



CEREDIGION **ASSESSMENT OF** **LOCAL WELL-BEING**

Ceredigion Public Services Board

2022



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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

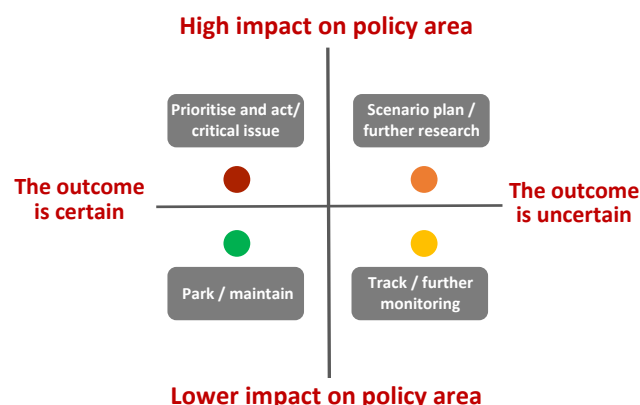


- Creating the conditions for Ceredigion's older residents to use their skills, knowledge and experience to help others in the community and remain **actively engaged in the economy**.
- Our Well-being Survey and stakeholder events highlight that provision of opportunities to **volunteer**, be **active 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
NEW BEGINNINGS				
Cost of living is increasing				●
The need for access to perinatal mental health support			●	
Low birth weights better than average, except in Aberystwyth South	●			
Further work on childhood immunisation uptake is required to reach government target			●	
Breastfeeding rates in Ceredigion are higher than the national average	●			
Adequate paid leave is important for the well-being of both the infant and the parents		●		
Average earnings and incomes are below average				●
Flying Start has been highly effective in Ceredigion for families in our most deprived areas	●			
There is demand for Childcare provision in Ceredigion, particularly Welsh medium		●		
Ensuring children have the opportunities to socialise in the language of their local area			●	
CHILDHOOD				
Childhood obesity decreasing and better than average		●		
Children's mental health following Covid-19				●
Children taking part in sport outside of school is the highest across Wales	●			
Secondary age children are less likely to undertake at least three occasions of activity per week			●	
Participation of females in sport needs increasing			●	
Child poverty higher than average and increasing over the last five years				●

In-work poverty increasing and remains a key issue				●
Ceredigion education system is a primary asset in Ceredigion				●
Welsh medium education is an asset to Ceredigion's pupils	●			
Gap between the top GCSE results of pupils from deprived backgrounds and those from non-deprived backgrounds has widened			●	
Childcare provision will need to adapt to more flexible working patterns in the future			●	
Positive attitudes of children towards outdoor play	●			
Younger people would like more play areas and recreational facilities			●	
Children feel connected to the natural environment and very aware of the need to protect the environment				●
Climate change was identified by children as the single biggest challenge being faced currently				●
Impact of COVID-19 on the well-being of children not fully understood			●	

YOUTH

Outward migration of young people				●
Younger people in Ceredigion identify connectivity, employment opportunities and affordability of housing as key to making a difference to their future				●
The student population of the county has been decreasing since 2014/15			●	
The need to upgrade digital infrastructure facilities and investment in public transport will enable young people to stay connected and improve well-being				●
Under 18 conceptions in Ceredigion is much lower than the national average and decreasing	●			
Young people need access to mental health support		●		
Environmental awareness and concerns over protecting the environment continues to grow				●
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				●
Feeling safe features prominently in The Well-being Survey and stakeholder events			●	
Younger people are most concerned by Prejudice and Community resources being closed down			●	
There is a strong connection to Welsh language and culture amongst younger people	●			
Housing affordability remains a key driver in the well-being of future generations in Ceredigion				●
Younger people have been disproportionately affected by the COVID-19 pandemic			●	

Mismatch between jobs and skills 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 arts, culture or heritage activities is declining in Ceredigion			●	
Ceredigion residents value the role that arts and culture 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 Welsh language				●

SOCIAL

Ceredigion residents are the most satisfied with their local area as a place to live in Wales	●			
Only 1/5th of residents feel that they can influence decisions			●	
Poverty remains one of the biggest challenges for the county				●
Reducing inequalities in the County, particularly in the environment, health, housing, transport and educational attainment				●
Victims of emotional and psychological abuse and domestic abuse has decreased in Ceredigion				●
Violence against the person incidents are increasing			●	
To enable a well-connected Ceredigion , greater public transport availability, better digital connectivity and shorter distances to access services is required			●	
Preventing the ' digital divide '			●	
Improvements to the transport network are needed and work towards the three priorities in the Wales Transport Strategy 2021			●	

ENVIRONMENTAL

The Climate and Nature Emergencies combined are the greatest challenges of our time.				●
The declaration of the Climate Emergency and Nature Emergency is a significant positive step in tackling the problem	●			
Decarbonisation will be challenging and requires careful consideration as to how its implemented				●
The exceeded phosphate pollution 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 mitigate environmental damages 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 housing and more affordable housing are needed				●

HEALTH				
The number of unpaid carers will likely increase in the future and will require support			●	
Smoking rates and alcohol consumption 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 mental health of residents in Ceredigion			●	
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 key to improving the physical and mental well-being of our survey respondents			●	
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				●
The need for greater work-life balance and flexible working in the future		●		
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				
Opportunities for older residents to remain actively engaged in the economy			●	
Opportunities to volunteer and be active in the local community			●	

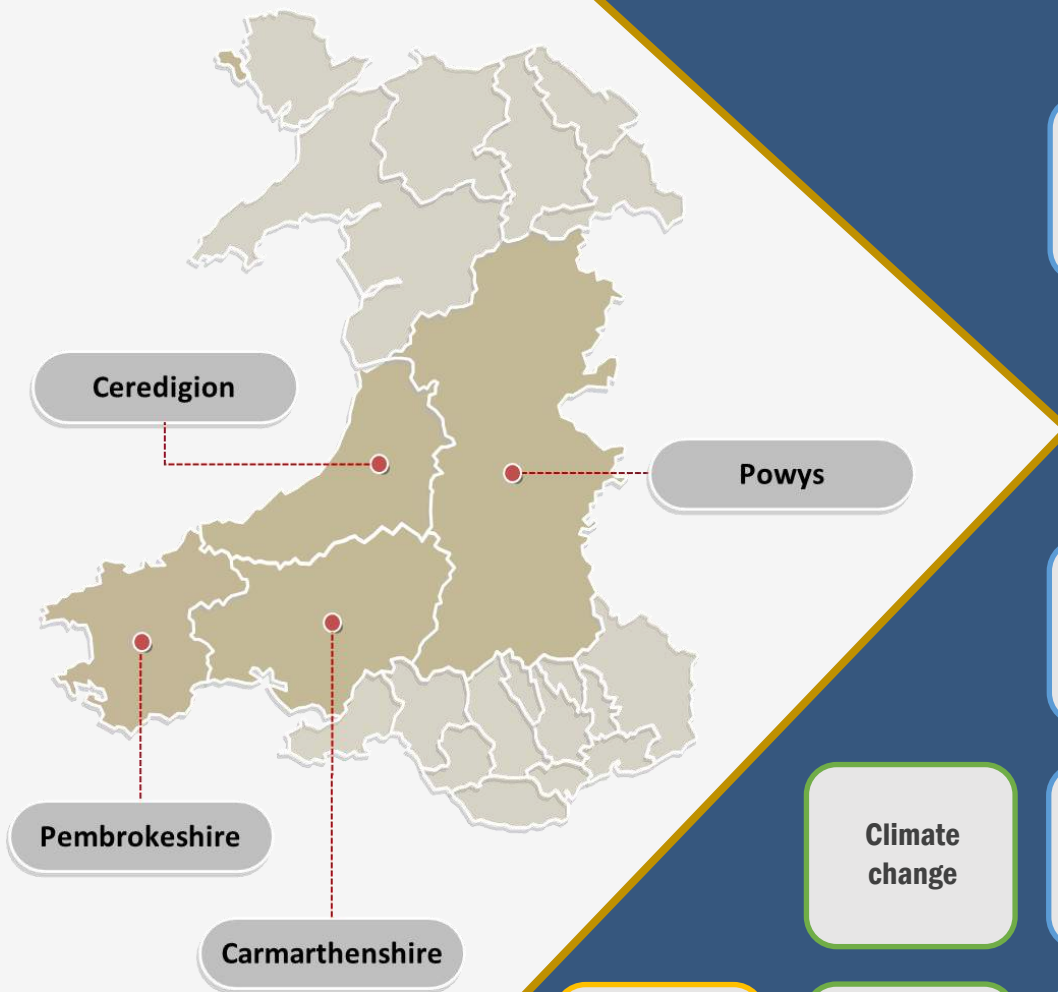
A higher level of provision will be needed in Housing for Older People , Housing with Care and Nursing Care in the county			●	
The cost of residential and nursing care is expensive			●	
Increase in dementia in Ceredigion				●
Access to healthcare or other support was the single most important thing identified by older people to maintain their physical and mental well-being over the next ten years			●	
Buildings without 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 disabled people.			●	
For many, the high costs make it impossible for people to be cared for in a home , without financial support				●
Ceredigion's ageing population will place a significant strain on our local health service and on our local labour market				●

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

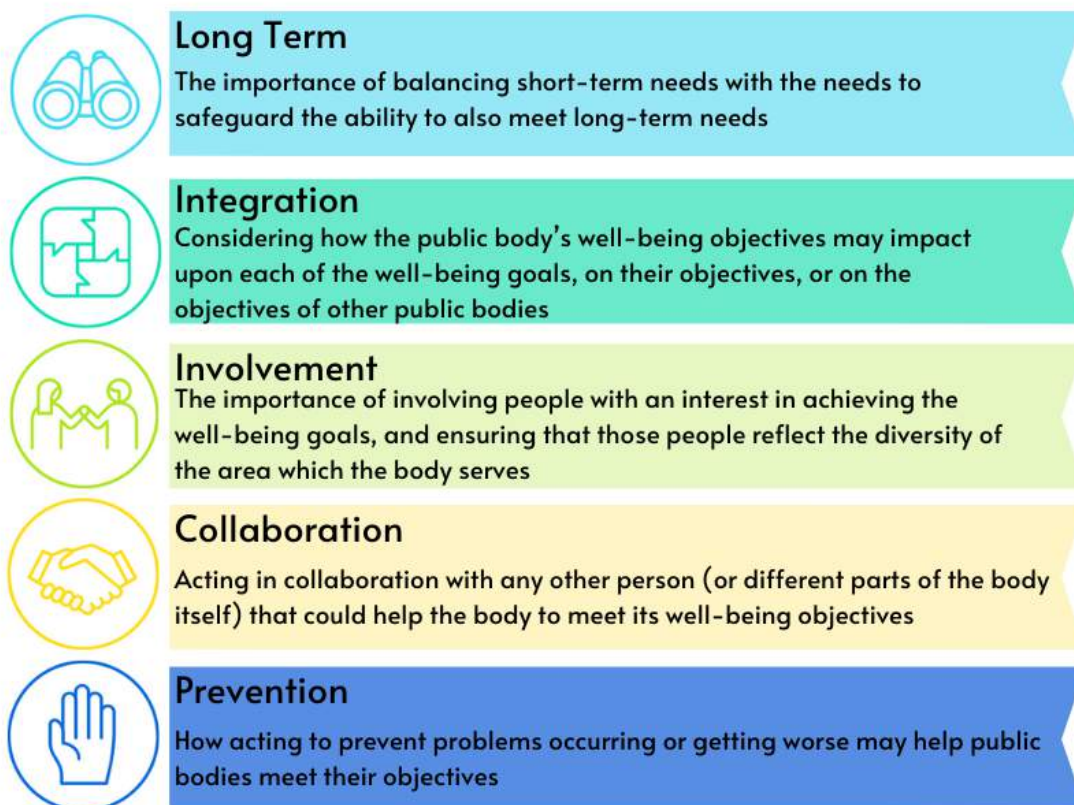


Source: Adapted from Public Health Wales (2019)

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
March – May 2021	Preparation – 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.
May – November 2021	Data Analysis – sourcing data, conducting desktop analysis, sharing insights and identifying local/regional trends	Data Group	Data leads across the three Local Authorities
May – October 2021	Engagement – 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
September – November 2021	Writing – 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 th May 2021	Enterprise and Innovation Project Group
7 th June 2021	Colocation and Integration of Frontline Services Group
8 th June 2021	Resilience Training Project Group
18 th June 2021	Understanding Our Communities Project Group
29 th 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

