within the worst 5% for availability of fast broadband in Wales. Other communities have broadband availability that was within the top quartile for Wales.

The Council and its partners are investing in broadband via a number of separate streams. Without this investment, it is likely that rural areas in Pembrokeshire would continue to lag behind.

<b>Community</b>	<b>% Unavailability of broadband at 30Mb/s</b>	<b>% rank unavailability</b>
<b>Northeast Pembrokeshire</b>	26.4	5%
<b>Fishguard Area</b>	15.1	15%
<b>Northwest Pembrokeshire</b>	31	3%

<b>East Pembrokeshire</b>	32.7	2%
<b>Haverfordwest North</b>	1	73%
<b>Haverfordwest South &amp; Merlin's Bridge</b>	3	52%
<b>Narberth Area</b>	27.8	4%
<b>West Pembrokeshire</b>	9.3	23%
<b>Neyland Area</b>	0.7	78%
<b>Milford Haven East</b>	3.8	45%
<b>Saundersfoot/Kilgetty Area</b>	20.2	10%
<b>Milford Haven West</b>	9.2	24%
<b>Pembroke Dock</b>	1.2	70%
<b>Pembroke East &amp; Carew</b>	10.5	21%
<b>Pembroke West &amp; Angle Peninsula</b>	16	14%
<b>Tenby Area</b>	3.8	45%

### *Transport*

Pembrokeshire is a peripheral and rural area and there are no dual carriageways in the county. There are two ferry ports and services, which both run to Rosslare, Ireland (the majority of traffic is freight). There are rail services to Pembroke Dock, Milford Haven (via Haverfordwest) and Fishguard, but rail services are slow and rail connections within Pembrokeshire are limited.

Though the road network has improved to some degree in recent years, Pembrokeshire's accessibility to the rest of Wales and beyond remains a barrier to jobseekers and businesses, with knock-on effects to our well-being. There is evidence to suggest that despite Pembrokeshire's outstanding natural environment, and generally being seen as a great place to live and raise a family, working people and businesses are often reluctant to re-locate here. This impacts on the abilities of employers to fill specialist vacancies or to recruit people with sufficient skills. It is possible that this might change as a result of the pandemic as working practices continue to evolve, and as remote working becomes more embedded with a shift away from traditional office-based jobs requiring someone to live relatively close to their place of work. This itself brings a number of unknowns in terms of what the impact on Pembrokeshire may be and there are likely to be trade-offs along the way.

The table below, again taken from the WIMD source data, shows the average time taken to travel by public transport to three key public services. The table clearly

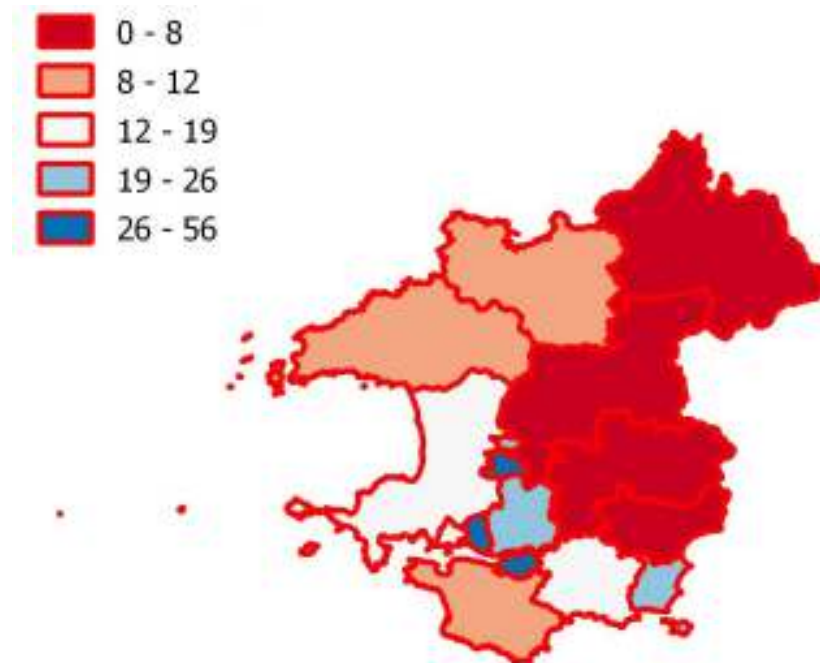
demonstrates that for anyone living outside the larger towns accessing basic public services is a challenge, to the extent that people living in the more rural areas, which are less served by public transport, return journey times of over an hour are fairly normal, despite the relatively short distances being travelled. This suggests that it is an issue of accessibility and availability of provision.

<b>Community</b>	<b>Average public return travel time to a pharmacy (minutes)</b>	<b>Average public return travel time to a food shop (minutes)</b>	<b>Average public return travel time to a primary school (minutes)</b>
<b>Northeast Pembrokeshire</b>	107	95	83
<b>Fishguard Area</b>	58	55	51
<b>Northwest Pembrokeshire</b>	77	66	61
<b>East Pembrokeshire</b>	122	111	83
<b>Haverfordwest North</b>	27	22	32
<b>Haverfordwest South &amp; Merlin's Bridge</b>	31	24	25
<b>Narberth Area</b>	102	74	68
<b>West Pembrokeshire</b>	40	42	37
<b>Neyland Area</b>	28	20	31
<b>Milford Haven East</b>	27	20	27
<b>Saundersfoot/Kilgetty Area</b>	82	72	83
<b>Milford Haven West</b>	56	48	50
<b>Pembroke Dock</b>	32	25	26
<b>Pembroke East &amp; Carew</b>	86	64	46
<b>Pembroke West &amp; Angle Peninsula</b>	64	61	53
<b>Tenby Area</b>	37	30	33

The map below shows the rank, in percentage terms for all 405 MSOAs in Wales of the average public transport return travel time to a primary school. A low percentage denotes a longer journey time. The map shows that, for even the communities with the lowest journey times in Pembrokeshire (Pembroke Dock and Haverfordwest south) these journey times are only around the median for Wales. All rural communities are well within the upper quartile for longer public transport journey times to a primary school.

Journey time maps for access to other services by public and private transport follow a similar pattern:

Rank, (% out of all 405 MSOAs in Wales) of the average public return travel time to a primary school. Low rank = long journey time





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# IMPACT OF COVID-19 IN PEMBROKESHIRE

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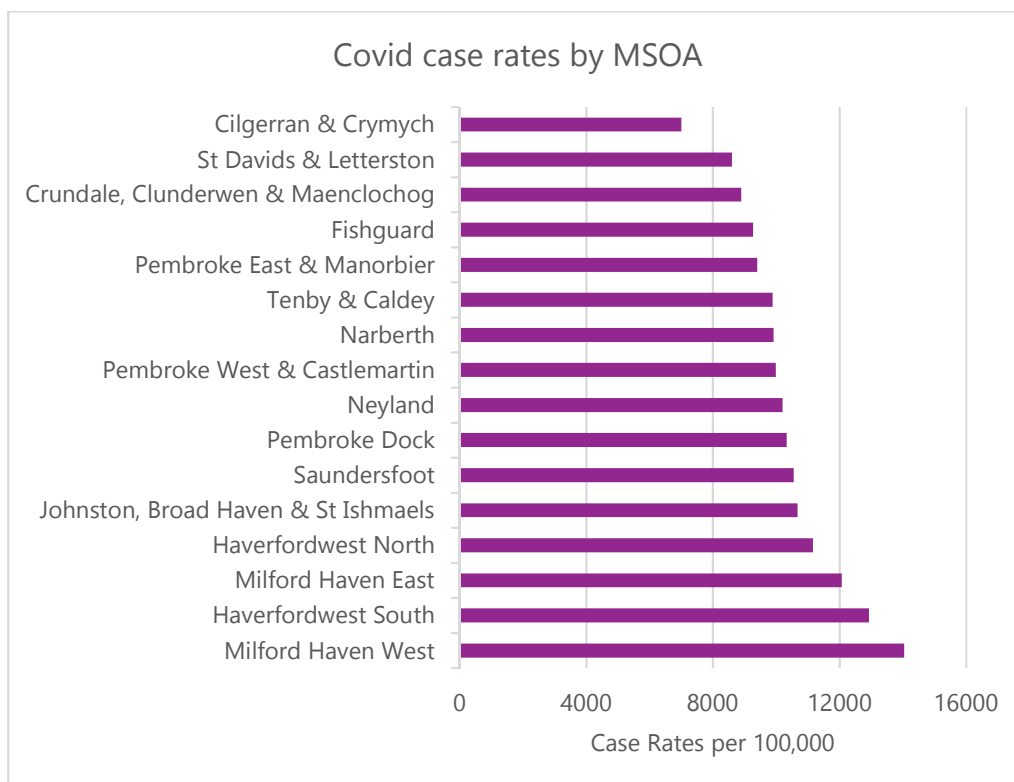
## Overview

The coronavirus pandemic can only be described as a seismic event, the impact of which is global. As a result, since March 2020 the lives of people living in Pembrokeshire has markedly changed, and will continue to change, for the foreseeable future. Many doubt that life will ever return to what it looked like before the pandemic started. It has affected almost every aspect of everyday life from health and education to the economy. As a result, people's well-being has been dramatically affected.

This purpose of this section of the assessment is provide a broad picture of how the pandemic has impacted on people and communities in Pembrokeshire. In this sense it is very much about scene-setting and establishing context for the assessment as a whole, recognising that since the pandemic is still ongoing much of what is discussed in the assessment in terms of other themes can only be considered with an understanding of this bigger picture. Many of these impacts will be explored in further detail in other sections of the assessment.

## Covid Health Statistics

UK Government data showed that as of 22<sup>nd</sup> February 2022, Wales had the second lowest case rate of Covid in the UK at 25,498.9 cases per 100,000. To date, Pembrokeshire has had a total of 23,588 cases of Covid, a rate of 18747.7 cases per 100,000, which is the 3<sup>rd</sup> lowest in Wales. Within the county, Cilgerran and Crymych have the lowest rates, with Haverfordwest South having the highest.



UK Government data also shows that Wales has the highest death rate in the UK, averaging 301.1 per 100,000. There have been 258 deaths reported in Pembrokeshire, a rate of 203.5 per 100,000, which is also 4<sup>th</sup> lowest across Wales.

Pembrokeshire had the 6<sup>th</sup> highest number of people per 1000 who were placed onto the shielding list in Wales:

Age Category	Number	Proportion of population (per 1000)
All Ages	6010	47.8
Under 16	120	5.5
16-69	3235	40.2
70 and over	2655	111.6

The development of the Covid-19 vaccine became the turning point in 2021, where there was a reduction in hospitalisations and an easing of restrictions. The vaccines provide over 90% protection against symptomatic infection in adults over 50 and between 92-96% protection against hospitalisation. Research published by the Senedd in February 2022 found that the uptake of the vaccine has been positive in Pembrokeshire with over 85% of the population being double-vaccinated.

<b>Vaccination Priority Groups</b>	<b>2 Dose Uptake</b>	<b>Booster Uptake</b>
Aged 18+	85.7%	25.7%
Aged 50+	92.8%	39.9%
Aged 80+	95%	72.1%
Care Home Residents	96.1%	55.5%
Aged 16-69 who are extremely clinically vulnerable	95%	33.6%

## Mental Health

Covid has had direct and indirect impacts on our health and one of these has been on mental health. The pandemic has resulted in reports of increased anxiety, depression, loneliness and isolation. An evidence briefing paper published by the Wales Centre for Public Policy in September 2021 on the impacts of Covid-19 and Brexit on well-being found that reduced physical activity and increased alcohol consumption are associated with individuals who are vulnerable to Covid, with worsening mental health seen with those most affected by the virus. Mental health issues in Wales almost tripled during the first lockdown compared to pre-pandemic levels, increasing from 11.7% to 28.1% of the population. Mental health issues increased as unemployment increased, with young people experiencing the largest deterioration. The gap between mental well-being in women and men increased from 9.9% to 14.1%, with women experiencing a greater decline in their mental health than men. Evidence also points to increased prescribing of antidepressant medication during periods of lockdown.

There was a significant increase in people reporting feelings of isolation and loneliness, not just from within the ageing population but also high levels reported among younger people. For adults with learning disabilities, increased feelings of loneliness and isolation were contributed to by the closure of day centres during lockdowns, leading to a lack of face-to-face activities. In August 2020, a press release from Hywel Dda UHB showed that there had been an increase of 72% in demand for access to SilverCloud Wales, a free online therapy service, provided by the NHS which provides help for up to 12 weeks for those aged 16 and over experiencing mild to moderate anxiety, depression or stress.

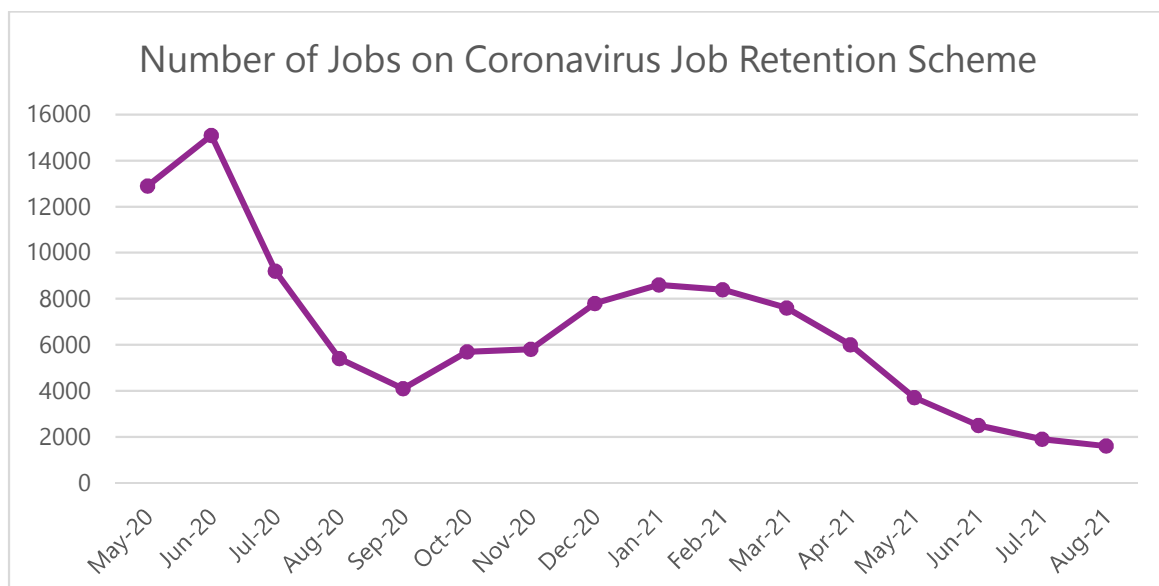
There is a strong link between poverty, mental ill health and suicide and Pembrokeshire has one of the highest rates of child poverty in Wales.

## Economy

Jobs are one of the most important factors for individual wellbeing, being the 21<sup>st</sup> and 22<sup>nd</sup> Welsh national indicators for well-being. Covid will result in changes to the economy in Pembrokeshire in the short, medium and long term.

Covid has exacerbated the inequalities experienced by the population, with a significant impact on those living in poverty. The pandemic hit low paid workers particularly hard in sectors such as accommodation and the food and beverage sector, of which Pembrokeshire has a particularly high proportion. The loss of earnings has led to mounting debts with some people being unable to pay rent, mortgage or bills.

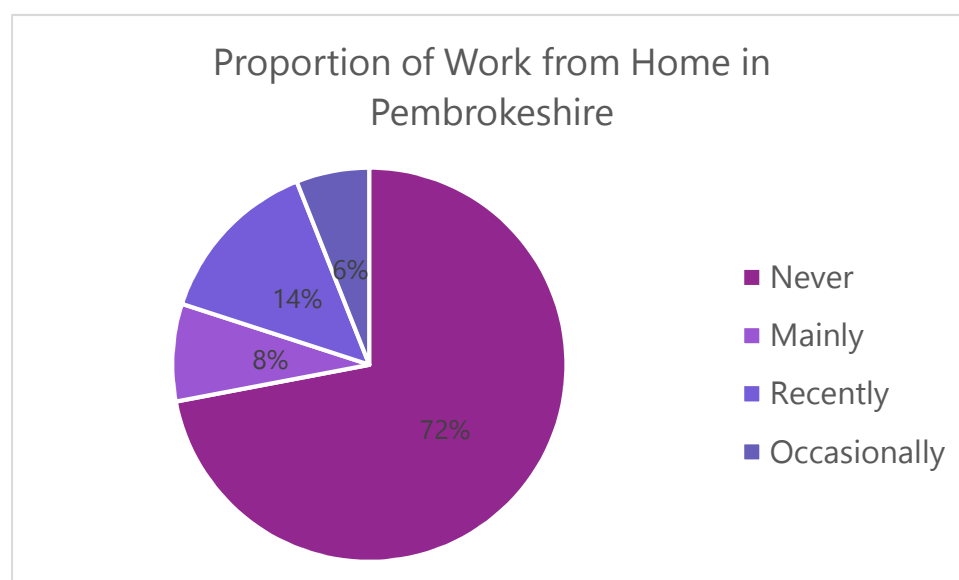
Covid has had a huge impact on the economy in Pembrokeshire, particularly due to 20.6% of jobs being within the hospitality and retail services (above the Wales average of 17.6%), both of which experienced lengthy closures. To date, 18,700 jobs have been put on furlough since the scheme started and Pembrokeshire was regularly one of the highest counties for uptake of the scheme. In March 2021, the highest number of jobs on furlough were found in food and accommodation services at 3,130 jobs, but this had dropped to 260 jobs by September 2021. The lowest number of jobs on furlough in March 2021 was in the agriculture, forestry and fishing, mining and quarrying, energy production and supply and water supply, sewerage and waste categories, with 70 jobs on furlough. The lowest number of jobs on furlough in September 2021 was in the health and social work category, at a total of 50 jobs.



Pembrokeshire now has one of the lowest claimant to job rates in Wales, which may be partly due to furlough allowing workers time to reflect on their career options and not wanting to return to low paid, unsecure work with antisocial hours.

## Working practices

Welsh Government have set a target of having 30% of the workforce in Wales to work from home. Pre-Covid, only 4% of jobs in Wales were work from home whereas in the first lockdown it was 37%. Remote working has been linked to an improvement in levels of well-being due to increased flexibility and reduced commuting. According to ONS data, in 2020 72% of workers in Pembrokeshire had never worked from home, which was significantly higher than the UK average of 64%.



Town centres have been significantly affected by the pandemic, with retail and hospitality closed for long periods of time, and the shift to work from home has resulted in a significant reduction in footfall. There is a potential for a reduction in demand for office space, further impacting urban businesses and with the potential to undermine efforts to revitalise town centres. The move to remote working may create increased demand for local cafes and shops away from town centres, benefiting local communities and facilitating business start-ups. Haverhub in Haverfordwest is one of the first local remote working hubs in a pilot scheme funded by Welsh Government as part of the development a remote working strategy, which may counter some of the issues faced by the town centre. The purpose of the hubs are:

- allow people to work nearer to where they live
- allow individuals to work together in their local community
- provide a space for those who cannot or do not want to work from home

## Digital Infrastructure

For both businesses and individuals, access to the internet is essential, particularly during Covid to allow people to work from home and to stay connected socially to reduce the feeling of isolation. According to the National Survey for Wales 2021, in Pembrokeshire 9% of households say they have no access to the internet. Over 88% of households and businesses have access to superfast broadband (30mbps) but only 6.5% of premises are able to access ultrafast (100mbps). 2.5% of households are only able to access speeds of up to 2mbps, which limits productivity and connectivity. Feedback received as part of our well-being survey suggested that digital connectivity was highly valued by those who are disabled and by carers, which may be due to the shift to online consultations by NHS services during Covid. However, some adults with a learning disability see this as a huge barrier as many are unable to work with this technology. Digital infrastructure was highlighted as a concern in a number of responses to our survey including particularly with regards to online education and learning, community cohesion, prosperity and health. It also should be noted that growth in digital as a means of communication and in the provision of some services can heighten the risk of exclusion for many in our communities, particular for the ageing population or those more vulnerable.

## Tourism

In 2019, Visit Pembrokeshire reported the estimated value provided by the tourism to the County was £590 million. While tourism had been initially impacted by lockdown and restrictions in 2020 and 2021, since July 2021 Pembrokeshire has experienced higher than typical visitor numbers. In 2021, South west Wales had 55% of accommodation providers receive more bookings than normal during May half term, and 77% of accommodation being fully booked for August. There is evidence to suggest that over the last 2 seasons we have seen very different demographics and dynamics in terms of staycations, and this has had consequences in terms of community impact. The longer-term impacts are not known as yet as despite the increase in visitor numbers, 48% of accommodation providers in Wales reported a drop



in profits of at least 20% over the last 2 years. As travel to other destinations abroad become less restrictive, we could expect to see visitor numbers decline further as options for holiday destinations increase once again.

## Housing

Long term, the increased risk of job losses may exacerbate the already significant need for affordable housing in Pembrokeshire. Due to the increase in the flexibility in home working, many people are looking to relocate to other areas to have more space and better living conditions. As a desirable area to live, between September 2020 and 2021, house prices in Pembrokeshire have increased by 11.1% due to demand. A lack of affordable housing opportunities and an increase in the number of second homes in the areas were identified in the Well-being Survey as some of the most important factors for well-being and an area of greatest concern for the people of Pembrokeshire.

## Environment

Due to the rural nature of the area, Pembrokeshire did not experience a marked reduction in pollution as did most urban areas, though Covid has had an impact on the local environment. The reduction in tourism allowed for the recovery of natural spaces such as the coast path that suffers from erosion of footpaths. From responses to the well-being survey, residents of Pembrokeshire said that access to nature and green spaces played a particularly important part in their well-being.

## Education

Covid has compounded some of the educational inequalities that children suffer. Children and young people have faced an enormous amount of disruption and uncertainty within their education over the last 2 years. Data from Quals Wales shows in 2021, the highest levels of top grades were awarded at GCSE and A-level since 2008/09, but this may not be fully reflective of what children and young people experienced during the pandemic and the effect it will have on them in their future education.

Many children faced digital exclusion, particularly due to poverty or lack of broadband availability, limiting their ability to access education. Entering into higher education, many students may now have gaps in their learning due to the disruption. Some

children with special educational needs were not able to attend their usual setting for education, and though they received support through online or phone sessions, this format was not suitable for all children. Parental input in supporting learning was key during the school closures, presenting a range of challenges, for example, to families where parents work, and were unable to provide as much support as those who do not, impacting on the quality of learning. Blended learning may present a positive opportunity through increased opportunities and ability to collaborate with other schools.

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# POVERTY

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## Overview

This section is intended to present a spotlight on poverty in Pembrokeshire in terms of the situation as we know it and some of the challenges we need to tackle.

Understanding poverty is a complicated issue, with differing definitions and measures often used to determine poverty, and with the causes and factors which create the conditions of poverty impossible to reduce to one single factor. Some of these are explored in more contextual detail in other sections such as Economy, Housing and Health. This is a complex area where no one response is likely to be adequate and it requires a holistic, co-ordinated approach to try and tackle it.

Creating a fair and just society is a major policy objective for Welsh Government and within this reducing the impact of poverty and eradicating child poverty are priorities. There are a number of drivers put in place by Welsh Government to support the anti-poverty agenda such as the Socio-economic Duty (commenced March 2021) which is designed to deliver better outcomes for those who experience socio-economic disadvantage. Similarly, one of the seven national Well-being Goals set out in the Well-being of Future Generations Act is “A More Equal Wales” which envisages a society that enables people to meet their potential no matter their socio-economic background or circumstances.

There is a common misconception that Pembrokeshire is an affluent county, and while this might be true in certain areas, there are significant pockets of deprivation particularly in our larger towns and in some of our more rural areas. Pembrokeshire is subject to the same macro influences, both at a national and global level, as any other area, which makes tackling the issue effectively at a local level extremely challenging. This is complicated further by our location, peripherality and rurality, since traditionally poverty has been viewed (and with interventions and solutions developed) through a lens of urban deprivation within larger towns and cities. Urban poverty is more easily recognisable through specific geographic concentrations of deprivation where low-income levels, unemployment and demand for social housing and welfare are obvious. Rural poverty is often ‘hidden’ due to population dispersion,

with the result that the poverty of smaller communities is lost in the relative affluence of the broader area.

Some of the contextual and more nuanced issues are explored in subsequent sections of the assessment. However, recent data presents a concerning picture around some of the challenges Pembrokeshire faces, and it is likely the case that the focus on poverty in the county in recent years has not been sufficient. Work is already underway to identify what the PSB can do collectively to tackle some of these issues and to this end, the PSB meeting held on January 25 2022 had a specific focus on poverty. The PSB has agreed to set up a multi-agency working group to see how partners in Pembrokeshire can work better together to tackle the issue of poverty in the county.

In short, it is too important an issue to wait until the production of the Well-being Plan in May 2023 to seek to address it.

## Factors that point to poverty being an issue in Pembrokeshire

It should be noted that several measures traditionally used to assess levels of poverty are often subject to significant 'lag', which means that reporting periods for data does not always equate to the period when that data is made available. Similarly, precise figures for what seem to be the same reported issue can also differ depending on the metrics used as a means of measurement, since there is no universal definition of 'poverty' nor a common agreement as to how it should be measured.

Notwithstanding this, given the impacts of the Covid-19 pandemic since March 2020, and the fact that the full impact of Brexit is yet to be totally understood, it is fair to assume that the situation, particular from an economic and health perspective, will not have improved in this intervening period.

## **PATCH**

*Pembrokeshire Action To Combat Hardship have been providing free food parcels, clothing and household items to those in financial crisis in Pembrokeshire since 2008. The charity aims to relieve the effects of poverty for individuals and families by helping those experiencing hardship, with all of the items provided being donated by residents, schools, businesses and churches in the county. The charity relies heavily on volunteers to put together and deliver parcels and holds an annual Christmas Toy Appeal to provide toys and art materials for families.*

*In 2018 PATCH helped a total of 3578 people by providing them with food parcels. Demand has increased significantly since then and in January 2022 alone the charity helped 700 families by providing food parcels. Due to the impact of Covid-19, all of PATCH's bases have been temporarily closed, but they have continued to provide assistance to those in need throughout the pandemic from their main base in Milford Haven.*

## **Child poverty rates**

Child poverty cannot be disassociated from poverty in general. It is a symptom of broader problems and issues caused by poverty and how it impacts on families. The contributing factors leading to child poverty are varied and include unemployment, working households on low incomes, under-employment, families with caring responsibilities or health issues, housing costs (social and privately rented), and the availability of childcare.

The effects of poverty can impact on a number of areas of children's lives starting from birth. Children born into low-income households are more likely to be born at a lower birth weight, suffer from chronic diseases and obesity, have issues with their cognitive development and with mental health, and perform less well than their peers in school. In the long-term, this can impact on opportunities and health later in life and ultimately, life expectancy.

A report released in October 2020 by the End Child Poverty coalition using research which modelled DWP data, found that Pembrokeshire had the highest child poverty

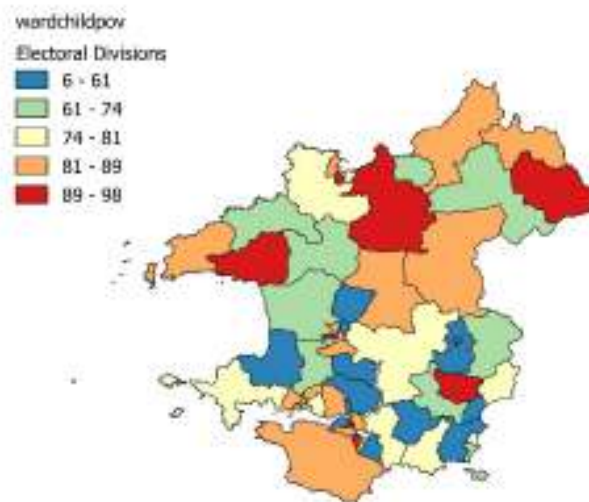
rate in Wales (once housing costs have been taken into account) with 31.4% of children judged to be living in poverty (a total of 4,376 children).

Local Authority	Child Poverty rate (AHC) 2018/19	% change since 2015
Pembrokeshire	31.3%	1.2%
Blaenau Gwent	31.2%	1.1%
Newport	30.7%	-0.3%
Ceredigion	30.3%	1.7%
Merthyr Tydfil	30.0%	-0.4%
Rhondda Cynon Taff	29.7%	-0.4%
Isle of Anglesey	29.4%	-0.5%
Powys	29.3%	0.7%
Carmarthenshire	29.3%	0.1%
Cardiff	29.0%	-1.5%

The Department for Work and Pensions publishes annual data on the number and Percentage of Children (aged under 16) living in relative low income families, by Ward. The most recent data shows that for 2018/19 that 28 of Pembrokeshire's 60 Wards have a relative child poverty rate within the top 20% for Wards in Great Britain and that eight of these are within the top 10% in Great Britain.

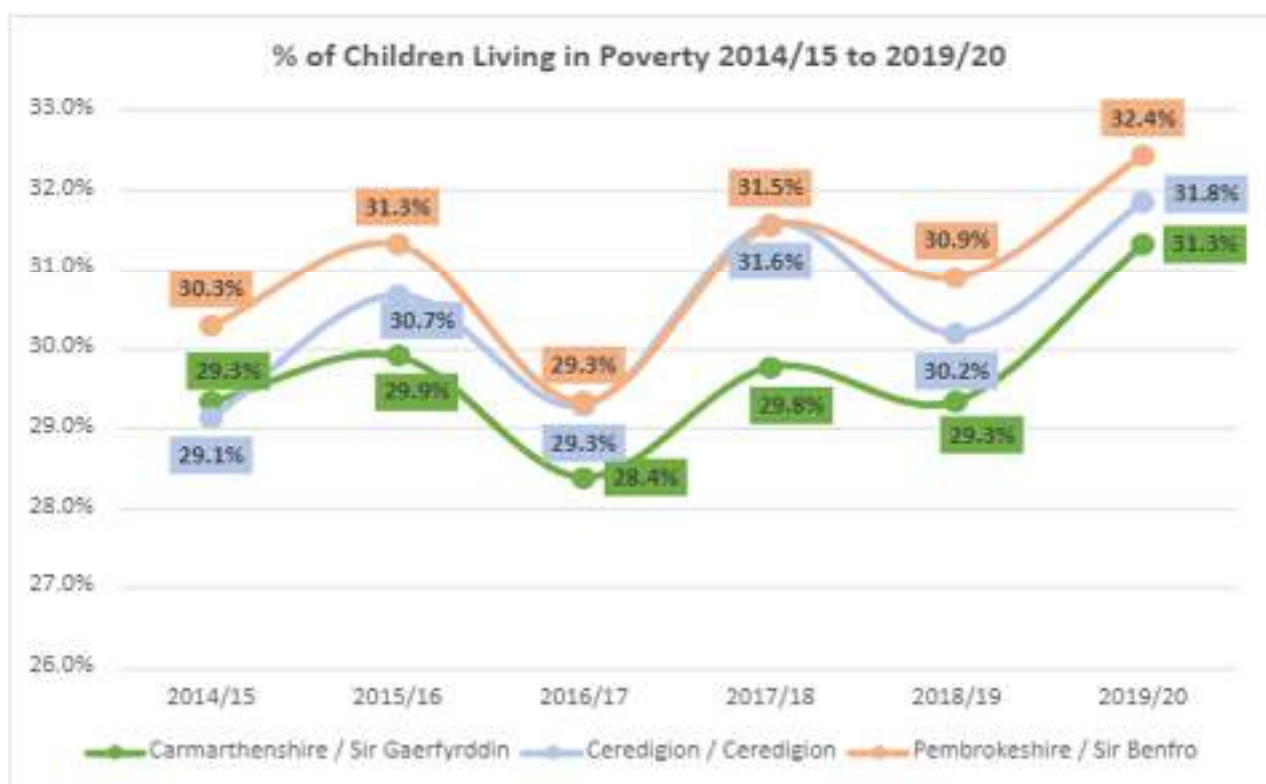


## Comparative Child Poverty: Pembrokeshire compared with the rest of Great Britain



The map shows relative child poverty in Pembrokeshire for 2018/19 compared with the other 8,627 Wards in Great Britain. Figures are before housing costs. The map divides our 60 Wards into quintiles.

The map shows that although child poverty compared with the rest of GB is high in parts of Pembroke and Pembroke Dock, some of our most rural areas, such as significant swathes in North East and North West Pembrokeshire, are also in the top 20% across the UK GB.



The number of young people eligible for free school meals (eFSM) increased sharply as a result of Covid-19's impact on the economy. This has been exacerbated by the end of the furlough scheme and the end of the uplift in Universal Credit.

Since 2019 pupils who were eligible for free school meals have continued to receive these even if they no longer meet the free school meal eligibility criteria. These are described in the table below as 'transitional'. The final column in the table below shows the percentage of young people who are eligible for free school meals plus those with transitional protection.

The data below is taken from the January 2021 Pupil Level Annual School Census (PLASC). Families have to apply for free school meals and we know that not all families do so. Therefore the figures for eFSM take-up within MSOA areas as presented below are likely to be under reported. As could be expected, there are significant numbers of eFSM pupils located within our larger towns and urban areas. However, there are discrepancies between the figure below and those presented above in terms of the rates of childhood poverty we see in some of our more rural areas.

Community	Not eFSM	eFSM	Total	% eFSM	% eFSM plus transitional
<b>Northeast Pembrokeshire</b>	766	51	817	6.20	8.90
<b>Fishguard Area</b>	1108	178	1286	13.80	19.10
<b>Northwest Pembrokeshire</b>	771	105	876	12.00	15.10
<b>East Pembrokeshire</b>	830	75	905	8.30	9.90
<b>Haverfordwest North</b>	920	254	1174	21.60	27.80
<b>Haverfordwest South &amp; Merlin's Bridge</b>	997	230	1227	18.70	24.10
<b>Narberth Area</b>	574	39	613	6.40	8.20
<b>West Pembrokeshire</b>	965	118	1083	10.90	13.60

<b>Neyland Area</b>	1108	122	1230	9.90	13.60
<b>Milford Haven East</b>	905	251	1156	21.70	31.10
<b>Saundersfoot/Kilgetty Area</b>	819	94	913	10.30	13.10
<b>Milford Haven West</b>	1031	278	1309	21.20	29.30
<b>Pembroke Dock</b>	1213	388	1601	24.20	31.40
<b>Pembroke East &amp; Carew</b>	942	82	1024	8.00	11.70
<b>Pembroke West &amp; Angle Peninsula</b>	958	283	1241	22.80	29.10
<b>Tenby Area</b>	631	68	699	9.70	11.60

In December 2019 Estyn carried out an inspection of Pembrokeshire County Council's Education Department. One of the four recommendations in their report was that the authority should 'Improve the outcomes for all groups of learners, including those that are eligible for free school meals and those that are more able'. At Key Stage 4, the achievement of Pembrokeshire pupils eligible for free school meals is below expectations in comparison with that of their counterparts across Wales.

Looking forward, it should be noted that the recent Co-operation Agreement (between the Labour government in the Welsh Assembly and Plaid Cymru) set out the intention to extend FSM eligibility to all primary school children. While this is a welcome initiative in terms of child health and well-being, it also means that the effectiveness of using eFSM as a proxy for child poverty will be reduced in the future. Other data sets will continue to describe poverty overall, and partners will need to consider how new data that can be cross-tabulated with attainment, attendance and ALN, can be developed.

## Economic data

- Between October 2019 and October 2020, 76.6% of working age (16-64) adults in Pembrokeshire were economically active (76.2% Wales) 23.3% were economically inactive (23.8% Wales)
- There are approximately 6,000 workless households in Pembrokeshire, which equates to 16.4% of households. This is above the UK figure of 13.6%.

- Median hourly pay in Pembrokeshire for full time employment is £14.07, compared to a Wales figure of £14.40, and a UK figure of 15.65
- The number of claimants in Pembrokeshire in receipt of Universal Credit is steadily increasing. The latest figures suggest that 9292 claimants in Pembrokeshire in receipt of Universal Credit compared to a figure of in 2019, and 8134 in 2020.
- The latest figures for the number of children in Pembrokeshire living in relative low income households (before housing costs and having claimed one or more of Universal Credit, Tax Credits or Housing Benefit) was 21% in 2018-19
- The most recent figures show that Pembrokeshire has the highest percentage of children living in workless households in Wales at 20.2%, against a Wales average of 12.6%

## Housing and homelessness

Data from the Council's Housing Section shows that there has been a clear increase in housing need over the past 12 to 18 months, demonstrated by the numbers on the social housing list operated through the Choice Homes programme. The increase in the number of people waiting for 2 bedroom houses indicates that there is an increase in families looking for accommodation in the social housing sector – at the end of 2019 there were 907 people on the waiting list for a 2 bedroom property and by the end of February 2021 this had risen to 1172. The total number of people currently on the waiting list is 4713.

Changes in national policy and guidance introduced at the start of the Covid pandemic has resulted in a large increase in homeless applications and duties placed on the Council to provide interim temporary accommodation whilst suitable and affordable accommodation is found. As of October 2021, 189 households had been placed in temporary accommodation compared with 51 in December 2019. This situation is likely to continue due to the shortage of social housing and affordable private sector rentals in the housing market.

## Rent and Council Tax arrears

Pembrokeshire currently has the highest level of Council house rent arrears in Wales, although our rent levels are the lowest of the social housing providers in the county.

In February 2020 the level of rent arrears was £987,275 but at the end of February 2021 this had risen to £1,472,318, an increase of almost half a million pounds. By comparison the rate of collection of Council Tax in February 2020 was 95.57% and in February 2021 was 93.04%, a difference of around 2.5%. In terms of the outstanding Council Tax debt at the end of February 2021 there was a difference of just over £5m between the amount collected and amount due.



# ECONOMY





A PROSPEROUS WALES	A RESILIENT WALES	A HEALTHIER WALES	A MORE EQUAL WALES	A WALES OF COHESIVE COMMUNITIES	A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE	A GLOBALLY RESPONSIBLE WALES
✓	✓		✓			✓
Well-being area: Economic						

## Overview

Economic well-being underpins the well-being of the community as a whole. This goes beyond income and is also about identity, self-esteem and social networks.

People spend around a third of their waking hours at work, so quality of work and whether people enjoy work is a major component of overall well-being. The National Survey has found that the percentage of people moderately or very satisfied with their jobs in Pembrokeshire for two out of the past three years was around 90%, one of the highest figures in Wales. Satisfaction with their job translates to overall satisfaction with Pembrokeshire as a place to live of around 90%, within the upper quartile for authorities in Wales.

Earnings through working life are a major influence on income for people who are above working age and retired. If Pembrokeshire is to guard against the risk of poverty in future then people being well-paid enough to save, as well as covering the cost of the day-to-day, is vital.

The availability of career opportunities will influence whether Pembrokeshire's young people choose to stay in the county. Evidence shows that in the past many more young people leave Pembrokeshire than come here to work (though the most recent figures suggest that this trend has slowed or possibly reversed). In this way, our economy makes an indelible mark on the shape of our communities and what they will look like in the future.

The economy crosses over into all the other themes in this assessment and some examples follow.