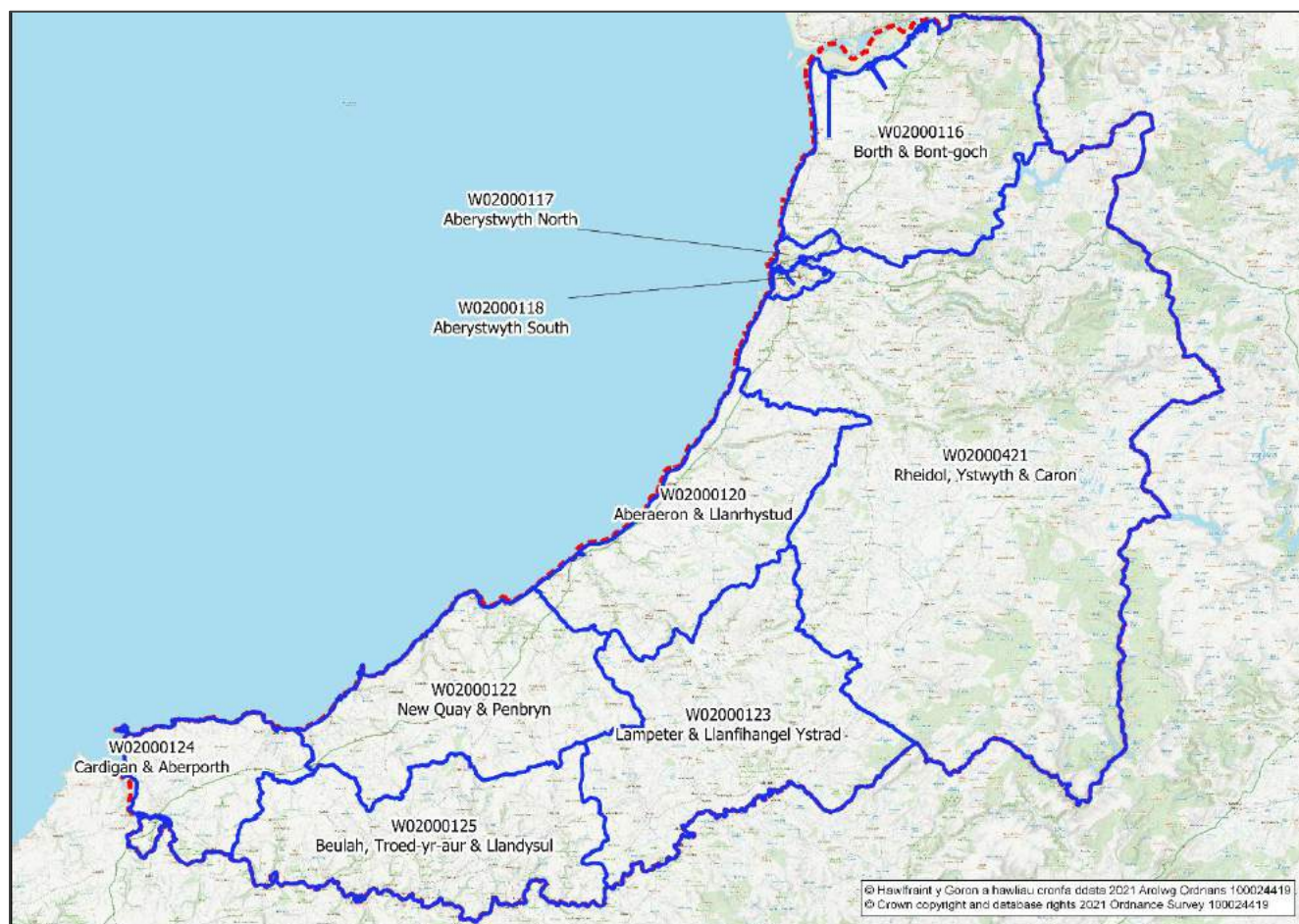
This approach enabled the integration of cross-cutting themes, for example, in considering the relationship between deprivation, housing quality and health. These stages are broad and indicative stages and not everyone's experience will fall neatly into these age groups, but they help us understand the 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**¹ 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.”²

¹ 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).

² “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

<p>Long-term</p> 	<ul style="list-style-type: none"> • Continuation of the PSB/RPB Network and Operational Groups • Development of “Have Your Say Ceredigion” – provides the opportunity for future concerns and the longer-term needs of citizens to be raised. • Development of “Gorwel” – 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. • Horizon Scanning Training – aided a better understanding around the future and explored factors that could give rise to possible future characteristics and events. • Futures thinking questions included in the survey- based on each of the 7 National Well-being Goals.
<p>Prevention</p> 	<ul style="list-style-type: none"> • Assessment highlights areas where preventative work can be undertaken – 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. • Partnership working between the three PSBs – sharing resources and expertise to avoid duplication and regional issues. Regional data gathering exercise to minimise data gaps.
<p>Integration</p> 	<ul style="list-style-type: none"> • Ceredigion PSB Project Groups structured around the 6 Ceredigion well-being objectives in its Local Well-being Plan. Each of the objectives support the delivery of the 7 National Well-being Goals. • Life Stages Model utilised in the Assessment – this approach recognises the interrelationships between the well-being goals and themes, for example, in considering the relationship between deprivation, housing quality and health.
<p>Collaboration</p> 	<ul style="list-style-type: none"> • Assessment undertaken in collaboration with a wide range of PSB partners (local and regional), third sector organisations and private sector organizations. For example: <ul style="list-style-type: none"> - 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. - Worked as a West Wales Cluster to deliver the Assessment under the PSB/RPB Network. - Developed a Well-being Survey and Regional Stakeholder toolkit. - 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. - Regional Well-being Co-ordinator Officer employed to oversee the delivery of the assessments and ensure consistency in our approach.

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						
New Beginnings								
1	Parental Health			●	●	●		
2	Parental Preparedness			●	●	●	●	
3	Relationships			●	●	●		
4	Financial Considerations			●	●			
5	Welsh Language and Culture	●		●		●	●	●
Childhood								
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		●	●				
Youth								
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	●	●		●	●			
Adulthood									
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	●		●	●	●	●		
Older People									
38	Continuing to Work	●			●				
39	A Suitable Home		●	●	●	●	●		
40	Maintaining Independence			●	●	●	●		
41	Needing Help			●	●	●	●		
42	Staying Connected		●	●	●	●	●		
43	At the End			●	●	●	●		

Prosperous	Resilient	Healthier	More Equal	Cohesive	Culture	Global
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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 1,900km² 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.

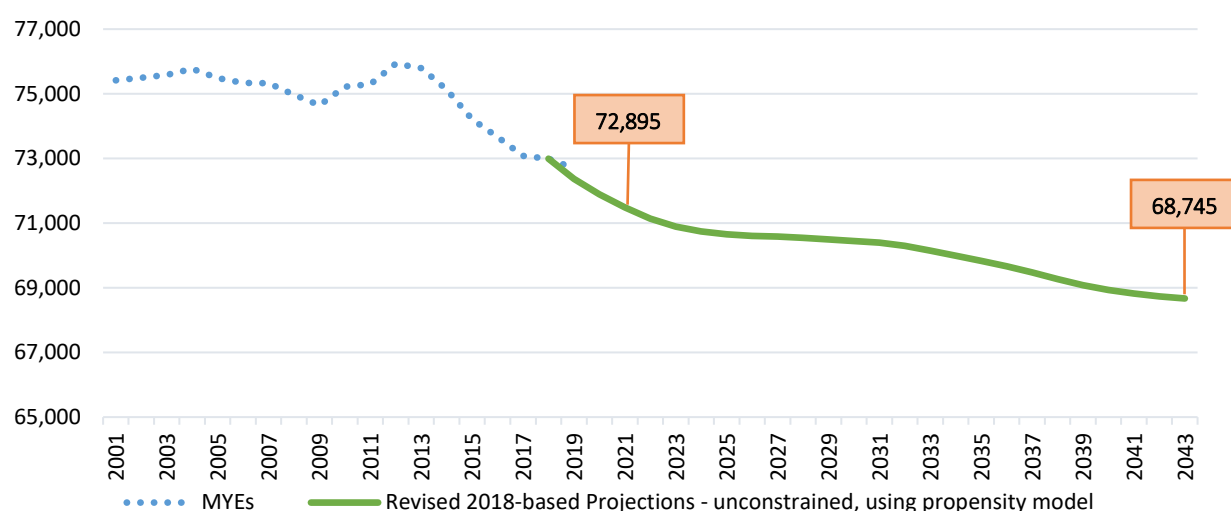
However, the rail line in Ceredigion does not run to the south; for example, taking a train from Aberystwyth to Carmarthen would take over 6 hours and would mean firstly travelling North to Shrewsbury and then to Southeast Wales, eventually linking up with the Carmarthen line. By car this journey would 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.

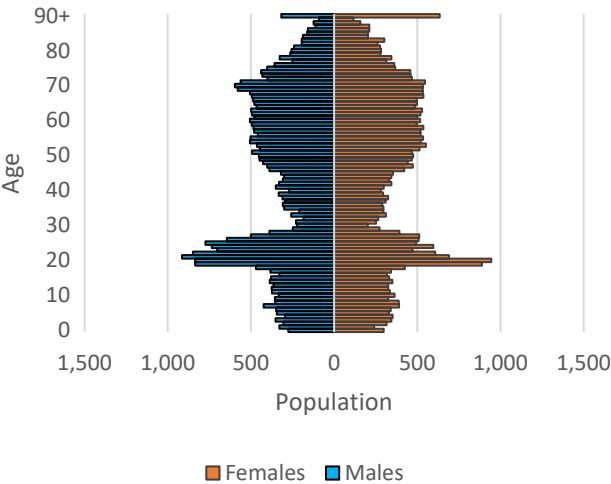
Figure 3.1: Population Trends - Ceredigion (2001-2043)



Source: Welsh Government, Local Authority Mid-Year Population Estimates and 2018-based Local Authority Population Projections.

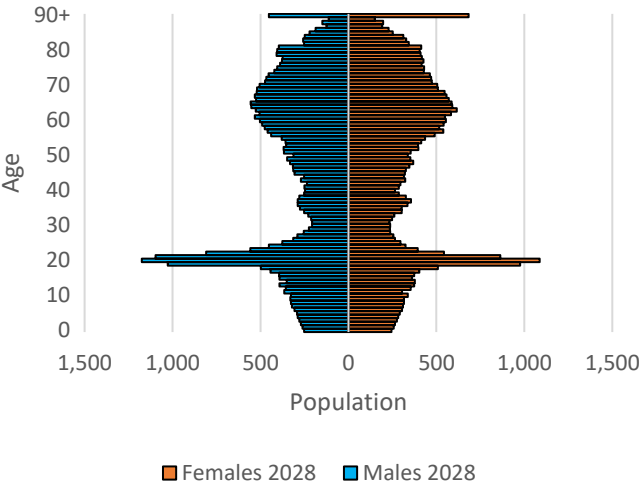
Although the population is set to decline, Ceredigion's older population (65+) is expected to grow significantly over the next 20 years (by 23.7% or +4,305 people), whilst the working age population (16-64) and children (0-15) are expected to decrease. The largest projected increase within the 65+ age 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 3.4.³

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.

³ 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.⁴

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.⁵

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

⁴ Regional Well-being Survey 2021.

⁵ 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 21st 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)”.⁶

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:

⁶ 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.⁷ 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)

⁷ 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.⁸ 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.⁹ 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.¹⁰ Some examples of these include antenatal and postnatal depression, obsessive compulsive disorder, posttraumatic stress disorder and postpartum psychosis.¹¹ 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.¹²

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

⁸ Hirsch D. (2020) Child Poverty Action Group. The cost of a child in 2020.

⁹ Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment.

¹⁰ Ibid.

¹¹ Ibid.

¹² 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 2018.¹³

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.¹⁴

Table 4.1: Parental Health Measures

	% of women who had an initial assessment carried out by 10 completed weeks of pregnancy		
	2018	2019	2020
Hywel Dda	73.4	78.7	80.3
Wales	73.1	72.3	76.0
	% of women who were recorded as smoking at initial assessment		
Hywel Dda	16.6	16.9	16.0
Wales	17.9	17.3	17.3
	% of women who 'stopped smoking' during pregnancy		
Hywel Dda	23.3	22.1	27.7
Wales	17.4	17.8	18.1
	% of women at initial assessment who had a BMI 30+		
Hywel Dda	28.2	27.4	29.4
Wales	28.0	28.2	29.2
	% of women at initial assessment who had reported a mental health condition		
Hywel Dda	19.5	23.2	24.5
Wales	24.3	25.1	27.1

Source: Welsh Government¹⁵

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.

¹³ Welsh Government (2020) Maternity and birth statistics

¹⁴ Ibid.

¹⁵ 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.¹⁶

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.¹⁷ Research shows that deprivation levels could be driving the disparity in low birth weights between community areas¹⁸, 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.¹⁹ Many different professionals and practitioners in Hywel Dda University Health Board (HDDdUHB), Ceredigion County Council, and the third sector lead and provide preparation for parenthood programmes and activities for upcoming parents.

¹⁶ "Well-being of Wales 2021". Welsh Government. 30 September 2021. 6.

¹⁷ WIMD (2019) Low birth weight (live single births less than 2.5kg) (%).

¹⁸ Welsh Government (2021). Well-being of Wales 2021. [Online]. Available at: [Wellbeing of Wales: 2021 | GOV.WALES](https://gov.wales/well-being-of-wales-2021) (Accessed: 02.11.21).

¹⁹ 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

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%²⁰. 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 4th 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 immunisations²¹ for children aged four in Ceredigion was similar to the national average (87.9% compared to 87.6%).²² 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).²³ 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).