- The economy also drives demographic change; this is perhaps its single biggest impact as this shapes Pembrokeshire's communities.

- The links between the economy and poverty are inextricably linked. In turn poverty drives many of the health inequalities that we need to tackle. In a similar way self, cohesive and resilient communities are underpinned by a strong economy.
- Inequalities in health are linked to economic activity. The economy contributes to people's sense of identity and self-worth as well as their income.
- New and refurbished housing relies on construction, which is a major employer within Pembrokeshire.
- Economic well-being relies on the skills developed through education and learning.
- Pembrokeshire's economy has contributed to climate change; from coal to oil and gas, fossil fuels have always been part of our industry, which has supplied the whole of the UK (and other countries) via pipelines, cargo vessels and power lines. Relatively few of the emissions from these industries are as a result of consumption within Pembrokeshire. Through the Milford Haven Energy Kingdom project our economy is now helping to mitigate its impacts.
- There are opportunities to take advantage of Pembrokeshire's coastal location to strengthen and re-shape Pembrokeshire's economy through development of a range of marine energy projects. More information on proposals is available later in this section of the assessment and in the Environment section
- The economy (through agriculture) has shaped Pembrokeshire's environment and landscapes into those that we cherish today, providing rich habitats for both plants and animals.
- Our historic landscapes, which form part of our culture, are often former industrial settings; such as Porthgain, Stepside Iron Works, or the Royal Dockyard in Pembroke Dock.

## Scene setting

The physical geography of Pembrokeshire has shaped our economy. Our coastline and proximity to the Celtic Sea and Ireland mean Pembrokeshire is on trans-European freight routes. Deep water ports have enabled the petro-chemical sector to develop. These same physical assets mean that Pembrokeshire is well placed to play a pivotal role in the green energy revolution. Our outstanding natural environment is the backbone of a £585m tourism industry.

Pembrokeshire is peripheral to the rest of Wales' and the UK's economy and relatively poor connectivity via the road and rail network has hindered some

economic development. Fast broadband provision is improving though many rural communities (or parts of them) do not have access to this. Pembrokeshire has good energy infrastructure – port facilities, high-pressure gas pipelines and connections onto the 400kV and 132kV electricity networks.

Whilst Pembrokeshire has good quality further education via Pembrokeshire College (as well as through some sixth forms), Pembrokeshire does not have a University and has a limited higher education offer.

## Analysis of data

Much of the granular data on how our economy compares with the rest of Wales and the UK come from the 2011 Census, which is now out of date. Further information is available from large-scale surveys, however, the accuracy at a Pembrokeshire level is less precise.

A further caveat to note is that the Covid-19 pandemic has had a huge impact on the economy and there is a risk that the following information describes how the economy used to work rather than how it will work in future.

There are a number of existing profiles. These include the Pembrokeshire Economic Development Strategy and Action Plan 2016-2021 which was commissioned from PACEC (considered by Cabinet 31 October 2016). More information can be found via this link <http://mgenglish.pembrokeshire.gov.uk/mgConvert2PDF.aspx?ID=38151>

## Businesses

### Business size

The total number of businesses in Wales in 2019 was 4,990 and the equivalent rate per 10,000 people was 696.6, the third highest in Wales.

Pembrokeshire has a high proportion of small and micro-businesses. For instance, over 80% of tourism businesses are micro-businesses employing fewer than 10 people.

### Business formation rates

Business formation rates and survival rates are a key measure of how well the economy is performing. The following table shows the number of new businesses formed in the past five years for neighbouring local authorities. The figures show

that the number of new businesses formed each year was higher in 2019 and 2020 than it was in 2016 and 2017. A surprising statistic is that, despite the uncertainty caused by the pandemic, the number of new businesses changed little in 2020 in Pembrokeshire and in neighbouring authorities.

Authority	2016	2017	2018	2019	2020
<b>Powys</b>	460	420	405	405	425
<b>Ceredigion</b>	235	220	185	230	200
<b>Pembrokeshire</b>	455	410	700	510	500
<b>Carmarthenshire</b>	665	625	605	605	720

Based on 2017 data, the business survival rates for new businesses formed in that year are higher than the Welsh average and around the upper quartile for Wales.

Area	Births	1-year survival	1-year per cent	2-year survival	2-year per cent	3-year survival	3-year per cent
<b>Pembrokeshire</b>	410	380	92.7	305	74.4	255	62.2
<b>Wales</b>	12,705	11,495	90.5	9,200	72.4	6,835	53.8
<b>United Kingdom</b>	375,605	334,790	89.1	260,135	69.3	200,390	53.4

Business demography, UK: 2019" Office for National Statistics. Online:

<https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/business-demography/2019>.

## Sector analysis

The table that follows shows that sectors that people in employment work in, taken from the Business Register and Employment Survey for 2020. This shows that accommodation and food services is the single largest sector and is also large compared with the rest of Wales. Health is a large sector, but its relative size is around the Welsh average. Compared with the rest of Wales, agriculture, transport and arts are relatively large sectors, but compared with accommodation and health, employ relatively few people.

Sector	Number	Percent	Relative position comparison to Wales
1 : Agriculture, forestry & fishing (A)	4000	8.7%	High

2 : Mining, quarrying & utilities (B,D and E)	800	1.7%	Average
3 : Manufacturing (C)	3000	6.5%	Low
4 : Construction (F)	3500	7.6%	High
5 : Motor trades (Part G)	800	1.7%	Below average
6 : Wholesale (Part G)	1250	2.7%	Above average
7 : Retail (Part G)	4500	9.8%	Average
8 : Transport & storage (inc postal) (H)	2500	5.4%	High
9 : Accommodation & food services (I)	8000	17.4%	Very high
10 : Information & communication (J)	500	1.1%	Very low
11 : Financial & insurance (K)	300	0.7%	Low
12 : Property (L)	700	1.5%	Below average
13 : Professional, scientific & technical (M)	2000	4.3%	Average
14 : Business administration & support services (N)	2500	5.4%	Below average
15 : Public administration & defence (O)	2500	5.4%	Low
16 : Education (P)	4000	8.7%	Average
17 : Health (Q)	7000	15.2%	Average
18 : Arts, entertainment, recreation & other services (R,S,T and U)	2250	4.9%	High

## Sector focus: Retail and town centres

Town centres are one of the most visible parts of the economy. They are often the foundation of the communities across the county. We have been working for over a decade, through a partnership approach, to re-invigorate town centres. The key outputs for this work have been a series of town centre masterplans. The partners involved in this work includes the Council, Town and Community Councils, third sector and business organisations and key public organisations such as the Port of Milford Haven. Inevitably, the impact and pace of work that these plans have catalysed has varied.

In general, Pembrokeshire's larger town centres have found it more difficult to adapt to changing retail patterns (such as the growth in out-of-town and more recently internet shopping) than town centres in other local authorities across Wales. This has resulted in higher than average vacancy rates. By comparison, the UK High Street Average vacancy rate for 2019 was 12.9%, and Wales's rate was 15.8%.

Town	% vacant A class 2019	% vacant A class 2020	% vacant A class 2021	Change in vacancy 2019-2021 %
Fishguard	17	19	22	29
Haverfordwest	17	21	25	47
Milford Haven	19	22	29	53
Milford Marina	13	33	5	-62
Narberth	9	11	9	0
Pembroke	9	15	19	111
Pembroke Dock	25	24	24	-4

Vacancy figures are taken at the beginning of each year. The table above shows that although vacancy rates in most towns increased in 2021 as a result of COVID-19, for the most part, they were already increasing. Narberth and Milford Marina appear to be performing relatively well.

Internet sales as a percentage of total retail sales across the UK for October 2021 was 26.3%, a little lower than October 2020's figure of 29%, but much higher than the October 2019 figure of 19.1%. These figures tend to be seasonal with a pronounced peak for each years' November figures.

It is clear that town centres in main towns will not regenerate through the private sector alone and without support from the wider public sector. The need for this investment is recognised in the Council's Recovery and Regeneration Strategy.

## Sector focus: Tourism

Pembrokeshire's tourism industry is the single largest sector in Pembrokeshire's economy. Pre-pandemic, there were 4.2m visits a year (2m day visits). Worth around £585m in 2019, this supported over 11,600 Full Time Equivalent jobs (2019 figures).

Partners re-shaped how Pembrokeshire has supported tourism through the creation of a Destination Management Partnership, the type of structure that is used in Cornwall and other counties with a large tourism industry to maximise the benefits of the industry and reduce duplication in efforts to support it. The vision partners wish to achieve is *One Pembrokeshire – a place of landscape culture and adventure*.

The tourism industry provides a large number of jobs that can be accessed with entry-level skills. Whilst career pathways exist in the sector (and strategies contain



plans to build on these pathways), many jobs within the sector remain relatively low paid with seasonal peaks and troughs in demand for labour.

Whilst tourism in Pembrokeshire has many strengths such as a strong destination brand, good access to its natural environment, a range of accommodation and a good range of adventure activities and events, there are weaknesses that still need to be addressed. These include stubborn seasonality, a more limited rainy day/off season offer than other locations, as well as pressure on tourism hot-spots which can result in a negative impact on the environment. The Pembrokeshire Destination Management Plan 2020-2025 has an action plan to maximise opportunities and grow the sector in a sustainable way.

The recent UK wide upsurge in demand for 'stay-cations' had led to rapid growth in tourism. As if often found with rapid change processes, the impact of a surge in tourism has not been entirely positive, for instance it is exacerbating problems within our housing market.

### **Sector focus: Energy**

Although directly employing relatively few people compared with accommodation, Pembrokeshire has a nationally significant energy sector that adds a significant amount of value. Two LNG terminals have the capacity to import and store 25% of the UK's annual national gas use, a vital asset that reduces the UK's dependence on Russian controlled gas imports. Pembroke has one of the largest oil refineries in Europe as well as large storage sites. Pembroke Power Station is a modern and efficient 2GW facility and is Wales' only large-scale power generation plant.

### **Sector focus: public sector**

Compared with other local authorities, Pembrokeshire has a roughly average number of jobs that are employed within the public sector though there are a much larger number of jobs that are funded through public sector spend, particularly the independent social care sector which is commissioned by both the NHS and Pembrokeshire County Council. Trends in both the specialisation and regionalisation of public sector services have the potential to shrink some public sector jobs in Pembrokeshire to the benefit of more centrally-located counties.

### **Sector focus: food and agriculture**

Although a relatively small part of the overall size of the economy, Pembrokeshire has a relatively high number of people employed in agriculture, either directly or

indirectly. The proportions of best and most versatile agricultural land in Pembrokeshire are much higher than the Welsh average. This provides a sound foundation for Pembrokeshire’s agricultural industry, but can also be a potential barrier to future development.

We anticipate that within the next ten years, there will be a significant change within agriculture as a result of Brexit and changes to trade relationships as well as changes to the system of agricultural subsidy in line with Welsh Government’s recent White Paper. By value, Wales’ fisheries economy is only worth about £45m through Pembrokeshire has a significant share of the valuable shellfish catch.

The food and agricultural sector is underpinned by the county’s ecosystems. The higher quality and more resilient these are, the easier the sector will find it to adapt to climate change. The strengths of Pembrokeshire’s ecosystems, as well as the challenges they face as a result from climate change and pressures on biodiversity, are covered in the Environment section.

The Pembrokeshire Food Park is an example of how the Council and partners are investing in projects to increase the value of agricultural produce from Pembrokeshire, retaining this value within the county to enable local businesses to thrive.

## Labour force

### Age of workforce

The following data is taken from the 2011 Census but is illustrative of the make-up of the workforce. Just over four in ten adults are economically inactive. However, many of these people continue to ‘work’ in the sense that they are doing activities that have a clear economic value: carers, and volunteers are just two examples.

Age category	Economic ally active: Total	Economic ally active: In employm ent: Total	Economic ally active: In employm ent: Employee : Total	Economic ally active: In employm ent: Self- employe d: Total	Economic ally active: Unemplo yed (includin g full- time students)	Economic ally inactive
All categories: Age 16 and over	58%	55%	42%	12%	4%	42%

Age 16 to 24	67%	56%	53%	3%	11%	33%
Age 25 to 34	84%	78%	67%	11%	7%	16%
Age 35 to 49	85%	81%	64%	17%	4%	15%
Age 50 to 64	66%	64%	45%	19%	3%	34%
Age 65 and over	12%	12%	6%	6%	0%	88%

Looking to the future, as the state pension age rises, it is reasonable to assume that there will be more older people who remain economically active and part of the formal workforce.

## Self employment

Pembrokeshire has high levels of self-employment. This is often viewed as positive and a sign of greater entrepreneurship. However, not everyone who is self-employed is so out of choice

The number of people who are self-employed, including the sector they work in can be estimated from the Business Register and Employment Survey. This data suggests that the number of people who are self-employed in 2018 - 2020 was 5,000, about 10% of the total number of employees, a 25% reduction in the number compared with the previous three years' figure of around 6,700. The biggest single reduction is in the number of self-employed people in the Agriculture, forestry and fishing sector, where numbers have dropped by more than a third.

The proportion of people who are self-employed has dropped across Wales and as a result Pembrokeshire has had the third highest rate of self-employment in Wales over the past six years.

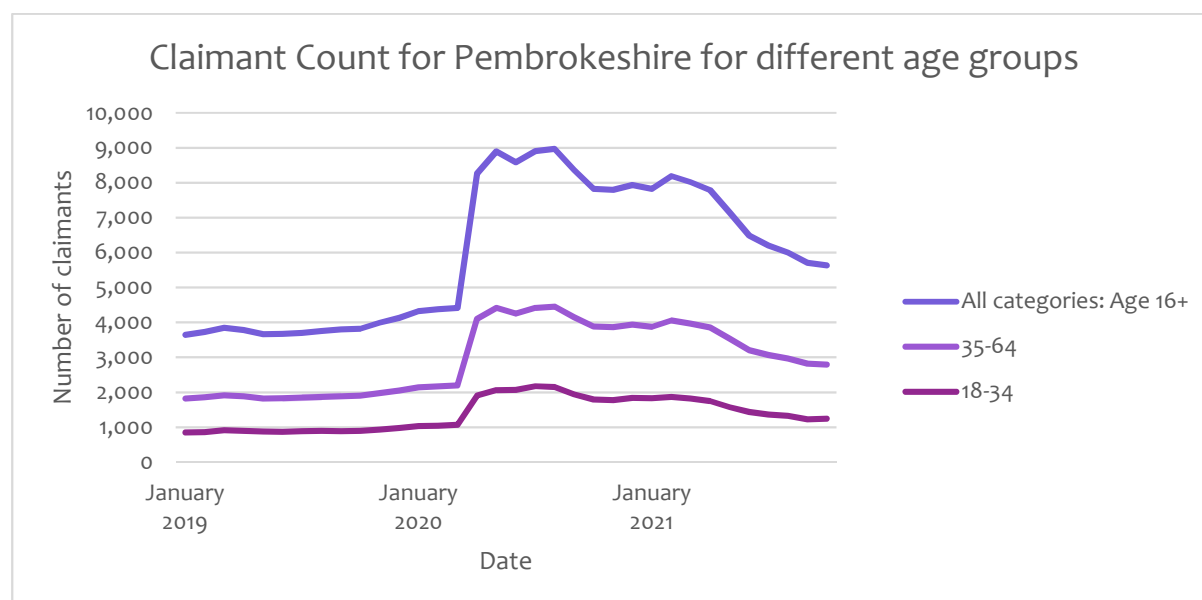
## Hours worked

About 60% of employees (not including people who are self-employed) worked full time for their employer in Pembrokeshire in 2020. Full time work is defined as more than 30 hours a week. Data from the ONS's Annual Survey of Hours and Earnings shows very little variation in the number of hours worked per week. Pembrokeshire's 2021 figure of 37.0 hours is the same as Welsh median; though the differences in hours worked between all 22 authorities is not statistically significant.

## Unemployment

The Covid-19 pandemic has had a significant impact on Pembrokeshire's economy. In April 2020, the claimant count rate (a proxy measure of unemployment) doubled as a result of the lockdown. The percentage increase in numbers was fairly

consistent across age groups. However, the unemployment rate for young people was significantly higher than that for other age groups pre-pandemic, and despite falling to near pre-pandemic level, young people's unemployment remains higher than for other age groups.



Schemes to support both self-employed people, and employees who could not work because of the pandemic and were furloughed, were gradually wound down and came to an end by November 2021. It is still a little too early to see how removing this support will impact on unemployment. It is further complicated by Pembrokeshire's seasonal pattern of unemployment – rates tend to rise throughout the winter and peak in January.

## Average pay

In 2020, the gross weekly pay for full-time workers in Pembrokeshire was £504.80, one of the lowest figures in Wales. Someone whose weekly pay was at the 25 percentile for Pembrokeshire only earned £403.40 per week, about the median compared with other Welsh council areas. 2020 figures were in line with previous years.

Pay figures for 2021 differ. Median pay was £568.80 an increase of 14% compared with 2020, a much faster increase than that seen across the rest of Wales. Rather than median pay being amongst the lowest in Wales it is now around the average. The 25 percentile only increased to £425.10, a 5% from 2020 to 2021. 2021 was a

very unusual year for Pembrokeshire's economy and it is too early to say whether wages in general will continue to be around the Welsh average or whether they will drop back.

## Skills

In general, skills levels in Pembrokeshire are similar to the rest of Wales. In 2019, about 8% of Pembrokeshire adults have no formal qualifications (7.7% for Wales) and 37% of Pembrokeshire adults have a qualification equivalent to NVQ4 (39% across Wales).

The Regional Skills Partnership has identified areas in which skills across the region need to improve. These are listed below

- Advanced Materials, Manufacturing and Energy. A key focus is on STEM learning pathways
- Construction Industry; curriculum development careers advice and guidance.
- Creative Industries and ICT ensuring that course content and delivery mechanisms meets the needs of employers.
- Food and Land-based effectively promotion of the sector and develop further education provision within the food manufacturing sector.
- Financial & Professional Services. A closer working relationship between the industry and providers to ensure that course content and delivery mechanisms meet the needs of employers.
- Health & Social Care. Training to ensure eligibility for registration, and a targeted campaign to train the meet the demand for care and support at home.
- Leisure, Tourism & Retail. To ensure that education leavers are equipped with the work readiness and basic skills to make a valid contribution to individual organisations and the sector as a whole.

## Impact on Life Stages

### Young people

Evidence from the young people's survey is that young people are not confident that, without positive change, they will be able to pursue their life ambitions without moving away from Pembrokeshire.

Data from Careers Wales indicates that the percentage of Year 11 students who do not go into education, employment in Pembrokeshire of 1.5% is around the average for Welsh authorities. The equivalent figure for Year 13 pupils for 2019 was 2.4%, better than the Welsh average

There is limited access to higher education institutes within Pembrokeshire though there are links with Trinity St Davids which has campuses in Carmarthen and Lampeter, and energy projects are making links to Swansea University. Over time, different ways of accessing higher education, e.g. more on-line learning, may erode this competitive disadvantage. Nonetheless, a university attracts young people from other areas, and the limited higher education offer within Pembrokeshire is a factor in driving net out-migration of younger people.

### Adulthood

Many of the statistics in this section are most relevant to working age people and in order to avoid repetition, these have not been repeated though one issue that has an impact on economic activity rates of younger adults is the availability of childcare.

The last Childcare Sufficiency Assessment (2017-22) identified that the distribution of childminders across the county was inconsistent. Although childcare provision was available at weekends, there was none available after 7pm. With regard to full day nursery provision, the highest number of full day care settings and places was available in Haverfordwest between the hours of 8am and 6pm. The assessment also identified that there was limited after school provision in the county and a lack of provision for older children both after school and during school holidays.

The parent/carers survey undertaken as part of the assessment showed that the biggest barrier for working parents to access childcare was affordability and a lack of childcare availability at specific times. Parent/carers working atypical hours highlighted the need for full day care to be available before 8.00am and after 6.00pm. Therefore, moving forward, Pembrokeshire will need to work with providers



to look at increasing the flexibility of core hours to ensure that childcare provision is not a barrier for working parents/carers or those wishing to return to work. Provision for children aged over 11 years after school and during school holidays will also need to be addressed alongside affordability, as this was identified as the biggest concern of parents/carers who responded to the survey.

The next Childcare Sufficiency Assessment, which will be undertaken in 2022, will look to assess the adequacy of current provision in view of the changes to the working patterns of some families brought about as a result of the pandemic.

## Ageing well

About one in ten older people are economically active, and the vast majority rely on savings built up throughout their lifetime (e.g. occupational pension) or state support. In Pembrokeshire, a significant part of government spending is channelled through the Department of Work and Pensions and this influences local spending power. In 2018/19, the most recent year for which figures are available, annual DWP spend was estimated at £403m, £234.8m of which was spent on the basic state pension. To put this figure into context, the net revenue expenditure of Pembrokeshire County Council in 2018/19 was £218m.

It is worth noting that many older people, whilst classified as economically inactive, continue to make a valuable contribution to their communities and wider society. Different ways of thinking about economics, for instance, those which underpin the Well-being of Future Generations Act, place much more importance on capturing the value generated by people (arguably mislabelled) as economically inactive.

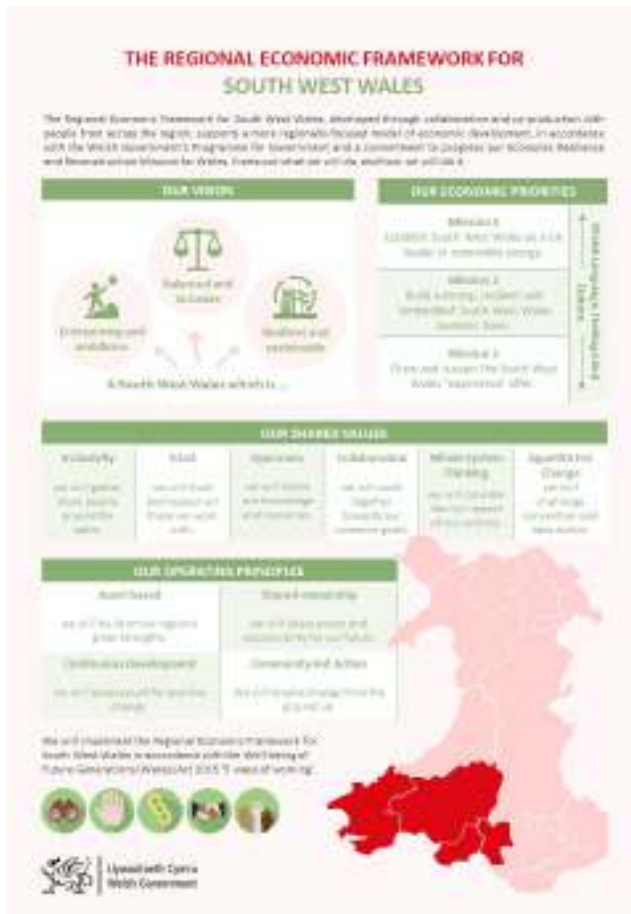
Current and future welfare policies, combined with changes to occupational pensions and growing inequalities in wealth (e.g. the ability to buy a house) will determine the spending power of tomorrow's pensioners. It is possible that the current UK-wide increase in pensioner poverty amongst people who rent or are from an ethnic minority will affect many older people.

## Responding to trends

The economy is much more dynamic than other policy areas and relatively small interventions by the public sector can lever in much larger private sector contributions to shape the local economy. This can be by providing necessary infrastructure or catalysing growth. There a number of mechanisms through which

regeneration is ongoing such as Enterprise Zones in the Haven waterway (but also at Trecwn and around Haverfordwest airport), and Swansea Bay City Deal.

The regional agenda is important for the economy; corporate joint committees have a-powers in this area and their inception has re-energised regional working.



Through the Regional Economic Framework partners across the South West Wales region will work collectively as a region, and embrace the ways of working set out in the Wellbeing of Future Generations (Wales) Act 2015. Actions include:

- build a stronger, greener regional economy as we make maximum progress towards decarbonisation
- further develop and deliver the three 'Missions' (These are to: establish south west Wales as a UK leader in renewable energy and the net zero economy; build a strong, resilient and embedded business base; grow and sustain the 'south west

Wales experience' offer) and priority actions captured in the south west Wales regional economic development plan

- work collaboratively with the Regional Skills Partnership to develop the right skills for a future workforce,
- promote and champion the south west Wales region as an area with economic opportunities, an ambitious attractive place to live, for skilled and well-paid employment and to encourage investment

The framework will be supported by a more detailed regional economic development plan.

## Responding to the decline in town centres

The functions and purpose of successful town centres has been moving from retail to one which provides an attractive experience and services underpinned by high

quality retail. There are a number of interventions to support town centres, which PSB partner organisations are supporting. The Council's Recovery and Regeneration Strategy recognises the importance of place and investment is focused on Haverfordwest and Pembroke South Quay. Projects in Haverfordwest are centred on the river, such as improvements to the Riverside Shopping Centre, the Western Quayside, replacing the car park and bus station and replacing it with a transport interchange, as well as ambitious plans for Haverfordwest Castle. Together these will create a coherent and attractive town centre, a virtual circle that will generate further investment. The Port of Milford Haven's masterplan for Milford Waterfront is leveraging in investment such as the Tŷ Hotel.

The need for town centre support has been recognised by both Welsh Government and the UK Government through specific grants and regeneration programmes. Information on current Welsh Government support such as the Targeted Regeneration Investment Programmes is available on its website <https://gov.wales/support-improve-town-centres>. The Levelling Up Fund is an example of UK Government support.

## Responding to Energy opportunities

There are a number of complementary projects that are positioning Pembrokeshire as a centre of green energy. The map taken from *Future Wales* which is Welsh Government's key spatial plan up until 2040 recognises the importance of Milford Haven for energy.

[illegible]

The Pembroke Dock Marine project will create a proposed Marine Energy Test Area (META) with eight pre-consented sites located in and around the Milford Haven Waterway, META aims to de-risk the development of marine energy projects by providing the opportunity to test devices, sub-assemblies and components. The sites are accessible yet still representative of real sea environments. META is non-grid connected and so is ideal for early stage developers, and is also a perfect base for research and innovation.

Delivered by the Port of Milford Haven, the proposed Pembroke Dock Infrastructure (PDI) will create large open plan fabrication and laydown areas and land to sea transition space to suit to the needs of modern industry. This will enable the existing capacity to work to economies of scale, which is not currently possible. The first part of this £60m project, which could create 1,800 high skilled year-round jobs, started in December 2021.

Delivered by ORE Catapult, the proposed Marine Energy Engineering Centre of Excellence (MEECE) aspires to become a place where specialist knowledge, resource, experience and capacity can be shared between existing and future developers.

It is likely that there will be major opportunities for offshore wind in the waters located from as far as 45km away from Pembrokeshire. In November 2021, The

Crown Estate published further detail on its plans for floating wind leasing in the Celtic Sea, confirming its ambition to unlock up to 4GW of new clean energy capacity from floating wind in the Celtic Region by 2035, driving regional economic growth, job prospects and supply chain opportunity. In excess of 50GW of floating wind capacity has been identified across the wider Celtic region which is expected to be developed beyond 2035.

Floating wind and marine renewable opportunities coupled with potential peak demand for electricity from sectors such as steel works and cement manufacture in neighbouring regions also provide a robust opportunity for hydrogen export. The South Wales Industrial Cluster brings together key interests from both sides of electricity generation and demand to understand how heavy industry can be effectively decarbonised using these regional opportunities.

In addition, the Homes as Power Stations project aims to deliver smart, low carbon, energy-efficient homes through a co-ordinated approach across the City Region. The project will facilitate the delivery of a programme of new build developments, the retro-fitting of existing buildings and local supply chain development support.

This is a fast moving area and opportunities are being created rapidly, for instance additional investment of £20m per year into tidal energy was announced by Welsh Government in early December 2021. This reinforces the key points with the Economic development peer review that Pembrokeshire needs to ensure it has the capacity to make the most of these opportunities.

## Outcomes from the survey

### Main survey

The survey asked people what they valued most about a prosperous community. The issues that were flagged up most frequently were affordable housing and a good transport network rather than issues such as a stable economy, green economy and digital connectivity. Issues that related to a fairer economy such as a living wage, access to training and further education and sufficient and affordable childcare were mentioned relatively infrequently.

Not all groups expressed the same views on priorities on the economy. Digital connectivity was more highly valued by those who were disabled, carers and those who currently had a household income of £45K or more per annum.

When asked about concerns about prosperity in future, again lack of affordable housing was the top issue. However, lack of suitable job opportunities and talent drain to other areas were the second and third highest priorities, with lack of affordable transport fourth.

Respondents were asked what they would consider doing to improve economic circumstances. Supporting local business (which was most popular by some margin), undertaking a qualification or training and creating jobs and employment for local people were the three things that people were most likely to consider doing to improve their own or their community's economic circumstances.

The final question was around what support needs to be in place to improve economic circumstances. More job creation and employment for local people, help for existing businesses and funding or employer support to undertake qualification or additional training were the three things that those responding indicated would be the most valuable types of support.

Tentative conclusions that might be drawn are those people who answered the survey are relatively content with the current state of Pembrokeshire's economy and that more are concerned with housing and connectivity issues than with the economy per se. However, the survey suggests that the more that people look to the future, the more likely they are concerned with the future prospects for good quality jobs and the need for support for training.

## Youth survey

Highlights from the youth survey that are relevant to the economy include:

- 60% of the young people strongly agreed or agreed that they wanted to stay living in their local area
- 59% of the young people strongly agreed or agreed that knew what type of job they wanted to do when they were older
- 37% of the young people strongly agreed or agreed that they could do the type of job they wanted to in their local area
- 50% of the young people strongly agreed or agreed that things were improving in their local area, about three times higher than the 15% of young people who disagreed or strongly disagreed with this statement.



In conclusion, comments from young people are largely positive. However, despite 60% wanting to remain in their local area, only 37% thought that they could find the job they want within their local community.

## Other engagement

Both the main survey and the youth survey picked up sustainability and climate change issues. The need to develop the economy in sustainable ways was the main theme of the feedback from sessions held by Pembrokeshire Nature Partnership, Pembrokeshire Association of Voluntary Services (PAVS) and Together for Change.

These findings suggest that communities are willing to change their buying habits or get involved with organisations in the third or community sector to meet future needs.

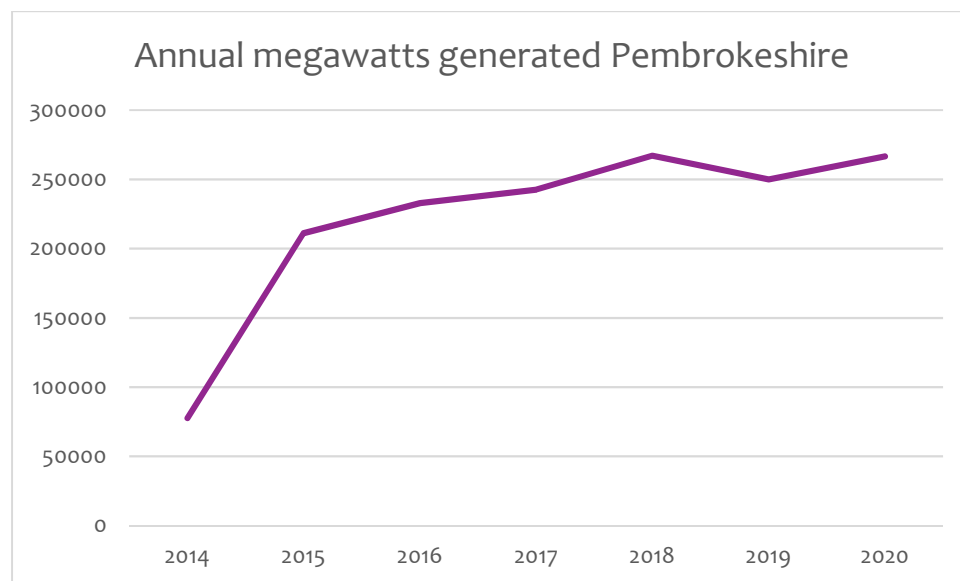
## Future trends and projections

All future trends have a high degree of uncertainty as social, technological and environmental changes interact.

Availability of well-paid and rewarding work is a 'pull' factor for migration. However, the strength of the bond between home and work location may be one of the biggest unknown factors as the PSB considers its next Well-being Plan. To date, most people live close to where they work –for example 95% of PCC employees live in Pembrokeshire, but the type of changes in working practices which have emerged through the Covid-19 pandemic have the potential to significantly change this. There is a possibility that people who currently live in other areas choose to relocate to Pembrokeshire, drawn by its high quality natural environment, as home-working continues to become more and more embedded as an acceptable working arrangement.

The future shape of Pembrokeshire's economy has clear cross-links with future environmental trends and our response to climate change. There is potentially a once in a generation opportunity for Pembrokeshire to establish itself as a national centre for generating and distributing green energy, for instance by using hydrogen as a vector, and this has been highlighted in the most recent Economic Development Peer Review commissioned by the Council. There is also a risk that as global dependence on fossil fuels wanes that Pembrokeshire's petrochemical industry will contract.

The graph below shows the increase in renewable energy generated in Pembrokeshire in the past six years. Since 2014, the amount of renewable energy generated across the UK has increased by 100% with a 200% increase in off-shore wind generation, which in 2020, was the single largest method of generating renewable energy. As demand for low carbon electricity increases (e.g. as a result of petrol and diesel cars being phased out) it is inevitable that there will be a requirement to further increase the proportion of green electricity generated as well as increasing the total quantity of green electricity produced.



It is likely that there will be major opportunities for off-shore wind close to Pembrokeshire. In November 2021, The Crown Estate published further detail on its plans for floating wind leasing in the Celtic Sea, confirming its ambition to unlock up to 4GW of new clean energy capacity in England and Wales and help establish a new industrial sector for the UK.

For agriculture, we can expect that in future, subsidy mechanisms will focus on sustainable land management and on the 'public goods' delivered by agriculture rather than being tied to food production and/or the area of land farmed. It is clear that there is growing interest in local and sustainable food production and this is likely to have a positive impact on carbon emissions and resilience. What is less clear is the extent to which changes to agriculture will change what Pembrokeshire's landscapes look like, or the landscape's relationship with local communities. Companies purchasing farmland to use for tree planting for their own carbon off-setting is an example of where UK wide policies may have a significant local impact.

## Impact of Covid-19 and Brexit into the longer term

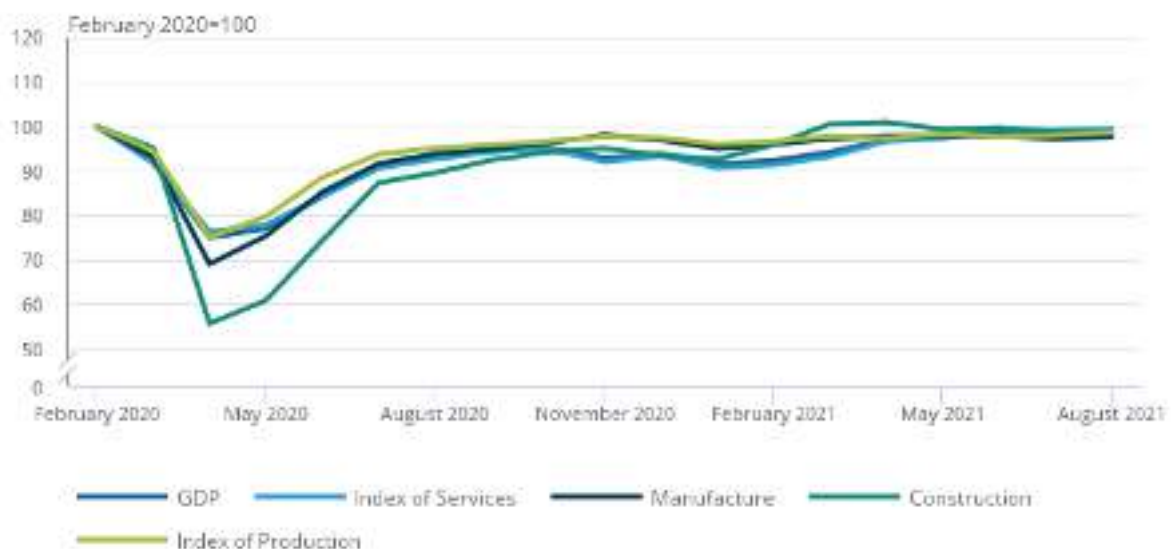
The longer-term impact of Covid-19 is difficult to forecast especially as Covid-19 coincided with Brexit and it is possible that new, more transmissible variants of Covid-19 will emerge.

The initial fears about the impact of the Covid-19 pandemic on the UK and global economy, such as a substantial increase in unemployment, would appear to be a too pessimistic based upon a summary of forecasts published by HM Treasury in October 2021.

- UK GDP growth of 7% is forecast for 2021 followed by 5% for 2022
- Unemployment across the UK, measured using the Labour Force Survey is expected to be 5% at Q4 for 2021 falling to 4.6% by Q4 2022
- Inflation using CPI as a measure, whilst still low by historic standards is expected to be around 3.5% for 2021 is expected to reduce to 2.7% by 2022

Figure 1: While output in all sectors is below February 2020 levels, the index of services is closest to its pre-pandemic level

Monthly gross domestic product (GDP) and components index, seasonally adjusted, UK, February 2020 to August 2021



Source: Office for National Statistics - Monthly GDP

It is also becoming ever-more clear, just as with previous major pandemics, Covid-19 is likely to continue be a major public health issue into the medium and longer term. This in turn is likely to have continuing impacts on the economy. For instance, social distancing requirements in manufacturing components in Asia is affecting the supply of key components.

The Covid-19 pandemic has resulted in levels of public borrowing unseen outside of wartime. This will impact on both the economy and the public finances into the longer term.

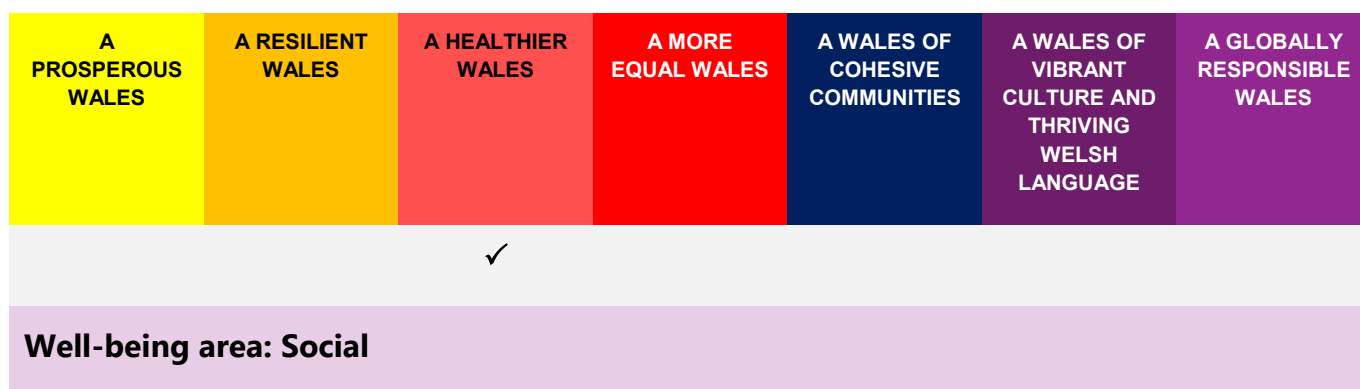
The long-term impact of Brexit is difficult to discern especially as both Covid-19 and Brexit have impacted on the same key factors:

- Transitional arrangements. The UK Government's intention is to negotiate new trade deals. However, this takes time and transitional arrangements are in place.
- Labour market shortages. Net migration to the UK was 38k at its lowest level in 2020 for many years. A combination of Covid-19 travel restrictions and work restrictions have led to a considerable reduction in workers from EU accession countries at a time when some sectors were expanding.
- Interruption to transport and logistics. Additional transport bureaucracy, combined with labour market issues and issues within the sector itself have strained supply chains.