²⁰ 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>

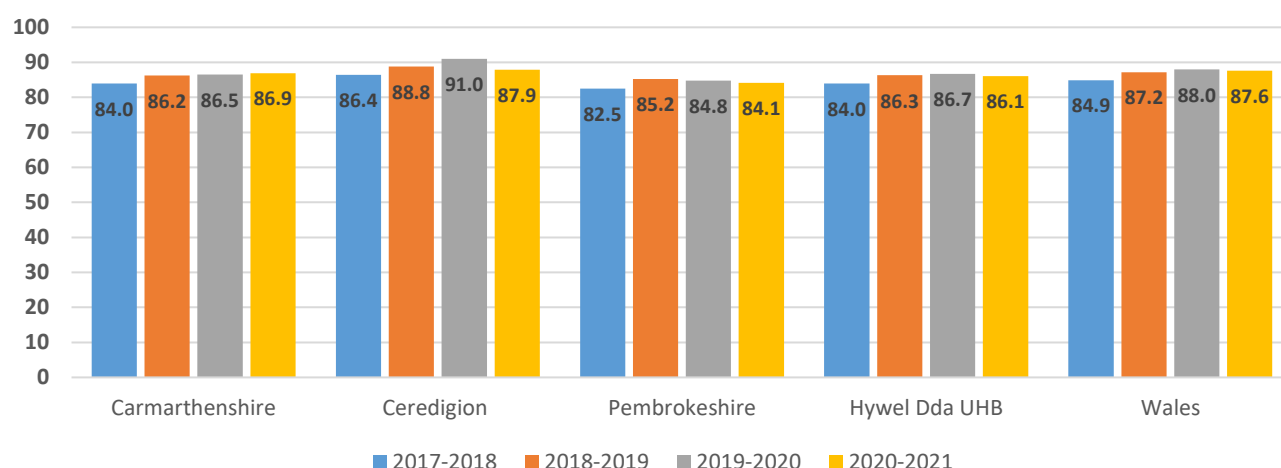
²¹ Completed '4 in 1' pre-school booster, the Hib/MenC booster and second MMR dose by four years of age.

²² Public Health Wales and NHS Wales (2021) Vaccine Uptake in Children in Wales COVER Report 2021: Data for the year ending 31st of March 2021. [Online]. Available at: [cover report Feb 95 \[WP\] \(wales.nhs.uk\)](https://www.wales.nhs.uk) (Accessed: 04.02.22)

²³ 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 2018²⁴, 2019²⁵, 2020²⁶, 2021²⁷

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.³

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%).²⁸ 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 Report²⁹, breastfeeding reduces the risk of childhood obesity by up to 25%³⁰ and can reduce the risk of both ovarian and breast cancer in the mother.³¹ 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

²⁴ Public Health Wales & NHS Wales (2018). Vaccine Uptake in Children in Wales COVER Annual Report 2018: Data for the year ending 31st March 2018.[Online]. Available at: [COVER20172018 v1b.pdf \(wales.nhs.uk\)](#) (Accessed: 04.02.22)

²⁵ Ibid.

²⁶ Ibid.

²⁷ Ibid.

²⁸ Public Health Wales (2018) Babies exclusively breastfed at 10 days following birth, 2018.

²⁹ 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).

³⁰ 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)

³¹ 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%).³²

Nationally, breastfeeding rates in Ceredigion fare very well, however, the UK has one of the lowest breastfeeding rates globally.³³ 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;³⁴ 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.³⁵

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 2020.³⁶ 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 month³⁷, 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.

³² Welsh Government (2020) 'Flying Start: April 2019 to March 2020'. [Accessed Online]. Available at: <https://gov.wales/flying-start-april-2019-march-2020-html>

³³ 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

³⁴ 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).

³⁵ 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>

³⁶ 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)

³⁷ 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.³⁸ 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.³⁹

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.⁴⁰

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.

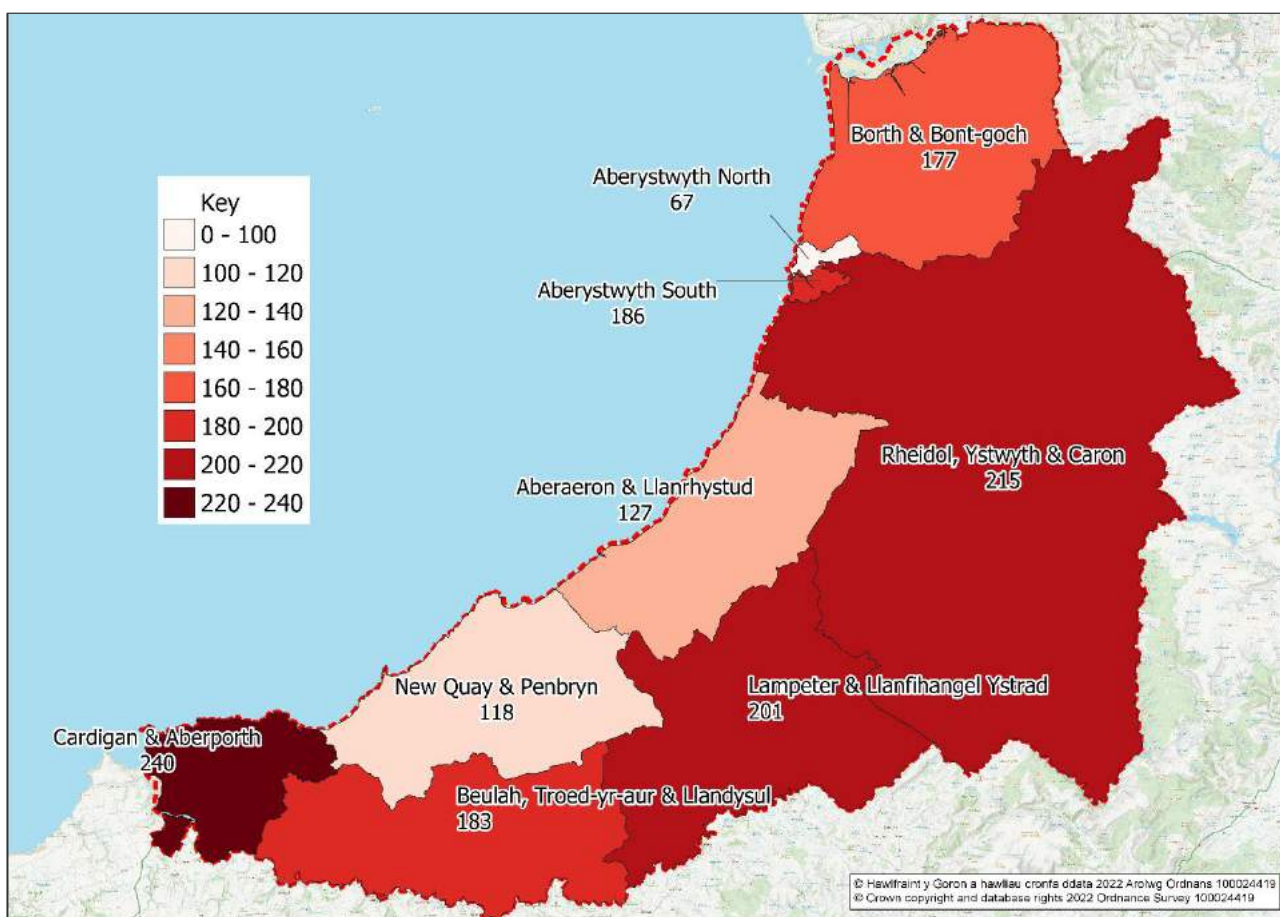
³⁸ Schoon I., Cheng H., Jones E., Maughan B. (2013) Wellbeing of Children: Early Influences.

³⁹ Doss D. (2009) The Effect on the Transition to parenthood on Relationship Quality: An Eight-Year Prospective Study.

⁴⁰ 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 4.2.⁴¹ Recent data collected from the Annual Population Survey revealed that there were around 1,300 lone parent households in Ceredigion (2015-17),⁴² a slight decrease since the 2011 Census.

Figure 4.2: Number of lone parent households with dependent children by Community Area



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.⁴³ 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'.

⁴¹ Census (2011) Lone parent households.

⁴² 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.

⁴³ 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

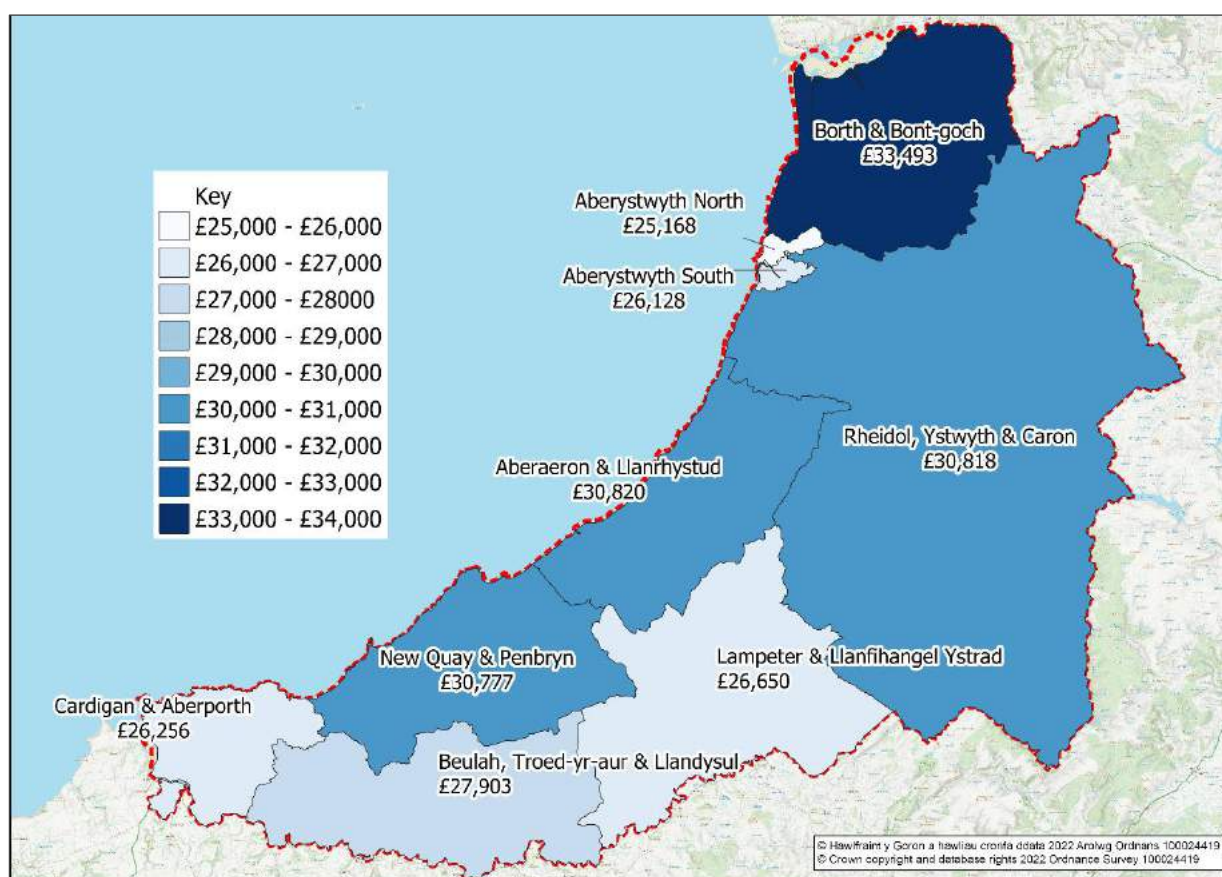
Community Area	People in Income Deprivation
Cardigan & Aberporth	19%
Beulah, Troed-yr-aur & Llandysul	14%
Aberystwyth South	13%
Lampeter & Llanfihangel Ystrad	12%
New Quay & Penbryn	12%
Aberaeron & Llanrhystud	11%
Rheidol, Ystwyth & Caron	10%
Borth & Bont-goch	10%
Aberystwyth North	6%

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.⁴⁴

⁴⁴ CACI Paycheck, 2020

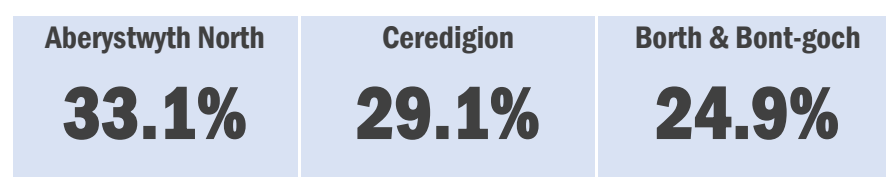
Figure 4.3: Median Income in Ceredigion by Community Area



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 year⁴⁵ 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



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.⁴⁶ 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

⁴⁵ Hirsch D. (2020) Child Poverty Action Group. The cost of a child in 2020.

⁴⁶ 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.⁴⁷ This is a sharp increase on the £115 in the previous year's survey.⁴⁸ This is largely blamed on the increase in the cost of living and the economic impact of the COVID-19 pandemic,⁴⁹ 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.⁵⁰

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.⁵¹ 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).⁵²

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

⁴⁷ Coleman, L et al. "Childcare Survey 2022". Coram Family and Childcare, 2022. 11.

⁴⁸ Jarvie, M et al. "Childcare Survey 2021". Coram Family and Childcare, 2022. 12.

⁴⁹ "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.

⁵⁰ 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.

⁵¹ 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).

⁵² 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

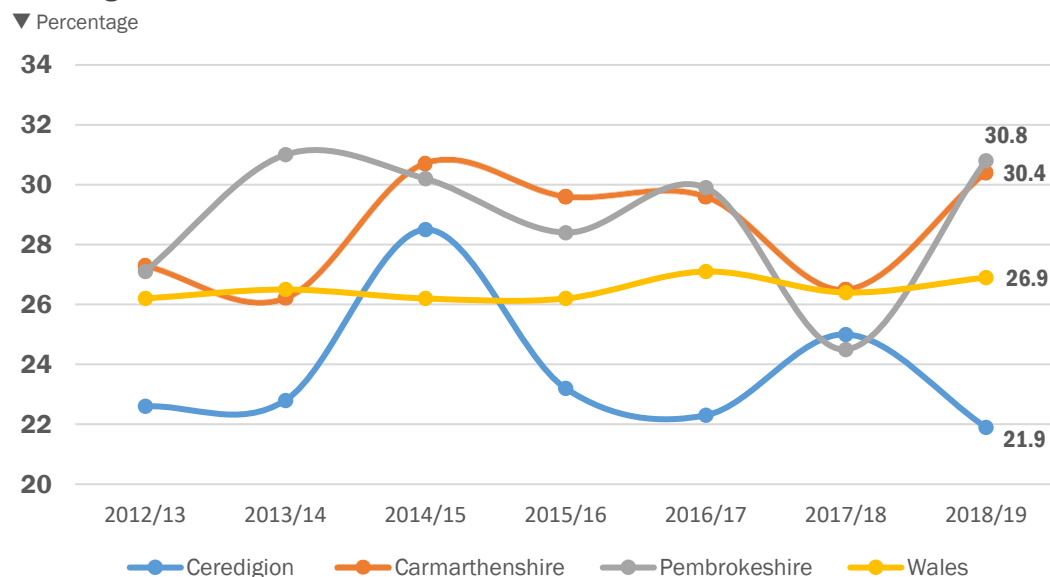
Children's Physical Health

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.⁵³

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%.⁵⁴ 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



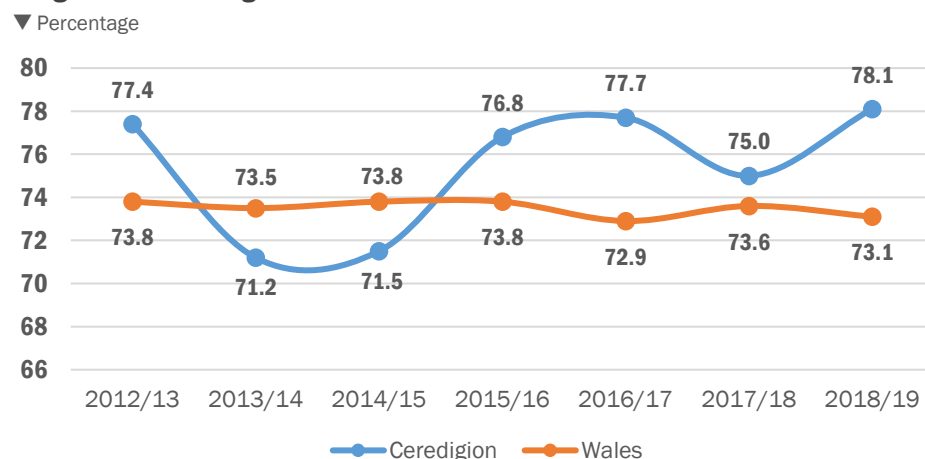
Source: Child Measurement Programme 2018/19

⁵³ Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment.

⁵⁴ 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 5.2.⁵⁵

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.⁵⁶

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%).⁵⁷ 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 per 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.⁵⁸ 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%).⁵⁹ Tooth decay can be a sign of a diet high in sugars and starches or poor oral hygiene.

⁵⁵ 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 Retrieved: 27/09/2021.

⁵⁶ Early Years Resources (2019) The Importance of Physical Activity for Children.

⁵⁷ Sport Wales (2018) School Sport Survey 2018

⁵⁸ Ibid.

⁵⁹ "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.⁶⁰ 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.⁶¹ 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.⁶²

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 2019/20.⁶³ 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.⁶⁴ 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.

⁶⁰ Welsh Government (2018) A Healthier Wales: Our Plan for Health and Social Care

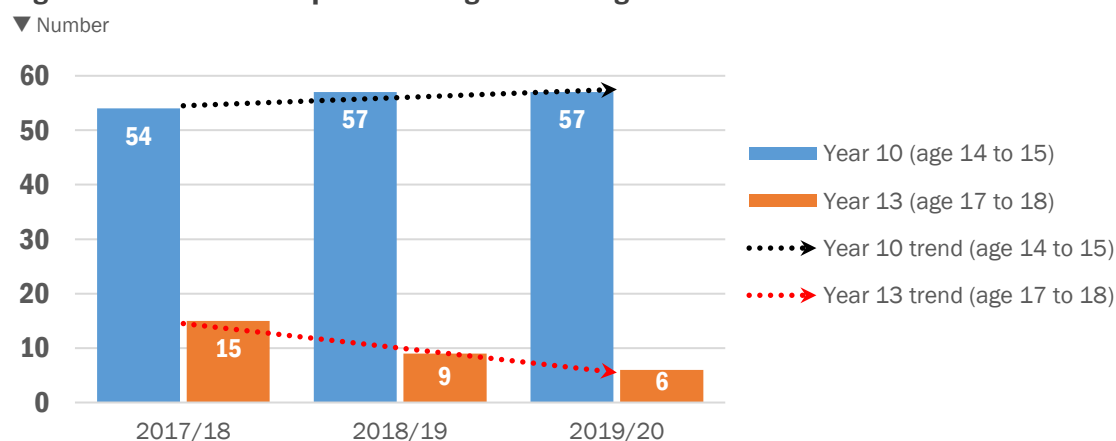
⁶¹ Page N., Hewitt G., Young H., Moore G., Murphy S. (2021) Student Health and Wellbeing in Wales: Report of the 2019/20 School Health Research Network Student Health and Wellbeing Survey. Cardiff University, Cardiff, UK. 11.

⁶² 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.

⁶³ 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

⁶⁴ 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%).⁶⁵

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".⁶⁶ This is an increase of 7% since 2017/18⁶⁷, 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.⁶⁸

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.⁶⁹ 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.

⁶⁵ 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.

⁶⁶ Ibid.

⁶⁷ 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

⁶⁸ Ofcom (2020) Children and parents: Media use and attitudes report 2019

⁶⁹ 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

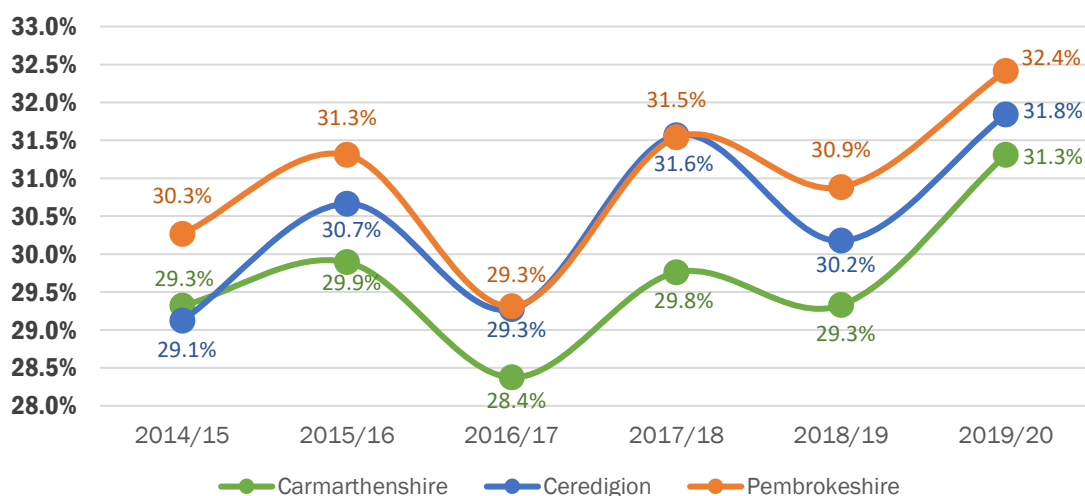
A new online counselling and emotional well-being support service for young people in mid-West Wales has been launched by HDdUHB. The Specialist Child and Adolescent Mental Health Service (S-CAMHS) has commissioned Kooth- an award winning online counselling service and is accredited by The British Association 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 5.4.⁷⁰

Figure 5.4: % of Children Living in Poverty 2014/15 to 2019/20

▼ Percentage



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.⁷¹

⁷⁰ "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.

⁷¹ "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.⁷² 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%).⁷³ 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 5.1.⁷⁴ 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.⁷⁵ These concerns are shared with parents – a Welsh

⁷² "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.

⁷³ "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.

⁷⁴ CACI Paycheck Directory MSOA. 2020.

⁷⁵ "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.

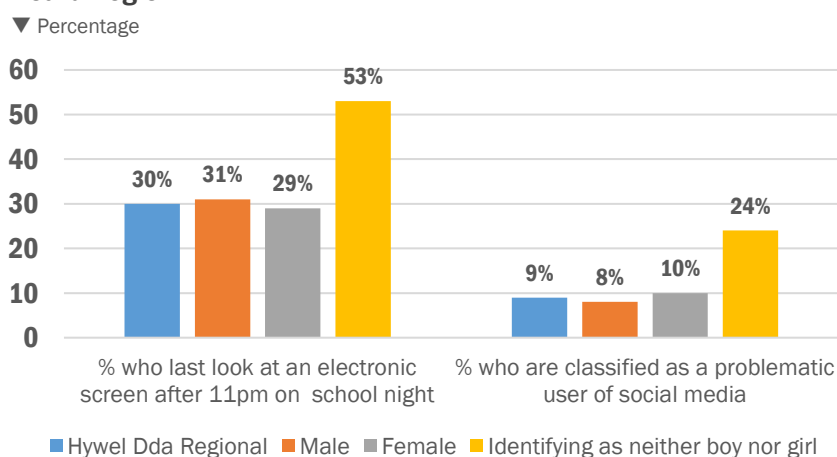
Government survey revealed that parents with young children aged under five were concerned about their child's use of technology.⁷⁶

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.⁷⁷

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.⁷⁸

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%.⁷⁹ Figure 5.5 provides a comparison of these figures across the Hywel Dda University Health Board region.

Figure 5.5: Screen Use in 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.

⁷⁶ "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.

⁷⁷ "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. Retrieved: 06/10/2021. 24

⁷⁸ 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.

⁷⁹ Ibid.

5.2 Strong Foundations

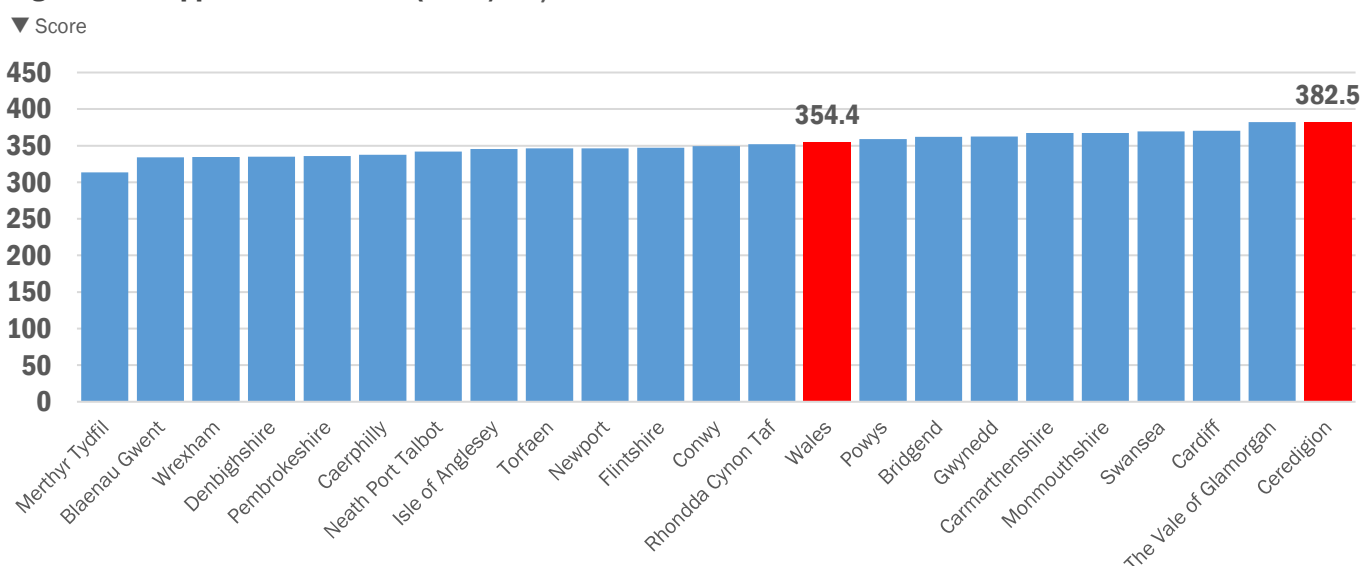
A Rich and Rounded Education

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).⁸⁰

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.⁸¹

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).⁸²

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.⁸³ 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.⁸⁴ 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

⁸⁰ Estyn. Latest Inspection Reports. Online: https://www.estyn.gov.wales/inspection-reports?f%5B0%5D=local_authority_lir%3A56 Retrieved: 05/20/2021.