# HEALTH AND SOCIAL CARE





## Overview

Living a healthy and active life, and avoiding behaviour which is harmful to our health, are the most important things we can do to improve health outcomes. However, our health is influenced by a wide range of factors. As individuals, we have a certain biological and genetic make-up and this determines to some degree how 'healthy' we will be in life. We all make lifestyle choices, both positive and negative, which influence our well-being.

There are also broader factors which can affect our health, such as the behaviours we engage in, where we live, how much money we have and the levels of support or care we receive from family, friends or professionals. These are often referred to as wider determinants of health and can create health inequity, where opportunities for achieving healthy well-being are not the same for everyone. Some of the factors which create health inequity are preventable or can be mitigated against through effective intervention measures. We know, for example, that there is a strong link which exists between socio-economic deprivation and poor health outcomes. We also know that people in rural communities without access to transport are more at risk from social isolation, which can impact on physical and mental health.

## Population Needs Assessment

The West Wales Care Partnership has recently produced its most recent Population Needs Assessment (a requirement under the Social Services and Well-being Act 2014) which provides a high-level strategic analysis of care and support needs, including the support needs of carers, across the region. It assesses the extent to which those needs are currently being met and identifies where further improvement



and development is needed to ensure that individuals get the services they need and are supported in living fulfilled lives.

As with our last Well-being Assessment, we co-ordinated activity with colleagues in health and social care to ensure public engagement work for both assessments relating to health and well-being was aligned.

While the Population Needs Assessment meets a separate statutory requirement, it will also be an integral part of the wider agenda of assessing the state of well-being in Pembrokeshire and therefore its findings will be a key consideration for us in our future planning to improve well-being.

## Key determinants of health

Social, economic and environmental factors are wider determinants of health which can have an impact upon people's physical and mental health. Differences in these factors between groups of people can lead to inequality and influence our health and well-being.

Public Health Wales's Wider Determinants of Health Unit, established in 2019, notes that these include;

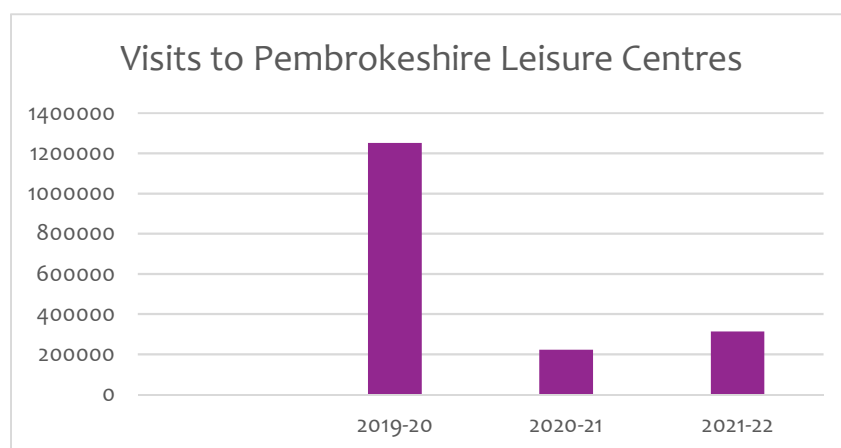
- money and resources
- our level of education and skills
- availability of good, fair work
- the quality and security of our housing
- our surroundings

These elements are all linked. A good level of education means people are able to find higher paid work, afford better housing and have more money to spend on buying healthy nutrient rich food. Unemployment, however, means a lack of income and resources, which can affect people's ability to maintain a balanced diet and influences the quality of the housing they can afford to live in. These factors in turn can influence the healthy or unhealthy behaviours we engage in, affecting our overall physical and mental health.

## Healthy behaviours

Healthy behaviours are those that that can be seen to have a positive effect on our health. This includes making sure that we eat a balanced diet which is low in fat and sugar, contains plenty of fruit and vegetables, includes wholegrain rather than refined starchy foods, and which includes two portions of oily fish per week.

Another behaviour that can positively affect our health is to make sure we get plenty of exercise. Data from the most recently National Survey for Wales undertaken in 2019-20 showed that 32% of adults ages 16+ participated in a sporting activity three times a week or more. Types of activity included walking, gym or fitness classes, swimming, running and jogging, cycling and football. The ability to take part in some of these activities, such as swimming and gym or fitness classes, was significantly affected during the pandemic, as fitness and leisure centres were forced to close. Prior to the pandemic, the number of visits to Pembrokeshire Leisure Centres recorded in 2019-20 was 1,250,628 and with centres closed for the majority of 2020—21 the number of total visits dropped to 221,663. Since the re-opening of Leisure Centres in May 2021 the number of visits has almost halved compared to 2019-20 figures, with total visits up to the end of October 2021 standing at 313,443. In some cases there can be barriers to accessing classes for those that are digitally excluded, when classes are advertised online or through social media.



A review undertaken by the British Medical Journal in 2021 found that during Covid lockdown periods when unnecessary outdoor activity was banned, there were decreases in physical activity and increases in sedentary behaviour. However, anecdotal evidence suggests that more people took up activities such as walking, jogging or cycling on a regular basis during the pandemic, or increased their activity levels in these areas. This may have been due to people wanting to increase their fitness levels, because of Leisure Centre and Gym closures, or as an antidote to lockdown boredom, as exercise was one of the few reasons for which people were permitted to leave their homes. It is unclear whether increases in these types of

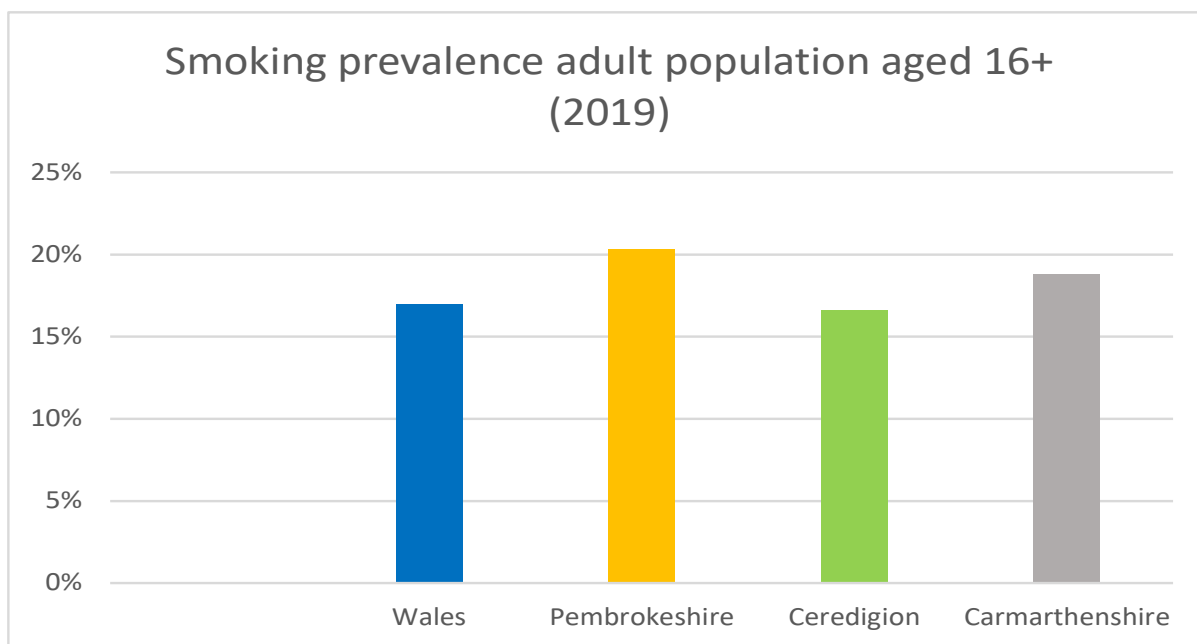
activities will be maintained now that restrictions have eased. Pembrokeshire, however, has a large network of walking and cycling tracks throughout the county and there are plans for more active travel routes to be put into place over the coming years. There are also several locations where Parkrun is available in Pembrokeshire; in Haverfordwest; Colby Woodland Gardens near Amroth; and Milford Haven Waterfront. These free weekly events take place on Saturday mornings for adults with a junior version available on Sunday mornings.

The importance of 'green and blue spaces' for people's mental health and well-being during the pandemic has been increasingly acknowledged as essential. Engaging with nature played a key role in maintaining people's physical and mental health and overall well-being during the Covid-19 pandemic and associated lockdowns as revealed by the "Why Society Needs Nature" report produced by Forest Research. The importance of prevention through the use of green, blue and social prescribing to improving well-being also cannot be underestimated.

## Behaviours that can negatively affect health

Just as healthy behaviours have a positive impact on our health, other behaviours we engage in and the choices we make can have a negative impact, which can also have an effect on those around us.

According to Ash Wales, smoking is the leading factor of preventable death, with data from 2019 showing that the rate of smokers in Wales was 17%, or 440,000 of the adult population. Data from the Public Health Wales Observatory in 2019 shows that Pembrokeshire has the highest rate of smoking prevalence in the Hywel Dda region, with a rate of 20.3% of the population over the age of 16 who are smokers.



Data is not available on a community level throughout Pembrokeshire, however, information from Hywel Dda UHB does show that there is some correlation between areas of deprivation and smoking rates, with Pembroke Dock and Neyland having a smoking rate of between 23% and 27%. More community level data would enable better targeting of smoking cessation services to areas where smoking rates are highest. However, hospital and community based smoking cessation services are provided across the Hywel Dda region to support quit attempts and provide access to nicotine replacement therapy (NRT) and as evidence shows that smoking prevalence is higher in more deprived areas, smoking cessation services have been targeted to those areas with greatest need. At time of writing (November 2021), Welsh Government were in the process of consulting on their long term tobacco control strategy with the aim of making Wales a smoke-free nation by 2030, which will mean achieving a smoking prevalence of 5% or less by this date. This is an ambitious target, but if achieved will have a significant impact upon the health of the nation as a whole.

NICE describes harmful drinking as a pattern of alcohol consumption that causes health problems directly related to alcohol. The misuse of alcohol can harm health in a number of ways, leading to chronic health problems, cancers, mental health issues, accidents and poisoning. Like tobacco, those at risk of harm from the misuse of alcohol come from all levels of society, ages and levels of prosperity. Although smoking is most commonly associated with deprived areas, the opposite is true for alcohol consumption with those drinking over the recommended guidelines living in

less deprived areas. Self-reported data from Public Health Wales shows that 20% do not drink any alcohol at all, 58% drink up to the recommended 14 units per week, 19% drink over this guidance amount and 3% report drinking to hazardous levels. In Pembrokeshire, data from Public Health Wales in 2019 showed that 66.6% of the population were moderate drinkers, 17% were hazardous drinkers and 2.2% were harmful drinkers. This information comes from self-reported data so must be considered with a degree of concern as it will not reflect the true issues. There are issues around the public's understanding of units and often this is under-reported when people are disclosing how much they drink.

Data from Hywel Dda UHB also shows that rates of hospital admissions for alcohol related conditions for adults in Pembrokeshire in 2019-20 were 267.8 per 100,000 a decrease of 9% on 2018-19 figures and a 24% change since 2015-16. However, during the Covid-19 pandemic there has been a reported increase in numbers of individuals accessing the Alcohol Liaison Nurse Services across each of the four main hospital sites in Hywel Dda. In addition, the age profile of individuals seeking support with significant alcohol related health issues has decreased, with an increase in those in the 40 plus age group now seeking support. This is also reflected in the profile of those accessing drug and alcohol services. Alcohol consumption also increased across the whole population during Covid, especially for those who were already drinking at higher risk levels pre-pandemic.

Drug misuse relates to the illegal use of banned or prescription only substances, which have a negative impact on health and can lead to dependence and other harmful behaviours. Long-term use of drugs can also lead to tolerance, which can in turn lead to overdose which in some cases can be fatal. The number of individuals admitted to hospital with conditions related to use of illicit drugs has continued to rise over recent years. In Pembrokeshire, figures for drug-related deaths in 2018 and 2019 were 5 for each year but this increased to 11 in 2020. Of these deaths the majority were male and occurred in more deprived urban areas.

Pembrokeshire also recorded 16 non-fatal overdoses during 2020, again the majority of which occurred in more deprived urban areas. There is anecdotal evidence that some harmful behaviours increased during the Covid-19 pandemic. For example, it is known that Dyfed Powys Police were successful in removing street dealers and county lines operations during the lockdowns, which meant that many people had to

buy from unknown sources, or even from the dark web, meaning that they could not be sure what they were taking. Accessing illegal drugs in this way leads to increased risk and increased harm.

In Hywel Dda during 2018-19, the majority of referrals for alcohol misuse were for those aged 50 plus and there was also an increase in the numbers of referrals for those over 70 years of age. Primary substance referrals in Hywel Dda for the same period related to use of heroin, cannabis and cocaine.

As a result of the pandemic and a number of national and regional lockdowns being enforced in Wales during the 2020 – 21 financial year, Pembrokeshire saw a reduction in both the number of referrals received and the number of assessment completed for drug and alcohol issues compared with the figures for 2019-20.

Between 1<sup>st</sup> April 2020 – 31<sup>st</sup> March 2021 Pembrokeshire received a total of 893 referrals which showed an 4.2% reduction on the 932 referrals received during 2019 - 20. During the same period Pembrokeshire completed 627 assessments, indicating a 15% reduction on the 738 assessment completed during same period the previous year.

Of the 627 assessments completed during this period 362 (57.7%) were for problematic drinking, 264 (42.1%) were for problematic drug use and 1 (0.2%) was unknown. This split is similar to previous years with alcohol use usually achieving a slightly higher percentage of assessments than drug use during the year, however, the split recorded in 2020-21 was noticeably wider than usual due to a 4.8% increase seen in the number of assessments completed for problematic alcohol use.

During the period 1<sup>st</sup> April 2020 – 31<sup>st</sup> March 2021, services in Pembrokeshire received 41 referrals for young people with drug and alcohol issues aged under 18, a 35.9% drop on the 64 referrals received for the same period in 2019-20. During the same reporting period Pembrokeshire completed 28 young person assessments, which was a 47.2% reduction on the 53 assessment completed in 2019 – 20. The reductions in referrals and assessments were a direct result of the Covid-19 pandemic and the introduction of national/regional lockdowns and school closures. This had a huge impact on Young Person services due to schools and colleges being one of the main referral sources, as well as access to young people being significantly reduced because of lockdown restrictions.



However, there is strong anecdotal evidence that an increase in parental drinking during lockdown has impacted upon young people and there has been an increase in young people accessing support for this. In addition, other risk taking behaviour appears to have increased, in particular reported vaping amongst young people in Pembrokeshire is increasing and there is evidence this is more widespread than those who traditionally smoked cigarettes.

## Mental health

One of the biggest impacts on mental health is loneliness. Certain life events can lead to people feeling lonelier, such as bereavement or job loss, and certain groups are more likely to experience loneliness than others, such as single parents, adults with learning disabilities or those whose incomes prevent them from involvement in a range of social activities. For those suffering from anxiety, depression or low self-esteem, loneliness can lead to people cutting themselves off from social contact, which in turn increases their sense of loneliness and isolation.

A recent Data Insight report from the Wales Centre for Public Policy focusing on individuals and based on data collected from three years of results from the National Survey for Wales (2016-17 to 2019-20) showed that there is a relationship between health, levels of loneliness and socio-economic background. Those reporting very bad general health reported higher levels of loneliness (42%) compared to those who described themselves as having a fair level of general health (23%). Other findings from the report were;

- Over 65s in very bad health are lonelier than those aged 75+. 50% of those aged under 65 with very bad general health reported feeling lonely compared to 24% of those aged 75+
- Among those in fair health, younger people report feeling lonelier – 46.9% of 16-24 year olds and 37.6% of 25-44 year olds reported being lonely, compared to 12.3% of those aged 75%
- How deprived an area is also correlates to health and loneliness; the most deprived areas of Wales were lonelier than the least deprived.
- The highest levels of loneliness were found in younger single households with or without children or in those from an ethnic minority background.

A report by the Welsh Government in 2019 noted that for young people leaving care, poor physical health was often linked to poor mental health and that organisations working with these groups felt that timely access to talking therapies was vital in tackling mental ill health. Younger LGBTQ+ people were also more likely to experience mental health issues than non LGBTQ+ young people, often as a result of bullying and not feeling able to talk openly about their issues. With regard to access to specialist mental health services for young people, data from Stats Wales shows that as of December 2021, 705 young people in Wales were waiting for their first appointment with specialist Child and Adolescent Mental Health Services (sCAMHS), down from 935 in December 2020. In the Hywel Dda region, 72 young people were waiting for their first appointment as of December 2021, down from 117 in December 2020.

In May 2020, the mental health charity Mind spoke to 675 people about the toll that the pandemic was taking on their mental health and found that in the previous 2 weeks nearly a quarter of people that had tried to access mental health services had been unable to access them. Many did not even attempt to access services, as they were concerned that their issues were not important enough compared to the wider crisis. An article published by the Senedd in May 2021 on the key challenges and opportunities for improving mental health and well-being in Wales noted that the mental health of some groups had been disproportionately affected by the pandemic. This included those with already existing mental health needs who may have been unable to access services, NHS and frontline workers, people on low incomes, and Black, Asian and minority ethnic groups. Some services were delivered virtually during the pandemic, but for those who were digitally excluded and without access to broadband, this would also have prevented them from accessing help.

Data from Stats Wales shows that as of December 2021, 307 people in the Hywel Dda region had been referred to local Primary Mental Health Support Services. During the same month, 183 people had been waiting up to 28 days for an appointment. However, these figures are only indicative of those who have been identified as requiring support and therefore the true figures are likely to be higher.

## Physical health

### Low Birth Weight

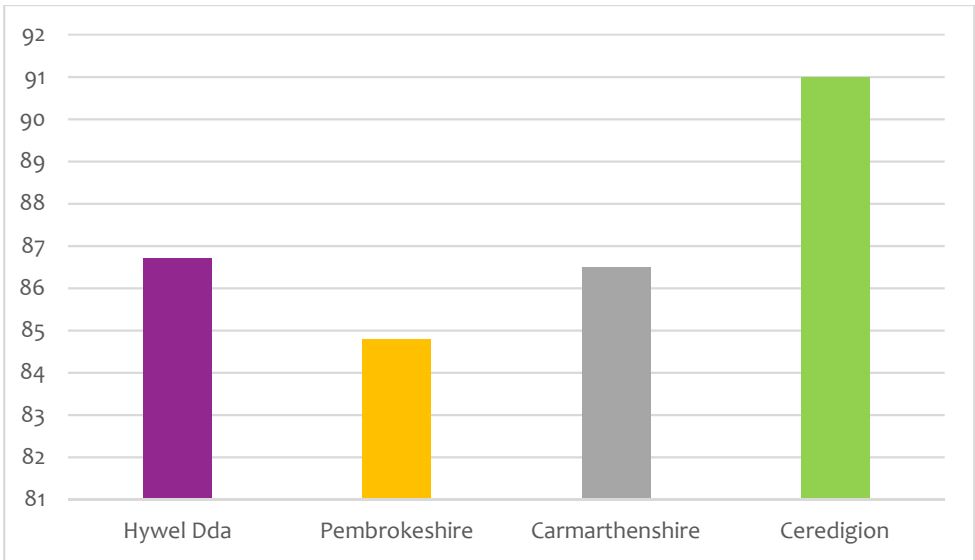
Research published in the British Medical Journal (BMJ) found that babies born with a low birth weight can encounter health and social disadvantage not only in childhood but also in adult life. In 2020, there were 46 low weight live births (children weighing less than 2500g at birth) in the county. This accounted for 4.7% of all live births and was lower than the Welsh average of 6.1%. These figures show an improvement from 2015 figures, with 63 low weight live births, an average of 5.4% of live births.

### Childhood Immunisations

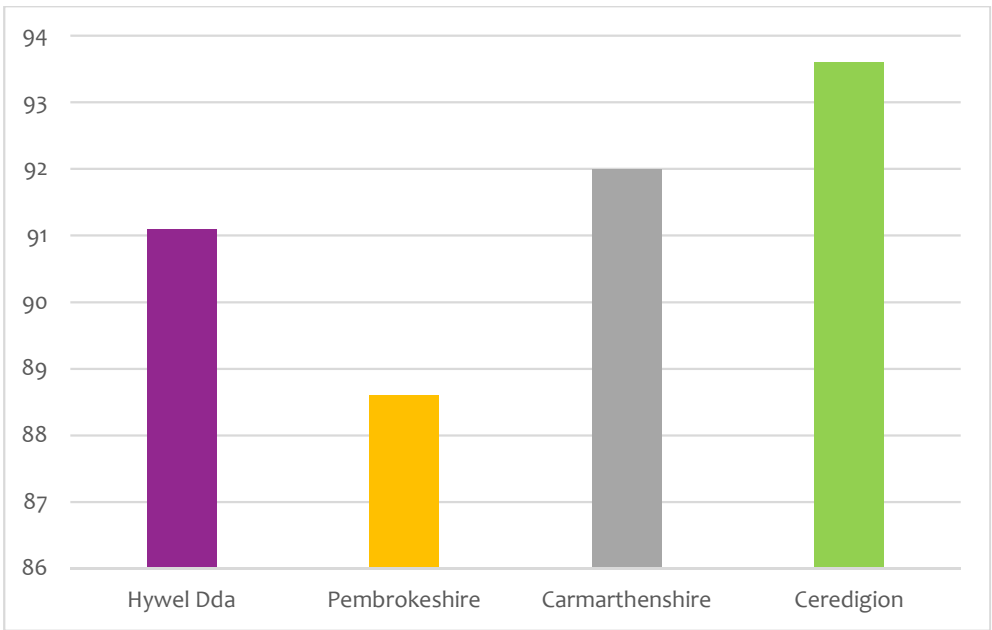
Immunisation not only protects children against serious disease but has a role to play in preventing future generations from contracting preventable diseases. It is important for as many children as possible to participate in immunisation programmes as the more people are immunised against a disease the harder it is for that disease to be passed on to others in the community who may be more vulnerable. Therefore, the target uptake rate for childhood vaccine uptake is 95%.

The overall vaccination uptake rate for the 4 in 1 preschool booster in Hywel Dda for children reaching their 5<sup>th</sup> birthday between 1<sup>st</sup> April 2019 and 31<sup>st</sup> March 2020 was 86.7%. In Pembrokeshire this figure was 84.8%, below the rates seen in Carmarthenshire (86.5%) and Ceredigion (91%). The uptake of second MMR vaccination doses in Pembrokeshire also lagged behind both Carmarthenshire (92%) and Ceredigion (93.6%) at 88.6%.

**4 in 1 preschool booster uptake rates in %for children reaching their 5th birthday between 01-04-19 and 31-03-20**



**2nd dose MMR uptake rates in % for children reaching their 5th birthday between 01-04-19 and 31-03-20**



It is unclear whether the vaccination uptake rate in Pembrokeshire changed in 2020-21 as data is not available, however, it is clear from the 2019-20 data that there is a need to improve childhood immunisation uptake rates within the county with the aim of meeting the target level of 95%.

### **Case Study - Vaccine Equity in Hywel Dda**

*Equity in immunisation reduces the risk of vaccine-preventable diseases among vulnerable individuals and communities who are at a higher risk of poor health outcomes from contracting the disease. **Reducing inequity in immunisation** is an important part in supporting communities to achieve their full health potential regardless of geography, demographic, social or economic status. The coronavirus pandemic highlighted a gap in the uptake of the COVID-19 vaccine especially in groups that have been disproportionately affected by the pandemic; for example, those from ethnic minority backgrounds, those at socio-economic disadvantage living in communities with high deprivation or social exclusion, including the homeless, those with mental ill health and those from traveller communities.*

*The Hywel Dda multiagency Vaccine Equity Group has undertaken a range of actions to reduce inequity, which has resulted in an increased uptake of the Covid-19 vaccine in the target groups. These actions included;*

- *Employing Community Outreach Workers to engage with minority communities about health and social care issues*
- *Used the Mobile Vaccination Vehicle (MVV) to run pop-up vaccine clinics in areas of socio-economic deprivation, traveller sites, rural communities and at colleges/ universities and workplaces*
- *Providing direct translation and interpretation support*
- *A targeted project to reach unpaid carers*

*This work has resulted in an increase in the uptake of the Covid-19 vaccine within the target groups and has provided a valuable multi-agency foundation for work in the future on booster programmes and the influenza vaccination programme.*

## **Obesity**

Data from Hywel Dda UHB from 2019 showed that 24.5% of children aged 4 -5 years in Pembrokeshire were overweight or obese, slightly under the Wales rate of 26.4%. Data also shows that there is a link to deprivation, with an obesity prevalence of 14.2% in that age group in the most deprived areas, and 8.2% in the least deprived areas.

There are also links between being a healthy weight and levels of fruit and vegetable consumption. Data from Hywel Dda UHB shows that in 2016-17 Pembrokeshire adults consumed just over the Wales average (23.9%) with an average 27.8% of adults eating at least 5 portions of fruit and vegetables a day. Almost 60% of adults in Wales are classed as being overweight or obese, with 24% of adults in Pembrokeshire aged 16+ being classed as obese. An increasing rate of diabetes being seen within the population is one of the main consequences of obesity. Wales also has the highest rate of maternal obesity in the UK with 6.5% of expectant mothers having a BMI of 35+.

## Dementia

Dementia is a syndrome (a group of related symptoms) that manifest when the brain is damaged by injury or disease. As dementia progresses, it leads to progressive impairments in memory, thinking and behaviour, which negatively impact a person's ability to function and carry out everyday activities. For a diagnosis to be made, there needs to be a recognisable change in the persons usual mental functioning, with a cognitive decline that can't be explained by normal aging. Dementia has significant impact on the individual, caregivers and relationships in general.

Dementia can be caused by a number of different conditions affecting the brain, including Alzheimer's disease and vascular dementia. The most common cause of dementia is Alzheimer's disease, a neurodegenerative disorder. Usually, dementia presents in those aged over 65, but can also rarely present in those aged below 65, where it is called young-onset dementia. As the incidence of dementia is strongly linked with age, it is inevitable that we will see an increase in dementia associated with the aging population.

It is estimated that currently dementia affects 1 in 6 people over the age of 80 in the UK. In West Wales records suggest that dementia affects 1 in 10 of those over 85, however, Alzheimer's Research estimates a diagnosis rate of only 53% across Wales, which could account for the lower-than-expected prevalence. 62% of those diagnosed with dementia in West Wales are women, partly due to the increased life expectancy of women. Nearly 50% of the female dementia patients are over 85 years old, compared with 36% of male patients. This equates to 45% of people with dementia that are also over 85 years old, and as highlighted above, this population will continue to grow across West Wales. Recent studies show that although



dementia prevalence is not increasing substantially, due to an increased life expectancy and better outcomes for care, prevalence will continue to increase

Looking ahead, the elderly population in West Wales is set to increase, meaning that:

- By 2025 the population of over 65s is likely to increase by 6% (over 80s by 11%).
- By 2040 the population of over 65s is likely to increase by 27% (over 80s by 55%).
- Over 65s currently make up a quarter of the population. In five years over 65s will make up 26.8% of the population and by 2040 nearly a third of the population will be made up of over 65s, with the over 80s becoming over 10% (from just over 6% currently)

### **Walk and Talk dementia support group**

*The Walk and Talk group provide an opportunity for people living with dementia to socialise, make new friends; catch up with old friends; enjoy the beautiful countryside and benefit from being out in the fresh air. One afternoon at Goodwick two ladies both living with dementia joined the group for the first time. Ann came with her granddaughter and Jo with her carer. Both looked anxious and seemed overwhelmed.*

*Soon into the walk, the ladies had started talking and walking alongside each other. For the rest of the afternoon, they chatted and laughed together. Ann's granddaughter said that she hadn't seen her gran laugh and chat that much for ages and ages. When it was time to leave, they said goodbye to each other, and Ann reached out to hug Jo. Ann proudly announced to everyone "today I have made a wonderful new friend who totally understands me".*

*The **group provided the perfect opportunity for Ann and Jo to connect.** Both have memory loss and communication difficulties. To you or I their conversation may have made little sense, but to them it was a conversation that created a friendship.*

## Palliative Care

For people with illnesses that are incurable, palliative care makes them as comfortable as possible by managing pain and other symptoms. It can also involve providing psychological and social support for the patient and their family or carers.

Information from the BMC Journal states that there will be increased demand on Palliative Care services over the coming years, with an anticipated 25% increase in demand for Palliative Care by 2040. However, due to the impact of the pandemic Hospice UK anticipates that this demand will be brought forward by approximately 10 years to 2030.

## Social Care

Social Care services have been at the forefront of the response to the Covid-19 crisis, not only through collaborative work with partners in Health and the third sector, but in maintaining the provision of core services.

The most recent data around adult service provision from the Director of Social Services Annual Report 2020-21 shows that although the service is managing demand in terms of numbers, indications are that cases are becoming more complex. This is supported by the fact that there has been a significant increase in the number of people accessing residential care with nursing support, which is measured by the number of bed nights of care provided per year.

The largest percentage increase in bed nights is related to temporary stays. These are not classed as respite but are beds which are commissioned on a temporary basis for a variety of reasons e.g. for reablement, assessments, intermediate care to support people to discharge from acute hospital beds, or for people awaiting domiciliary packages of care. The proportion of temporary bed nights to total bed nights was 3.5% during both 2018/19 and 2019/20. This proportion had increased to 6.7% in 2020/21 indicating a greater use of temporary beds in relation to permanent beds. The number of bed nights for temporary beds has risen by 93% over the last 3 years from 8,241 in 2018/19 to 17,793 in 2020/21. Some of this increase may be related to the availability of suitable workforce numbers to deliver domiciliary care.

An increase in more complex cases, coupled with an increase in demand for temporary beds will have a significant impact upon Social Care budgets. The age profile for Pembrokeshire shows an increase in the number of older adults in the

county over the next several years, which is likely to impact on these budgets even further.

In relation to domiciliary care, at the start of lockdown in March 2020, approximately 75 packages of care were cancelled by families wishing to provide care directly, in order to avoid the risk of registered care agencies coming into the home. More recently, the requirement for domiciliary care has risen steadily and there are approximately 60 people waiting for packages of care at any one time. This is still less than pre-Covid levels however, when the service regularly saw up to 90 people waiting for the delivery of a domiciliary care package.

Workforce issues are also of concern, with recruitment issues leading to a lack of domiciliary care workers. This is impacting upon the number of delayed transfers of care, where people are unable to leave hospital due to packages of care not being in place to support them at home. Workers to support reablement, short-term care at home to help people recover after being discharged from hospital, are also in short supply. Staff shortages in both these areas can have knock on effects on health care in general if hospitals are unable to release beds by discharging patients safely back into the community. The service is currently looking at innovative ways to recruit and retain carers. This includes the on-going development of the directly managed domiciliary service and bringing the Direct Payment service under the direct control of the Local Authority. Whether issues with current workforce levels can be improved will have a profound impact on healthcare provision in the county over the coming years.

## Carers

Census data published in 2011 estimated that there were over 47,000 unpaid Carers in the Hywel Dda area and it is expected that when the new 2021 Census data is published that the number self-identifying as Carers will have increased. Given the overall population demographics and the future trend of a rising elderly population the number of Carers is predicted to increase. 8,483 unpaid Carers were known to GP practices in Pembrokeshire on 31st March 2020 and within twelve months this had increased by over 2,000 (25%). As a result of the roll-out of the vaccination programme, by May 2021 a further 3,000 unpaid Carers had self-identified, an overall increase of over 5,500 unpaid Carers (64%) compared to registered numbers during the course of the past 15 months. This was most likely due to carers wishing to protect

themselves and those they care for by accessing the Covid vaccinations available to them as a priority group.

Recent research by Carer's UK in 2020 explored Carers' experiences during the pandemic finding that more than a two-thirds (78%) of unpaid Carers reported that the needs of the person they care for have increased. Unsurprisingly, from a Carer perspective during the pandemic their caring role has impacted both physical and mental health, with 64% identifying a worsening of their mental health in particular.

Throughout the last year, digital exclusion has presented a barrier for many carers, including young carers, especially due to the lack of regular support as service models changed due to the pandemic. One of these barriers included a lack of access to broadband at home, with young people using up their data allowances whilst being unable to leave their homes and being unable to keep in contact with friends. Broadband would traditionally have been accessed whilst at school or college, or generally out and about, but lockdown restrictions prevented them from doing this. At the end of Carers week in June 2020, all young carers on the Local Authority's register were provided with a voucher enabling them to purchase additional data, music or a book, in order to support their well-being. This was repeated for Christmas 2020, along with a Christmas hamper and gifts. Furthermore, through Digital Community Wales, 20 young carers have been provided with laptops to support them to undertake education, connect with young carers services and maintain friendships.

Carers in Pembrokeshire seem to have generally managed well during lockdown however, as traditionally they will have had plans in place to manage their own responsibilities alongside their caring responsibilities, meaning they have an in-built resilience. However, given the length of the pandemic and impact on services that often provide carers with regular breaks, for example, the closure of day centres, some are experiencing poorer well-being and increased isolation. Wherever this has been identified, services and support are being provided to assist them in the most appropriate manner.

## Survey and Engagement outcomes

Respondents to the Well-being Assessment Survey said that feeling healthy and happy, having access to health and care services as close to home as possible or

available through technology and being able to enjoy nature and access outdoor and green spaces, were the three things that they valued most highly in relation to physical health and / or mental well-being.

Looking ahead over the next 10 years, the three things that concerned people the most regarding their ability to stay physically and mentally healthy were; not having access to healthcare or access to support as close to home as possible (or via technology); not being able to spend time outdoors or in nature and green spaces; and not being able to take regular exercise.

Those over the age of 65 had particular concerns around being able to help themselves in the future and knowing where to get support if they are unable to help themselves. Having access to transport which is affordable and reliable was also important to this age group, especially those living in rural or south coast areas of the county, which links to issues with public transport infrastructure within the county. Access to affordable and reliable transport was also of concern to carers. Access to support for themselves when unwell and a lack of support to help care for a family member as an unpaid carer were also issues raised by carers, perhaps reflecting current workforce issues within the health and care sector. Disabled respondents highlighted concerns about having to go to different places or speak to different people to get the support they need.

Of those responding to the Youth Survey, 70% strongly agreed or agreed that their life was going well. Narrative responses from young people show that 'friends' were felt to have the most significant impact on their well-being but 'family', 'dogs', 'school', 'play' and other pets were also very important.

In addition, we received a wide range of comments on health and social care in response to other questions within the survey and from sessions that were held by Pembrokeshire Association of Voluntary Services (PAVS), Together for Change, Carer Providers Forum, Day Opportunities Provider Forum, Dementia Providers Forum and the Living with Dementia Forum. Much of the feedback focused on current service provision and the additional challenges posed by providing services in rural areas, including digital access and access to transport. Improvements in NHS dental services, GP services and mental health support were also a common theme.

Looking ahead, when asked what people could do to improve their own physical and or mental well-being, 54% of respondents said that increasing exercise, staying fit or

keeping active was important, along with staying connected or socialising with friends, family or community groups (18%) and accessing green spaces (15%). In order to do these things, greater availability of, or access to, leisure and exercise classes that are appropriate, affordable or free was seen as the most popular way forward alongside improved access to healthcare services (including primary care, secondary care, mental health services and dental services) and getting involved with local community groups, activities or courses. Walking, cycling and riding routes or areas that are safe and well maintained were also considered to be important, as well as improved public transport.

## Impacts on Life Stages

### Youth / Adulthood

Pembrokeshire has the highest rate of smoking prevalence in the Hywel Dda region, with a rate of 20.3% of the population over the age of 16 who are smokers.

### Adulthood

There has been an increase in those in the 40 plus age group seeking support for alcohol related issues since the start of the pandemic.

### Ageing well

There is a predicted increase in the rate of dementia in over 65s as a result of an aging population

There has also been a significant increase in the number of people accessing residential care with nursing support. The age profile for Pembrokeshire shows an increase in the number of older adults in the county over the next several years, which is likely to impact on Social Care budgets

Population demographics and the future trend of a rising elderly population the number of Carers is predicted to increase.

Respondents to the WBA survey over the age of 65 had particular concerns around being able to help themselves in the future and knowing where to get support if they are unable to help themselves. Having access to transport which is affordable and reliable was also important to this age group, especially those living in rural or south coast areas of the county. Although there are trends showing an increase in the age



of residents in Pembrokeshire and throughout Wales, the positive support provided by older people to their communities and to the county as a whole cannot be underestimated. Many carers and volunteers are older individuals and provide valuable assistance to relatives, friends and their communities.

## Future trends and projections

Recent figures show a significant increase in waiting list numbers due to necessary restrictions imposed by the pandemic. This is likely to not only have an effect on the physical health outcomes of those waiting for treatment and those waiting for assessment, but also on the mental health of these individuals. The effects on mental health will be due to a number of issues including the realities of pain management for conditions that worsen whilst treatment is awaited and anxiety experienced by those awaiting assessment who do not yet know what their health outcomes or treatment is likely to be.

The most recent figures show that the waiting list for diagnostic and therapy services at Withybush General Hospital has increased from 3,797 in August 2020 to 6,959 in August 2021.

The prevalence of adults who are overweight or obese in Wales is also increasing, which will continue to have significant impacts on health and well-being. If current rates continue, it is estimated that 64% of adults in Wales will be overweight or obese by 2030, with the number of people with conditions related to obesity, such as diabetes, likely to increase as a result.

An aging population and associated increasing prevalence of certain diseases, chronic health conditions and complex care needs will likely see demand for health and social care increase, at a time where there are fewer people of working age to fund these services. Unpaid care, which is disproportionately carried out by women, may become more important if adaptations to current services cannot be provided and subsequent social and economic problems might arise from this. The success of the economy will become increasingly tied to the ability of older workers ~~being able to continue~~ to work for longer.

There will be challenges in supporting people to live well into their older age, and in supporting healthier and longer working lives, to ensure people are economically

productive for longer. This will also contribute to improved health and well-being and helping people to continue to be happier and healthier into their older years.

Inequalities in life expectancy and healthy life expectancy will continue to exist for those living in more deprived areas. There is a relationship between the level of self-reported health and the level of deprivation experienced by adults in Wales, with those who are most deprived in Wales being the least likely to report being in good or very good health.