⁸¹ 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.

⁸² Welsh Government (2020) Examination results in schools in Wales, 2018/19.

⁸³ Arts Council of Wales (2018) Arts Council of Wales Corporate Plan 2018-2023.

⁸⁴ 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 Wales⁸⁵, 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 5.2.⁸⁶ 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.⁸⁷

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.⁸⁸ Around 3,125 or 33.6% pupils in Ceredigion are considered to have special educational needs (SEN).⁸⁹ 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.⁹⁰

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.⁹¹ 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 10-30.⁹²

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.⁹³ 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 5.7.⁹⁴

⁸⁵ 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.

⁸⁶ 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.

⁸⁷ "Well-being of Wales 2021". Welsh Government, 30 September 2021. 5.

⁸⁸ 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.

⁸⁹ 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.

⁹⁰ Ceredigion County Council. Special Educational Need (SEN). Online: <https://www.ceredigion.gov.uk/resident/schools-education/special-educational-needs-sen/> Retrieved: 06/10/2021.

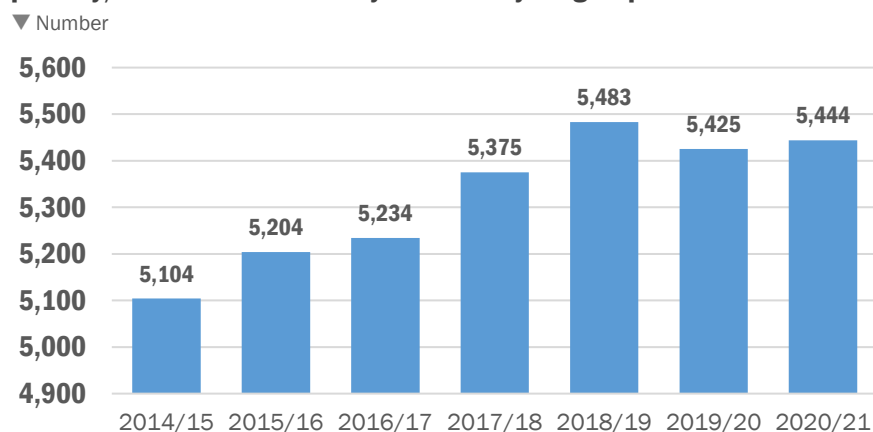
⁹¹ Ceredigion Youth Services. Who are we and what do we offer? Online: <https://www.giceredigionys.co.uk/about/> Retrieved: 06/10/2021.

⁹² Area 43. Online: <https://www.area43.co.uk/> Retrieved: 06/10/2021.

⁹³ 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.

⁹⁴ 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.⁹⁵ 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.⁹⁶

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'.⁹⁷ 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.⁹⁸ Additionally, results from May 2020 showed that 40% of Ceredigion participants (aged 7-11) were sad 'some of the time',⁹⁹ by January 2021, this had also increased to 44%.¹⁰⁰

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

⁹⁵ Mental Health Foundation (2020) Impacts of lockdown on the mental health and wellbeing of children and young people

⁹⁶ Wales Centre for Public Policy (2021) The education response to Coronavirus: Implications for schools in Wales

⁹⁷ Children's Commissioner for Wales' Coronavirus and Me consultation 2020.

⁹⁸ Children's Commissioner for Wales' Coronavirus and Me consultation 2021.

⁹⁹ Children's Commissioner for Wales' Coronavirus and Me consultation 2020.

¹⁰⁰ 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.¹⁰¹

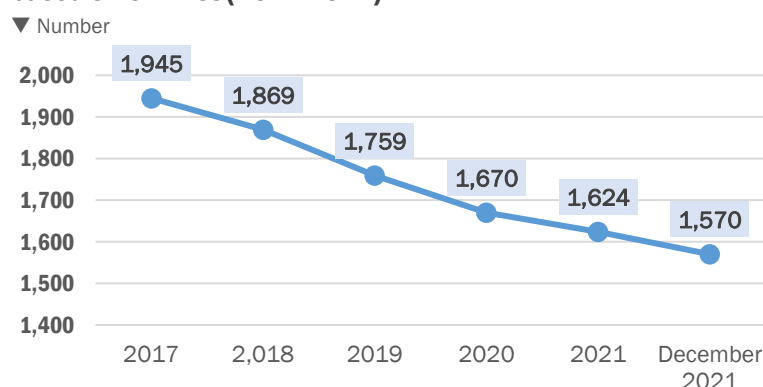
The pandemic has likely led to children losing basic educational and social skills, as well as setting them back because of the time lost. The Education Endowment Foundation has noted that school closures are likely to reverse the previous 9 years of progress made to reduce the learning gap between the most and least deprived.¹⁰²

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.¹⁰³ 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)¹⁰⁴ 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 not 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 places have decreased over time due to reduced demand from parents and

¹⁰¹ Wales Centre for Public Policy (2021) The education response to Coronavirus: Implications for schools in Wales

¹⁰² Education Endowment Foundation (2020), 'Impact of school closures on the attainment gap: rapid evidence assessment'

¹⁰³ 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. Accessed 4 Aug 2020.

¹⁰⁴ 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.¹⁰⁵

¹⁰⁵ 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.¹⁰⁶ 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.¹⁰⁷ 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.¹⁰⁸ In particular, disadvantaged children and children growing up in poverty are more likely to experience multiple ACEs.¹⁰⁹

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%.¹¹⁰ 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%).¹¹¹

¹⁰⁶ Ibid.

¹⁰⁷ Public Health Wales (2016) Adverse Childhood Experiences and their association with chronic disease and health service use in the Welsh adult population.

¹⁰⁸ Hywel Dda University Health Board (2016/2017) Annual Report of the Director of Public Health.

¹⁰⁹ Public Health Wales (2016) Adverse Childhood Experiences and their association with chronic disease and health service use in the Welsh adult population.

¹¹⁰ "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.

¹¹¹ "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.

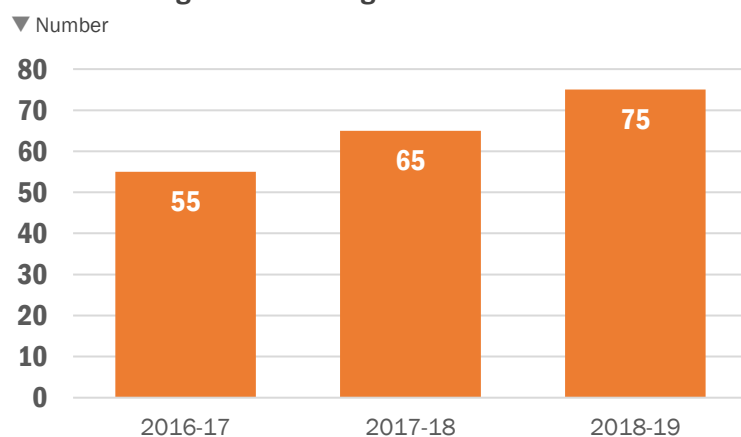
Experiencing an ACE can increase the likelihood of coming into contact with the criminal justice system. The number of offences committed by children in Ceredigion was 54 in 2019/20, the lowest number across Wales¹¹². The most common offence groups noted were drugs (less serious category) where there were 11 offences and violence against the person (less serious category) where there were 12 offences.¹¹³

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.¹¹⁴

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.¹¹⁵ 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).¹¹⁶ 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.¹¹⁷

¹¹² "Proven offences by children" (2019/20) Youth Justice Board.

¹¹³ Ibid.

¹¹⁴ "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.

¹¹⁵ Ibid.

¹¹⁶ "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.

¹¹⁷ "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.¹¹⁸

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.¹¹⁹ 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”¹²⁰

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.¹²¹

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.¹²² 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.¹²³

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.¹²⁴ 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.

¹¹⁸ The Children's Society (2018) Young Carers Well-being

¹¹⁹ West Wales Care Partnership (2017) West Wales Population Assessment.

¹²⁰ Welsh Government (2002) Welsh Assembly Government Play Policy

¹²¹ Play Wales. Play and Deprivation. Online: <https://www.playwales.org.uk/eng/playdeprivation> Accessed: 17/01/2022

¹²² Play Wales. Play and Health. Online: <https://www.playwales.org.uk/eng/playhealth> Accessed: 17/01/2022

¹²³ Ibid.

¹²⁴ “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%).¹²⁵ 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.¹²⁶ 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.¹²⁷

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.¹²⁸

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%).¹²⁹

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

¹²⁵ Children's Commissioner for Wales' Coronavirus and Me Consultation 2020.

¹²⁶ Children's Commissioner for Wales' Coronavirus and Me Consultation 2021.

¹²⁷ Children's Commissioner for Wales' Coronavirus and Me Consultation 2020.

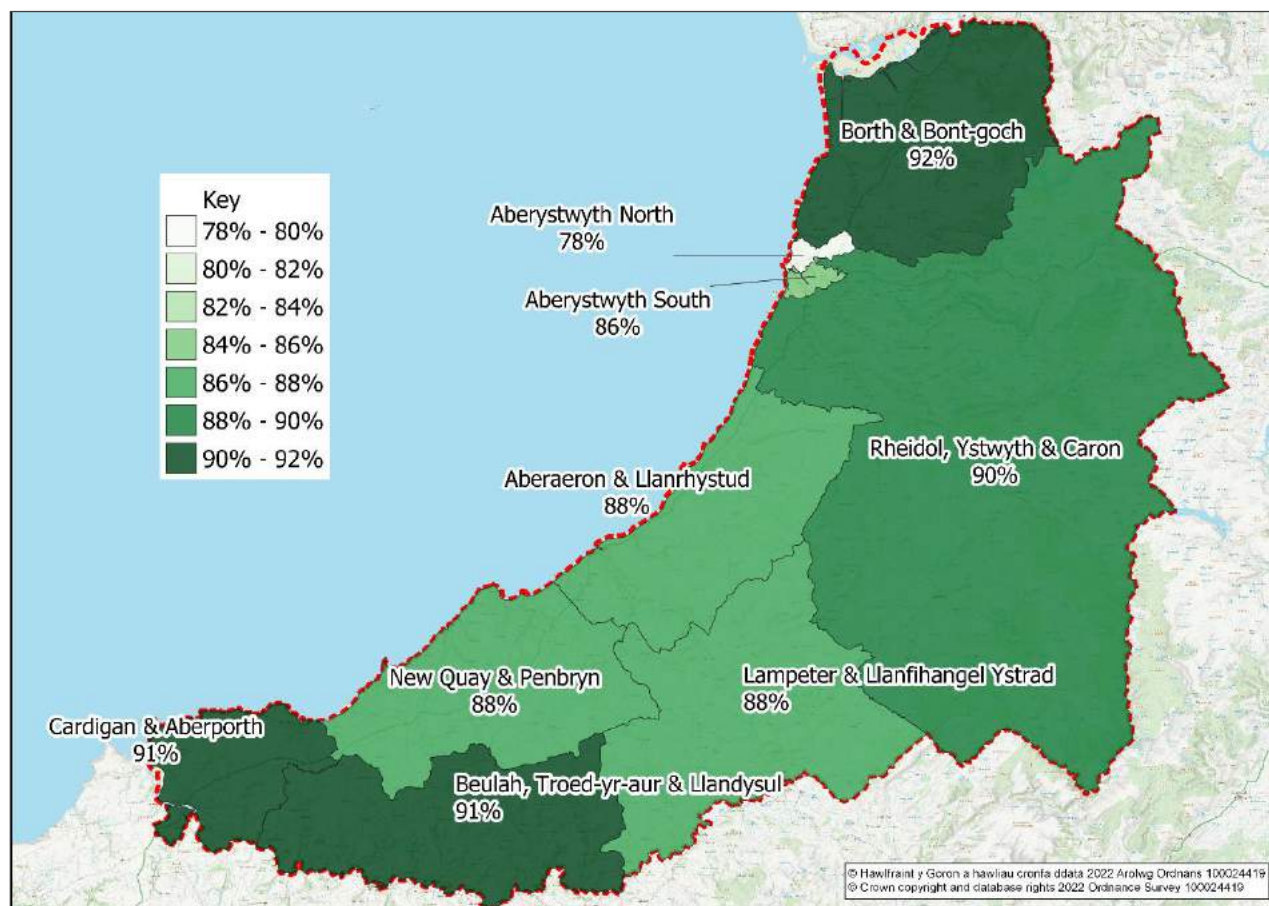
¹²⁸ Children's Commissioner for Wales' Coronavirus and Me Consultation 2021.

¹²⁹ "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.¹³⁰

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.¹³¹ 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

¹³⁰ 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.

¹³¹ 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.¹³² 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.¹³³

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.¹³⁴ 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 2021.¹³⁵ 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.¹³⁶ 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.¹³⁷

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.

¹³² 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/childrensviewsandwhatmakesahappylife/2020). [Online]. Available at: [ons.gov.uk](https://ons.gov.uk/peopleandplaces/populationandmigration/childrenandyoungpeople/articles/childrensviewsandwhatmakesahappylife/2020) (Accessed: 1/09/2021).

¹³³ 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).

¹³⁴ 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/S0926641014000091) (Accessed: 1/09/2021).

¹³⁵ "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/>

¹³⁶ 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/)

¹³⁷ Ibid.

¹³⁸ 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.

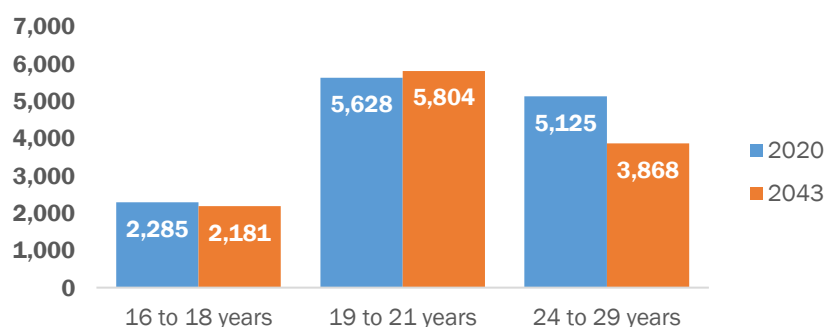
Table 6.1: Population change 2020 to 2043

	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

▼ Percentage



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.¹³⁸

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

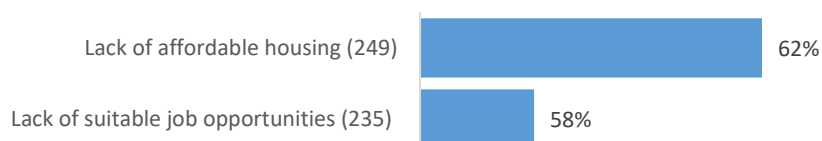
These themes have been high on the agenda for some time, but the COVID-19 pandemic has exacerbated each – digital connectivity in particular has become essential over the last twelve months where online access has largely been the only way to keep in touch, the impact on the economy has heightened concerns 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)



¹³⁸ 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.

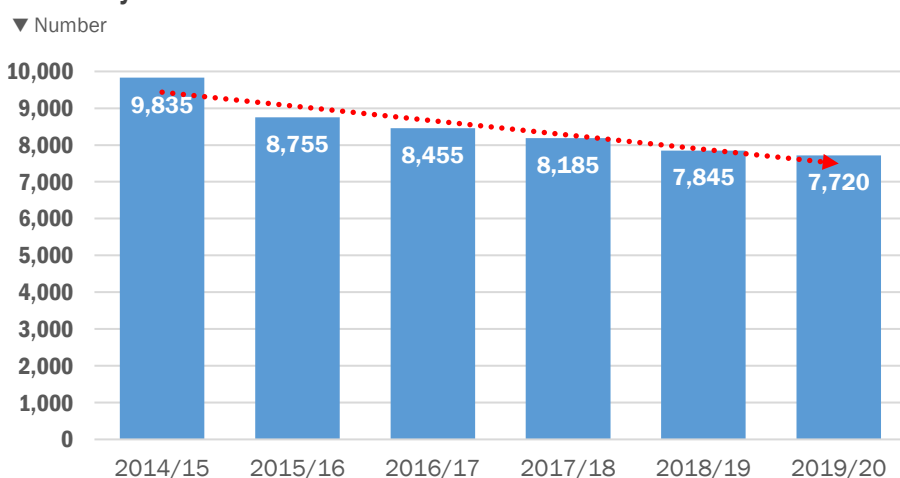
But there is also a fundamental link to culture and language, for retaining younger people is essential to continuing the long-held traditions of the county as one of the bastions of Welsh language and culture. Young people leaving the County will most likely lead to a loss of Welsh speakers and the 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).¹³⁹ This comes despite the University continually being ranked the highest in Wales for student satisfaction over the last six years.¹⁴⁰

Figure 6.4: Number of HE student enrolments at Aberystwyth University



Source: Higher Education Statics Agency

¹³⁹ 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.

¹⁴⁰ 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 £87,000.¹⁴¹ It is thought that Ceredigion's economy has benefited from almost £80 million because of the impact new international students also.¹⁴² 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 data¹⁴³, 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.¹⁴⁴

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 months¹⁴⁵, and the Public Health Wales' ongoing "How are we doing in Wales?" survey recorded a 22% increase in alcohol consumption as at February 2021.¹⁴⁶

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.

¹⁴¹ "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.

¹⁴² London Economics (2021). The costs and benefits of international higher education students to the UK economy – September 2021.

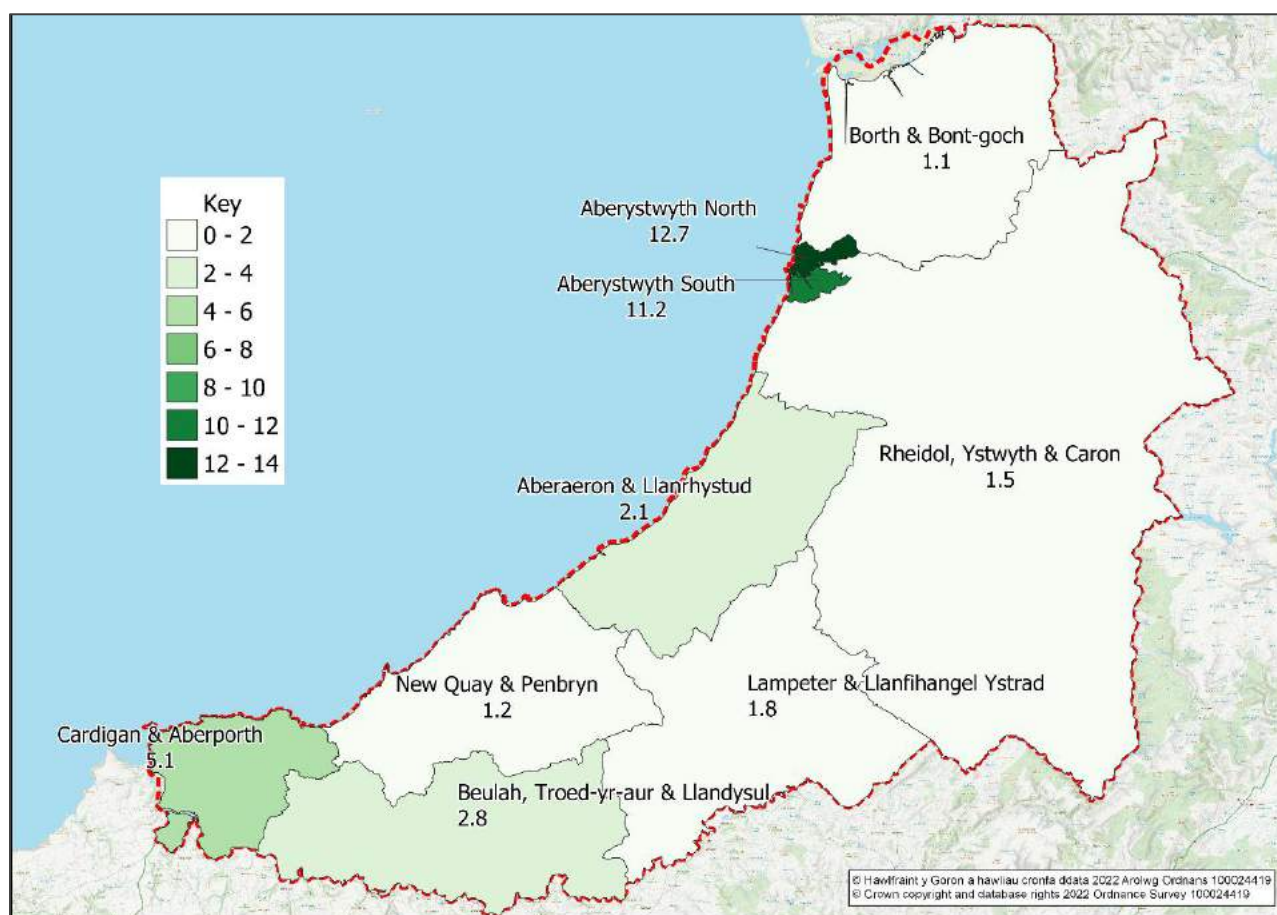
¹⁴³ Public Health Wales (2019) Percentage of adults who reported heavy and very heavy drinking, by Local Authority, Wales, 2016/17-2017/18.

¹⁴⁴ National Union of Students (2018) Students and Alcohol National Survey.

¹⁴⁵ British Liver Trust (2020)

¹⁴⁶ "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.¹⁴⁷

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.¹⁴⁸ 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

¹⁴⁷ DataCymru Core Data Set

¹⁴⁸ 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.¹⁴⁹ The most commonly reported conditions were anxiety and depression.¹⁵⁰

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.¹⁵¹

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.

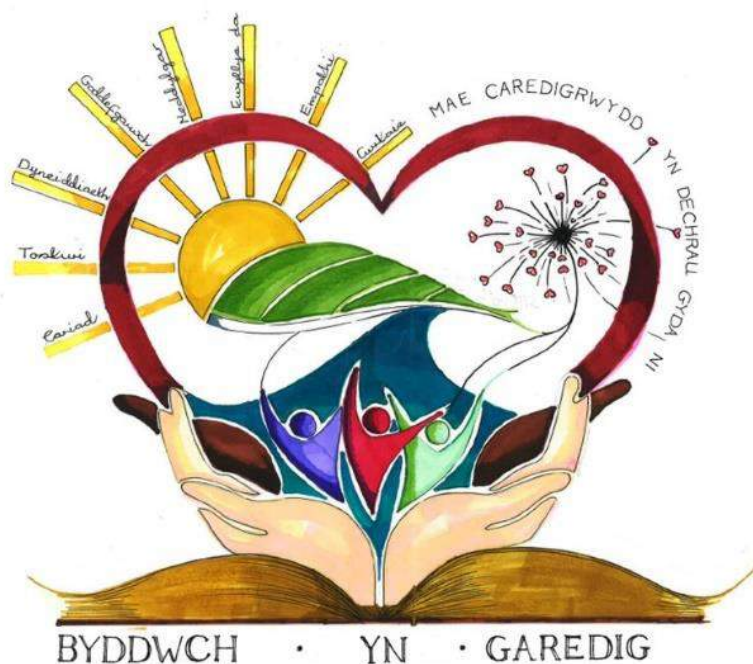
The winning design was created by a group of pupils at Ysgol Bro Teifi. As a prize for winning the mural design competition, 'Marvellous Murals' will bring their plans to life on the school site. This will enable the children and young people to be reminded of the important message of being kind to themselves 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.

¹⁴⁹ Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment

¹⁵⁰ Unite Students Insight Report (2019)

¹⁵¹ Young Minds (2021) Coronavirus Impact on young people with mental health needs.

Figure 6.6: Winning Kindness Mural designed by Ysgol Bro Teifi



Staying Connected

Many young people struggle with loneliness. The Loneliness Experiment (2019) revealed that 40% of 16-24 year olds said they “often” or “very often” felt lonely compared to just 17% of over 75’s.¹⁵² Additionally, a study by ONS revealed that almost 10% of 16-24 year olds felt lonely “always or often”.¹⁵³

Connectivity is fundamental to the well-being of young people, and is also a fundamental part of both a young person’s leisure time and culture. The ability to stay connected is simply considered essential in today’s world.

In Wales, 99% of 16-24 year olds said they used the internet ‘several times a day’ according to the National Survey for Wales (2020/21). The majority of young people use the internet to stay connected with friends and family, including through the use of social media. Mobile phones, tablets, computers and laptops are the most common devices used to access the internet, with the majority of young people owning at least one of these.

However, Ceredigion has one of the lowest levels of 4g coverage in Wales (53%), according to OfCom, the communications regulator, compared to an average of 60% across Wales. Additionally, just under 20% are estimated to be unable to receive standard broadband speeds of 30Mbit/s, despite having one of the highest proportions able to receive full fibre services.¹⁵⁴

The need to improve coverage across Ceredigion and other parts of rural Wales is widely recognised and there are a variety of schemes and funds available to improve this. Locally, a Digital Development Officer employed by the Local Authority is working with individuals, communities and businesses across Ceredigion who have limited or no access. For example, Ceredigion has been chosen for a fibre broadband pilot scheme called the “Broadband Upgrade Fund” which aims to support businesses, employees and rural communities to benefit from faster and more reliable internet.