How healthy people are, and how limited they are by illness, will be important in adapting to and meeting the challenges that increased prevalence of chronic health conditions and complex care needs an ageing population may bring. If there are inequalities in health trends it is important to also understand how this may link to changing health needs of an ageing population and whether certain groups may be more vulnerable to its impacts.

An ageing population is associated with increased pressures on health and social care. Unpaid and informal care is likely to make up a larger proportion of care for those in older age.

Living in poverty is also associated with poorer health and well-being outcomes which if not addressed, can exacerbate existing inequalities.

The pandemic has affected the number of referrals and assessments carried out for a variety of services with a decrease in referrals meaning fewer people accessing help. Impacts will be seen in future years.

# HOUSING





A PROSPEROUS WALES	A RESILIENT WALES	A HEALTHIER WALES	A MORE EQUAL WALES	A WALES OF COHESIVE COMMUNITIES	A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE	A GLOBALLY RESPONSIBLE WALES
✓		✓	✓			
Well-being areas: Social / Economic / Environmental						

## Overview

Housing is a key factor in the overall well-being of residents in Pembrokeshire. Poor, unsuitable or unreasonably priced housing can lead to financial and/or mental health pressures on residents as well as the associated physical health risks such as respiratory conditions.

Aside from the standard of the housing and the impacts that can have upon people's health and well-being, the health of the local housing market can also have a significant effect. A healthy housing market, from a well-being perspective, is one in which the average price of a house is affordable to the average income earner in the locality, as well as there being a reasonable choice in terms of location and access to services, education, employment and other associated factors.

From a well-being perspective, a healthy rental market is one in the which the average rent falls into the category of a living rent, where the tenant is not charged above and beyond what they can afford to pay whilst still maintaining a decent standard of living. Other important factors include there being an appropriate range of choice in terms of size and location of a dwelling in the rental market. An unhealthy overall housing market is one in which local people earning the average salary are unable to purchase a property in their locality that is appropriately priced in relation to the local median salary, or are unable to rent a property whilst still being able to afford other basic necessities such as food and household bills.

Some focus must be given to the impact of housing upon the local environment and its contribution to global warming in addition to the direct impact inefficient homes have on those living in them. Both of these issues have an effect upon the current and future well-being of Pembrokeshire residents. There is a need to work together both to adapt to the changing climate but also to work with natural processes to

mitigate the effects of climate change. New targets to reduce phosphate levels in the River Cleddau Special Area of Conservation are currently preventing any development that will increase phosphate levels unless it will not have any adverse impact on the integrity of this waterbody. Work with land managers, farmers and housing associations through the “Ecosystem Enterprise Partnership – Building Natural Solutions” project aims to find ways to mitigate nutrient impacts from future housing development contributing to sustainable economic development by allowing businesses to grow whilst reducing the overall level of nutrients entering waterways.

The Welsh Government has set the target for all new build homes for social rent, existing social housing stock and homes of all those living in fuel poverty to be EPC (insulation and fuel efficiency) rating A by 2030 which if achieved, will dramatically decrease the carbon emissions associated with housing and provide support to lift people out of fuel poverty. The effects of climate change will have an extremely detrimental effect on the long-term well-being of Pembrokeshire residents, with the impact of rising sea levels and increased frequency of extreme weather events being felt already by many communities in the county. An example of such is the coastal flooding in Newgale.

## Local housing market

Two main drivers of the housing market are the resident population and the local labour market. Analysis of the stock of housing allows an understanding of the current market balance and existing occupation patterns. The 2019-based household estimates published by the Welsh Government indicated that the number of households in Pembrokeshire has increased by 3.4% since 2014, reaching 56,123 households in 2019. This compares to the national growth in the number of households of 3.2% over the same period. When looking at the makeup of a household, current data shows that there are more couple households without children, and fewer couple households with children. This is in line with what we know about the change in population in Pembrokeshire.

## Income

Income has a direct effect on the level of choice a household has when determining its future accommodation. The mean earned gross income for full-time employees resident in Pembrokeshire in 2020 was £31,829 according to the ONS Annual Survey

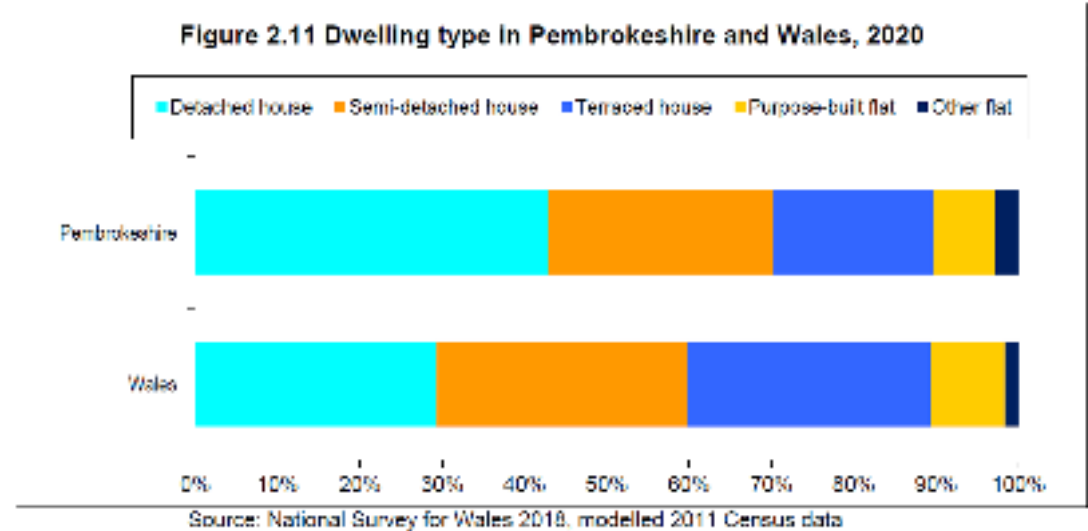
of Hours and Earnings. In comparison, the national average was £31,897. In Pembrokeshire there is a relatively large difference between higher earners and lower earners (in comparison with nationally).

### Housing stock

The latest dwelling stock estimates from the Welsh Government indicate that there were 63,034 dwellings in Pembrokeshire in 2020, and that, over the last five years, the number of dwellings had increased by 2.4%, or almost 1,500 properties. In comparison, the dwelling stock in Wales increased by 2.2% between 2015 and 2020. Analysis of the data held by the Welsh Government on the application of Council Tax to dwellings indicates that, in 2020, 2.7% of dwellings in Pembrokeshire were long-term empty properties. This is notably higher than the figure recorded for Wales as a whole (1.8%). The same data source indicates that 6.8% of dwellings in Pembrokeshire were classified as chargeable second homes, markedly higher than the national figure (1.8%) reflecting the impact of location on the housing market. Disparity between densely populated areas such as Haverfordwest and the coastal strip in terms of house prices.

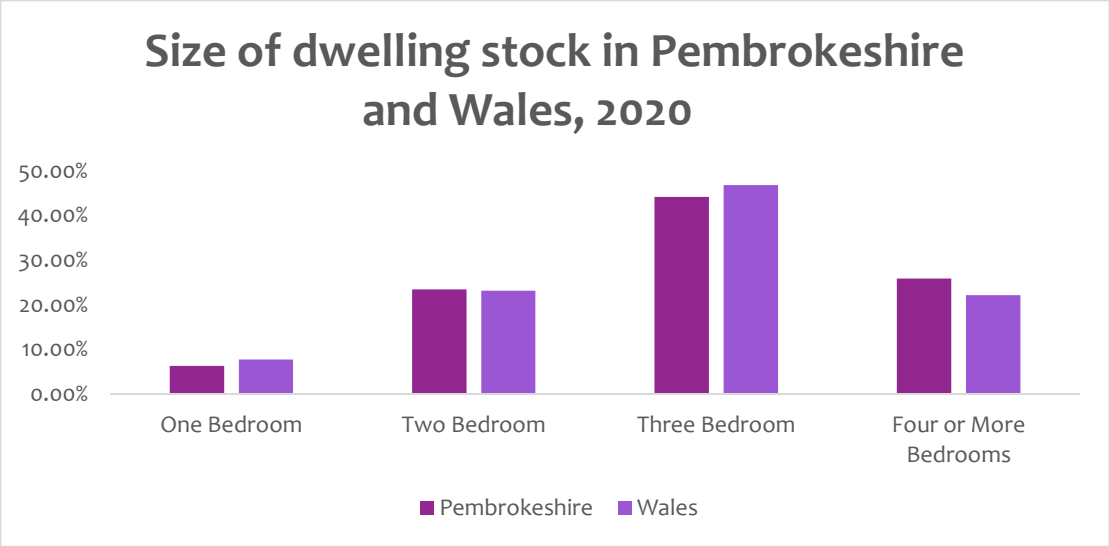
### Types of Accommodation

The figure below compares the type of accommodation in Pembrokeshire in 2020 with that recorded for Wales. Pembrokeshire contains more detached dwellings than the national average. The county contains notably fewer terraced houses than is found across Wales. The most common property type in Pembrokeshire is detached houses followed by semi-detached dwellings.



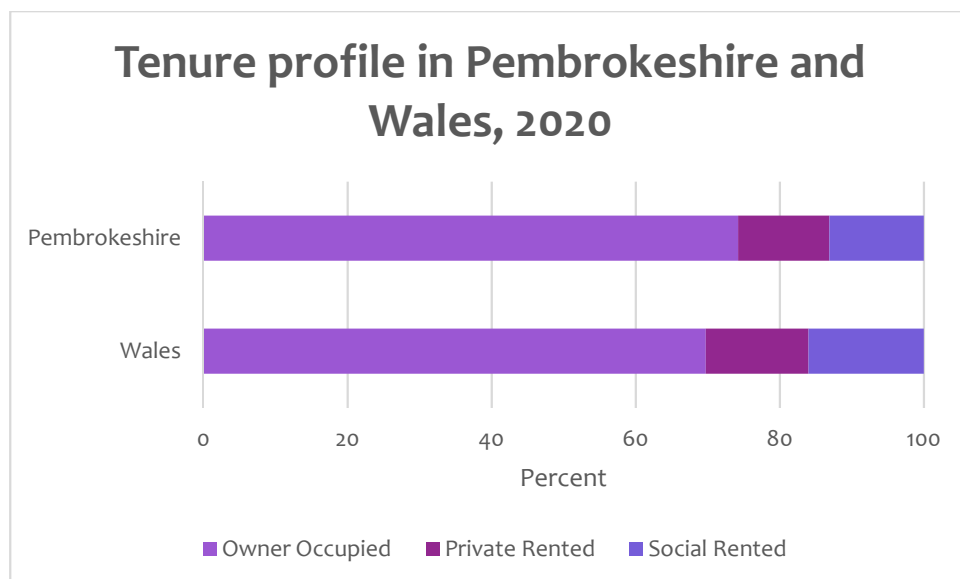


The graph below details the size of the stock of properties; Pembrokeshire has a greater proportion of larger homes (homes with 4 or more bedrooms) and fewer smaller dwellings (one bedroom) than Wales as a whole. Overall, some 44.2% of all dwellings in Pembrokeshire have three bedrooms.



Source: National Survey for Wales 2018, modelled 2011 Census data

The private rental market is characterised by a shortage of rental properties that go off-market very quickly, and at prices often above the average affordable rent for most people. The figure below compares the tenure of households in Pembrokeshire in 2020 with that recorded for Wales. The data indicates that 48.1% of households in the county are owner-occupiers without a mortgage, compared to 40.1% nationally. The proportion of owner-occupiers with a mortgage in Pembrokeshire (25.0%) is however lower than the national average (29.7%). Some 14.5% of households in Pembrokeshire are resident in the Social Rented sector, lower than the figure for Wales (16.0%). Finally, some 12.4% of households in Pembrokeshire live in private rented accommodation, compared to 14.3% in Wales.

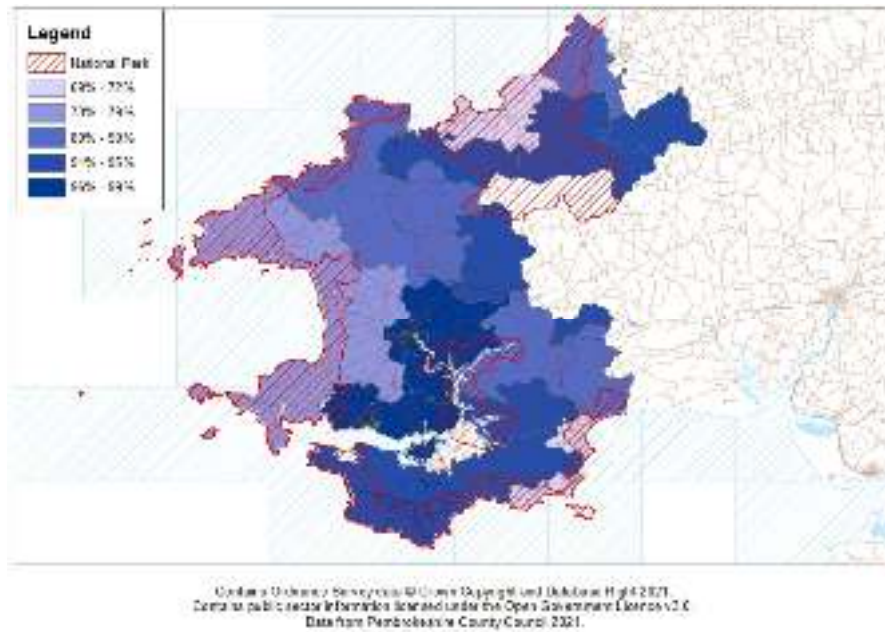


Source: Welsh Government Dwelling Stock Estimates, 2020, modelled 2011 Census data

## Impact of second homes

As noted in the housing stock section above Pembrokeshire has significantly more empty properties and those classified as chargeable second homes compared to the Welsh average. When considering the proportion of housing stock unavailable for use Pembrokeshire has the second highest percentage of any Local Authority in Wales. According to the report *Second homes: Developing new policies in Wales* in Mid-2020 some 9.2% of the housing stock was unavailable for use. These are not evenly distributed across the county, with coastal areas that are typically tourist hotspots particularly hard hit. Holiday rentals and 'Airbnbs' are also high in number which add additional pressures on the housing market.

## Percentage of homes available for use across Pembrokeshire



Second homes in Pembrokeshire have had a two-pronged detrimental effect on housing and communities Pembrokeshire. Firstly, second homes have dramatically inflated house prices along the coastal strip in Pembrokeshire, particularly in areas such as the Tyddewi peninsula, Newport/Trefdraeth and Dale. This has resulted in many local people being unable to afford to buy, or indeed to rent, in their home towns or the immediate locality. As a direct result, many of these communities are significantly depleted of residents and economic activity especially outside of the spring and summer months. In terms of the statutory requirement to protect the Welsh language, these communities (particularly north of the 'Landsker line') have been negatively depleted in terms of Welsh language proficiency and use.

The recent increase of the second homes council tax premium is likely to have a number of effects on housing in Pembrokeshire. Due to Welsh Government changing the criteria which self-catering holiday lets must meet (which comes into force on 1 April 2022), the increase in the number of second homes that transfer to become self-catering holiday lets which we anticipated is now less likely to occur. We may see a small number of second homes come back onto the market due to their owners being either unable or unwilling to pay the increased council tax premium. However, the premium will not deter those with the means and willingness to pay it both in terms of keeping their second homes and in terms of buying a second home in the county.

With revenue from the council tax premium increase it is likely we may see a number of empty homes and properties come back into use through the use of empty homes renovation grants and loans.

## Affordable homes

An affordable home is defined by the Welsh government as, "housing where there are secure mechanisms in place to ensure that it is accessible to those who cannot afford market housing, both on first occupation and for subsequent occupiers, [... or where there are] secure arrangements in place to ensure the recycling of capital receipts to provide replacement affordable housing".

The private rented sector in particular has seen rising rents above and beyond wage inflation in Pembrokeshire which has placed a number of vulnerable households in a situation where they have large amount of pressure on their personal finances as a result. This can lead to a household becoming unable to afford a private rent and forced into the social rented sector, which has limited numbers of properties available for social rent, which then can push people into homelessness. The impact this has on well-being is substantial as financial pressures have been reliably linked to increased chance of developing long-term mental health conditions.

The table below shows the average property price by dwelling type in 2020 in Pembrokeshire, and Wales as a whole as presented by the Land Registry. The data indicates that the overall average property price in Pembrokeshire is 6.5% higher than the national figure. The data also shows that detached and semi-detached houses in the county are cheaper than their national equivalents, however, flats and terraced houses in Pembrokeshire are typically more expensive than the national figures.

Table 1: Mean property prices 2020 – Source Land Registry

Dwelling Type	Pembrokeshire		Wales	
	Average Price	Percent of Sales	Average Price	Percent of Sales
Detached	£277,378	44	£286,107	30.2
Semi-Detached	£166,467	24.6	£176,562	30.2
Terraced	£138,942	24.8	£138,248	33.1
Flats	£143,630	6.7	£136,810	6.5

<b>Overall Average</b>	£206,895	100	£194,324	100
<b>Mixed adjusted overall average price</b>	£189,315		£194,324	

The mean property price in Pembrokeshire has risen by 15.5% between 2015 and 2020 compared to an increase of 17.4% nationally. The number of sales in Pembrokeshire over this period has fallen by 43.1% compared to a decrease of 43.9% in Wales.

The table below shows the average private rents by dwelling size in 2019 in Pembrokeshire, and Wales as recorded by the Rent Officers Wales. The data indicates that the overall average rental price in Pembrokeshire is 9.4% lower than the national figure. The data also shows that whilst one, two and four bedroom rents are notably cheaper than the national figures, three bedroom rents are quite similar to their national equivalent. The mix adjusted average rent indicates that equivalent properties in Pembrokeshire are around 10.2% lower than those found nationally.

Table 2: Mean private rents in 2019\* (price per month) - source: Rent Officers Wales 2019

<b>Dwelling Size</b>	<b>Pembrokeshire</b>		<b>Wales</b>	
	Number of Sales	Average Price	Number of Sales	Average Price
<b>One Bedroom</b>	268	£390	5,215	£468
<b>Two Bedroom</b>	669	£477	13,507	£549
<b>Three Bedroom</b>	633	£580	11,941	£598
<b>Four Bedroom</b>	145	£704	2,238	£856
<b>Overall Average Rent</b>	1,715	£521	32,901	£575
<b>Mixed adjusted overall average price</b>		£516		£575

The mean rents in Pembrokeshire have fallen by 2.0% between 2014 and 2019 compared to an increase of 8.2% nationally. The number of lettings in Pembrokeshire over this period has grown by 34.8% compared to a rise of 26.2% in Wales.

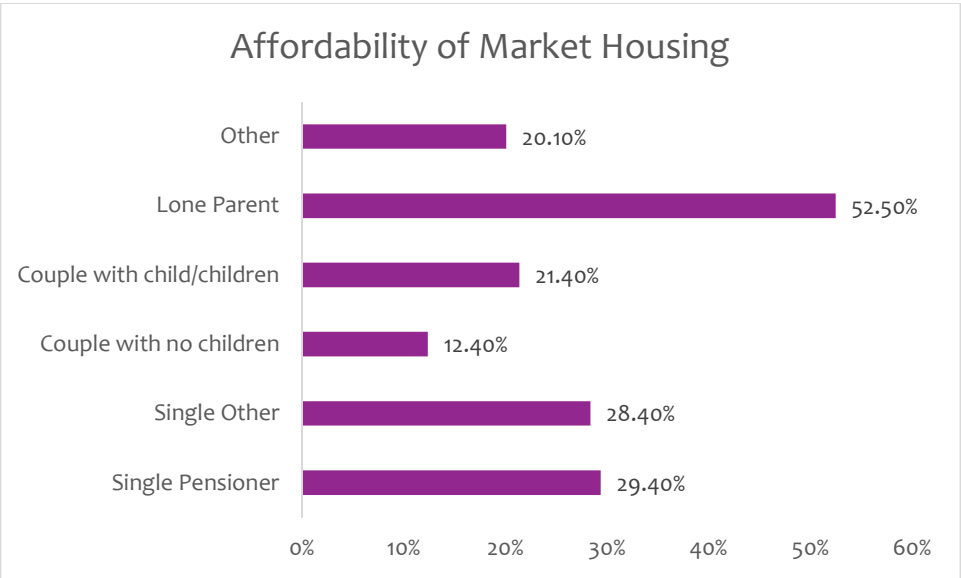
The cost of Social Rented accommodation by dwelling size in Pembrokeshire can be obtained from the Welsh Government. The table below illustrates the cost of Social Rented dwellings in Pembrokeshire. The costs are significantly below those for private rented housing, particularly for larger homes, indicating a significant gap between the Social Rented and market sectors.

Table 3: Price per month of Social Rented dwellings

Bedrooms	Average Cost
One	£317
Two	£355
Three	£378
Four	£485

The data indicates that 48.6% of lone parent households in Pembrokeshire would be unable to afford market housing (if they were to move home now). Single person households are also relatively unlikely to be able to afford, whilst couple households without children are most likely to be able to afford market housing in the county.

**Theoretical affordability of market housing: Proportion of households unable to afford both entry-level private rent and entry-level home ownership.**



In 2014 the Welsh Government published *‘Getting Started with Your Local Housing Market Assessment: A Step by Step Guide’* (referred to subsequently as the SbS Guide) which sets out how affordable housing need should be calculated. It details a



quantitative approach to calculating affordable housing need, which can be applied consistently across the local authorities of Wales.

The table below details the results of this exercise carried out as part of the Pembrokeshire Local Housing Market Assessment 2021:

**Table 4: Affordable Housing Needs Projection**

Stage in Calculation	Location		
	National Park	Non-National Park	All of Pembrokeshire
Stage 1: Current need for affordable housing	101	463	564
Stage 2: Newly arising affordable housing need	16	48	64
Stage 3: Newly arising need from existing household	17	184	201
Total affordable housing need (sum of stages 1-3)	134	694	829
Stage 4: Supply of affordable housing	94	517	611
Stage 5: Total need for affordable housing	40	177	217

It should be noted that this need for 217 affordable homes per year represents 73.3% of the projected annual household growth in Pembrokeshire between 2020 and 2025 (a figure of 297 as identified in table 4.3). The figure of 40 affordable homes per year recorded in the National Park area represents 74.0% of the projected annual household growth in this part of the county between 2020 and 2025. The annual need for 177 affordable homes in the non-National Park part of Pembrokeshire represents 73.2% of the projected annual household there. Welsh Government targets relate to social rented stock and more generally to social housing stock. An issue in Pembrokeshire (and across Wales) is the age of the housing stock, which is a crosscutting issue affecting different tenure types. Insulation and fuel efficiency needs to be considered on a broad footprint.

## Social housing

Social housing in Pembrokeshire is, like the rest of the housing sector, under significant strain due in large part to the same pressures: a lack of new builds, and rising prices and rents which force people to turn to public sector housing.

The Welsh Government's target of having all social housing up to EPC Rating A (the second highest rating possible) by 2030 will be an extremely difficult and expensive target to achieve in Pembrokeshire, due to the age of much of the stock in the county, and according to the Ministry of Housing, Communities and Local Government just under half of the county's social housing remains ungraded (Ministry of Housing, Communities and Local Government, 2020).

The need for additional affordable housing has been well documented in the Pembrokeshire Local Housing Market Assessment. The map below shows the estimated increase in need for social rented housing by 2033 over the 2020 base.

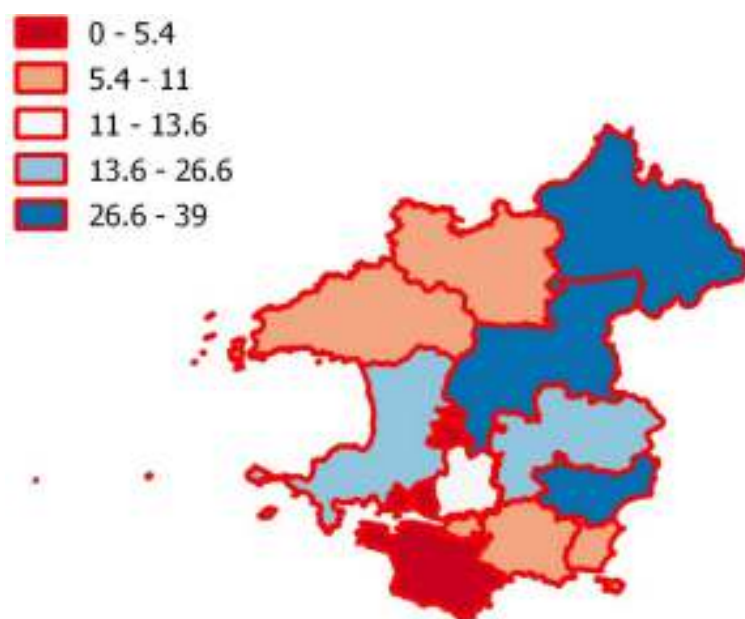


Figure 1: Percentage increase in social housing 2020 – 2033 estimated to meet need

This demand is concentrated largely in urban areas of the county with towns like Haverfordwest and Milford Haven having two of the largest levels of demand in terms of raw numbers. The map in Figure 10 clearly demonstrates that the biggest percent increase in social housing need is in the more rural areas where there are significantly less social housing premises currently available.

The data in this area very clearly shows that the county is facing an acute set of challenges around social housing with no easy solutions. As with other areas of the housing sector in Pembrokeshire, these challenges are connected to a number of national drivers such as the pandemic and macro-economic challenges. There are Pembrokeshire and Wales-specific challenges such as second homes, a lack of housing construction and significant planning restrictions that are driving pressures in this area.

## Homelessness

Homelessness is a complex and cross cutting issue. People become homeless for a number of reasons and being a homeless person does not necessarily mean that you are sleeping rough. Many homeless people are staying with friends and family 'sofa surfing', or staying in hostels and B&Bs. This is often referred to as hidden homelessness.

Homelessness, particularly hidden homelessness, is on the increase in the county due in large part to increasing private rents beyond wages inflation and increased scarcity of private rented housing. There is also significant pressure on the building sector to build more social housing, which to date has been delayed by a number of factors such as phosphate pollutions addition to planning law, the pandemic, supply chain issues and a lack of contractors willing to build in Pembrokeshire.

In November 2020 the Council purchased a number of homeless pods designed to house single rough sleepers or couples made from recycled shipping containers. While these containers are far from a desirable end state in tackling homelessness in the county they do provide safe, habitable, temporary accommodation that houses individuals whilst longer term housing solutions can be found.

The latest data from Welsh government tells us that 50-70 in every 10,000 households in the county are either homeless or threatened with homelessness. This is significantly above the Welsh average and reflects the scale and nature of the pressures in the housing sector in Pembrokeshire. Welsh Government has a stated policy intention to end homelessness in Wales, by putting a statutory duty on local authorities to provide social housing and short-term solutions to those presenting as homeless.

In the period after the series of national lockdowns in 2020 and early 2021 we have seen a rising number of people presenting as homeless in the county and also a marked increase in latter half of the year following the end of furlough and the removal of the £20 a month uplift in universal credit.

Due to a number of factors such as rising inflation (and associated increases in the cost of living), economic uncertainty and the sluggish local and national housing markets, it is likely that levels of homelessness may stay at their current levels or indeed increase if there is not an effective intervention.

## Housing and the climate

Housing and the climate / environment have a three-way effect between each other and people's well-being. Housing both built and in construction has a significant impact on its local environment and on climate change globally, however this can be somewhat mitigated through greener building practices such as using building materials that have a lower carbon footprint, retrofitting existing homes with insulation and more energy efficient utilities.

The "Green Recovery" includes ensuring development takes a more sustainable path which means reducing carbon emissions, increasing resilience to climate change, reversing the decline in biodiversity, connecting people and nature and tackling unsustainable levels of production and consumption. All of this while at the same time ensuring job creation, skills development, new markets and vulnerable groups are prioritised.

## New beginnings

Adequate housing has a large impact upon our first years. Housing insecurity causes parents distress and can put some people off starting a family in the first place. Birth rates in Pembrokeshire are falling, an aging population is continued to be projected in Pembrokeshire with outward migration being a large factor.

## Childhood

A stable household is incredibly important to the foundations of a family. Homes that are good quality, efficient to heat and close to amenities such as schools, leisure centres and parks are desirable for families.

## Youth

The price and availability of houses in Pembrokeshire means that young people are often priced out of the marketplace in the county. This is supported by figures that show a strong outward migration of residents in this age bracket.

## Adulthood

Adults and families are struggling to find adequate housing in their local communities and some are feeling priced out of their homes areas.

## Ageing well

The population of over 65s in Pembrokeshire is set to grow significantly in the coming 25 years. As such there will be an impact in the housing needs over this period, particularly for specialist accommodation. According to the latest data, there are 2,034 units of Sheltered Housing for older people in Pembrokeshire currently, alongside 224 Enhanced Sheltered/ Extracare units. It is worth noting that some 57.8% of the Sheltered Housing for older people is in the affordable sector as is 57.1% of the Enhanced Sheltered/ Extracare units.

Type of Specialist Accommodation	Tenure		2020	Profile 2033	Additional units required
Sheltered housing for older people	Market		859	1,141	282
	Affordable		1,175	1,302	127
	Total		2,034	2,443	<b>409</b>
Enhanced Sheltered/ Extra care housing	Market		96	157	61
	Affordable		128	188	60
	Total		224	345	<b>121</b>
All specialist accommodation for older person households	Market		955	1,298	343
	Affordable		1,303	1,490	187
	Total		2,258	2,788	<b>530</b>

The requirement for 530 additional specialist units for older person households represents 13.0% of the total household growth in Pembrokeshire for the period 2020 to 2033. The actual numbers and type of specialist accommodation needed may depend on changes in patterns of demand and expectations.

The Council continues to support disabled people to adapt their homes so that they can continue to live within their community. Approximately 140 adaptations are facilitated each year within the private sector. If adapted homes are subsequently sold, it is possible that new owners may remove adaptations and therefore it is not possible to estimate the total stock of housing in Pembrokeshire that is suitable for disabled people. The Council continues to adapt social housing and maintains a register of adapted homes. Where practicable, if an adapted home becomes available, it will be matched to the needs of someone who is on the waiting/transfer list. It is worth noting that since 2004, much more rigorous building regulations for access have applied and whilst this is not a guarantee that new homes will meet the needs of all disabled people, stock built since this date are more likely to be suitable. It is likely that there will be demand to adapt homes in the future. The increases in building work costs noted elsewhere will also impact on our ability to facilitate these adaptations.

In summary, the housing sector within Pembrokeshire, like in many parts of the UK, faces a number of acute cross-cutting, interconnected challenges such as a limited supply of homes, rising house prices, rising fuel costs and a lack of social housing, as well as the threat of coastal erosion and flooding to a number of its coastal communities, and subsequently, the housing stock in those communities. The increase in cost of building materials is also impacting on the viability of schemes and new house building. These challenges are having a significant negative impact upon the well-being of all age groups in Pembrokeshire.

There are number of factors that relate to how this current set of circumstances arose, such as the number of second homes in certain communities, disruption to the construction sector during the pandemic, a lack of housebuilding since the turn of the century, changes to planning regulations, a lack of contractors, and in-migration driving an increase in house prices due to the market becoming more competitive. In the private rented sector we have also seen a growth in the conversion of what were previously homes available for private rental into year round or seasonal holiday lets. The lack of construction and wider availability has also impacted the availability of long term rentals available on the market.

In addition many homes within the county are poorly insulated which has a number of negative knock-on effects to people's health. For example, a poorly insulated



home can lead to increased heating costs in the winter leading to an increased risk of fuel poverty, as well as an increased risk of individuals developing respiratory conditions due to the presence of mould and damp. Poorly insulated homes also have a larger effect on climate change as more fuel must be burnt in order to keep them warm and fit for human habitation.

## Survey and Engagement Outcomes

When asked "Which three things do you value the most in a prosperous community?" respondents to our regional survey "Affordable housing opportunities" was the most valued issue for a prosperous community. Similarly, when asked "Looking ahead, what concerns you the most about prosperity in the county?" Lack of affordable housing was raised most often as a significant concern with 67% of respondents raising it as a concern for the future.

A response from our regional survey details the affect that the housing market is having on the Welsh language, communities and residents of Pembrokeshire; "I know of several Welsh speaking Pembrokeshire families not able to return to Wales due to house prices/ or on the point of leaving due to house prices. They are all in work, but despite this, our local house prices are now prohibitive. WE ourselves, though 3rd time buyers and in our 50s are having to think about moving away, as we run a land business, and the prices are too high."

Another response details the affect that the housing market is having on the well-being of young people in Pembrokeshire; "It makes me so, so sad to have to move away from my people and my home to be able to start a life. We as two working (young) people in Pembrokeshire have no prospect of buying a home. We have not been able to start a family because we cannot find a home, the whole situation of financially being a young person in Pembrokeshire is very damaging for mental well-being."

Suitable housing for those with differing needs is a concern for Pembrokeshire residents when they look towards the future. 'Continued cuts to public services', 'not enough housing to meet different needs' and 'people thinking the lives of those who are different from them being less valuable than their own' were the three things that concerned people most about living in a society which strives to be equal for all.

68% of survey respondents stated that they were concerned about the levels of housing available to meet differing needs.

# ENVIRONMENT & CLIMATE CHANGE



A PROSPEROUS WALES	A RESILIENT WALES	A HEALTHIER WALES	A MORE EQUAL WALES	A WALES OF COHESIVE COMMUNITIES	A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE	A GLOBALLY RESPONSIBLE WALES
	✓					✓
Well-being area: Environmental						

## Overview

Climate change and the nature emergency are the defining issues of our time. The natural environment is a huge part of what makes our county such a special place to live and work, it is our most precious inheritance but addressing the climate and nature emergencies presents us with a huge challenges. Both the climate crisis and loss of biodiversity are interwoven challenges which cannot be solved in isolation. Climate change places our habitats and wildlife at risk, but if helped to recover, healthy natural habitats can store carbon, reduce flood risk, help prevent coastal erosion, improve people's health and well-being, as well as maintain healthy soils, clean water and the pollinators needed for our crops – and therefore sustain us.

Natural resources are essential for the air we breathe, the water we drink and the food we eat. They give us energy, prosperity and security; they protect us and make us healthier, and our lives better.

The way we interact with our natural resources is vital to the social, economic and cultural well-being of people living in Pembrokeshire today and the generations to come. We need to manage our natural resources sustainably because natural resources that are healthy and thriving are also healthier for people, their communities and for the economy.

Natural Resources are defined by the Environment Act 2016 as:

- Animals, plants and other organisms
- Air, water and soil
- Minerals
- Geological features and processes
- Physiographical features
- Climatic features and processes



# Natural Resources Wales (NRW)

Natural Resources Wales are a government sponsored body, they are responsible for looking after natural resources and what they provide for Wales: to help reduce the risk to people and properties of flooding and pollution; to look after special places for well-being, wildlife and timber; and to work with others to help them to manage the resources sustainably. Areas of focus for Natural Resources Wales in the South West Region, which includes Pembrokeshire are:

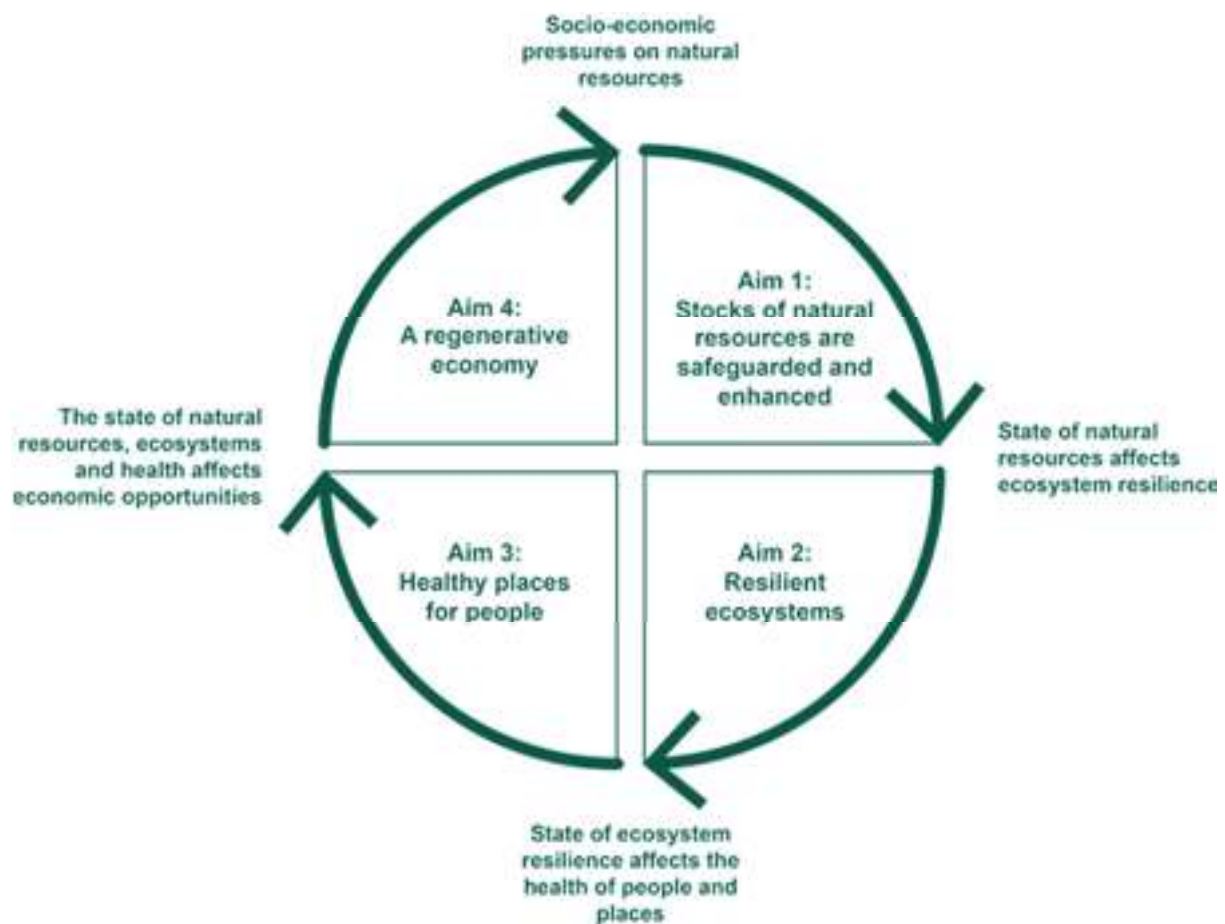
South West Area Statement	Link to Well-being Goals
Ensuring sustainable land management	A Globally Responsible Wales A Prosperous Wales A Resilient Wales
Reversing the decline of, and enhancing, biodiversity	A Globally Responsible Wales A Prosperous Wales A Resilient Wales
Reducing health inequalities	A Healthier Wales A More Equal Wales A Wales of Cohesive Communities
Cross-cutting theme: Mitigating and adapting to a changing climate	A Globally Responsible Wales A Prosperous Wales A More Equal Wales

Marine Area Statement	Link to Well-being Goals
Building Resilience of marine ecosystems	A Globally Responsible Wales A Resilient Wales A Prosperous Wales
Nature-based solutions and adaptations at the coast	A Globally Responsible Wales A Resilient Wales A Prosperous Wales
Making the most of marine planning	A Globally Responsible Wales A Resilient Wales A Prosperous Wales

NRW published the second State of Natural Resources Report (SoNaRR2020) in 2020, in which they assess to what extent Wales is achieving the Sustainable Management of Natural Resources (SMNR). **Error! Reference source not found.** details the four

long-term aims of the SMNR and how they are interlinked. SoNaRR2020 concludes that Wales – and by extension all Local Authorities– are not yet meeting the four long-term aims of SMNR.

### The four aims and the linkages of sustainable management of natural resources.



To make Wales’s use of natural resources more sustainable, we need transformational change to our:

- **Food** – The global food system has a significant impact on the environment. Land use is identified by the UN IPBES report (2019) as one of the big drivers of the nature emergency. Emissions of pollutants, depletion of resources, biodiversity loss and ecosystem degradation are consequences of the current food system in Wales and beyond.
- **Energy** - The global energy system is one of the main drivers of the climate emergency. Wales’s current energy production and consumption creates many pressures for ecosystems and public health here and across the planet. Wales



needs to increase its use of renewable and sustainable energy sources, reducing the current dependence on harmful fossil fuels.

- **Transport** - The transport system has an impact on ecosystems and health. Urban transport contributes to carbon emissions, air and water pollution, noise pollution and the social and economic effects of congestion or lack of transport opportunities.

## Natural Environment

### Land Use

Managing land sustainably can deliver a range of environmental and wellbeing benefits including; reducing flood risk, improving recreation opportunities, improving ecological diversity, improving water and air quality while producing sustainable high quality local food. Our challenge is to manage conflicting and competing interests such as agriculture, industry, housing and recreation, whilst maintaining and enhancing the biodiversity and landscape we value.

### Soil

Soil is an incredibly valuable and finite natural resource. It:

- Supports food production
- Stores and filters water, supporting crops and potentially helping to reduce flood and drought risks and protect water quality
- As the largest store of organic carbon on our planet, soils are important for regulating the climate and for climate change
- Provides a habitat for a vast array of organisms with 25% of all known species residing in soils. It further supports biodiversity by allowing plants to grow and habitats to develop in different soil types.

Across Wales there has been a decline in the organic matter, plant and animal life living in the soil, leading to a reduced quality and function. The majority of carbon in the terrestrial environment is stored in soils rather than vegetation. Soil erosion is being made worse by the change of land use and inappropriate land management. The most immediate pressure on the current pattern of land use is the uncertainty posed by Brexit. Soils in the built environment can provide the same range of services as in any other environment, but soil can also be degraded and destroyed by

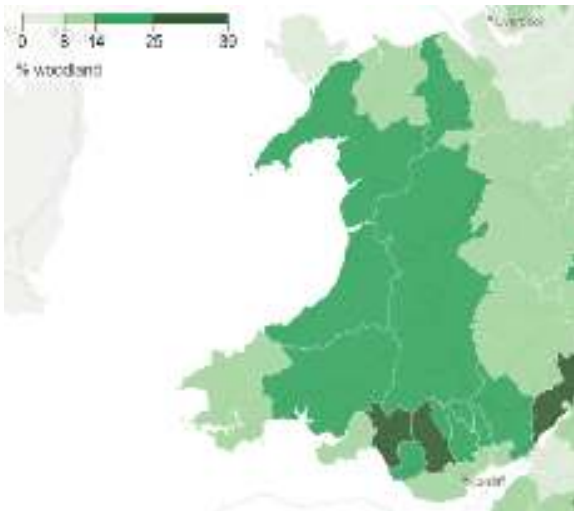
construction of buildings and infrastructure. Undamaged soils and Sustainable Drainage Schemes (SuDs) schemes are important to reduce flooding, improve water quality, mitigate habitat loss and provide more outdoor recreation and education opportunities.

Managing soils sustainably is becoming ever more important because society exerts pressure on soils. These pressures include climate change, land use change and land management which lead more directly to threats like pollution, sealing by infrastructure, soil compaction and erosion. The biggest threat to soils is climate change. Soils with high organic content and with good soil structure will be more resilient and therefore better able to retain and store more water for plant growth. Extreme weather events such as more intense rainfall, prolonged periods of dry and cold weather, and more extreme and frequent flooding events are likely to increase in future due to climate change. More intense rainfall increases the challenge of preventing soil erosion and run-off emphasising the importance of appropriate soil husbandry and land management to prevent an increased risk of flooding, pollution and the risk of landslides.

Agriculture is a dominant land use in Pembrokeshire. Sustainable land management is hugely important for farmers, the environment, the local economy, our culture and communities. Intensive agricultural practices can damage soil structure (e.g. through compaction, the creation of fine seed beds or reducing the levels of organic matter and biological activity), which may then contribute to water pollution from soils/sediments and nutrients. This also has a negative impact on the ecological status of rivers, coastal and estuarial waters in the county.

Data from 2016 referenced in the Welsh Government's Securing Wales' Future report, states that the distribution of agricultural land per thousand hectares in Wales is as follows;

Arable	Permanent Grass	Rough Grazing	All other land on agricultural holdings	Total
42.3	96.9	14.3	17.5	162.9



**Woodland as a percentage of area, local authority districts, UK, 2019**

### Tree Cover

The presence of trees is vital to communities, they improve air quality, store carbon, provide habitats and improve the well-being of people. Regionally, Pembrokeshire has the least tree cover at 10%, with Ceredigion and Carmarthenshire having 15% and 17% respectively.

Pembrokeshire has one of the lowest urban canopy cover percentages of any local authority area in Wales. The woodland that there is in the county comprises of sparse small woodland blocks in the rolling agricultural landscape with plantation forest and native woodland remnants in the steep valleys.

The majority of woodland in the county is privately owned and managed. The Welsh Government Woodland Estate (WGWE) is very diverse with an increasing representation of native species. Tree health is a particular issue for all woodland in Wales. *Phytophthora Ramorum* and *Hymneoscyphus Fraxinaeus* have affected larch and ash trees in the area. The majority of the WGWE in Pembrokeshire is designated as ancient woodland and will be restored to predominantly native broadleaf over time. This contrasts with the conifer plantation forests of Carmarthenshire and Neath Port Talbot.



**Location of trees in Pembrokeshire, taken from the National Forest Inventory**

There are significant networks of woodland habitats around the Daugleddau estuary and Cleddau river valleys and also around Fishguard and the Gwaun Valley, forming the North Pembrokeshire Woodlands SAC, notable for lichen assemblages and bat communities. Overall Pembrokeshire woodlands are in a stable condition with opportunities to improve woodland habitat connectivity. Future prospects for the native woodland in Pembrokeshire are good with an extensive network of native woodland alongside the rivers and streams in the heart of the county and opportunities to join up and extend this woodland area.

Pembrokeshire provides ample opportunity for new planting but it is essential that **the right trees are planted in the right places for the right reasons** to ensure that existing valuable habitats are not lost.

#### **Pembrokeshire Nature Partnership – Plant Pembrokeshire**

*Plant Pembrokeshire is a project that will create a woodland by the people of Pembrokeshire, for the people of Pembrokeshire, by planting a tree for every child born to a Pembrokeshire family. Using land donated by Pembrokeshire County Council who have also sourced trees and planned the woodland, the Pembrokeshire Nature Partnership are working on the project alongside Hywel Dda University Health Board and Pembrokeshire Coast National Park Authority. Hywel Dda University Health Board work with parents to promote sustainable parenting and promote the benefits of the natural environment and Pembrokeshire Coast National Park Authority, alongside Tir Coed, work with volunteers and people from other organisations to plant the trees.*

*The project has many benefits, including improving the quality of the Cleddau catchment area by soaking up run-off, and reducing soil erosion and flooding and increasing biodiversity. The project also provides opportunities for people to improve their mental well-being by being in nature. 1,300 trees have so far been planted over the last three years, with the project providing an example of how public sector organisations, private companies and individuals can work together for the benefit of wildlife and the wider environment.*

## Hedges and Edges

Species-rich hedgerows with mature hedgerow trees are also a significant landscape and historic feature across much of the county. They can be important habitats for butterflies, moths, birds and small mammals. They are important cultural features in the landscape. Hedgerows act as windbreaks, help prevent soil loss, reduce flooding and link habitats. However, the current condition of hedgerows in the county is very variable - some have been restored/replanted in recent years, but others have been removed or continue to decline through lack of appropriate management. Today we also see the impact of ash dieback disease on our hedgerow trees.

## Bogs and Peatlands

Peatland ecosystems are important habitats which support a unique biodiversity. Over time healthy peatlands can capture and lock up vast amounts of carbon, while providing other vital benefits that help us become more resilient, such as flood prevention, clean water and improved health and wellbeing. The UK's peatlands store over three billion tonnes of carbon but peatlands are struggling. Globally 25% of peatlands have been destroyed, whilst in the UK at least 80% are damaged. Lowland raised bogs are the most threatened peatland with only 6% remaining, the majority in unfavourable and degraded condition and in need of restoration.

Meaningful implementation of Wales's national peatland restoration and woodland creation programmes will help safeguard soil from degradation processes such as erosion and soil organic matter loss, enhance soil carbon stock in the long term and mitigate drought and flood risk.

The LIFE Raised Bog project covers all of Wales and has been running for several years. The main focus so far has been work on Cors Caron but restoration work will be taking place at Esgyrn Bottom SSSI, part of the Afonydd Cleddau SAC in the autumn of 2022. Another all Wales project targeting bog restoration the LIFE Quaking Bogs project has also received approval and work will include sites in Pembrokeshire, mainly in the Preselis and St Davids peninsula.



## Air Quality

Clean air is a critical natural resource and is essential in protecting not only human health, but also Wales's natural and built environment. Air pollution affects both urban and rural areas. No levels of air pollution are 'safe'. Although air pollution from industry and transport has declined in recent decades, nitrogen-containing air pollutants continue to cause significant environmental harm whereas previously emissions of sulphur caused widespread acidification of water resources and damaged trees and forest soils.

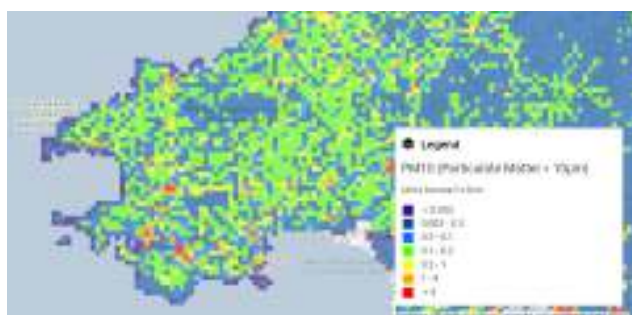
Air quality monitoring in Wales is primarily undertaken by Local Authorities and, through several national networks, managed by the Welsh Government.

Poor air quality in the UK is estimated to cause 40,000 early deaths annually (Air Quality Expert Group, 2020), with 2,000 deaths in Wales alone, which amounts to 6% of total deaths (Public Health Wales, 2016). This was demonstrated during the Covid-19 pandemic where lockdown restrictions affected energy use, emissions and some air pollutants across the UK. Initial assessments suggest a reduction in nitrogen oxide (NO<sub>x</sub>), including NO<sub>2</sub> emissions in urban areas during lockdowns, as a result of lower traffic volumes (Clean Air Advisory Panel, 2020). This and the associated reduction in traffic noise is likely to have had a positive impact on well-being. A growing body of evidence indicates that the impact of air pollution goes beyond physical health and can impact on human well-being due to people's personal connections to the richness of their natural environment. SONaRR 2020 states that the effects of air pollution disproportionately affect those in deprived areas.

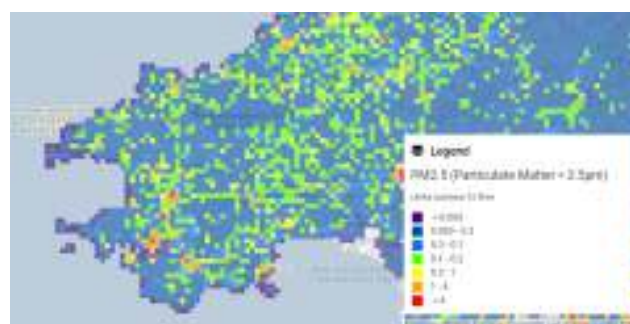


## Particulate Matter

Particulate matter (PM) consists of a mixture of solid particles and liquid droplets found in the air. A primary PM is directly emitted from source, a secondary PM can form in the atmosphere due to chemical reactions between pollutant gases. Overall figures for the region are lower than World Health Organisation (WHO) guidelines. Non-exhaust road transport emissions, domestic and industrial emissions contribute to the local peaks in urban areas. Domestic wood and coal burning also make a significant contribution. The size of the PM and length of exposure are key factors in the potential of adverse health conditions and determine where the impact will be on the body. Small particles less than  $2.5\mu\text{m}$  in diameter pose the greatest problems because they can get deep into the lungs and bloodstream leading to respiratory problems. When exposure to PM reduces lung function, it also reduces the ability of people to access nature and benefit from it; as a result, this also reduces their quality of life. There is extensive evidence to show that long-term exposure to PM increases mortality and morbidity from cardiovascular and respiratory diseases. PM has also been classified as carcinogenic to humans and causing lung cancer.



**Particulate matter under  $10\mu\text{m}$  – taken from National Atmospheric Emissions Inventory**



**Particulate matter under  $2.5\mu\text{m}$  – taken from National Atmospheric Emissions Inventory**

Levels of particulate matter in Pembrokeshire are generally low, as can be seen in the graphs above. As is typical there is a higher amount of larger, less dangerous, particulates in the air. Areas of highest population contain the highest levels of both classifications of particulate matter, particularly around Haverfordwest, Milford Haven and Pembroke.

## Air Quality Management Areas

Local authorities are responsible to declare Air Quality Management Areas (AGMAs) if national air quality objectives are not likely to be met. Across the region

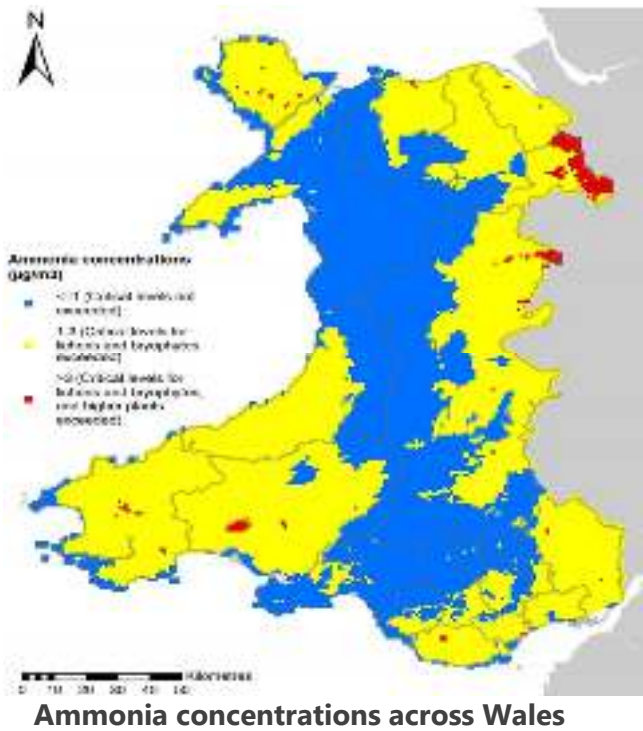
(Carmarthenshire, Ceredigion and Pembrokeshire) there are five active AQMAs: two in Pembrokeshire, none in Ceredigion and three in Carmarthenshire (see Table 5).

Local Authority	AQMA Name	Pollutants	Date Declared
Carmarthenshire County Council	Llandeilo AQMA	Nitrogen dioxide NO <sub>2</sub>	11/11/2011
Carmarthenshire County Council	Llanelli AQMA	Nitrogen dioxide NO <sub>2</sub>	02/08/2016
Carmarthenshire County Council	Carmarthen AQMA	Nitrogen dioxide NO <sub>2</sub>	02/08/2016
Pembrokeshire Council	AQMA No. 1 2012	Nitrogen dioxide NO <sub>2</sub>	06/07/2012
Pembrokeshire Council	AQMA No. 2 2012	Nitrogen dioxide NO <sub>2</sub>	06/07/2012

Table 5 AQMAs in the Carmarthenshire, Ceredigion and Pembrokeshire region

Ammonia

Nitrogen is an important nutrient for plant growth and food production but excess can be emitted to the air as ammonia (NH<sub>3</sub>) from agriculture and waste management and re-deposited onto soils and plants, and into freshwater bodies. The impact of nitrogen, in particular ammonia pollution, is significant with 88% of sensitive habitats being damaged by high concentrations of nitrogen. More than half of Wales now experiences ammonia concentrations that are too high for lichen- and bryophyte-rich ecosystems to function properly; these include ancient woodland, bog, heathland and



acid grassland (See **Error! Reference source not found.**).

In Wales in 2012, emissions of ammonia were estimated at 25kt. Agriculture contributed 85% of the total and 52% of agricultural emissions were derived from cattle manure management alone. Concentrations are likely to increase unless measures to control agricultural emissions are implemented. Ammonia emissions can transform in the atmosphere and contribute to increased levels of particulate matter and ozone, causing harm to human health. Agriculturally-dominated and sparsely populated counties like Pembrokeshire, Carmarthenshire and Ceredigion have an important role to play – and arguably a responsibility for – mitigating any negative impacts of agricultural emissions on the well-being of people across the county. A key concern identified in SoNaRR 2020 “are the localised impacts of new ammonia sources associated with the rapid expansion of intensive poultry developments”.

## Actions Going Forward

Measures to combat air pollution, for example GI, can help transform urban and rural spaces by improving enjoyment and promoting positive behavioural changes. In addition, the cultural services imparted by ecosystems often depend on nitrogen-sensitive biodiversity, for example, in flower-rich meadows or lichen-draped woodlands.

The Welsh Government is committed to building healthier communities and better environments. Clean air has a central role in creating the right conditions for better health, well-being and greater physical activity in Wales. In September 2017, the Welsh Government published its national strategy, Prosperity for All, which sets out a cross-government commitment to reducing emissions and delivering vital improvements in air quality through planning, infrastructure, regulation, and health communication measures.

The existing vegetation in Wales takes up a significant amount of air pollutants. Restoring land cover and changing land use practice to maximise the regulating provision of the ecosystems can further reduce air pollutants. Studies have shown that this approach could be more beneficial than traditional abatement technologies and can be especially effective in combination.

Encouraging the use of the cleanest modes of transport for freight and passengers, active travel and the creation of urban green space, are likely to be key in reducing emissions in the future.

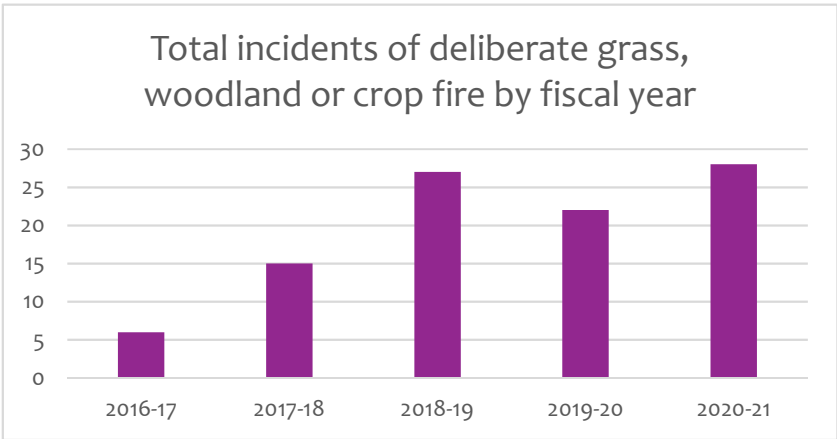
Expansion of the air quality monitoring network in Wales, in both the urban and rural environment, would help strengthen our evidence and reliance on computer modelling, to better understand the scale and impact of key pollutants such as ammonia on the environment. Better data sharing as a result of new legislation, especially within the agricultural sector, will also allow us to target our interventions and policy to ensure pollution can be minimised.

Wildfires

Wildfires continue to be a problem across Wales with 15,576 grassfires between 2015 –2020. In the same period there were 4947 grassfires in the Mid and West Wales Fire and Rescue service area.



**Deliberate grass, woodland and crop fires recorded by MSOA 2016-21**



**Deliberate grass fires reported by Mid and West Wales Fire and Rescue Service**

In Pembrokeshire the areas most affected by deliberate wildfires are: Pembroke Dock, and Milford Haven. These are shown in blue on the graph of Pembrokeshire in Figure 8. Incidents of wildfires in our county have been relatively low, seeing an increase from 2016 and staying stable over the last 3 years.

The environmental harm caused by arson is significant, it can damage or destroy:

- Habitats, vulnerable plants, wildlife and grazing.
- Properties and historic features.

- Alter the physical structure, composition and hydrology of the soil.
- Affect water quality.
- Affect Air quality and potentially cause traffic accidents.



**Long-term trend of grass fires in Wales**

Smoke from wildfires carries small particles suspended in the air - particulates - that pose a danger to human health, as detailed above. To combat the setting of deliberate wildfires in Wales an all Wales task force has been created, Operation Dawns Glow. When looking at the all Wales figures from 2001/2 there has been a significant improvement in both deliberate and accidental grassfires.

## Flood Risk

Flooding causes significant damage and distress to those who live in areas affected. Floods are one of the most common environmental emergencies; with widespread and long-lasting health, environmental and financial impacts affecting homes and businesses, and can significantly disrupt the normal functioning of whole communities. From a health perspective, quite often the worst affected are the most vulnerable in society.

Nearly 3000 properties in Pembrokeshire are currently at some level of flood risk from river or surface water flooding or coastal inundation. 1632 properties are at low risk, 418 at medium risk and 769 at high risk. Climate change will increase the number of properties, infrastructure and key services at risk of flooding. Places which do not currently flood will become at risk of flooding and those already known to be at risk will see the level of that risk become greater.

Extreme weather events will become more common; events such as the 2020 storms will increase the level and frequency of flooding. Three key climate change impacts relative to flood risk are extreme rainfall events, river flood flows and sea level rise.

NRW Communities at Risk Register (CaRR) identifies the 5 Pembrokeshire communities most at risk (i.e. combined tidal, pluvial and fluvial scores).

CaRR 'community' name	Top 5 communities Max score ranking (undefended) (CaRR 2019)
Haverfordwest	1
Pembroke	2
Tenby	3
Fishguard	4
St. Dogmaels	5

## Shoreline Management

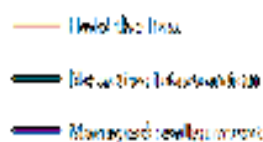
Climate change is predicted to cause a rise in sea levels, which together with predicted changes in storm intensities and increased wave action may pose further risk to exposed coastal areas and communities such as Amroth, Saundersfoot, Little Haven and Newgale

Shoreline management plans (SMPs) identify risks from flooding and coastal erosion, opportunities to maintain and improve the environment by managing these risks, and set out where we should continue to defend the coastline or where it would be more sustainable to adapt over time.



**Coastal Management Plan,  
20 year timescale**

Coastal adaptation will be required where there is a change of policy option over the SMP time periods or epochs, i.e. short term (Epoch 1 0-20 years), medium term (Epoch 2 20-50 years) and long term (Epoch 3 50-100 years); for example a change in policy option from 'Hold The Line' (HTL) to 'No Active Intervention' (NAI) or 'Managed Realignment' (MR), to deliver a more sustainable and resilient coastline to help manage and mitigate future flood and coastal erosion risks.





Where No Active Intervention (NAI) is proposed, consideration will need to be given to how this is undertaken. Locations that are expected to remain defended will need to consider nature-based solutions to improve environmental resilience and deliver wider benefits across the well-being goals.

## Water Quality and Health

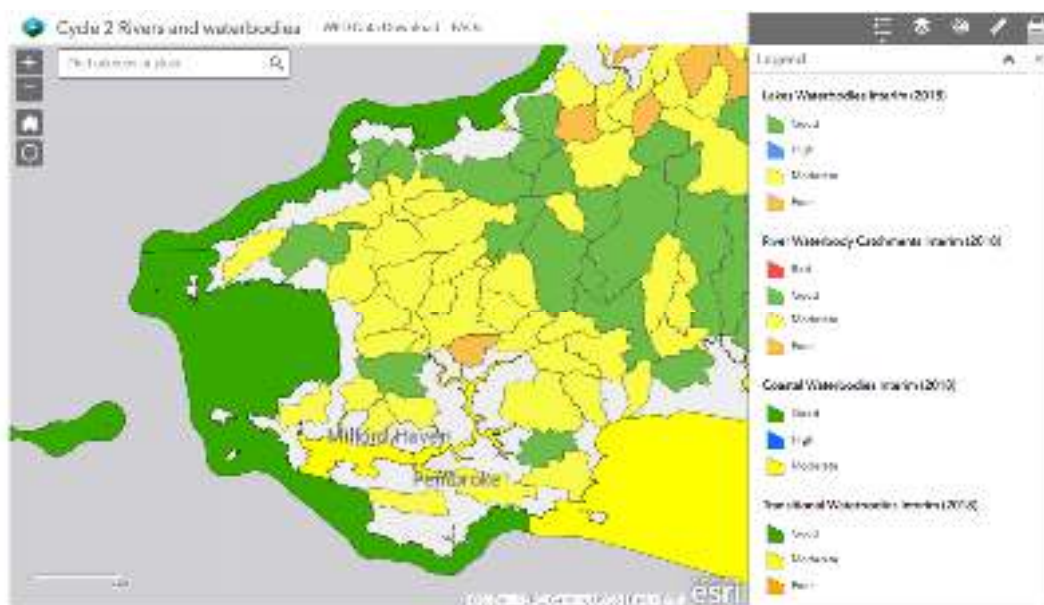
Our rivers, lakes, groundwater, estuaries, coasts and seas provide us with important natural benefits, many of which contribute to the well-being of local communities and the wider population. These benefits include:

- Providing clean fresh water for people to drink, for industry and for agriculture
- Clean rivers and seas for recreation, relaxation and enjoyment
- Income generation from business and industry, tourism, energy production, angling and commercial sea and shell fisheries
- Supporting resilient terrestrial and marine ecosystems and habitats
- Providing seafood (fish and shellfish) and for crop growth

By working together to improve and maintain the management and quality of our water resources, we can deliver benefits for the environment, the local economy, health and quality of life.

There are a number of significant factors that have an impact upon our waterways in Pembrokeshire. Water quality is being affected by pollution from nitrates, phosphorus and sediments from agriculture and sewage. Artificial structures and changes to river channels and banks pose barriers to fish and disruption of natural habitats. Invasive species are widespread, including Japanese knotweed and Himalayan balsam and there is an increasing demand for water.

Nutrient concentrations in Welsh rivers and globally are a widespread problem and Pembrokeshire is no exception. -To assess Water Framework Directive (WFD) compliance, NRW assess the condition of water bodies through monitoring, which produces an overall classification. The current classification or status for each water body is shown.



**Classification of water bodies in Pembrokeshire taken from Water Watch Wales**

A decreasing proportion of water bodies are achieving the required Water Framework Directive (WFD) Good Ecological Status (GES), with more deteriorating than improving, over the longer term.

The overall proportion of non-tidal water bodies at GES within Pembrokeshire (30% of the 69 waterbodies) is significantly lower than the average for Wales (40%).

In this predominantly rural county diffuse pollution from agricultural sources is contributing to water quality failures, both in terms of water chemistry, but also dependent ecological indicators. The problem is exacerbated by continuous sewage and storm sewage overflow discharges from water industry sources.

Along with work to tackle nutrient and sediment pollution, addressing and improving fish passage is a key issue to address to see improvement in a small number of water bodies, such as Pembroke River quality.

Continued efforts to reduce water quality impacts from drainage misconnections and from storm sewage discharges is required in urban areas.

Most of the tidal water bodies (termed transitional) within Pembrokeshire are currently failing to achieve standards for dissolved inorganic nitrogen and, in some cases, related biological indicators such as diatoms and/or macroalgae (seaweed). In

addition to detrimental ecological impacts this can also cause problems for recreation users of the Milford Haven Waterway and commercial fishing operations. Continuous sewage discharges and diffuse pollution from agriculture and rural land management are the predominant issues identified. Levels of certain chemical contaminants including Tributyltin (TBT) and Mercury (thought to be due to atmospheric deposition) have also been recorded as above statutory guidelines in tidal waters.

Compliance Assessment of Welsh River Special Area of Conservation (SACs) against Phosphorus Targets in 2021 found 67% of waterbodies within the Cleddau River SAC, including every water body of the Western Cleddau, failed to meet target phosphate levels. This has significant implications for any proposed new development within the catchment because any new development that might result in an increase in the amount of phosphate within the SAC must be able to demonstrate that it will at least not add to, or it will reduce, phosphate levels in the receiving waterbody.

At present, there are areas of Pembrokeshire where no house building or development can occur due to the failing of the rivers Cleddau and Teifi against target phosphate levels. This has major implications for affected communities.

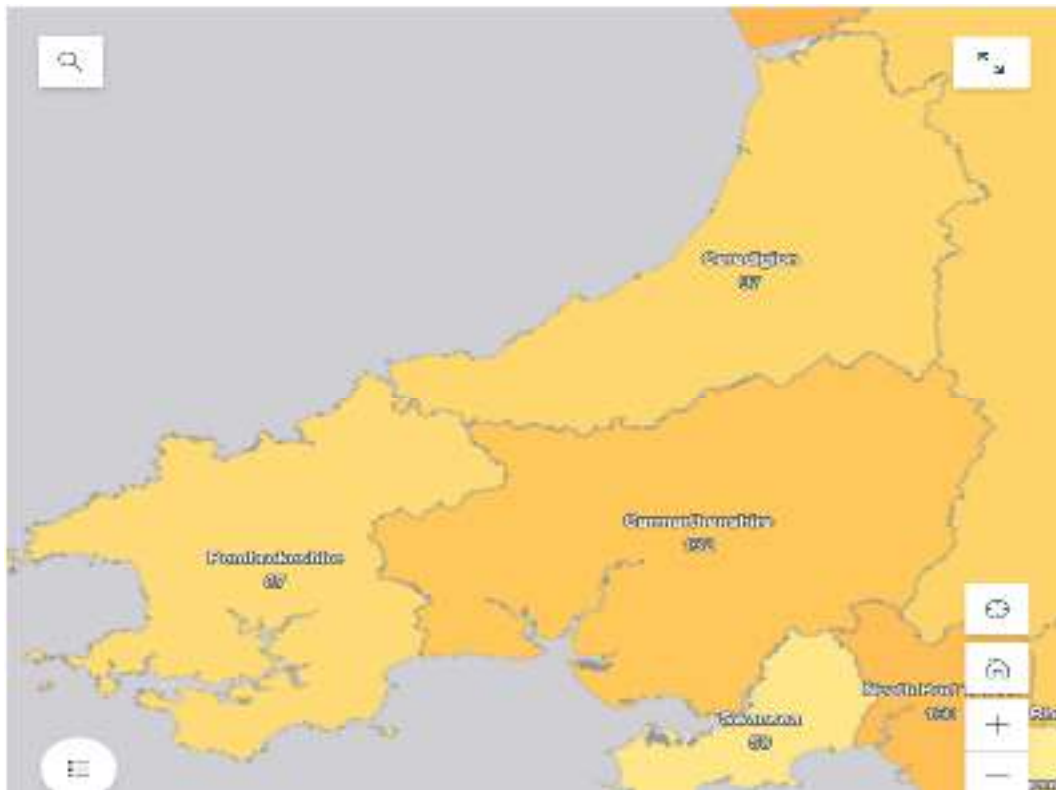
## Bathing Waters

In Pembrokeshire we are lucky to be able to swim and enjoy recreation in some of the cleanest waters in the UK. This is similar for our neighbours in Ceredigion and Carmarthenshire. 27 of the 29 bathing waters in Pembrokeshire have achieved the highest 'excellent' status, the other two were awarded 'good' status.

## Pollution Incidents

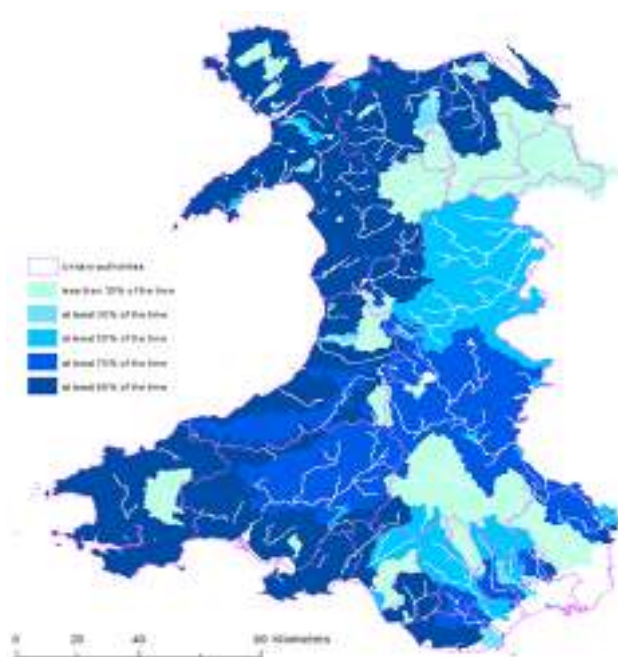
Pembrokeshire had 302 confirmed incidents between 2016 and 2020, 89% were low impact and 11% high impact. In 107 of the total number of confirmed incidents agricultural materials and waste was the main type of pollutant followed by 52 incidents caused by sewage. Approximately 15% of incidents from agricultural sources and 3 % from water industry sources had a high impact.

## Number of confirmed environmental pollution incidents, taken from the Wales Environment Pollution Incidents Interactive Map



## Water resources

The demand for water must be balanced with the importance of protecting water resources for a healthy environment. Water is taken from rivers in Pembrokeshire for public water supply, agriculture, industry, power generation and amenity uses. Within Pembrokeshire does not have a big surplus of water available for future additional use. This is because most of the water 'available' is already licensed for use, particularly at low flows. The Eastern and Western Cleddau catchments provide most of Pembrokeshire's public water supply. As these rivers are designated SACs and therefore afforded a high level of environmental protection, there is potential conflict with the demand for water.



Demand for water is increasing as the local population increases and tourism numbers increase. The impacts of Covid led to an even greater increase in tourist numbers but whether this increase will continue in future is unknown. Water resources will come under increased pressure in the future, impacting upon the ecosystems, people and businesses which rely upon them.

Actions that we can take to improve the current situation are:

- Help people to understand where their water comes from why we need to use it wisely to avoid wasteful practices and do more to improve water efficiency.
- Water Resource Management Planning by Dwr Cymru/Welsh Water to ensure that there is enough water to supply consumers under future climate and population scenarios.

## Waste and Recycling

Living in a 'disposable' society where waste is continually generated increases pressure on the use of our natural resources. Once waste is generated it requires treatment at facilities that require land, consume energy and water and produce emissions into the environment. If waste is not handled and treated properly it can be harmful to ecosystems, biodiversity and the well-being of the population.

Wales is transitioning to a high recycling nation which is a necessary component of a circular and regenerative economy. However, more needs to be done to prevent waste from being generated if we are to achieve zero waste and one planet living. The pace of becoming a high recycling nation must be matched with the provision of suitable waste facilities and end markets for materials, particularly for material streams that are currently difficult to recycle.



**Percentage of all waste recycled**

Residents in Pembrokeshire have continued to improve upon their excellent recycling rates. Pembrokeshire currently has the highest rate of combined waste reuse, recycling or composting in Wales at over 70%. The Welsh government target for recycling rates will be increasing from the current rate of 64% to 70% in 2024. Pembrokeshire is one of four counties in Wales currently exceeding a 70% rate in advance of this change, alongside neighbouring Ceredigion.

Taking a circular economy approach is a key pillar of a green recovery, helping not only to address the climate and nature crisis, but also driving better and more equitable economic outcomes for Wales.

It is currently not clear what the impact of Covid-19 has had on recycling rates and caution should be given to making comparisons to previous years. However, the picture in Pembrokeshire is cause for optimism.

## Ecosystem Resilience

Ecosystem resilience is the capacity of ecosystems to deal with disturbances, either by resisting them, recovering from them, or adapting to them, whilst retaining their ability to deliver services and benefits now and in the future. Disturbances include, (but are not limited to); habitat and species loss and deterioration; climate change; pollution and invasive non-native species.

Healthy and resilient ecosystems that are resistant to threats and disturbances provide benefits including:

- Clean air and water
- Provision of food
- Ability to adapt to climate change and extreme weather events e.g. flood prevention
- Store carbon ('green' and 'blue') to mitigate the impacts of climate change
- Protected habitats, biodiversity and landscapes for their intrinsic value and associated improved health and well-being



- Economic from tourism, recreation and enjoyment of landscapes and iconic species such as seabirds and seals

Work that can be done to improve the ecosystem resilience in our county starts with the development of an understanding of value of the natural environment and recognise biodiversity as an asset. Biodiversity underpins the social and economic systems we rely on in Wales and despite a more integrated policy framework, we struggle to find ways to measure it as an economic asset. Clear information is needed to show where declines in biodiversity and other natural resources are leading to impacts on well-being. Developing this understanding and bringing that understanding into decision making will be a critical step in building future ecosystem resilience.

The county has an extensive network of 'designated' (protected) sites; As well as the Pembrokeshire Coast National Park, Pembrokeshire has 77 Sites of Special Scientific Interest (SSSIs), 10 Special Areas of Conservation (SACs), 4 Special Protection Areas (SPAs) and 1 Marine Conservation Zone (MCZ) – Skomer. These designations cover and protect marine, terrestrial and freshwater habitats and the species dependant on them.

Pembrokeshire's important semi-natural habitats include woodland, semi-natural grassland, heathland, rivers, wetlands and coastal habitats.

The rich mosaic of habitats are especially noted for:-

- The range and diversity of marine habitats and species e.g. grey seals, maerl (type of seaweed) habitats and the largest native oyster beds in Wales
- Iconic seacliff landscape with coastal grasslands and maritime heaths
- The extent of unimproved neutral grassland on the Castlemartin peninsular
- The extensive heaths and commons of the Preseli Hills SAC
- Significant examples of upland and lowland oak woodlands
- The eastern and Western Cleddau Rivers SAC and the Pembrokeshire Marine SAC

There are a number of pressures which impact upon these valuable habitats and the ecosystems they support. These include; development, leading to incremental loss and fragmentation of habitats reducing genetic diversity; intensification of agriculture (e.g. agri-pesticide use impacting pollinators, damage to peripheral habitats like hedges, nutrient and sediment pollution e.g. elevated phosphate in SAC

rivers); impacts of non-native species and disease; increased recreation and inappropriate land use and lack of management such as grazing. Climate change is likely to further exacerbate these pressures.

The majority of Pembrokeshire's terrestrial, freshwater and marine, protected sites are in unknown or unfavourable condition, which means that although they are still of immense ecological value, they could be improved.