Our engagement with younger people highlighted variations in the level of concern about the future of digital infrastructure in Ceredigion. In our Well-being Survey, just over a fifth (21.4%) of the 17-24 respondents identified ‘Poor digital infrastructure’ as something that concerned them the most about the prosperity in Ceredigion, compared to 41% amongst all respondents. Whilst, during a stakeholder event with the Youth Council, members said

¹⁵² The Loneliness Experiment (2019)

¹⁵³ ONS (2018) Community Life Survey.

¹⁵⁴ Ofcom (2020) Connected Nations Wales Report

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

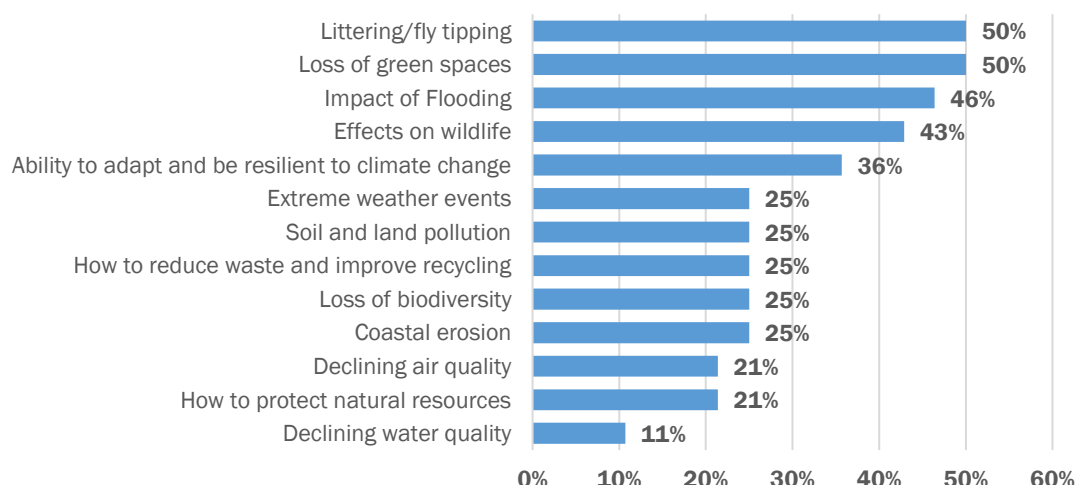
Environmental Awareness

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.¹⁵⁵ 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.¹⁵⁶

Feeling Safe

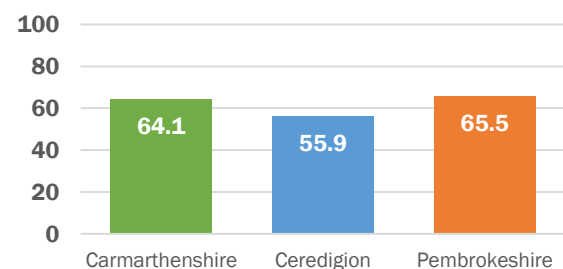
Feeling safe is a topical and perhaps surprising issue of late in Ceredigion. Overall, the crime rate in Ceredigion continues to be low and the county continues to be one of the safest places to live in Wales and across the United Kingdom. The overall number of offences committed in the county in 2020/21 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)

¹⁵⁵ Caru Ceredigion. Online: <https://www.ceredigion.gov.uk/resident/caru-eredigion/> Retrieved: 21/10/2021.

¹⁵⁶ 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

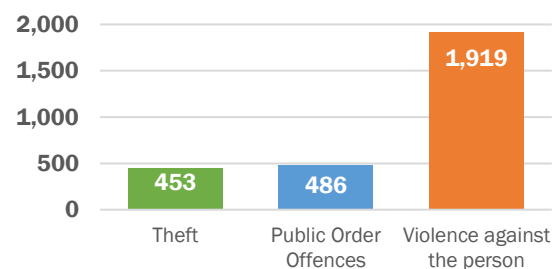
▼ Number per 1,000 population



Source: Adapted from Dyfed Powys Police, 2020/21

Figure 6.9: Most prevalent types of crime in Ceredigion 2020/21

▼ Number of incidents

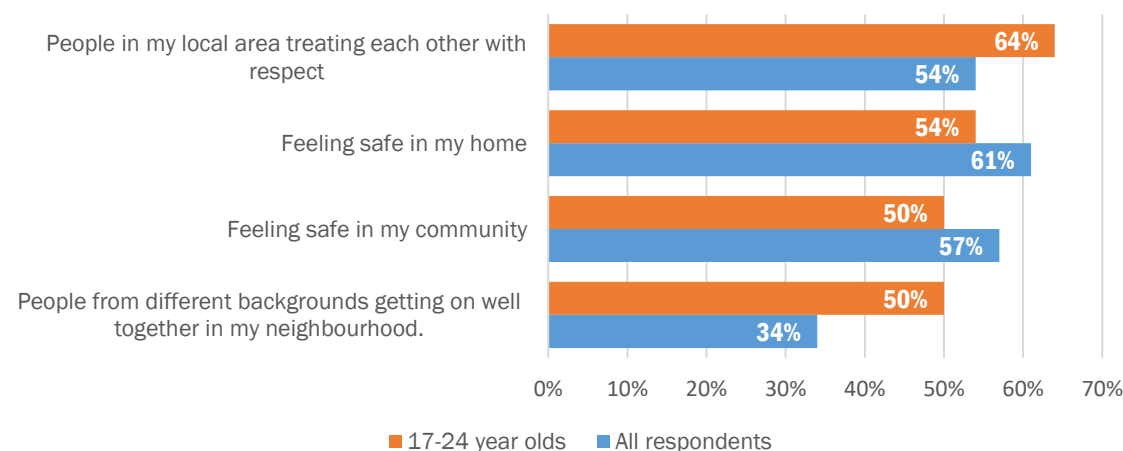


Source: Dyfed Powys Police (2021)

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 safe, green spaces 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 safe cycle paths are in place, I would not feel safe on cycling to work".
"A safe and caring community as we now have will help to achieve my aims."	" Safe environment , 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 safe and nice places to be. "	"I find it frustrating that I can't use Welsh in my community and that it's difficult to walk to other communities safely. "

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

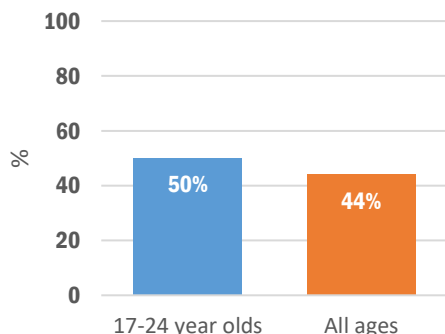
Of the responses to our Well-being Survey from 17-24 year olds, 46% said they could speak Welsh and 32% noted that Welsh was their main language. While there have been concerns that the Welsh language is being spoken less outside of educational settings in general daily life, the results indicate a strong 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

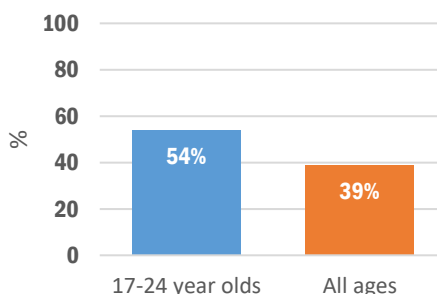
being able to use the language of their choice". In all questions relating to language and culture, options relating to Welsh language scored higher within the 17-24 respondents than across the survey results as a whole (Figure 6.11).

Figure 6.11: Well-being Survey Results 17-24 year olds

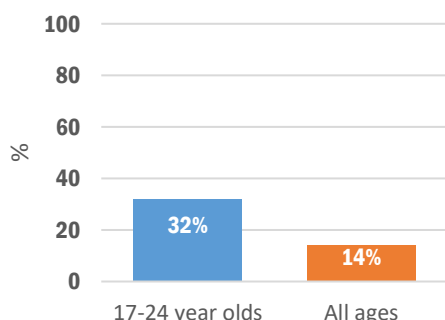
What three things do you value the most? Being able to use the Welsh language



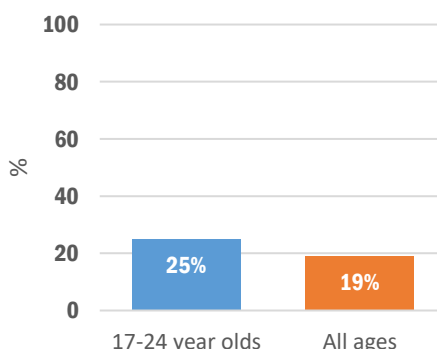
What concerns you the most about your County's vibrant community and thriving Welsh language? Traditions being lost



What concerns you the most about your County's vibrant community and thriving Welsh language? Lack of Welsh education in schools and colleges



What concerns you the most about your County's vibrant community and thriving Welsh language? Not being able to use the language of my choice



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.¹⁵⁷ 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.

¹⁵⁷ "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. 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.¹⁵⁸

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.¹⁵⁹

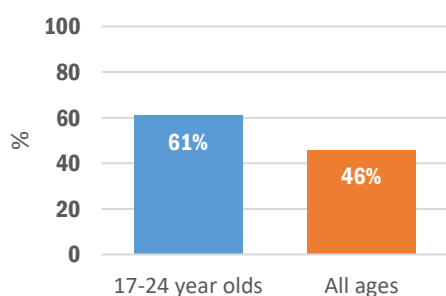
The 2022-32 Welsh in Education Strategic Plan has committed to collaborate with Welsh medium providers to expand the provision that enables children to gain access to Welsh medium extracurricular activities and develop opportunities to use their Welsh language skills (e.g. Urdd Gobaith Cymru, Ceredigion 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.

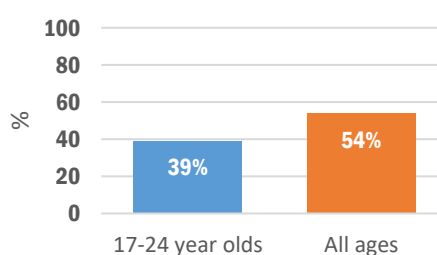
However, from our Well-being Survey, we do know that younger people not only have a connection with language and culture, but also have a desire to maintain it for future generations and support the vibrant culture and thriving Welsh language well-being goal, as demonstrated in Figure 6.12. For example, 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

What would you consider doing to help achieve a vibrant community with a thriving Welsh language? Learning or improving your Welsh



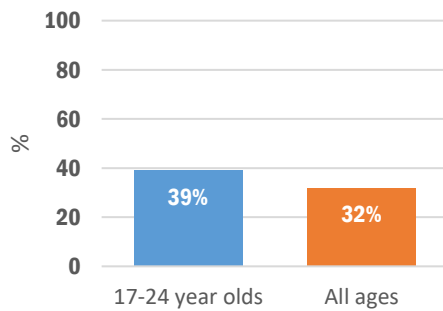
What would you consider doing to help achieve a vibrant community with a thriving Welsh language? Visit your local museum or other heritage establishments



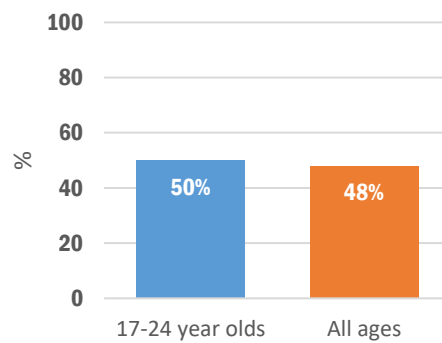
¹⁵⁸ Ceredigion Y.F.C. Online: <https://yfc-eredigion.org.uk/en/home/> Retrieved: 05/10/2021.

¹⁵⁹ 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

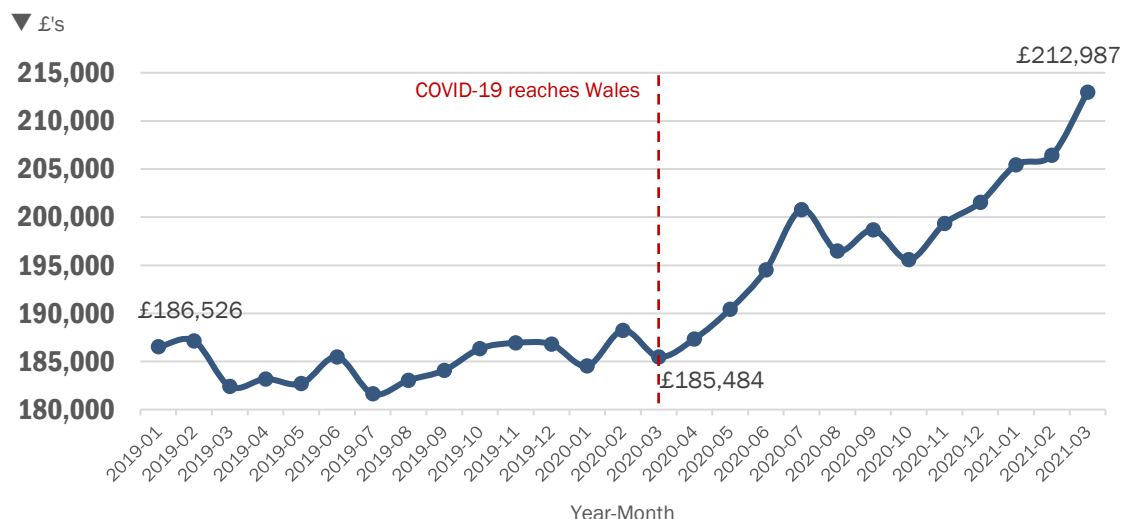
Finding a home of one's own is a defining step for many young people, but finding suitable and affordable accommodation in Ceredigion can be difficult. The growth in demand and limited stock has kept house and rental prices high in the county, and housing affordability has been a concern for many years, 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 6.13.¹⁶⁰

¹⁶⁰ 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.¹⁶¹

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 6.14.¹⁶²

¹⁶¹ 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

¹⁶² "Consultation on Developing a New Ceredigion Economic Strategy 2020-2035: Feedback Report". Ceredigion County Council, 18th 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 2020.¹⁶³

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.¹⁶⁴ 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).