Pembrokeshire Marine SAC is considered to be one of the best areas in the UK for large shallow inlets and bays, estuaries, reefs and grey seals. Also supporting Atlantic salt meadows, mud and salt flats, coastal lagoons and sandbanks. Several SAC features, including grey seals and Allis Shad, a widespread North Atlantic fish from the herring family, are in favourable condition but 10 of the 15 features are in an unfavourable condition, including estuaries, mudflats and sandflats.

Otters are in favourable condition in the Afonydd Cleddau SAC. Brook and river Lamprey are in an unfavourable – recovering condition but other features for which it is designated (Sea Lamprey, Bullhead, Alluvial forest, Active Raised Bog and water courses with the *Ranunculus fluitantis* and *Callitriche-Batrachium* vegetation) are unfavourable-unclassified as there is insufficient information to fully assess them.

Typical of national trends, the Eastern and Western Cleddau rivers are currently classified as 'At risk', and the Nevers 'Probably at risk' for both salmon and Sea Trout populations with Sea Trout particularly badly impacted by the effects of intensive agriculture.

Interventions to support ecosystem resilience often have benefits beyond those which are the primary aim. For example, contour planting of hedgerows to attenuate flood risk may improve water quality, provide shelter for out-wintered stock and provide habitat for nesting birds. In order to understand opportunities, threats and complex inter-relationships, the Council's Ecologist and conservation team have developed a GIS based land use planning tool, which displays relevant ecological information and is used to inform and assess planning applications and inform biodiversity enhancement projects.

## Climate Change

Climate change is a cross-cutting issue, it is happening now, it is affecting our well-being and will impact the well-being of future generations. By the 2050s in Wales: Annual temperatures are projected to rise by 1.2°C, Summer rainfall is expected to decrease by around, 15% Winter rainfall is projected to rise by 6% and Sea levels ~~is~~ are projected to rise by 22 cm. There is clear evidence of climate change in Wales, e.g. increases in mean daily temperatures, reduction in air frosts, and increase in storm events. This is predicted to have a range of impacts not only directly on health and well-being but also on habitats and species such as a decline in native species, changes in migration patterns and increases in invasive species. In addition, the State of Natural Resources Report identified the potential for increased coastal erosion, affecting beaches, intertidal areas and other coastal features, which could have a significant impact along our extensive coastline.

Any climate change policies need to be integrated with policies for biodiversity. A climate emergency is a biodiversity emergency. Climate change mitigations can exacerbate the biodiversity crisis so there is always a need for them to be considered together.

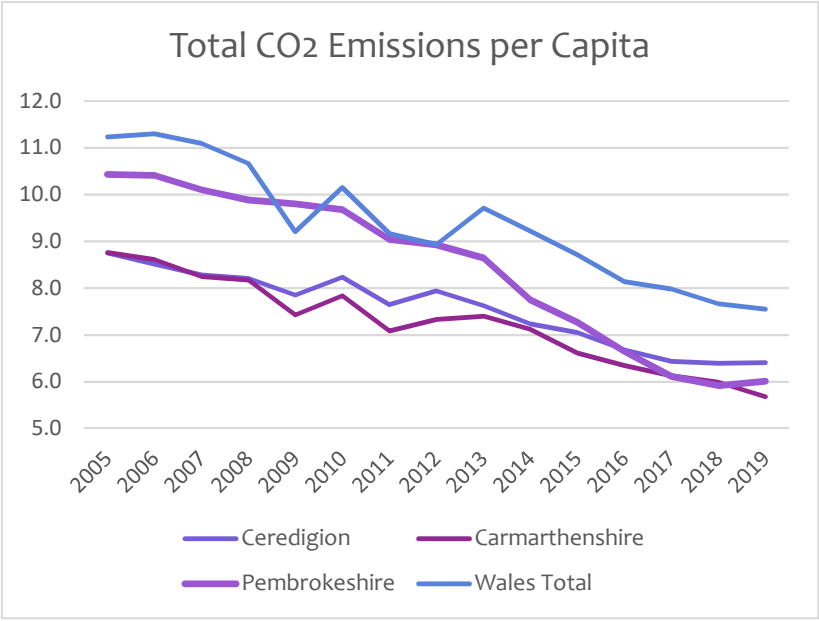
Further emphasis should be given to the role of nature recovery in both mitigating and adapting to climate change, recognising the significance of these two interrelated challenges. By putting nature into recovery, we can tackle climate change. Thriving habitats, both terrestrial and marine, can safely lock up vast amounts of carbon, while providing other vital benefits that help us adapt to our future climate, such as flood prevention, clean water and improved health and well-being.

In 2021, the UK Climate Change Committee ([www.theccc.org.uk](http://www.theccc.org.uk)) released the third independent assessment of UK Climate Risk. The Summary for Wales identifies the following risks as high magnitude, requiring action now:

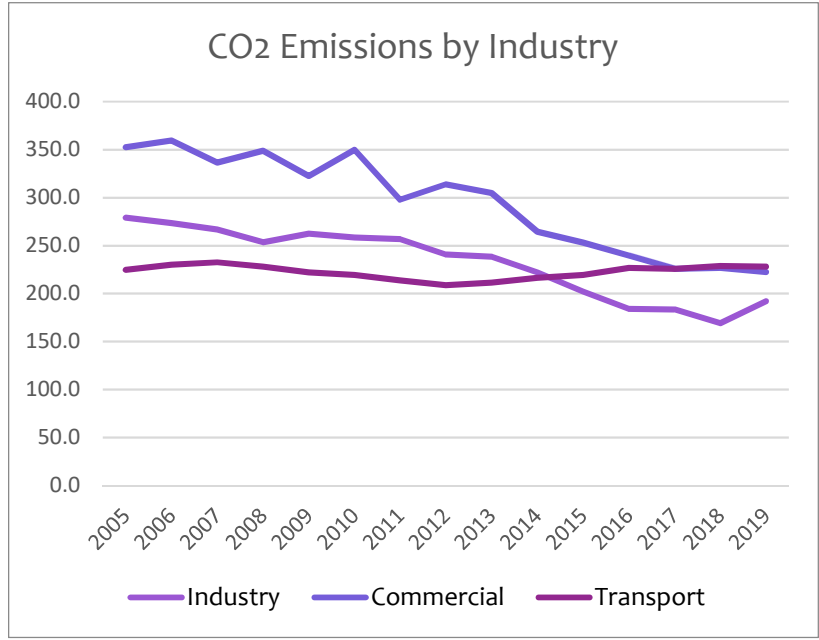
- The impact of climate change on the natural environment (terrestrial, freshwater, coastal and marine, forests and agriculture)
- Increases in the range, quantities and negative consequences of pests, pathogens and invasive non-native species

- More frequent flooding and coastal erosion, leading to: (a) damage to coastal businesses; (b) increased severity and frequency of flooding to homes and communities; and (c) damage to infrastructure services (energy, transport, water supplies and ICT)
- The impact of high temperatures, high winds and lightning on the transport network
- The impact of high temperatures on people's health and wellbeing
- Extreme weather events causing disruption of health and social care services
- Changes in temperature, precipitation, groundwater and other landscape changes causing damage to cultural heritage assets
- International impacts of climate change (e.g., food availability, safety and security, risks to international law/governance) that could affect the UK through disruption of trade routes, supply chains and public health.
- The Welsh Government has set out an ambitious pathway to achieve a Net Zero Public Sector by 2030 and a Net Zero Wales by 2050, which will be a challenge and require us to work together in partnership to achieve. Pembrokeshire County Council Action Plan towards becoming a Net Zero Local Authority by 2030. Funded by the UK Community Renewal Fund, Pembrokeshire Coastal Forum and Netherwood Sustainable Futures are working with the PSB to develop a Pembrokeshire-wide Climate Adaptation Strategy to provide a co-ordinated strategic approach to address climate risk by agencies, authorities and local communities. This work will help provide a fuller picture of how identified impacts will be addressed and how current policies and strategies link to the ability to manage risks.

# Carbon Dioxide

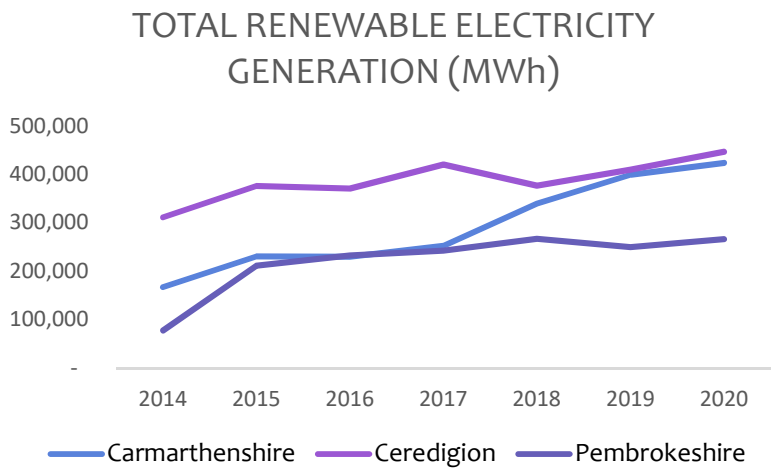


Carbon dioxide emissions do not directly pose the same health risks as other gases, such as carbon monoxide. However, impacts of high carbon dioxide emissions are felt globally through climate change; in turn creating a large impact on the health and well-being of people.



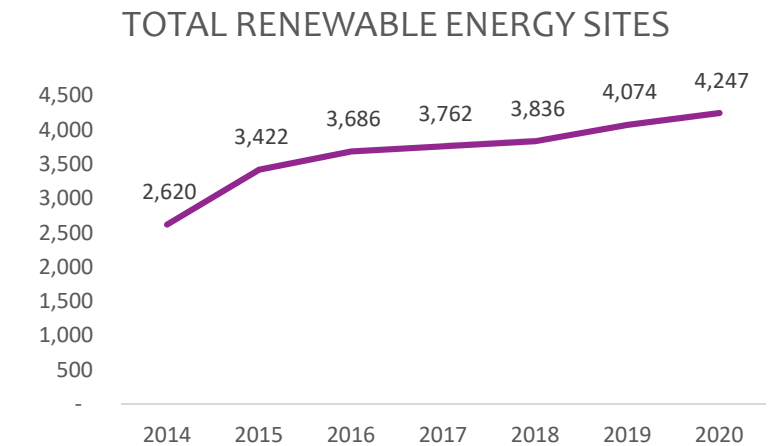
The CO2 emissions per capita in Pembrokeshire are reducing, following the same pattern as seen in Ceredigion, Carmarthenshire and across Wales. The gap between the difference in emissions between the three main sources, industry, commercial and transport has narrowed. Transport is now the leading source of emissions in Pembrokeshire, emissions from industry have risen in the past year.

# Renewable Energy Generation

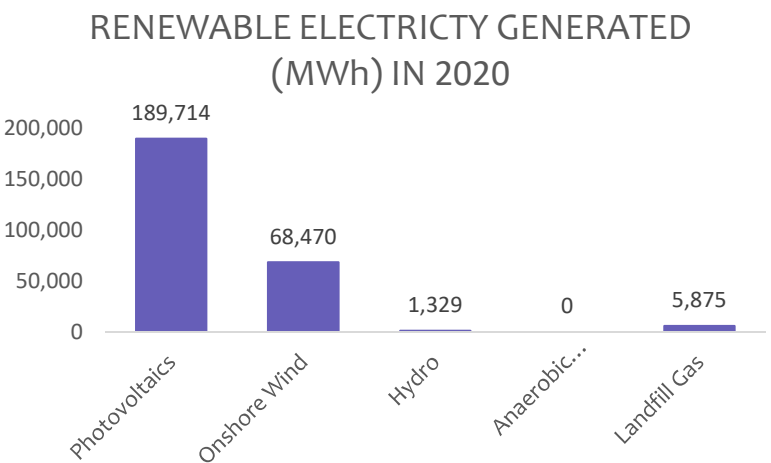


The capacity and generation of renewable electricity has been increasing in Pembrokeshire, the wider region, and across Wales in recent years.

As of 2020, there were 4247 renewable energy sites in Pembrokeshire, a significant increase from the 2620 sites present in 2014. Of these, photovoltaics generated the most electricity in 2020, followed by on shore wind farms.



There are a number of opportunities for taking action to address the impacts of climate change:-



We need to transform our energy system - Making buildings energy efficient and low carbon is one example of reducing overall energy use, and therefore greenhouse gas emissions, whilst also helping towards the behavioural changes needed in society to address many of the issues faced.

Encouraging the local generation of energy and promoting demand management and energy efficiency are also important to effect change. Pembrokeshire has the



highest concentration of wave resource in Wales equating to an indicative capacity of up to 5.6 GW providing a significant opportunity for development of the industry. Pembrokeshire County Council is leading the way in renewable energy with a collaborative £4.5 million project exploring the vital role hydrogen could play in a decarbonised energy future. A proposed Marine Energy Test Area (META) with eight pre-consented sites located in and around the Milford Haven Waterway, META aims to de-risk the development of marine energy projects by providing the opportunity to test devices, sub-assemblies and components. The sites are accessible yet still representative of real sea environments. META is non-grid connected and so is ideal for early stage developers, and is also a perfect base for research and innovation.

We need to transform our transport system - SoNaRR 2020 recommends considering actions in the social sphere, driving change in how and why people travel or transport things. This could include building on the change of lifestyle we all experienced during the Covid-19 pandemic - More working from home enabling people to travel more sustainably, people staying local for holidays and recreation and encouraging the purchase of local produce to reduce transport costs. Improving active travel routes, enabling the switch to electric vehicles and embracing global energy transition based on a hydrogen economy can all play a part. It is recognised that infrastructure changes will play a big part in how realistic it is for people to change to more sustainable travel methods, such as electric vehicles.

We need to transform our Food System – increasing food production through sustainable farming practices, which will include low carbon management practices, increased biodiversity-friendly management practices, new incentives and regulatory mechanisms, altered diets and reducing food waste will all help to make a more efficient food system.

Removing carbon from the atmosphere and maintaining long-term storage of it (sequestration), for example through peatland restoration, increased tree cover in the right places with the right species and supporting projects to increase ‘blue carbon’ storage within the marine environment is vitally important. This needs to be done in a way that benefits both the local community and maximises the environmental rewards. Using large areas of land to plant single species of trees will neither benefit the local environment nor the communities in Pembrokeshire.

As a society, we need to address our over-use of resources and its impact in Wales and globally. Our society relies on ecosystems as a source of natural resources and to dispose of wastes and emissions. Wales's global footprint makes it clear that our systems of production and consumption are putting too much pressure on the environment. We need to reduce our use of natural resources and the pollution and waste we generate, in order to have an economy, which regenerates ecosystems, instead of degenerating them.

## Summary of Engagement responses

The environment is a priority for the young people in Pembrokeshire. 59% of the young people who responded to our youth survey strongly agreed or agreed that they felt connected to their local environment. 82% strongly agreed or agreed that the future of the environment was very important.

From the regional survey a strong theme raised by local people was of the surrounding agriculture and local food. When asked, 80% of survey respondents would consider using locally sourced food and 58% of respondents said they would like to see more advertising of local food businesses. Several comments were made about making more of the food produced in Pembrokeshire available to local people; "Sourcing food locally would significantly improve the community's environmental impact. Supporting or facilitating our local food producers to be able to deliver this would make a significant difference. Educating our children that sourcing locally as opposed to restricting diets would also go a long way to reinforcing good behaviours."

When responding to the regional survey a the majority of residents in Pembrokeshire stated when asked what they would consider doing to improve their local environment that they would recycle more (75%) and reduce waste (74%) Around half (55%) said they would like recycling in the county to be made easier.

A comment from an engagement session held by the Pembrokeshire Nature Partnership detailed the importance of ecosystem resilience; "The Resilience goal is overarching. Without a healthy, functioning environment no other goals are possible. It is the keystone piece. Natural capital is the building block from which ALL other capital is made. It must be used sustainably."

54% of respondents to the regional survey stated that the ability to adapt and be resilient to climate change was one of their top concerns about their local environment when looking to the future.

When asked "What would you consider doing to improve your local environment?" over half of regional survey respondents stated that they would "improve energy efficiency and purchase green / renewable energy" or "use renewable energy". A suggestion of a move from fossil fuels to a renewable energy industry was raised in several engagement responses. A quote taken from a session held by Pembrokeshire Nature Partnership stated; "Engineering can transfer from fossil fuels in the Haven to the renewable sector. Prospects for Renewable Energy mean skilled well-paid jobs, and jobs in environmental management and agriculture"

# EDUCATION AND LEARNING



A PROSPEROUS WALES	A RESILIENT WALES	A HEALTHIER WALES	A MORE EQUAL WALES	A WALES OF COHESIVE COMMUNITIES	A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE	A GLOBALLY RESPONSIBLE WALES
✓			✓		✓	
Well-being areas: Social / Economic						

## Overview

Education and learning is a key issue for the PSB as it underpins other themes. Without basic skills such as literacy and numeracy, citizens can be excluded from many aspects of society. The skills acquired in school and college underpin the economy. As the new curriculum demonstrates, education and learning are inextricably linked to culture and self-expression. Education and learning is important in its own right and ultimately, it is part of what it is to be human and is part of the fabric of society.

Learning and maintaining the capacity to learn enables people to continue to engage with their families and community and for people to maintain their independence. The increased use of digital communication and the need to learn how to use these technologies is a case in point.

Some PSB partners have a particular role in formal education services, such as Pembrokeshire County Council and Pembrokeshire College, and these organisations, as well as third sector organisation such as PAVS and PLANED, have a role in delivering lifelong learning. All PSB partners have a role as employers for workforce training, particularly for apprenticeships. Education and learning are not the responsibility of one or two PSB partners.

Further education is provided by Pembrokeshire College and the most recent Estyn inspection found that the college's performance was good with excellent prospects for improvement. The college has expanded and there are 2,000 full-time and 13,000 part-time learners and apprentices split between two campuses (the MITEC centre is focused on engineering). Through Work-Based Learning (WBL) Apprenticeships and Traineeships, the college is working with more than 3,500 employers.

As noted in the economy section, there is a limited higher education offer within the county. Pembrokeshire College offers a range of higher education courses in conjunction with other institutions such as Trinity St Davids and Swansea University, many of which are targeted at known schools shortages, such as engineering, and health and social care. Over time, there has been a steady increase in on-line learning opportunities (the Open University was established over 50 years ago) and it is possible that Covid-19 will result in a permanent shift towards on-line learning. If so, the impact of the relative lack of higher education institutes within Pembrokeshire may wane.

For formal education services, further education services provided by Pembrokeshire College are rated good by Estyn, and there are many examples of good schools (for instance Ysgol y Preseli in Crymych has been ranked the fourth best state secondary school by the Sunday Times Parent Power schools guide). However, Estyn's December 2019 LEA inspection found that there despite strong strategic direction, under performance had not always been dealt with robustly. It also found that whilst there had been improvement from previous inspections, consistency of improvement remained an issue.

Since Estyn's 2019 Inspection, there have been a six of inspections of schools (including one secondary school) that required some degree of follow-up. In all cases, these have been removed from lists of schools that require significant improvement of review. Routine inspections of schools such as Gynradd Llandudoch assessed the school as good. Whilst there is no room for complacency, these inspections provide externally validated evidence of the progress schools are making to improve.

The Covid-19 pandemic coincided with implementing the Estyn Post Inspection Action Plan. The initial lockdown was extremely disruptive to schools and colleges and schools necessarily focussed on providing a safe environment for learning. One of the adjustments made was that public examinations were replaced by teacher assessments for GCSE and A-levels and these are not comparable with previous years.

A complicating factor to measuring progress is that Welsh Government had already changed how it collated examination results, making it more difficult to draw comparisons between local authorities or to make generalised assessments of



education and learning across broad areas. As a result, the analysis of data section, which draws on the Public Services Board well-being assessment core dataset uses data from a time at which we know improvement was needed. However, this remains the most recent data and in future the PSB will need to rely on more qualitative assessments on the progress which is being made.

Since the last Well-being Assessment, the new national curriculum has been agreed. This will be implemented over the next year and places much more emphasis on young people having a broad range of skills as well as developing a sense of place. Another important development is changes to how young people with Additional Learning Needs are supported.

Covid-19 has interrupted young people's learning especially those young people on low incomes or with additional learning needs. Covid-19 has also been a stressful time, limiting opportunities for social interaction and straining people's mental health. This too is likely to have an impact on learning. On a more positive note, it has also tested new digital ways of delivering education and learning.

## Analysis of data

### School provision

The range and type of schools in Pembrokeshire from September 2021 is shown below.

Age Range	Secondary	Community Primary	Voluntary Controlled	Voluntary Aided	Special	Total
3 – 11		32	10	6		49
3 – 16	1			1		2
3 - 19					1	1
4 – 11		3		1		3
11 - 16	1					1
11 - 19	4		1			5
	6	35	11	8	1	61

There is a considerable variation in the size of primary schools which have capacity to offer places to about 10,250 pupils. The largest primary school has almost 700 pupils, the smallest only 21 with the median average being around 125 and the upper quartile around 230. The 25% largest primary schools provide just over half of

the 9,525 places taken up. There are approximately 750 surplus places for primary schools.

The vast majority of primary schools offer nursery provision. Access to childcare is key in addressing gender inequalities in the workplace (see life stages analysis).

Pembrokeshire's two middle schools offer 1,075 places (one of these, Caer Elen is Welsh medium).

There is variation in the size of the six secondary schools in Pembrokeshire. The largest has 1,620 on roll, the smallest around 525 and the median size is around 900. There are about 5,960 secondary students on roll whereas the capacity is just over 7,000.

Post sixteen education is delivered within the framework of a Memorandum of Understanding with Pembrokeshire College. The aim of this is greater collaboration between Schools and the College to minimise duplication and maximise the offer of courses to students. Since the last assessment, the number of school sixth forms has (following extensive debate) been reduced as the number of learners meant sixth forms were not viable. Campus 6 at Pembrokeshire College offers a wide range of A-levels and vocational equivalents such as Extended Diplomas.

Pembrokeshire's well-regarded Special school, Portfield, caters for children and young people with severe, profound and complex learning difficulties in the age range 3 -19 years. The whole spectrum of children's needs are supported through the involvement of many professionals.

Learning Resource Centres provide additional support for young people with additional learning needs (e.g. autism) with the aim of supporting young people to reach their potential within a mainstream school setting. Eight are based at primary schools providing 160 places. There are currently three centres for secondary age children, with a proposal to expand this to four, providing capacity to meet the needs of 92 learners.

Whilst not a school in its own right (as young people remain on the roll of their own school) there is also a pupil referral unit which provides intensive support for children and young people with Behavioural, Emotional and Social difficulties.

Schools provide more than education; they are community hubs in their own right and decisions to open, close or merge schools are taken very carefully (Council has opted to make these decisions itself rather than delegate them to the Executive). The Council has a school re-organisation policy that aims to match the number of school places to the number of children in an area and, over the past decades, there has been a steady reduction in the number of schools. Factors include:

- a fall in the number of young people of school age,
- changing locations of where pupils live; in general, this is towards main towns and away from rural areas
- the need to update school buildings and provide learning environments that are fit for the future. The successful C21st schools programme has seen well over £100m invested in new or re-furbished school buildings and more projects are either on site or are planned.
- the educational advantages of federating or merging small schools, such as reducing the number of head teachers with significant teaching requirements.

Pembrokeshire has bucked the national trend by increasing the amount of Welsh medium provision. The Welsh in Education Strategic Plan for the period 2022 – 2031 is currently in draft and will be agreed in early 2022. The expansion of Welsh medium provision is a priority within this plan, and is required in order to meet challenging Welsh Government targets.

## Location of pupils and need

The table below is summarised from the January 2021 Pupil Level Annual School Census and shows how many pupils (of all ages) live in Pembrokeshire and the communities that they live in. It also shows how many children have been identified by their families as entitled to free school meals.

It is not straight-forward to tie back the number of pupils living in communities to the number of people living there as some schools have sixth forms; others do not as well as inaccuracies in population estimates. Communities that are close to education provision in other counties (e.g. Whitland School or Cardigan school) such as Northeast Pembrokeshire, Saundersfoot/Kilgetty area and Tenby area have a lower proportion of pupils attending Pembrokeshire schools compared with those that are further from the border

Community	Pupils not entitled to FSM	Pupils entitled to FSM	Total number of pupils	% entitled to FSM
Northeast Pembrokeshire	766	51	817	6.2
Fishguard Area	1108	178	1286	13.8
Northwest Pembrokeshire	771	105	876	12.0
East Pembrokeshire	830	75	905	8.3
Haverfordwest North	920	254	1174	21.6
Haverfordwest South & Merlin's Bridge	997	230	1227	18.7
Narberth Area	574	39	613	6.4
West Pembrokeshire	965	118	1083	10.9
Neyland Area	1108	122	1230	9.9
Milford Haven East	905	251	1156	21.7
Saundersfoot/Kilgetty Area	819	94	913	10.3
Milford Haven West	1031	278	1309	21.2
Pembroke Dock	1213	388	1601	24.2
Pembroke East & Carew	942	82	1024	8.0
Pembroke West & Angle Peninsula	958	283	1241	22.8
Tenby Area	631	68	699	9.7

Free school meals is covered in more detail in the poverty section. It is worth noting that only those pupils who apply for free school meals are counted in this list; other measures of childhood poverty do not contain this distortion.

There is a wide variation in the percentage who are entitled to free school meals with much higher proportions in the main towns, or communities that cover part of a main town such as Pembroke West & Angle Peninsula

In addition to those entitled to free school meals, in January 2021, a further 830 pupils received free school meals via transitional arrangements. Following the co-

operation agreement between the Labour and Plaid group in the Senedd, all primary school children will be entitled to a free school meal.

## Educational outcomes

The Flying Start programme supports children and their families who live in communities with relatively high levels of deprivation. The percentage of Flying Start children reaching or exceeding their developmental milestones at 3 years in Pembrokeshire in 2015 was 54%, which dropped to 46% in 2016, the most recent published figures. The figure for 2016 was a little below the median average, whereas 2015's figure was at the upper quartile.

For GCSE results, the percentage of pupils aged 15 who achieved Level 2 threshold including a GCSE grade A\*-C in English or Welsh first language and Mathematics for 2015 to 2017 (the last year that results were measured in this way) was at the Welsh median average; the actual percentage figure dropped from 59% to 55% to 54% for each year respectively. However, education results tend to be influenced by levels of deprivation. Given the relative levels of poverty in Pembrokeshire at this time, compared with the rest of Wales, results might have been expected to be higher.

The following is part of the Welsh Index of Multiple Deprivation underlying data set and shows another measure of GCSE performance based on where pupils live. This shows a considerable variation in outcomes from Northeast Pembrokeshire and East Pembrokeshire which are well within the upper quartile for Wales to Pembroke Dock which is very low compared with other MSOAs

Community	Key Stage 4 average point score	Percentile rank: Key Stage 4 average point score
Northeast Pembrokeshire	128	20
Fishguard Area	121	40
Northwest Pembrokeshire	126	26
East Pembrokeshire	131	13
Haverfordwest North	117	54
Haverfordwest South & Merlin's Bridge	111	77
Narberth Area	123	35
West Pembrokeshire	120	44

Neyland Area	108	86
Milford Haven East	107	88
Saundersfoot/Kilgetty Area	130	16
Milford Haven West	121	40
Pembroke Dock	98	98
Pembroke East & Carew	122	38
Pembroke West & Angle Peninsula	102	95
Tenby Area	119	47

The impact of young people leaving school without achieving literacy and numeracy qualifications has impacted on other parts of the education system. Estyn's 2017 report on Pembrokeshire College noted "More than half of the college's learners enter the college without either a GCSE grade C in English or Welsh, or in mathematics. Those learners taking discrete classes to improve their English and Mathematics generally make solid progress from their starting points. The rates at which learners achieve their Essential Skills Wales qualifications are good, and show an improving trend."

The Council has a particular responsibility to people in care. In 2016, the most recent figures we have available, no 16 year olds left care without qualifications and this has tended to be the norm in previous years.

Child poverty, as measured by entitlement to school meals impacts upon attainment. The figures below are taken from a 2019 report and do not necessarily reflect the most up-to-date position. Nonetheless, they are indicative of the generalised impact of poverty on attainment. The section on responding to trends gives further details on addressing the attainment gap and this is arguably the key point.

- The Foundation Phase Indicator for eFSM has declined from 81.2% in 2015 to 67% in 2019; the FPI eFSM gap, has increased from 9.8% in 14/15 to 18.5% in 18/19.
- The KS2 CSI for eFSM increased from 73.7% in 16/17 to 77.5% in 18/19; the eFSM KS2 gap has decreased from 18.6% in 16/17 to 13% in 18/19.
- The KS3 CSI for eFSM reduced from 70.3% in 16/17 to 66.7% in 18/19; the eFSM KS3 gap declined from 22.1% in 16/17 to 21.2% in 18/19.
- The KS4 Capped 9 Points Score for eFSM declined from 273.4 in 16/17 to 255.1 in 18/19; the gap has increased from 84.8 to 91.4 between 16/17 and 18/19.



- The KS4 L2i eFSM decreased from 30.3% in 16/17 to 20.5% in 18/19; the gap has increased from 30.7 to 32.7 between 16/17 and 18/19.
- The attendance of Primary eFSM learners in 18/19 was 92.8%, with a 3 yr. average of 92.82%. eFSM attendance is equal to, or higher than national averages since 15/16 (18/19 comparator not available).
- Secondary eFSM (88.7% in 18/19) attendance has been lower than national averages since 13/14 (18/19 comparator not available).

A-level results across Pembrokeshire generally compare well with the national average (the college and many school sixth forms). More data on the core results will be available in the final assessment.

## Higher education

The table below, part of the Welsh Index of Multiple Deprivation underlying data set shows the percentage of leavers who go onto higher education in 2019. This shows a very wide variation in the likelihood of young people embarking on higher level skills courses, ranging from 12.2% in Milford (99% of MSOAs had proportions of young people entering higher education that were higher than this) though to 37.6% in Saundersfoot/Kilgetty, well within the upper quartile for Wales.

Community	Key Stage 4 leavers entering Higher Education (%)	Percentile rank: Key Stage 4 leavers entering Higher Education (%)
Northeast Pembrokeshire	31.3	43
Fishguard Area	25.5	71
Northwest Pembrokeshire	26.9	63
East Pembrokeshire	31.8	42
Haverfordwest North	22.3	81
Haverfordwest South & Merlin's Bridge	20.3	86
Narberth Area	28	58
West Pembrokeshire	24.7	74
Neyland Area	17.9	92
Milford Haven East	12.2	99
Saundersfoot/Kilgetty Area	37.6	18
Milford Haven West	29.3	52

Pembroke Dock	19	90
Pembroke East & Carew	34.9	27
Pembroke West & Angle Peninsula	25.8	68
Tenby Area	32.4	39

## Adult learning

Learning Pembrokeshire provide a range of courses for different audiences. These include essential skills and ESOL, key to meeting reducing inequalities and ensuring that people can participate in society. A variety of courses are offered to support Welsh learners. Courses are also offered to support employers / sectors such as food safety and food allergen management for catering and personal licensing. Others are for general interest / leisure courses such as yoga, Tai Chi and Pilates, and arts courses. Digital courses are provided to support employment e.g. ECDL as well as ones focussed on digital literacy / basic IT skills

PAVS offers a training programme to support the sector (for instance on funding and on responsibilities of being a trustee) as well as courses with a broader applicability, for instance for safeguarding as well as digital training. There is a dedicated area on their website. PLANED offer a range of digital media courses as well.

It is worth noting that there is a wide range of informal learning through community groups most of which happens organically and with little input from the public sector. Some of these groups are supported by projects run by PSB partners. For instance PLANED's 'Echoes of the past' provides a local welcome to local heritage. Pembrokeshire's local history groups offer well-researched insights into centuries of heritage which have shaped its landscape and people.

People interact in different ways for education and learning depending on how old they are. For young people, education and learning takes up a significant proportion of their lives and their well-being will reflect their experience of school and how it nurtures them. For other people, education and training may be linked to gaining work based skills. For older people, education and learning may be an end in itself; a way of meeting.

## Impact on Life Stages

### New beginnings

For the youngest age group (and their parents and carers), play and nursery provision is key. The Economy section has more information about nurseries and the Childcare sufficiency audit. The text that follows relates to play and the Play Sufficiency Assessment.

Children learn about themselves, others and the world through play. The Pembrokeshire Play Partnership promises to work to improve the availability, commitment and understanding of the importance of high quality play opportunities for children and young people of Pembrokeshire. Play, and specifically outdoor play, is very beneficial for children and can improve a child's physical health and fitness and have a positive impact on children's mental well-being.

The last Pembrokeshire Play Sufficiency Assessment undertaken in 2019 identified a number of areas for improvement in order to provide play opportunities for children in the county. These included providing opportunities for those with diverse needs and aiming to ensure that additional support is available for play opportunities to be fully inclusive. Making use of open spaces was another area identified for improvement suggesting that Community Asset Transfers could be used as a way of sustaining community play parks (Community Asset Transfers are where communities take responsibility for maintaining a play park for example, perhaps through a long-term lease). Work has also been undertaken to provide better access to play provision within communities following consultation with a range of partners.

### Younger people

The implications for school age people are commented on throughout the education and learning section.

### Youth and Adulthood

The growth in apprenticeships offers an alternative way to high skilled jobs rather than the academic graduate route. Continued education and learning may become more relevant to working age people as the nature of work changes and jobs change.

## Ageing well

As the state retirement age has increased (and may increase further) and with more people working up until this age, there will be a continued need for lifelong learning. Rather than older people engaging with 'leisure' courses, there may be a need for greater vocational training for older people, who in the past, may have left the labour market.

## Responding to trends

### School provision

A paper on Planning School Places was considered by the Council's Schools and Learning Overview & Scrutiny Committee on 30 September 2021. This sets out detailed demographic trends and puts it into the context of other factors such as building condition.

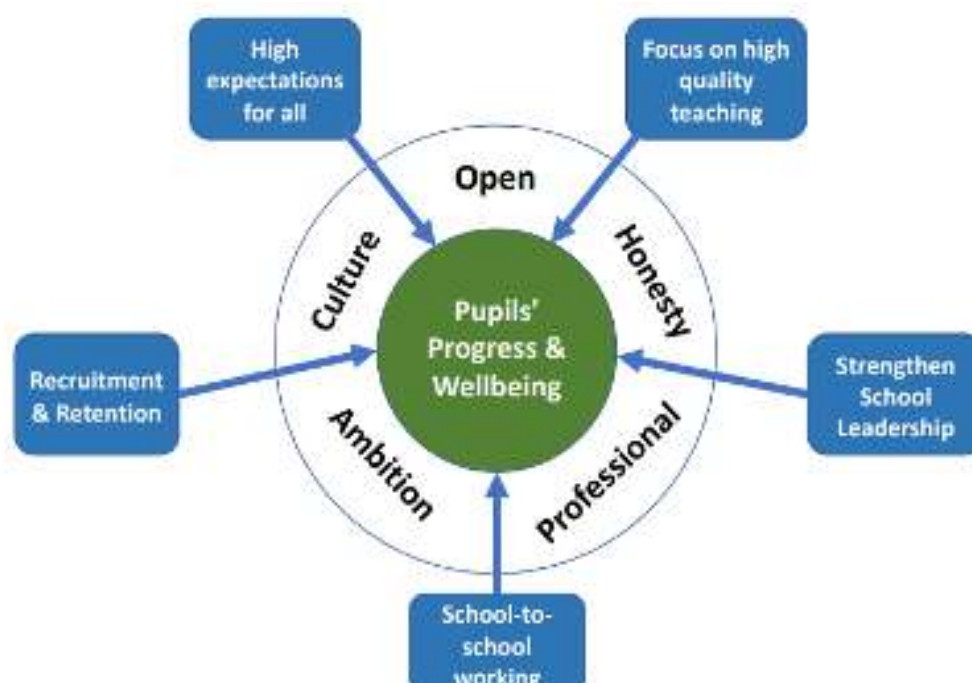
The table below summarises the complex issues within the report and proposes objectives and indicative actions:

Objectives	What this might involve:
Improve Standards	<ul style="list-style-type: none"><li>• Reduce the number of headteachers with a significant teaching commitment</li><li>• Reduction in the number of schools</li><li>• Removal of VC status from PCC owned faith schools</li><li>• Reduce the number of schools in 'poor' condition</li><li>• Further extend 3-16 / 3-19 provision</li></ul>
More Federations	
Extend Welsh medium provision	
Sustainable education community	
Better quality buildings	

### Educational outcomes

A new strategy for Education is in development. The strategy runs until 2027 and its vision is to make *Pembrokeshire a great place to grow, learn and live*. The introduction of the draft sets out the challenge ahead "Pembrokeshire has made some improvements in recent years. We are clear that more remains to be done to ensure that Pembrokeshire is a great place to grow, learn and live. We need to bring about a shift in focus to enable schools to lead improvement across the system, moving away from a culture of dependency, and encouraging innovation in teaching and leadership."

Progress against the Estyn Post Inspection Action Plan continues to be monitored by as a sub group of the Schools and Learning Overview & Scrutiny Committee. The following diagram summaries the objectives that have been set (in blue) whilst the words within the circle highlight the culture that leaders wish to engender.



Estyn held an improvement conference in November 2021. This found that steady progress is being made against many of the recommendations from previous inspections and that PCC had communicated effectively with schools during the pandemic. It noted schools are improving and that there are many fewer primary and secondary schools that are now a cause of concern. It found that Leaders have an improved understanding of the issues for these schools, and that the PCC Education leadership structure has a balanced distribution of responsibilities. Estyn found some areas for improvement though: there are still a small number of schools that require intervention and that, in general, self-evaluation and improvement planning in Education is not sharp or robust enough.

ERW, the body offering support for school improvement which operated over a six county footprint (South West Wales + Mid Wales) has been wound up and a new body, Partneriaeth, created which covers Pembrokeshire, Carmarthenshire and Swansea. It is clear that the future of school improvement work is likely to be through regional delivery. School improvement is one of the four Corporate Joint Committee functions (though to date this has not been commenced).

There are specific projects in place to address the attainment gap between those who are and who are not entitled to free school meals. The Raising Attainment for Disadvantaged Youngsters (RADY) will be rolled out in all schools along with a roll out for Peer Tutoring for eFSM pupils. This follows on from work in previous years, for instance critically evaluating the use of pupil deprivation grant to ensure it is focussed on projects that will address this issue.

## Outcomes from survey

There is a limited amount of information in the surveys and engagement work on education and learning.

### Main survey

Access to training and further education was one of the ten options respondents were asked to rank that they valued in a prosperous economy. Access to training and education was ranked 9<sup>th</sup>, about half the number of mentions of the top three items.

The survey report contains comments on education and these are replicated below:

- "Better schools might encourage well-qualified people to apply for jobs here where there are shortages. More research is needed into why it is difficult to attract good applicants for some jobs such as GPs."
- "Very unhappy with the new PSE curriculum coming in 2022. Again the Welsh Government did not listen to the people and the consultation was done so quietly and not covered by the media."
- "I would like local schools to be more outdoor based and adapt to integrate the needs of children with additional needs better."

Other comments around education include the opportunities for using the outdoors as a learning environment, and promoting land-based careers such as agriculture. A few comments were also made about the need for investment in school sports facilities, especially 4G pitches.

Schools and colleges featured in the questions about a vibrant community and thriving Welsh language. Only 40 out of the total 1,038 mentions were for lack of Welsh education schools / colleges, one of the lowest ranked answers. In a similar way, the number of mentions for "Support your children through Welsh medium



education" and "More information on the benefits of Welsh medium education" were ranked much lower than other answers.

Some of the comments made about the Welsh language argued for greater Welsh medium provision whilst other respondents were less positive about more Welsh medium education:

- "I am a Welsh speaker, our children attend a Welsh medium school, noting the above question (what would you consider doing to help...) we watch TV programmes in Welsh without sub-titles."
- "More Welsh opportunities in mainstream schooling not just in Welsh medium schools! Welsh should be encouraged in all schools not just in 1st language schools."
- "English medium schools should be available to all students in Wales as at the moment equality and fairness on that front is disappearing"

The metadata for the survey asked whether respondents volunteered. Of the 28 people volunteering with organisations supporting young people, 10 of the mentions were school based (e.g. Governor) emphasising both the important role that volunteers play in schools as well as the way in which school's governance structures are part of wider structures for civic society.

## Youth survey

School plays a large part in young people's lives. School mentioned 35 times in "What is best about your community" and 78 times in "Three things made you smile this week" emphasising the positive view that young people have about schools.

## Future trends

### Demographic change

Education and learning will need to respond to demographic change. This is a complex area and it is also an area that the PSB can influence; land use planning policies such as the number, type and location of new housing, housing policies, policies to promote fast broadband and the attractiveness of home working and policies around economic development can influence demographic change and therefore the future demand for formal education services.

Without a co-ordinated initiatives to attract younger people and their dependents, it is likely that the number of school aged children within Pembrokeshire will continue to fall.

## Future skills needs

The skills required in near future are commented on in the Economy section in the part that describes the work of the Regional Learning Partnership. Over the long term this list will also be shaped by:

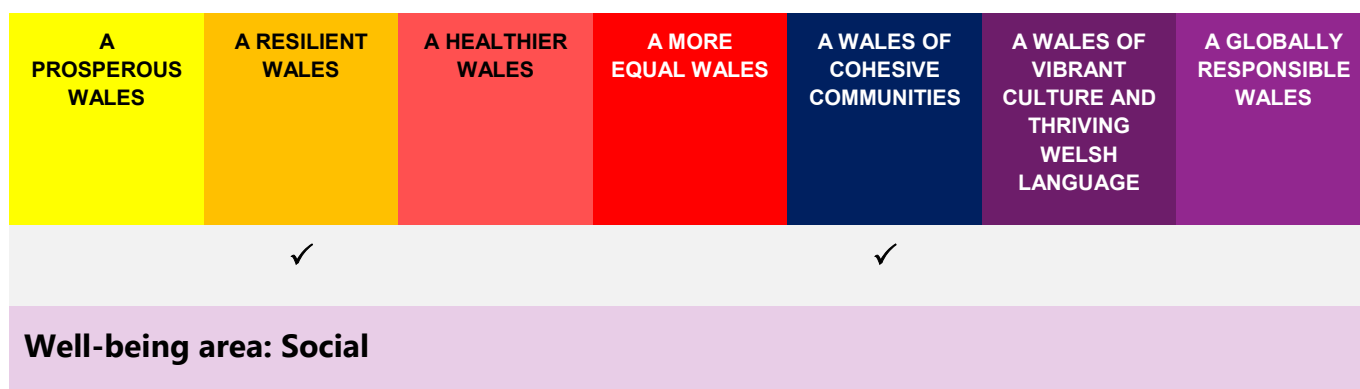
- Decarbonisation and growth in the green economy. This is not limited to skills for engineering; there is also likely to be demand for environmental and agricultural skills
- Continuing demand for health and social care skills
- The growth in automation. This is likely to reduce demand for lower skilled jobs, particularly in administration. Over time, automation may reduce or change demand for higher skilled professional jobs. The implication of this is that people will need to develop broad-based competencies, be flexible and continue to invest in their own skills base.

Reports published by the Future Generations Commissioner are clear that how the skills agenda is also important:

- Learning to be created and delivered in partnership with businesses, charities and other organisations across Wales.
- Assessments should be broad based and should be centred around pupils not testing
- any future approach to skills must address equality issues and should be just.

# SAFE, COHESIVE & RESOURCEFUL COMMUNITIES





## Overview

An individual's perception of whether they live in a safe community, and feel safe in that community, has a significant impact on their feelings of general well-being. People's feelings of safety are affected by their experiences and perceptions of crime and this in turn has an impact upon how cohesive or connected that community feels to them. Alongside this, the resilience of a community, and its ability to deal with challenges that affect the lives of its residents, can affect feelings of well-being. Being an active member of a vibrant community, for example through being a member of a local group or through volunteering, can enhance feelings of well-being and belonging, so that individuals feel more connected to their community and invested in its future.

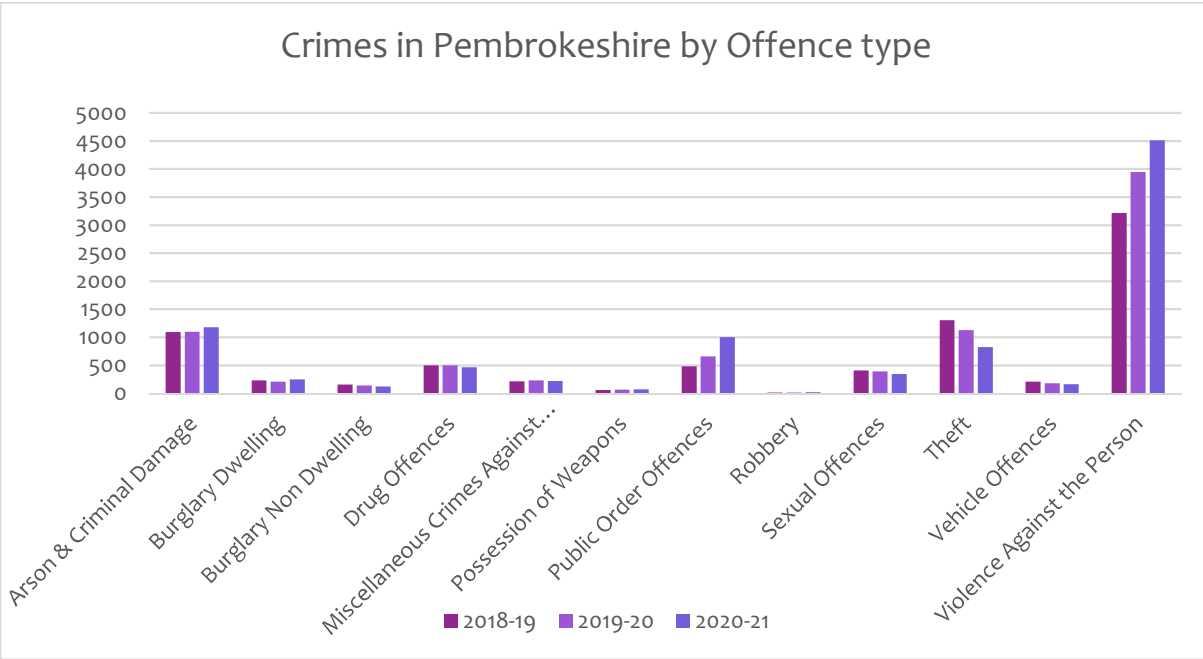
## Community Safety

### Crime and disorder

Patterns of crime have been influenced by the pandemic, with falls in some types of crime and increases in others. The Crime Survey for England and Wales, undertaken by the Office for National Statistics (ONS), shows a 32% increase in fraud incidents in the year ending June 2021, whereas many areas have shown a reduction in theft and robbery due to the majority of people staying at home. However, the impact of the pandemic on how the survey was conducted mean that questions regarding some crimes, particularly domestic abuse and sexual assault, have not been included in the latest survey.

Pembrokeshire is one of the safest places to live in the UK and has very low levels of crime and disorder compared to other areas of Wales. Total levels of recorded crime

for Pembrokeshire in 2020-21 were 9,162. The graph below shows comparisons of crime volumes and offence types in Pembrokeshire for the last three years;

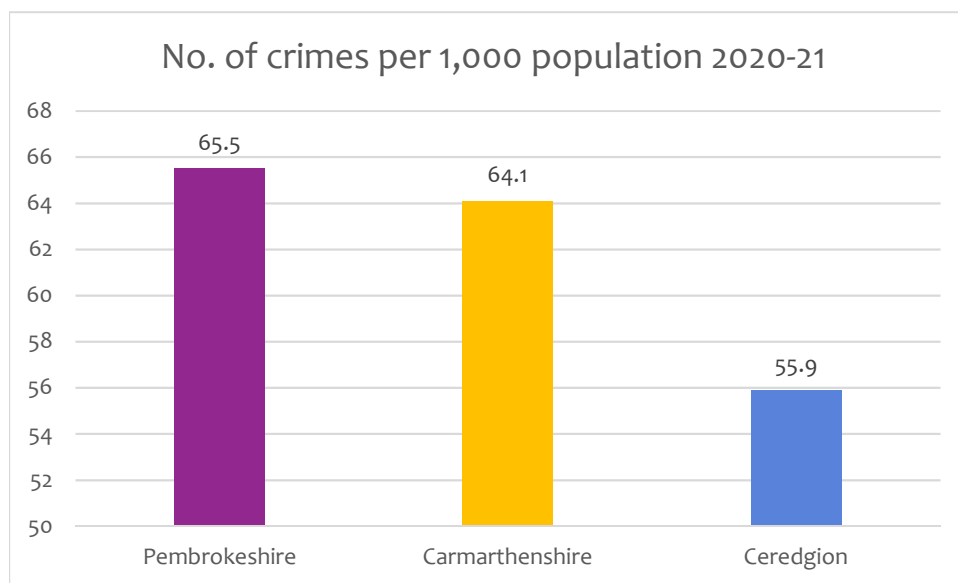


The data shows increases over the past three years in public order offences and violence against the person and a significant decrease in theft, which is in line with the results of the Crime Survey for England and Wales undertaken earlier this year. Figures for 2020-21 show that over a quarter of violence against the person offences in the Haverfordwest North area were alcohol related with around a third of public order offences in the same area also being alcohol related. Certain areas within the county have higher percentages of public order offences committed via social media or digital means, rather than in person. The highest percentages were recorded in Tenby (6.67% of total public order offences), Saundersfoot/Kilgetty area (5%) and Pembroke East and Carew (4.55%), most likely related to issues associated with the housing of asylum seekers in Penally.

Although theft offences overall reduced in 2020-21, some types of theft increased, in particular shoplifting, which made up a significant proportion of total theft offences in some areas (Pembroke Dock, Milford Haven West and Haverfordwest North). Changes to recording practices occurred in May 2017 with all crimes now being recorded at point of contact. This has increased recording accuracy and as a result recorded crime volumes have increased.



Across the region, there have also been increases in Public Order offences over the last three years and increases in Violence against the Person offences, apart from in Ceredigion in 2020-21 where there was a slight decrease in the numbers recorded. With regard to crime rates per 1,000 population, Pembrokeshire's crime rate is close to that of Carmarthenshire, even though there is a considerable difference in estimated population for each county (ONS data puts mid-year 2020 estimates at 126,751 in Pembrokeshire and 190,073 for Carmarthenshire). It is unclear why this is the case, although elements such as demographics may be having an impact.



According to data gathered through the National Survey for Wales in 2018-19, 89% of people in Pembrokeshire reported feeling safe at home, walking in their local area or travelling. Survey results for the first part of 2021 (April to June) show that this figure has dropped to 81%.

Safer Pembrokeshire is the Community Safety Partnership for Pembrokeshire and is responsible for ensuring that partners work together to keep people safe in the county. Prior to the start of the pandemic in early 2020 work was ongoing to update the Community Safety Strategy for Pembrokeshire. Although it was not possible to complete this work due to the pandemic, a crime and disorder survey was undertaken in May 2021 to gauge people's perceptions and experiences of crime as a basis from which to reconsider a revised strategy. However, the number of respondents to the survey was low and the partnership has therefore agreed to re-

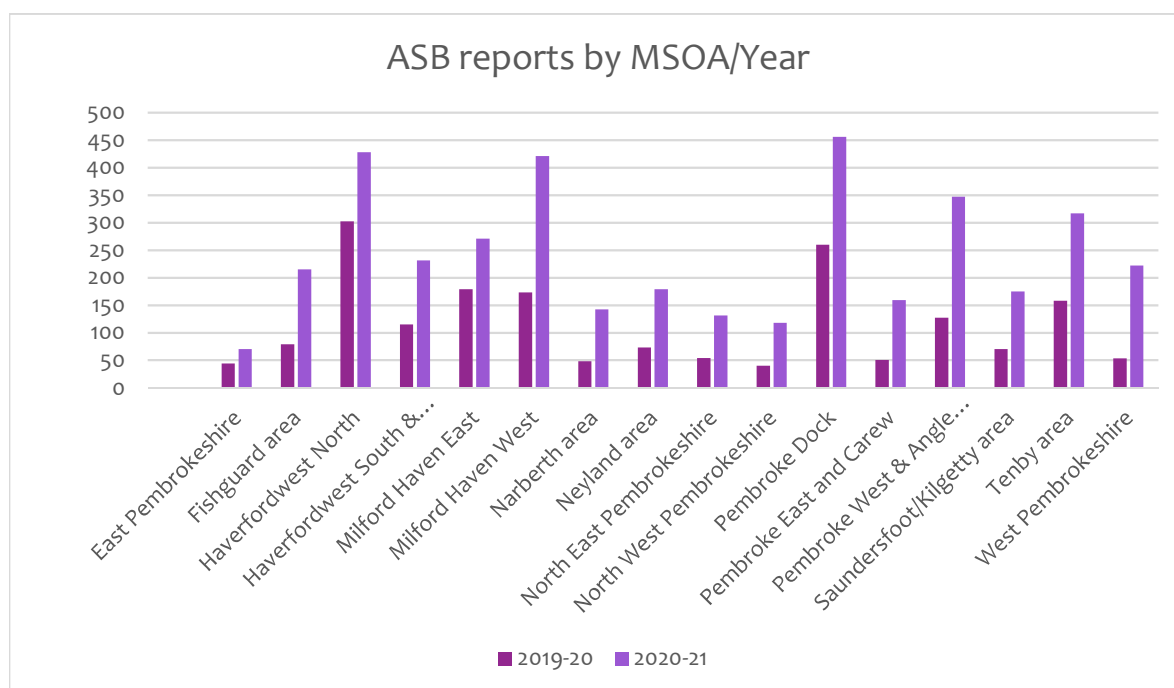


run the survey in early 2022 supported by a more focused publicity and communication plan, in an effort to increase the response rate and raise awareness.

In February 2021 it was agreed that the PSB would receive regular updates around community safety and cohesion from the Community Safety Partnership. This was due to an increase in community safety and community cohesion issues related directly and indirectly to the Covid-19 pandemic, which affected a number of communities across Pembrokeshire in various ways, as well as impacting on the resources of a number of PSB partners.

Pembrokeshire has experienced considerable pressures during school holiday periods over the last two years, mainly due to an increase in people holidaying in the UK because of travel restrictions imposed during the pandemic. This led to incidences of anti-social behaviour (ASB) in several popular holiday locations associated with large groups gathering and individuals not adhering to social distancing requirements in shops and hospitality venues. Issues associated with 'fly camping' have also been an issue, with people having camped illegally in tents and motorhomes dumping the contents of chemical toilets and litter near these locations. Since lockdown and travel restrictions have eased incidences environmental damage caused by 'fly camping' has eased.

Anti-social behaviour is more of an issue within certain areas of the county, particularly in relation to Covid-19 rules and restrictions and linked to second home ownership, but reports increased across all areas of the county during 2020-21. Anti-social behaviour is an issue that has been directly attributed to large gatherings of young people, although it can often be the case that ASB is being perceived as taking place when this is not actually the case. For this reason work is ongoing within the local authority to provide safe spaces for young people to gather and socialise, thereby reducing the perception of ASB attributed to young people gathering in groups.



## Reducing reoffending

People who leave prison are less likely to reoffend if they have strong foundations in place, such as a stable home, a steady job, and good health free from substance misuse. The HM Prison and Probation Service Reducing Reoffending Plan (2021-2024) sets out how the HMPPS plans to work with partners to reduce reoffending through a whole system approach across Wales that targets the complex root causes of criminal activity effectively.

In January 2021 the Police and Crime Commissioner for Dyfed Powys confirmed that he was to invest in a refreshed integrated offender management programme, in partnership with the National Probation service. Integrated Offender Management (IOM) involves the joint management of people who are considered as being highly likely to re-offend. The refreshed Home Office and Ministry of Justice's National Integrated Offender Management Strategy refocuses IOM on neighbourhood crime: robbery, burglary, theft, and vehicle theft. Currently, neighbourhood offences have the highest levels of reoffending of any offence types, and make up a high proportion of overall reoffending.

## VAWDASV

Violence against women, domestic abuse and sexual violence (VAWDASV) has far-reaching consequences for families, children, communities and society as a whole. The cross-government definition of domestic violence and abuse is: *'Any incident or pattern of incidents of controlling, coercive or threatening behaviour, violence or abuse between those aged 16 or over who are, or have been, intimate partners or family members regardless of gender or sexuality. The abuse can encompass, but is not limited to the following types of abuse:*

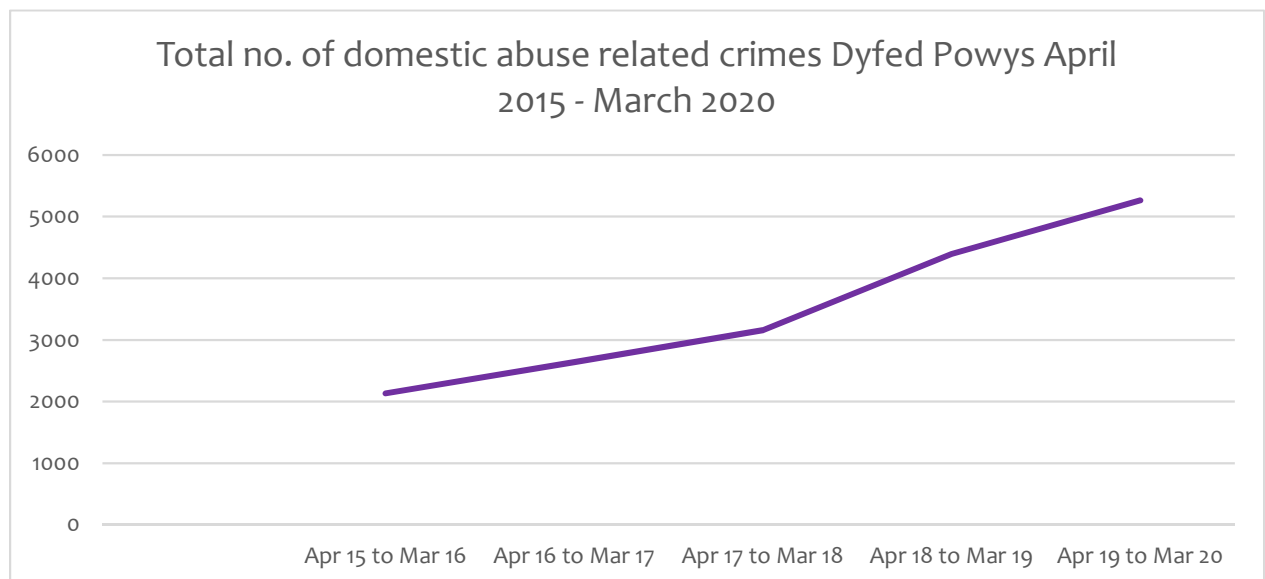
- psychological
- physical
- sexual
- financial
- emotional

The Mid and West Wales VAWDASV Strategy aims to embed Violence against Women, Domestic Abuse and Sexual Violence as “everyone's business” within work and day-to-day life. Violence against Women, Domestic Abuse and Sexual Violence is a cross cutting theme that requires all areas of public policy to address and to shape and improve the delivery of services for those affected.

Domestic abuse impacts upon all ages groups. It not only affects younger people ~~it~~ and can ~~also~~ be prevalent in older people's relationships. Signs of abuse in older people's relationships may be difficult to identify, as ~~it~~ abusive behaviour may be deeply embedded over a long period of time, and older people themselves may not recognise themselves as being in an abusive relationship. The Older Person's Commissioner for Wales has recently identified financial and economic abuse as particular issues affecting older people. Consideration should therefore be given to how domestic abuse is recognised and responded to across all age ranges and domestic situations and how people are targeted in terms of messaging and signposting towards support services.

With the exception of controlling or coercive behaviour, domestic abuse is not a specific criminal offence and therefore offences that are domestic abuse-related will be recorded under the respective offence that has been committed, for example, assault with injury. Police are however required to flag when an offence is domestic abuse-related and report this data to the Home Office.

Data from the ONS supplied by the Home Office on Police recorded crime shows that the number of domestic abuse related crime in Dyfed Powys has increased year on year since 2015-16. The graph below shows the total number of domestic abuse related crimes in the Dyfed Powys region from Year Ending March 2016 to Year Ending March 2020;

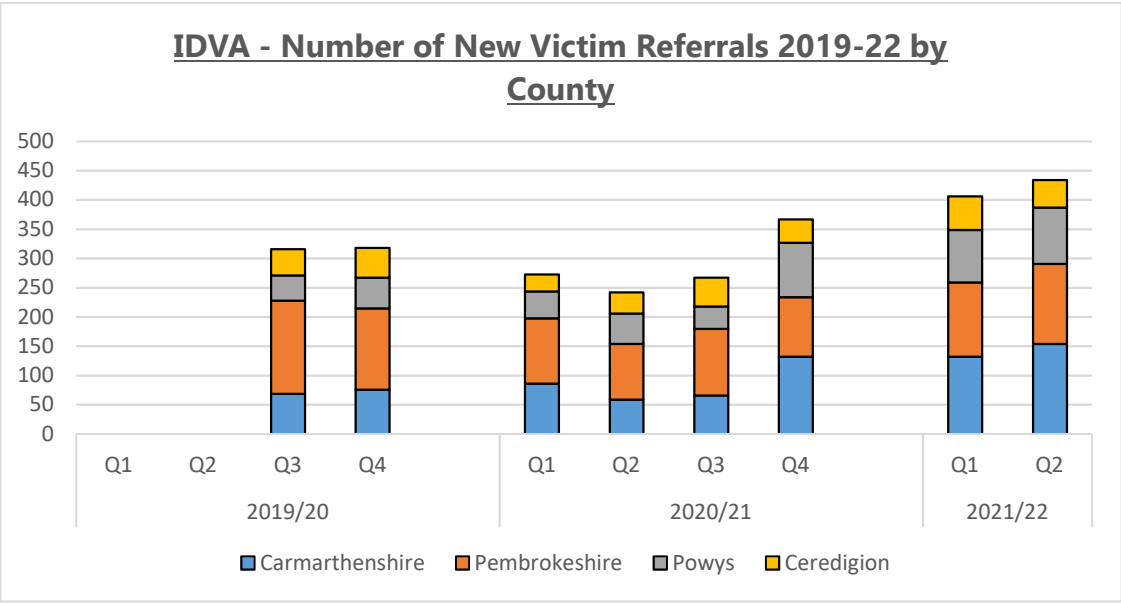
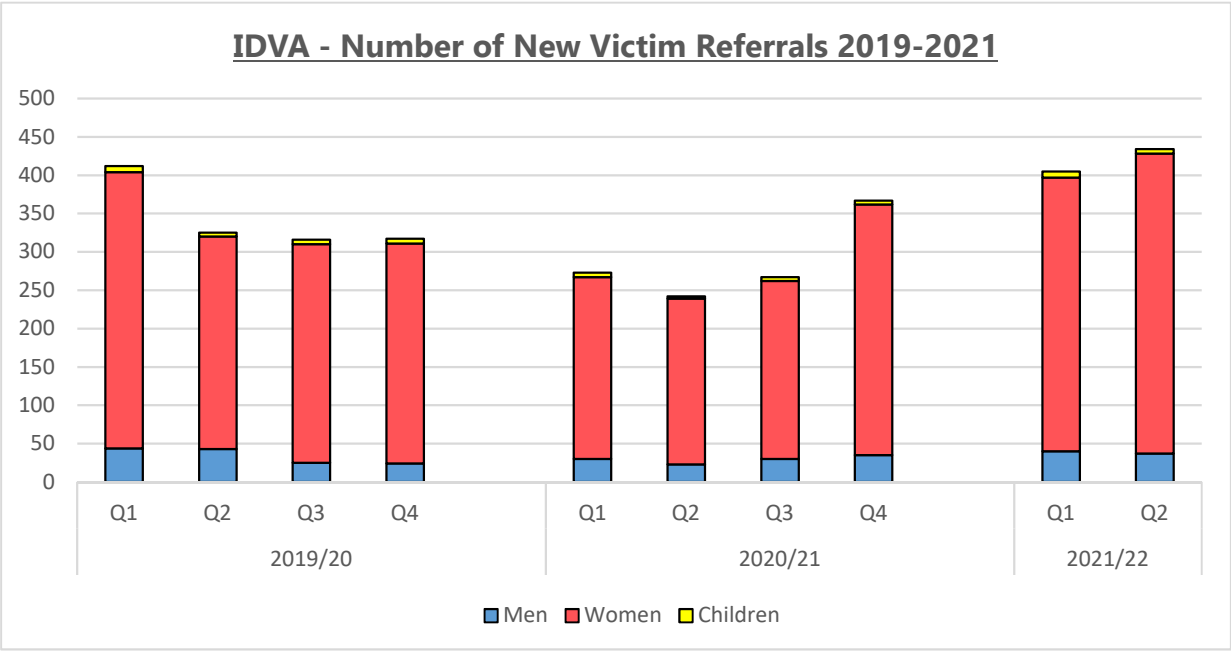


The latest data from Stats Wales provided by Local Authorities showed that in Pembrokeshire in 2018-19 there were 151 cases of alleged domestic abuse against males and 225 cases of alleged domestic abuse against females.

Reports to specialist domestic abuse services from those experiencing abuse in the home increased significantly during lockdown due to stay at home advice, preventing victims from leaving their homes. Independent Domestic Violence Advocates (IDVAs) help people living in fear of domestic abuse. They help to keep victims safe by giving them a voice and work in partnership with many other agencies. Where the risk of harm is high, they work with victims to make their homes safe or help them find somewhere safe to stay. The help provided by IDVAs covers many areas of the victim's life, for example, it could mean helping the victim's children to live safely and well or helping victims through the Court system. The Dyfed-Powys Police and Crime Commissioner along with the four local authorities in the area commission the IDVA service in Dyfed Powys.

Since the start of the pandemic there has been an increase in the numbers of individuals needing support from IDVAs. At the start of the first lockdown, numbers dropped as restrictions made seeking help harder, however, this changed when restrictions lifted when numbers soared.

The graphs below show figures for individuals referred to the service between 2019-2020 and the first two quarters of 2021-22;



Hafan Cymru is a non-profit organisation that provides housing related support across Wales, including for those experiencing, or at risk of, domestic abuse. In response to the impacts of the pandemic on young people witnessing domestic abuse in the home, Hafan Cymru has set up a Children and Young People's Well-being Project in the area for those in the 5 – 18 age group. With schools closed for a considerable amount of time children and young people experiencing the negative effects of domestic abuse in the home were without 'safe spaces' to retreat to and unable to connect with friends and peers in the same ways as they would have done. The project offers structured activities to provide an outlet for enjoyment or expression and a range of tools are used to help young people to open up about feelings or worries.

## Substance Misuse

Drug and alcohol misuse can have a range of adverse effects on outcomes for individuals and the communities in which they live.

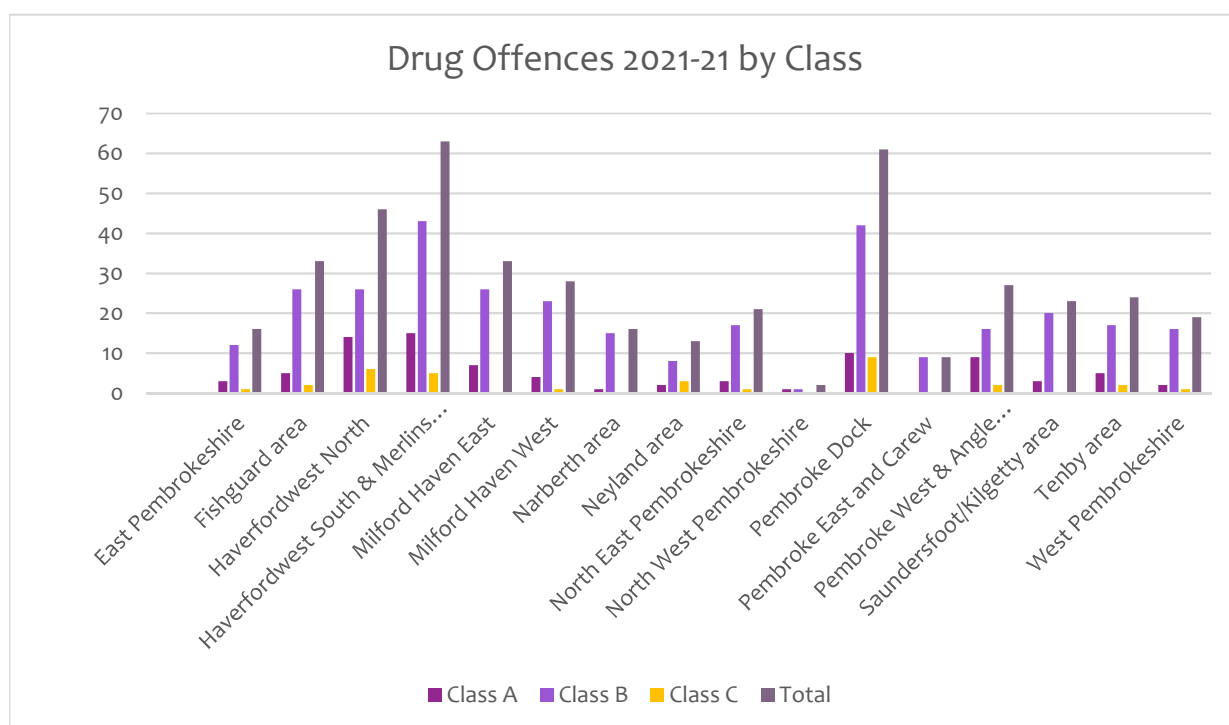
Responsibility for planning and commissioning substance misuse services in Wales rests with Area Planning Boards. In the Hywel Dda region the statutory partners who are required to make sure that there is a local plan in place to tackle substance misuse are;

- Hywel Dda University Health Board
- Local Authorities (Ceredigion/Pembrokeshire/Carmarthenshire)
- Dyfed Powys Police
- National Probation Service
- Fire Service

Service providers across the region work closely with criminal justice and other services in order to reduce criminal activity caused by substance misuse.

Data from Dyfed Powys Police shows that the highest number of drug related offences were recorded in Haverfordwest South and Merlins Bridge, Pembroke Dock and Haverfordwest North, with the majority of these relating to Class B drug offences (Class B drugs include amphetamines, barbiturates, cannabis and dihydrocodeine).





## Fires and Road Safety

Mid and West Wales Fire and rescue data shows that there was an increase in deliberate fires in 2020-21 to 108, up from 74 recorded in 2019-20. The majority of these were reported in Pembroke Dock (23), Pembroke West and Castlemartin (15) and Milford Haven West (13). Within these figures, most fires were related to the burning of refuse outdoors, grassland or woodland fires or other outdoor fires on land or within outdoor buildings. Accidental fires reduced in most areas in 2020-21, however, dwelling fires and vehicle fires were the most prevalent during this period.

Data from Stats Wales Service also shows that the number of road traffic collisions attended reduced by almost half from 2019-20 to 2020-21, this probably being due to Covid restrictions which meant that people were only permitted to drive for essential reasons and only within the county. Data shows that there were 164 road accidents in Pembrokeshire in 2020, with 132 slight injuries, 31 serious injuries and one death. This figure was down from 246 in 2019 (169 slight injuries, 71 serious, 6 deaths). Again this reduction in reported injuries is most likely due to stay at home advice and Covid rules which restricted movement by vehicle. Engagement, training

and interactions to promote road safety are carried out by MAWWFRS through a combination of proactive and reactive work.

## Community Cohesion

Community cohesion is important in providing a sense of feeling safe in a community. National Survey results for 2018-19 showed that overall, people who agreed that they felt a sense of belonging to the local area were more likely to feel safe in that local area, compared with people who did not. In addition, people who agreed that those from different backgrounds get on well together in their local area were found to be more likely to feel safe in the local area, compared to those who did not.

Data from the National Survey for Wales 2018-19 show that the following **factors** are linked to people agreeing that their local area has a sense of community:

- Being older.
- Having ~~high~~ positive mental well-being.
- Feeling safe in different situations (e.g. walking in the area after dark).
- Being satisfied with the local area as a place to live.
- Having a good understanding of what the local councillor does for the community.
- Feeling able to influence decisions affecting the local area.
- Feeling satisfied with the availability of local services and facilities.

Overall, 52% of adults agreed that there was a sense of community in their local area.

In Pembrokeshire, residents responding to the National Survey for Wales reported high levels of satisfaction with their local area, with 90% reporting that they were satisfied in 2016-17 and 2018-19 and 92% reporting that they were very satisfied or fairly satisfied in the first part of 2021. Regarding feeling that their area had a sense of community, including feeling a sense of belonging, that people from different backgrounds get on well and that people treat each other with respect, survey results from 2018-19 show that 62% of Pembrokeshire residents felt that their area had a sense of community. This figure may well have increased due to the numerous

community initiatives that developed during the pandemic, however, data is not recorded to a local authority level for the first part of 2021.

Community Cohesion in Pembrokeshire linked to extremism, in particular far right extremism, was an issue that came to the fore in 2020 following a decision by the Home Office to house 234 asylum seekers in the former Penally MOD Camp. For a short time, Pembrokeshire became a target for members of far right groups seeking to capitalise on the decision to house the asylum seekers in the county in order to further their own agenda. The resources of the local authority, Dyfed Powys Police and a number of other agencies were significantly impacted, however, they worked closely with the asylum seekers and local community to foster positive relationships and target those responsible for committing crimes both online via social media and whilst protesting at the site. However, there were positive outcomes to the decision, as it led to the creation of a local county of Sanctuary movement, helping refugees and asylum seekers.

Training around countering far right extremism has recently been held for professionals in the region by Small Steps, a company that employs former right wing group members to deliver their training programmes. This training focused on raising awareness, identification of signs and symbols and the tactics used by far right members to build support for their cause and how counter narratives can be used to reduce the appeal of far right extremism to vulnerable individuals who may be targeted by such groups. Following closure of the asylum camp, Pembrokeshire has seen a noticeable reduction in right wing activity together with a reduction in reports related to race hate incidents.

Hate crime relates to incidences where people are targeted for abuse because they identify with one or more of the following:

- disability
- race or ethnicity
- religion or belief (which includes non-belief)
- sexual orientation
- gender identity

Over the past 2 years information submitted to the Cohesion Team by Victim Support evidence that hate crime is relatively low in Pembrokeshire. Over this period Victim Support has received an average of 12 hate crime referrals per month. The

majority relate to race issues averaging 8 reports, followed by sexual orientation, disability and religion. The latter three groups average a single number of reports each per month.

During 2021 the Cohesion Team have introduced a Weekly Community Tension Monitoring Meetings, bringing together numerous Public and Third sector Organisations in order to understand tensions and issues emerging with Pembrokeshire. Tension monitoring has been a very effective method of testing the temperature within communities and has helped identify issues early on, and enabled partners to put in place plans to mitigate any tensions before they develop into bigger concerns. Monitoring over the last twelve months has included looking at trends in Hate Crime, Protest Groups, Covid-19 and Anti-Vaccine related concerns together with low level ASB management.

Campaigns such as Hate Crime Awareness Week, which takes place every year in October, are important to raise awareness of hate crime and how to report it. Much work goes on during the campaign to share messaging and information about local and online events and work happening in Schools. Throughout the year, training on hate crime awareness, coordinated by the Welsh Local Government Association, takes place in schools across the county.

## Community Resilience

A community with a strong volunteer presence and community network is likely to be more resilient to challenges and better placed to respond to them, whether these challenges are due to environmental issues or where residents require help to access services, for example.

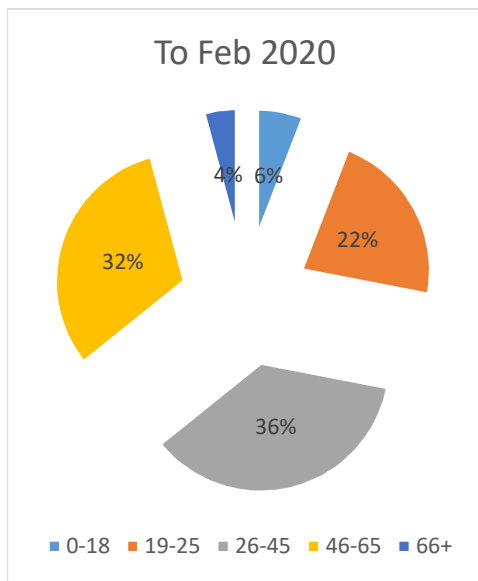
The emergence of Covid-19 and the ensuing lockdown established the importance of volunteers in supporting our communities. In late March 2020 the Pembrokeshire Community Hub was established, a partnership between Pembrokeshire County Council, Pembrokeshire Association of Voluntary Services (PAVS), Hywel Dda University Health Board, and Delta Wellbeing, a company that utilises technology enabled care to support ongoing independence. The Hub provided a single point of access for people who were shielding or self-isolating, or those experiencing other issues who needed some additional support with things such as shopping or collecting prescriptions, for example. The Hub received and responded to around

8,300 telephone calls over the initial lockdown period and it has subsequently been agreed to establish the Pembrokeshire Community Hub as a permanent element of community infrastructure.

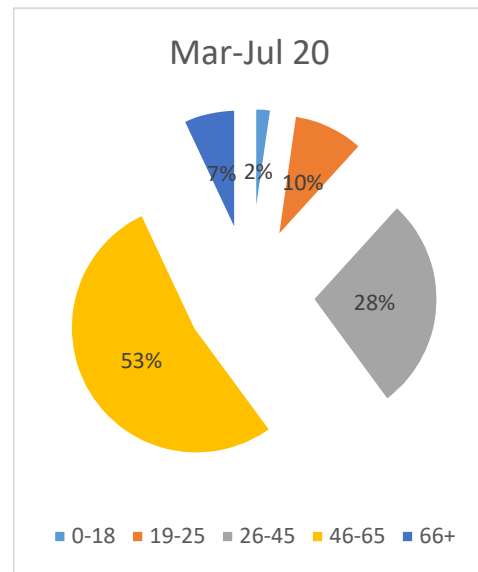
One of the challenges moving forward is how to embed the principles underpinning the Hub concept into everyday working in order to support and enable the future sustainability and resilience of communities in Pembrokeshire and to promote the wellbeing, independence and social inclusion of people across the county. A project group is currently working on developing delivery plans that will support this approach, and to mitigate against the short, medium and long-term impacts of the crisis. This work will ensure that Pembrokeshire emerges stronger from the current crisis and is well prepared in the event of any future crisis.

Data shows that the volunteer demographic within the county changed during the first lockdown, with a significantly higher percentage of working age (26-65) people registering as volunteers, many of whom mentioned they had been furloughed, were working part-time, or had spare time due to other things they were involved with having closed (such as sports groups etc.). Numbers of volunteers in this age range have subsequently fluctuated but have remained higher than pre-March 2020. There was also a reduction in enquiries from young people under 25 during the first lockdown but more enquiries from people over 66, many of whom were not able to undertake their normal volunteering role as places such as charity shops closed. Since the start of 2021 there has been an increase in enquiries from those under 25 especially school/ college students looking to volunteer in health/ hospital environment due to future career aspirations.

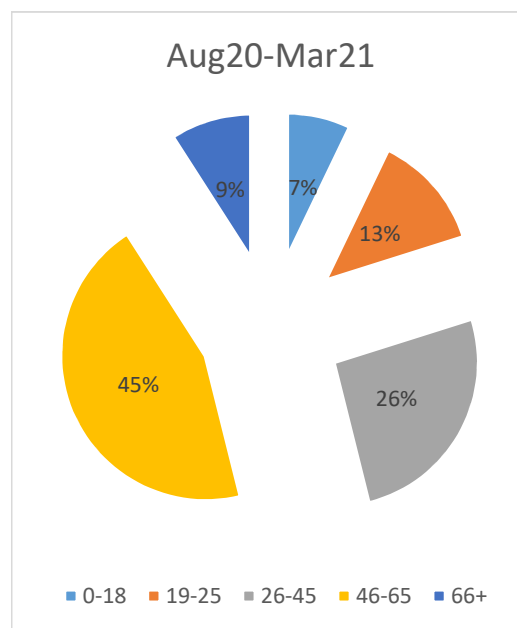
## Age range of volunteers (%)



Age range of volunteers prior to first lockdown



Age range of volunteers during March to July 2020



Age range of volunteers August 2020 to March 2021



### **Case Study - Greening Fishguard and Goodwick**

*Greening Fishguard and Goodwick is a community volunteering project which started about 7 years ago to look after the green spaces in the area. The project brings together people in the communities of Fishguard and Goodwick, to look after municipal areas of land that traditionally would have been planted with daffodils and annual flowers. These have now been turned by the volunteers on the project into 'sustainable' areas with a diverse range of flowers, which support bees and other insects. Children from the local primary school are also involved through caring for a vegetable plot which has been set up in a car park near to their school. The project highlights the importance of caring for our green spaces but also the benefits of bringing members of the community together on a shared project which supports physical and mental health.*

Around 96 informal community-led support groups came into being to help their neighbours during the Covid crisis. A number of these groups continue to operate and have come together as the Pembrokeshire Community Support Network, facilitated by PAVS. The number of voluntary sector organisations in Pembrokeshire registered with the Wales Council for Voluntary Action (WCVA) as of June 2021 was 2695. The largest number of these organisations, just over 17%, were organisations delivering activities directly into communities. Data from the National Survey for Wales from 2019 shows that Pembrokeshire had one of the highest rates of volunteers in Wales at 31.2%. This is likely to have increased as a direct consequence of the pandemic and the establishment of the Pembrokeshire Community Hub.

### **Case Study - Together for Change**

*Together for Change (TfC) was established in September 2020 by Solva Care in collaboration with PAVS and PLANED. Its focus is on community-level action and organisations. As a Pembrokeshire-wide partnership, Together for Change are committed to working across sectors to develop agreement on future approaches to the provision and delivery of support for communities.*

*The programme works at both a strategic and community level across three workstreams; **Strategic**, to create a joint vision and strategy with public and third sector partners around a social and green model of health and well-being;*

**Research**, which aims to undertake research and evaluation at a community level; and, **Communities**, which involves the sharing of best practice with communities developing their own networks, as well as work with PLANED to engage with town and community councils and strengthen the democratic process.

## Survey and Engagement outcomes

### Community Safety

Pembrokeshire's Community Safety Partnership undertook a survey between March - May 2021 focused on people's experiences and perceptions of crime. Although there was a low number of respondents to the survey (92), 62% of respondents either agreed or strongly agreed with the statement that levels of anti-social behaviour in their area had increased over the last 12 months. Further work is needed to identify both the areas these concerns related to and the particular issues that lead to incidences of ASB.

When asked about how safe they felt in their community over the last 12 months, 49% of respondents said that they felt less safe than they did a year ago. The top five concerns identified by respondents about issues of concern in their area were; people using or dealing drugs; speeding and other motoring offences; acquisitive crime - burglary/theft/robbery; online fraud (including romance fraud); and finally, violence without injury (verbal arguments, pushing and shoving). However, 74% of respondents their local area was a welcoming place to live and visit and 71% said it was a tolerant place to live and visit.

In June 2021, as Pembrokeshire emerged from lockdown due to COVID, PLANED undertook a community focused survey to gauge the thoughts, needs and opportunities within communities. The majority of the respondents to the survey reported that they felt a sense of belonging to their local area and that people treated each other with respect. Over 80% of respondents also reported that they felt safe walking alone in open and accessible green spaces in their community.

### Community Cohesion

In March 2021 a report was produced on behalf of the Mid and West Wales Community Cohesion Team reviewing the status of community cohesion in Mid and

South West Wales. Background work for the report included focus groups with representatives of the following sectors of the community: Communities of Interest, Black, Asian and Minority Ethnic (BAME) communities; EU (non-Welsh) citizens; Rural and isolated; First language Welsh speakers; Gypsy / Traveller Communities; Syrian Refugees; LGBTQ+ people, disabled people and/or people with health conditions; young people.

The results of the consultation showed overall positive opinions towards the current levels of community cohesion in Mid and South West Wales, with 77% referring to community cohesion as good. This rose to 92% when the responses of those who referred to community cohesion as good but requiring improvement were included. Brexit was perceived as having had a negative impact on community cohesion in Mid and South West Wales. Results from survey question about the impact of Brexit on community cohesion revealed that 63.7% of participants believed that the Brexit referendum has had a negative impact on community cohesion.

The consultation showed positive attitudes towards the impact of Covid-19 on community cohesion, however, qualitative feedback demonstrated concerns about the longevity of the positive impacts and increase of negative impacts. 67.3% of survey respondents believed that community cohesion had either improved (40%) or not changed (27.3%) since the beginning of the pandemic. However, the qualitative data showed that most people had concerns about positive impacts being short lived, with concerns about different risks and threats to community cohesion, such as an increasing socio-economic divide, increased exclusion of already marginalised communities, decrease in opportunities to socialise and resentment due to Covid-19 rules infringement.

The main barriers to community cohesion identified by participants during the consultation were;

- Lack of access to travel, public services, and a decline in community venues and public places.
- Lack of efficient communication about opportunities for community engagement, and a lack of awareness around available services to the community.
- Lack of funding from public bodies, and a dependency and reliance on third sector organisations as another barrier to community cohesion.

- Important stigmas towards some communities such as LGBTQ+ communities, Gypsies/Travellers, refugee communities, young people, etc.), with references to the role of the media.
- Challenge of language barrier especially in regards to access to online information and online services.

Several trends around suggestions on what could be done to improve community cohesion were identified during the consultation:

- Informal community activities and get togethers: This was described as an important way to promote cultural diversity and inclusion, especially due to the rural nature of the area. Suggestions often referred to small-scale community events, promoting intergenerational mixing, and working towards the normalisation of participation in local community events.
- Improving access to transport and services.
- Giving a bigger voice to the community: consultation with the local community which leads to tangible actions, and more representation and involvement of the community in the design and implementation of policies and programmes.

Some of the main high level findings from the Well-being Assessment Survey and corresponding Youth Survey highlighted a number of concerns from Pembrokeshire residents, particularly among those over 65, disabled respondents and those in minority ethnic groups;

'Feeling safe in my community', 'People in my local area treating each other with respect' and 'Feeling safe in my home' were the three things, which people valued most highly in relation to the community that they lived in. 'Feeling part of my community' was more important by those who lived in North Pembrokeshire and those who were aged 65 or over.

'Community resources being closed down', 'Lack of investment in our community' and 'The voice of the local communities not being heard' were the three things that concerned people most about community cohesion looking forward, with 'The voice of the local communities not being heard' being much more of a concern to disabled respondents.

With regard to reporting suspicious activity, those who lived in North Pembrokeshire, who were aged 65 or over or from minority ethnic groups were less likely to report suspicious activity when they see it. Those who lived in main towns were more likely to report suspicious activity.

More information on how to report a crime, hate crime or anti-social behaviour was considered more important by those who were disabled and those from a minority ethnic group.

'More funding for local groups', 'More information on community groups' and 'More information on well-being services' were the three types of support that people felt would be most valuable in encouraging them to take steps to help achieve cohesion in their community.

The results of the youth survey showed that 60% of young people strongly agreed or agreed that they felt part of their community.

We also received a wide range of comments regarding infrastructure related to community cohesion. The largest number of these related to the need to improve public transportation services and there were also comments on the transport infrastructure, particular in relation to the provision of safe routes for cycling and walking.

## Community Resilience

A number of people who responded to the survey noted that they volunteered in more than one capacity for a wide range of hours each month. Volunteers ranged from trustees or board members of community projects, those providing support to children's or young people's groups, cultural or heritage related volunteering, volunteering for faith groups or sports clubs, working with environmental groups or charities or sitting on local town or community councils. The main barrier to volunteering expressed by respondents was the lack of time available, particularly for those of working age.

Results from the Well-being Assessment survey regarding what people would consider doing to help achieve good community cohesion in their neighbourhood revealed that those aged 65 or over, from minority ethnic groups or those who spoke Welsh were more likely to consider taking positive and practical action to improve their community. Joining a community or volunteer group was less important to people overall, but those living in North Pembrokeshire and those who speak Welsh were more likely to do this. The lowest number of responses was from those who considered that taking part in local democracy would help to achieve community cohesion.

The value attached to connectedness within communities was high, especially in responses from those groups working directly with and in communities. The

importance of feeling well connected and the need to improve information about how people can get involved was considered especially important.

### **Pembrokeshire Association of Voluntary Services (PAVS)**

***Relationships and connectedness*** increase wellbeing more than wealth.

*Meaningful social connection is vital for wellbeing. Helping people feel useful and valued is priceless - the mental health issues that arise from feeling useless are many and varied. People have so much knowledge to share. Rural communities are much better connected emotionally than major towns. They depend on each other and help each other. They meet in the village pub for a chat.*

Of those responding to the PLANED Covid-19 survey, over 50% said that they routinely volunteered to support local groups, projects and events, with the majority of people providing up to 9 hours of support over the previous six months.

Young people felt that a community with events, local opportunities and jobs was important to their well-being, as was a friendly and supportive community.

Availability of venues for events to take place and better public transport were two of the areas young people felt needed to improve in order to help these things happen.

## Impacts on Life Stages

There are no particular impacts on any life stage when it comes to feelings of safety, resilience and connectedness within a community, with issues affecting communities being felt across all age groups. Issues with transport, for example, has impacts across all life stages. Better public transport links for travel to work and safe routes for walking and cycling to increased connectedness between communities are important for everyone in a community. A lack of community venues is also something that affects all age groups, as a lack of suitable venues to host events and groups means fewer opportunities to increase the cohesiveness of that community.

## Future trends and projections

- Increase in public order offences being committed via social media or by digital means
- Increases in ASB across all areas of the county



- Increase in referrals to specialist providers regarding support for Domestic Abuse
- Greater numbers of community groups undertaking what would traditionally have been seen as support provided by public services
- The voice of communities not being heard was a concern for residents going forward, especially disabled residents
- Need to improve public transport and transport infrastructure related to safe places to walk, cycle and connect communities
- Reduction in number of community venues impacting on ability to support community events and groups

# CULTURE AND LEISURE



A PROSPEROUS WALES	A RESILIENT WALES	A HEALTHIER WALES	A MORE EQUAL WALES	A WALES OF COHESIVE COMMUNITIES	A WALES OF VIBRANT CULTURE AND THRIVING WELSH LANGUAGE	A GLOBALLY RESPONSIBLE WALES
		✓	✓		✓	
Well-being areas: Cultural / Social / Economic						

## Overview

Culture and leisure activities are closely related to our natural and physical environment and have a strong connection to many sources of well-being such as learning, sharing, good physical and mental health, connections with others, self-fulfilment, self-expression and self-worth. It is a necessary part of both individual overall well-being and people's perception of being part of a community and plays an important part in the vibrancy, connectivity and cohesiveness of a place. For individuals to thrive they need to have access to cultural events and leisure activities, to be able to engage with each other in shared experiences and feel part of a shared community. Similarly, participation is an important part of individual development and fulfilment and spans all age groups, bringing positive experiences and growth through all life stages, from the earliest childhood memories in school right through to being an active member of a community in retirement. Central to this for many people in Pembrokeshire is use of the Welsh language, whether in daily life as a fluent and active user, or as a Welsh learner who wants to become more grounded and aware of the heritage and culture of Pembrokeshire.

## Culture and the arts

Pembrokeshire has a number of popular arts and culture venues across the county as well as great restaurants and sport facilities. The Torch Theatre, Theatre Gwaun and Queens Hall are home to a wide range of events and activities from comedy and drama to music and pantomimes, and there are many libraries spread across the county. Pembrokeshire is also well-furnished with a rich and diverse arts scene. Oriell y Parc, Tenby Museum and Art Gallery, the Haverfordwest Town Museum and the Waterfront Gallery in Haverfordwest are hosts to exhibitions from local artists and

craft workers. There are six leisure centres in the county along with many grass root sports clubs providing opportunities for active participation across our towns and villages. The Council also has numerous maps available as part of Active Travel, which help people find routes to integrate sport into their everyday lives and commute.

Pembrokeshire has a wealth of built historic environment features including over 2500 listed buildings, 531 Scheduled Monuments and 9 Historic Landscapes. The preservation of our built heritage is important as both a link to our past but also as an asset for residents and a key attraction for visitors. Most of the historic environment within the county is accessible to the public, so both locals and visitors can interact and form a relationship with Pembrokeshire's past. The physical heritage as well as the oral tradition and memories of the historic environment plays an important role in the formation and affirmation of personal, regional, national and spiritual identity. The historic environment is more than a representative of a past culture, it also represents a present culture that is very much alive. Pembrokeshire is home to many culturally significant landmarks and buildings such as St David's Cathedral, Pentre Ifan and Pembroke Castle. Additionally the Pembrokeshire Coastal Path is a notable part of the county's heritage and provides a wonderful opportunity to enjoy the beauty of Pembrokeshire for residents and tourists alike.

A somewhat unique characteristic of Pembrokeshire's geography and history is the Landsker Line, which separates North and South Pembrokeshire and which has had a significant impact on the use of the Welsh language in the county and people's ability to be able to use Welsh in their everyday lives. The recent expansion of Welsh medium education within many traditional non-Welsh speaking areas of the county will likely have a positive effect on this as learning the language becomes more commonplace.

## Creative Industries in South West and Mid Wales

Generally, the impact of the pandemic has been significant for the vast majority of businesses with financial challenges and a severe drop in trade and demand for services exacerbated by the affected by lockdowns. In Wales only 11% of eligible employees in arts, entertainment and recreation received furlough payments, and while this is higher than most regions in the UK, it points to the importance of volunteers in ensuring that many local groups can be sustained. In 2019, 31.8% of



people volunteered (which is one of the highest in Wales) with the majority of volunteers being retirees. This cohort are likely to be more cautious about group activities during the pandemic and also vulnerable to broader impacts such as shielding or caring for other ageing relatives or friends.

The impact of the pandemic on consumer behaviour and the rate at which venues will re-open and events will begin again makes it very difficult for the sector to plan effectively, particularly given the amount of uncertainty at present and the possibility of future lockdowns or restrictions. This clearly has knock-on impacts on staffing levels and recruitment. The workforce is characterised by a high proportion of self-employment and therefore the majority of these respondents indicated that they have not furloughed staff.

A concern for the sector is the loss of talented and highly skilled staff who will be unavailable when the sector fully re-opens due to having sought alternative employment and greater job security elsewhere. This could have devastating effects for a sector which was an important economic driver prior to the pandemic, and could have resulting negative impacts on people's well-being if they are no longer able to enjoy the various types of rich cultural activities which were available before.

## Libraries

Libraries are an integral part of bringing a community together, personal development and education. Pembrokeshire refreshed both its user surveys in March 2019, as part of its annual consultation with users. Results demonstrate both consistently high levels of satisfaction with the service, and the positive impact of the library on people's lives, and survey findings are closely analysed to identify trends and areas for improvement. Pembrokeshire continues to meet the target for easy access to service points, with 13 branches (and a mobile library service) serving its dispersed population.

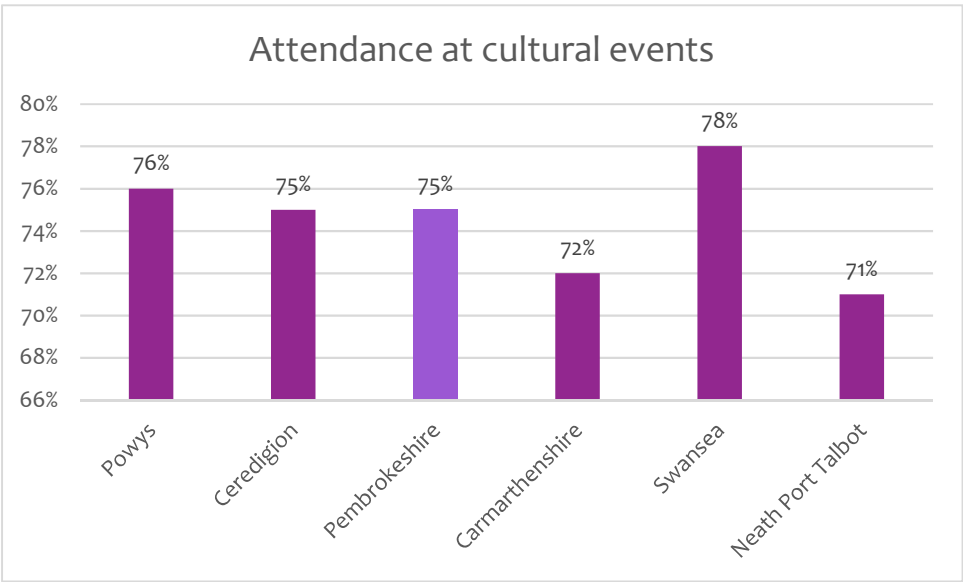
Libraries have been greatly affected by Covid and particular so during lockdowns. The number of visitors reduced following the introduction of social distancing rules and limited or on occasions no seating areas available. The Order & Collect service meant that the community was able to use the library even during limited capacity. The survey about the service suggested that 30.8% of people felt more connected to the community through the service. Just over half respondents contacted the library

by phone and 34% by the online order form. This shows the importance of providing a variety of contact methods to meet the needs of library members and to make contacting the library as easy and convenient as possible.

Library visiting numbers have improved since the roll-out of the vaccination programme and as people have become more comfortable with social distancing measures. Between April and October 2021 there were 46,807 visitors through the doors, which suggests that people are feeling safer physically visiting the library at this point.

There is evidence that library staff play an important role in broadening people’s enjoyment of reading. The majority of respondents to the library service survey suggested that many people (70%) preferred a member of staff to select the particular titles for them from a list of genres they liked to read, such as crime, thrillers or romance. Of this group, 95% have been introduced to new authors and 87% have been encouraged to read a book they would not have chosen for themselves.

### Cultural events



Attendance and participation in cultural events is important for health, well-being and education. It is crucial that there is sufficient focus on making events accessible and helping the public to be able to attend and take part in cultural events as we start to slowly shift towards living with the pandemic. The following information was collected



before 2020 and it is important that in the recovery of the cultural sector is emphasised for the overall well-being of the population.

Many factors can enable or limit access to cultural events, such as:

- Age (more likely to attend if aged 25-34)
- Deprivation (more likely to attend if living in the least deprived 20% of areas)
- Access to car
- Education level
- Access/use of internet
- Health: 47% of those who described their general health as being bad or very bad attended arts events three times a year, compared with 81% of people who felt in good or very good health.
- Well-being: Those who attend arts, culture and heritage events are more likely to have high satisfaction with life: 85% of this group said they were satisfied with life, compared with 74% of those who do not attend such events. They are also less likely to feel lonely.
- Education: Those with higher levels of qualifications are more likely to attend – 88% of those with a degree or equivalent attended or participated in cultural activities three times a year, compared with 45% of those with no qualifications.

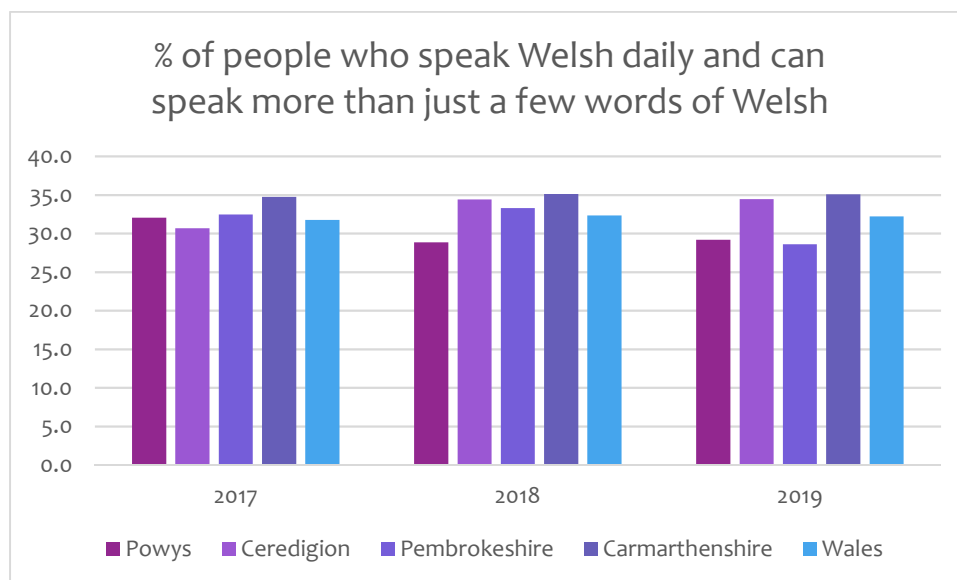
Adults from households with children aged 5 to 10 years were more likely to visit the theatre (42% vs 36% of those with no children), combined arts events (34% vs 22%), heritage sites (68% vs 63%), museums and galleries (47% vs 39%) and libraries (40% vs 27%). Those providing small to moderate amounts of unpaid care to other adults were also more likely than non-carers to attend arts events (66% vs 61%), heritage sites (19% vs 17%) and libraries (32% vs 30%) suggesting that sharing activities with others may be an important driver for engagement.

## Welsh Language

Being able to use Welsh in everyday life has a significant impact on the overall wellbeing of Welsh-speaking individuals and communities. It is important that those who wish to use the Welsh language in their everyday lives are able to do so without barriers for an individual's sense of self-identity, culture and connection with our heritage to be enhanced. A broad and diverse range of Welsh cultural events and experiences is the best way to engage as many people as possible is using the Welsh language.

	% of people 3+ who can speak Welsh (ONS 2011)	% of people who speak Welsh daily and can speak more than just a few words of Welsh (2018)	% of people who speak Welsh daily and can speak more than just a few words of Welsh (2019)
Ceredigion	47.4	32.6	36.1
Powys	18.6	7.9	8.5
Pembrokeshire	19.3	9.2	10.2
Carmarthenshire	43.9	29.8	30.4
Wales	19	11	10.4

In 2019 the percentage of people who can speak Welsh in the county reduced from previous years and numbers are lower than in our neighbouring counties of Ceredigion and Carmarthenshire. However, use of the Welsh language is increasing.



## Nature and sport

The Pembrokeshire Coastal Path covers 186 miles (299 km). From St Dogmaels in the north to Amroth in the south, the trail covers almost every kind of maritime landscape from steep limestone cliffs, undulating red sandstone bays, volcanic headlands, beaches, estuaries and flooded glacial valleys. Lying almost entirely within the Pembrokeshire Coast National Park, the trail displays an array of coastal flowers and bird life, as well as evidence of human activity from Neolithic times to the present. The path is an accessible way for the community to spend time in nature and stay active. It also brings visitors and offers a fertile ground for educational programmes for all ages.

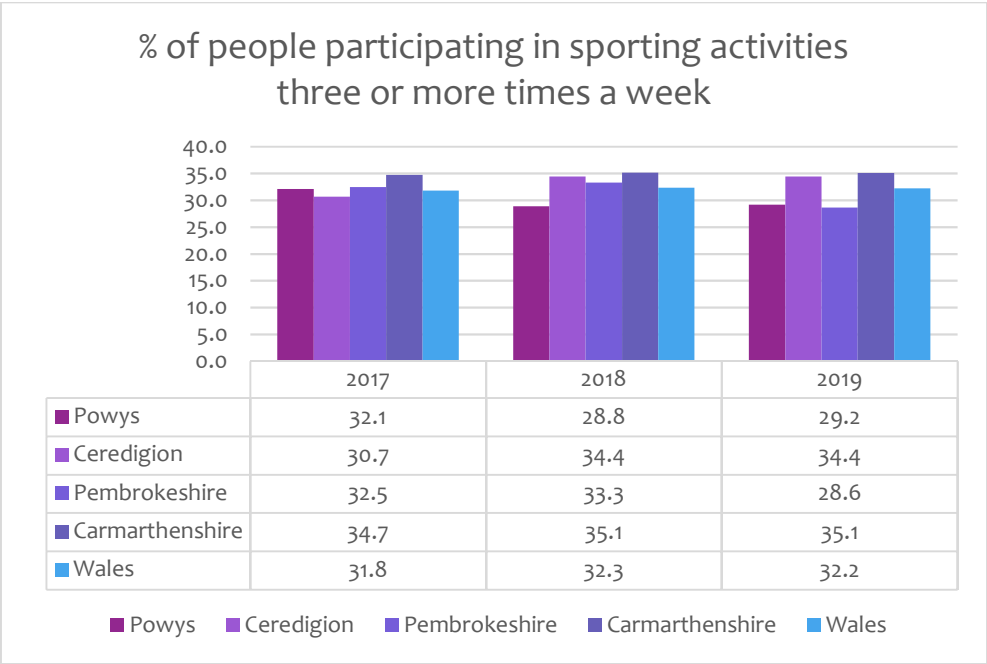
The bathing water quality in Pembrokeshire is high, with 29 of its beaches recognised as complying with the necessary standards in 2021, 27 of which were judged to be excellent. Similarly, Pembrokeshire has 11 beaches recognised under the Blue Flag scheme which is a hallmark of high quality of bathing water, cleanliness, safety and activities across beaches, and is used as a standard across the globe. An associated measure is that of the Green Coast Award, which again focuses on high water quality and high environmental standards and seven beautiful, untouched, rugged beaches that line so much of Pembrokeshire are recognised under this scheme.

Pembrokeshire has been awarded the most Blue Flags and Green Coast Awards in Wales. Overall, the exceptional quality of many of beaches are vitally important to the local economy, valued by residents and tourists alike, and a source of pride for many people who live here and value the natural beauty and landscape.

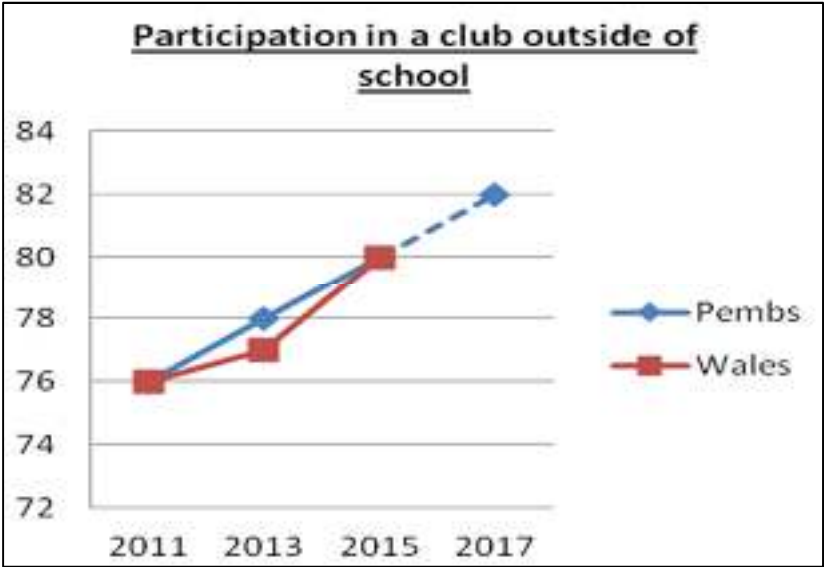
Access to the Coast provides many opportunities for volunteering and taking part in various activities. Locals can join surfing, walking and sports clubs as well as volunteer to take part in nature projects. 3,810 trees have been planted between 2019 and 2021 alone. These activities offer intergenerational cooperation and helps to build a cohesive community.

In Wales, most forest sites and national nature reserves managed by Natural Resources Wales (NRW) saw a 90% reduction in visits during the first lockdown in March to June 2020, but a substantial rebound during the more open summer season from July to September, with visitor numbers at some sites almost doubling compared to previous years. Pembrokeshire specific figures are not available, but 40% of adults reported that they spent more time outside and 35% reported not to have visited a natural site in the last 14 days (The People and Nature Survey for England April-June 2020).

The percentage of people participating in sporting activities three or more times a week in Pembrokeshire was below the Wales average in 2019.



82% of pupils participated in sporting activities through a community club in 2017 (Wales 80%) which ranks Pembrokeshire as the 12<sup>th</sup> highest in Wales. It is important to note that this number will be different after the pandemic due to lockdowns, rules around social distancing and parents being more cautious.



Pembrokeshire is considered to be particularly well-served when it comes to the availability of sporting facilities for community use. As well as the numerous clubs and facilities in towns and villages, there are a host of options also accessible for

community use on school sites (outside school hours) across the county, as highlighted below:

School site	Pitch type
Fishguard	Astro turf
Caer Elen	3G pitch
Haverfordwest High (Portfield)	Astro turf
Haverfordwest High (Prendergast)	Astro turf (3G to be added to new school shortly)
Milford Haven (Thornton Hall)	Astro turf
Gelliswick School	3G
Ysgol Harri Tudor (Pembroke)	Astro turf and 3G
Greenhill School (Tenby)	Astro turf
Ysgol y Preseli (Crymych)	Astro turf

## Survey and Engagement outcomes

The results of our survey showed that locally produced food festivals and events, and history and heritage were most important to people with regard to culture in Pembrokeshire.

As well as events held within communities, twice-yearly food festivals are held in Haverfordwest town centre, which showcases the work of local and regional food producers. Although postponed in 2019 due to the pandemic, the festival is due to come back in December 2021. Also held in Haverfordwest town centre, the weekly outdoor farmers market offers customers a chance to buy locally produced products and produce direct from local suppliers and has been running for over 20 years. Pembrokeshire Fish Week runs over several days in the summer and is co-ordinated by Pembrokeshire County Council and supported by a number of organisations including the Port of Milford Haven. The event focuses on the county's first-class seafood, spectacular coastline, award winning beaches, and fascinating maritime heritage. Again, the event has been postponed over the pandemic but it is hoped that it can be brought back in 2022.

For Welsh speakers, our survey showed that having the opportunity to use the language was more important to those living in the North of the county, which statistically has the highest proportion of Welsh speakers in the county. In terms of contributions to culture, Welsh speakers also identified that opportunities to use Welsh informally and in the workplace were important.

When asked what they would consider doing to help achieve a vibrant community with a thriving Welsh language, the majority of respondents to the survey said that visiting a local museum or other heritage establishment, the introduction of schemes to support young people to live and work locally, and learning to improve Welsh language skills were most important. Those who lived in main towns were more likely to find a local sport or community club to join or volunteer for, possibly because these types of clubs are more established in urban areas.

The majority of responses to the survey noted that opportunities to learn and improve skills, the availability of more information on local community groups, and good transport links to arts and culture venues were the three areas of support that people felt would contribute most strongly towards a vibrant local culture and thriving Welsh language. Good transport links were especially important to those over the age of 65 and for carers.

63% of young people who responded to the young people's version of the survey strongly agreed or agreed that there were activities available locally that they were interested in taking part in.

A number of specific comments were received about leisure centre provision, based mainly around access to leisure centres in terms of class times and centre opening times and concerns about the cost of classes. Comments about access to green spaces and outdoor exercise equipment and outdoor play spaces, alongside safe cycling routes, were also received.

Being able to access museums, libraries and cultural events is important across every life stage.

Having the arts in young people's lives is essential; we know that intuitively. Parents sing to their babies, dance with their toddlers, and occupy children with crayons and paper. To be able to involve a child in activities is essential for their development. There is some evidence that the experiences young children have in museums may shape their thinking, values, aspirations, artistic appreciation, understanding of science, and identities throughout their lives. Pembrokeshire offers many museums and immersive experiences on the Coastal Path and at Heritage sites for families and people of all ages. One of the challenges is to introduce museum, early childhood and public policy professionals to each other so that they can:



- 1) recognise their shared goals
- 2) understand the resources and learning environments available in museums that can benefit young children
- 3) join forces to articulate indicators of success
- 4) conduct rigorous research studies to advance knowledge and produce evidence of the immediate and lifelong value of museum learning for our youngest children

For young people and adults one of the biggest challenges is that they are unable to afford the house prices in their local area. With a lack of Higher Education providers in the county most young people leave to study and are then unable to afford to move back and buy a property. This results in a lower number of professionals who would be able to help the cultural industry thrive.

Pembrokeshire County Council does offer apprenticeship opportunities as part of the Welsh Futureworks scheme. Many small businesses also train and help young people through traineeships and apprenticeships. These types of jobs were disproportionately affected by Covid, as they are less likely to qualify for furlough and businesses are less likely to keep them on when financially struggling.

The role of volunteers in supporting and sustaining cultural activities in the county cannot be underestimated. For example, in Haverfordwest Town Museum provide opportunities for 1,500 volunteers a year. Volunteering for a museum, for charities and arts venues helps to bring different generations together. Milford Haven Museum is entirely volunteer run, providing the community with a valuable place to get experience as a young person and to feel part of the community as a retired person.

The results of our survey did not show any particular impact on any specific life stages, apart from the importance of good transport links, which was important to those aged over 65. Instead, being able to get involved in the culture and heritage of an area is important to everyone in terms of supporting the well-being of individuals and communities.

The Wales Centre for Public Policy notes that participation in cultural events is generally higher for families with children (aged 5 to 10 years), with those over the age of 75 less likely to participate. Their research also found that those that attend cultural events regularly are more likely to have higher levels of well-being. They also note that those with their own personal transport are more likely to attend

cultural events, highlighting the importance of a strong transport infrastructure which supports cultural well-being.

## Future Trends

The Wales Centre for Public Policy also highlights the impact of the Covid-19 pandemic, on the arts, culture and heritage sectors. Lockdown restrictions have meant that many venues and events have been shut or postponed for long periods of time, with some likely to have closed permanently. Cinemas and other venues have now largely re-opened in the county, although it is difficult to predict what the long-term impacts on these cultural elements will be in terms of returning footfall and future resilience. Widening access to culture and the Welsh language across the county may help to support future development and provide opportunities to measure well-being and identify any future concerns.

Culture and the arts have strong connections to people's sense of well-being. Traditionally culture is related to identity, social cohesion and integration, sense of belonging to a community and place, and the protection and enhancement of cultural diversity. The various arts and culture venues across the county are essential to the well-being of the people in Pembrokeshire. The restaurants, food and accommodation venues help cultural events to find a place and to cater the needs of locals in many different ways; they offer a place for the community to come together, actively use Welsh in an informal setting and accommodate tourists, who help Pembrokeshire culture thrive.

Both the Pandemic and Brexit will have effects on tourism and the local communities though the full impact is not yet known at this time given the seismic nature of both events. Despite the negative effects of lockdowns and lower numbers of foreign tourists many venues were able to reopen and make up some of the losses experienced over the Summer of 2021. Volunteers and the local community ~~has~~ have helped each other through initiatives like the HaverHub that helped organise food deliveries for vulnerable people and volunteers in the local area. Haverhub also now has a range of groups, events and art exhibitions to help the community thrive and continues to offer volunteering opportunities. Another exciting project to be launched soon is Pembrokeshire Inspired, which is a digital project where local events can be shared under the relevant categories by venues or participants.

# NEXT STEPS



## Next steps

This Well-being Assessment provides the evidence base for us to work with people in Pembrokeshire – people and communities, front-line staff who are at the forefront of service delivery, partners and key stakeholders - to identify the PSB's priorities for the next 5 years, and to ensure we work collaboratively to improve well-being now and in the future.

These priorities, and the actions we will take to achieve them, will be expressed in the next iteration of the Well-being Plan, which we will publish by May 2023. We will work together using an integrated partnership approach to develop innovative and co-produced solutions to achieve outcomes which contribute to the national Well-being Goals and to meet our requirements under the Well-being of Future Generations Act.

The PSB has committed to using the findings from this Assessment to develop a "Pembrokeshire 2040" vision which will establish a sense of collective purpose and shared direction which all partners in the county will work towards over the long term. This vision, and the outcome statements supporting it, will establish the type of place we want Pembrokeshire to become, so that we can start planning today for what we want the county to look like in the future.

Planning for this is currently under development, however we are keen that this piece of work will provide an opportunity for everyone to be involved by way of specific scenario planning and futures thinking workshops for key stakeholder and community groups, and broader citizen engagement activities. The end goal is that the "Pembrokeshire 2040" vision exercise will ultimately provide the overarching framework through which the PSB can establish its own Well-being Objectives to support the development of the Well-being Plan, as well as providing the longer term priorities for the county which partner organisations can align with in their own forward planning processes. It is anticipated that this work will take place between April and June, with the vision and Well-being Objectives being established by early summer.

We will revisit the assessment on a regular basis as we move forward as part of a programme of ongoing engagement and involvement with our citizens and communities. We will refresh our data when appropriate to ensure our evidence base is reliable and robust and a platform from which we can develop long term, preventative solutions to the key factors which influence the well-being of people in Pembrokeshire.

Central to this will be the newly developed “Gorwel” (“Horizon” in English) data and engagement platform, as it will support facilitating this engagement by providing improved opportunities for people and communities to feed back their experiences of well-being in Pembrokeshire, alongside the challenges they face and what matters most to them. It will also provide PSBs and interested parties with up to date data on well-being. The aim is to facilitate an ongoing dialogue with the people of Pembrokeshire, and strengthen our understanding of well-being issues over the coming years.

We will also continue to work with the West Wales Regional Partnership Board to ensure that the Well-being Plan addresses relevant issues identified within the Population Assessment of care and support needs in the region and create synergy with the Area Plan that will be produced over the same timescale.