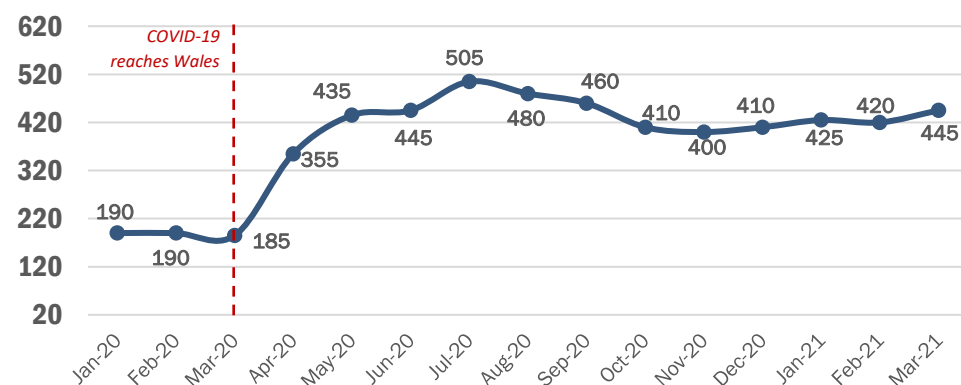
¹⁶³ Halifax, 12 months to December 2020, UK Finance. Online: <https://www.lloydsbankinggroup.com/media/press-releases/2021/halifax/soaring-house-prices-failed-to-deter-first-time-buyers-2020.html>. Retrieved: 22/06/2021.

¹⁶⁴ 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

▼ Number



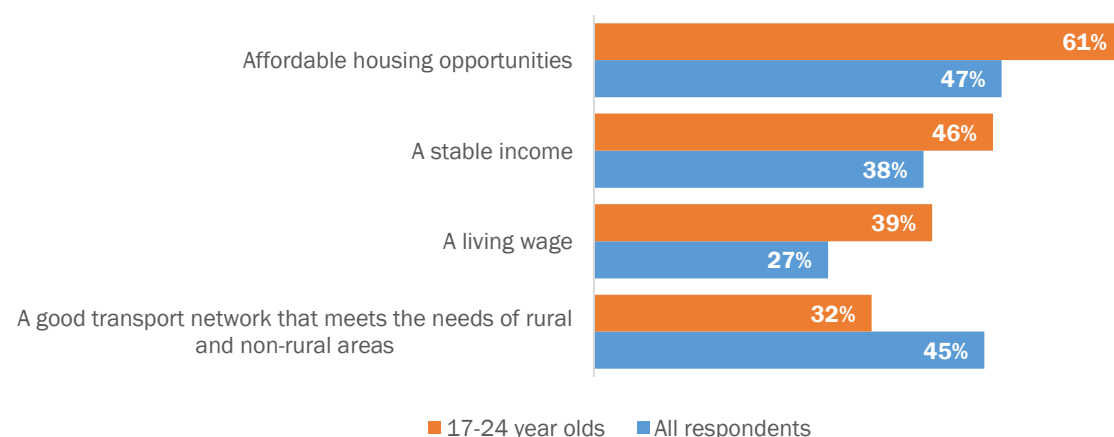
Source: ONS, Claimant count by sex and age

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.¹⁶⁵ 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?

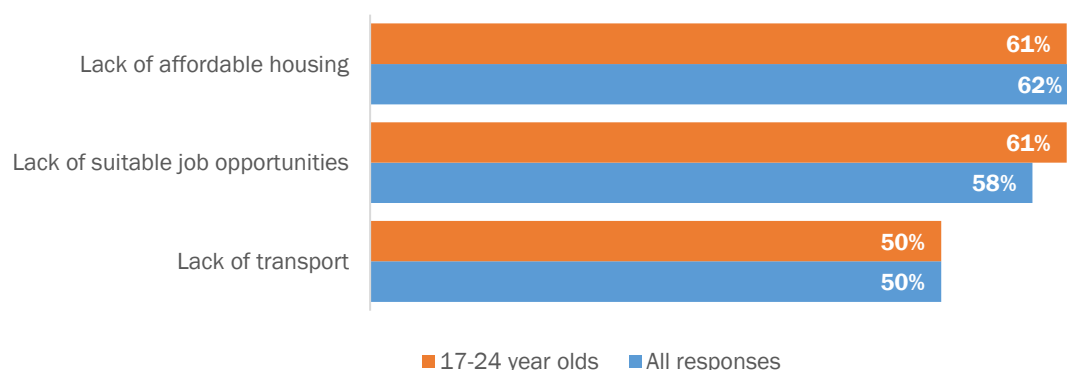


Source: Ceredigion PSB Well-being Survey

¹⁶⁵ "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).

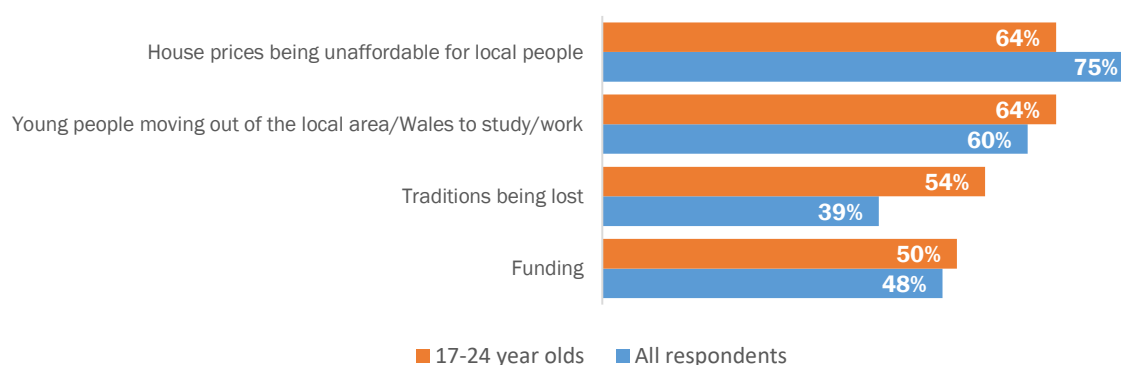
Figure 6.17: Q19 Looking ahead, what concerns you the most about prosperity in the county?



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



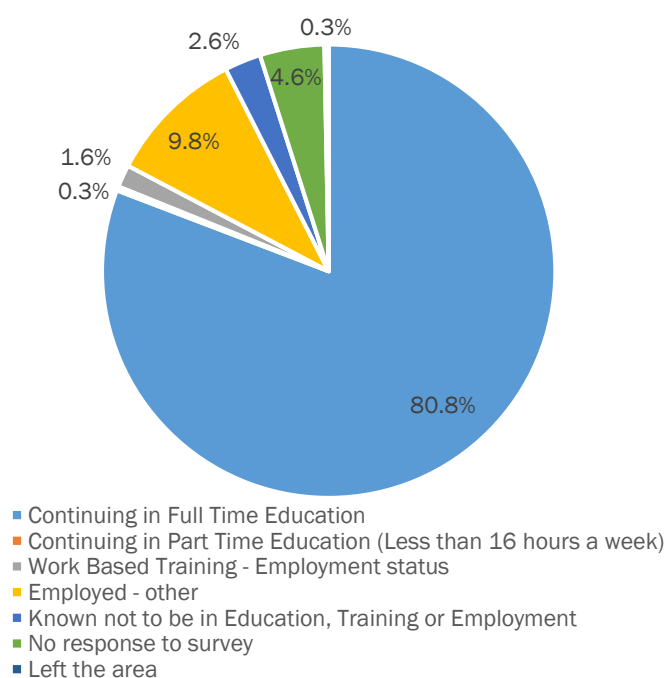
Source: Ceredigion Public Services Board

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

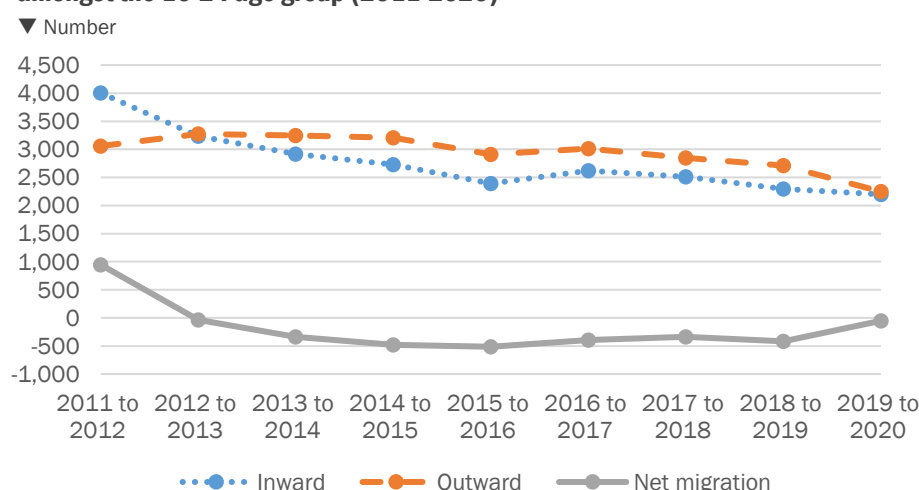


Source: Careers Wales (2021)¹⁶⁶

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)¹⁶⁷

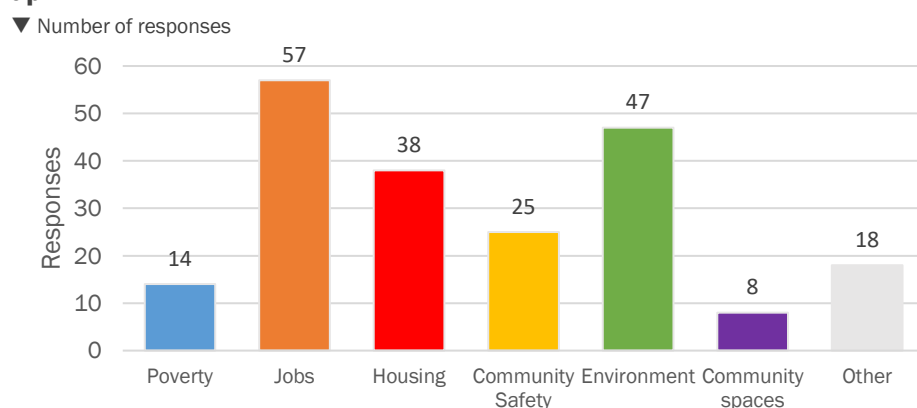
¹⁶⁶ Careers Wales (2021). 'Recent destinations by year, school cohort and local education authority from schools in Wales'. [Online]. Available at: <https://careerswales.gov.wales/careers-professionals/pupil-destinations> (Accessed: 22.10.21)

¹⁶⁷ 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?'



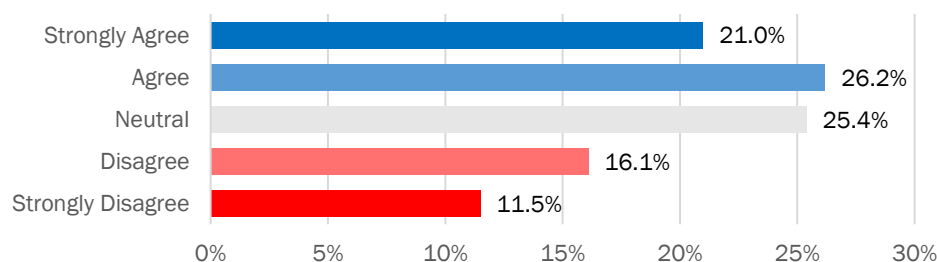
Source: School Survey 2021

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.¹⁶⁸ 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.

¹⁶⁸ 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)¹⁶⁹. 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.¹⁷⁰ 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)¹⁷¹ 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)¹⁷², 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.

¹⁶⁹ HESA (2021). ‘Graduate Salaries’. [Online]. Available at: [Graduates' salaries | HESA](#) (Accessed: 21.10.21).

¹⁷⁰ Ibid.

¹⁷¹ NOMIS (2021). ‘Labour Market Profile- Ceredigion’. [Online]. Available at: [Labour Market Profile - Nomis - Official Labour Market Statistics \(nomisweb.co.uk\)](#) (Accessed: 21.10.21).

¹⁷² 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.¹⁷³ 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, 19th 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.

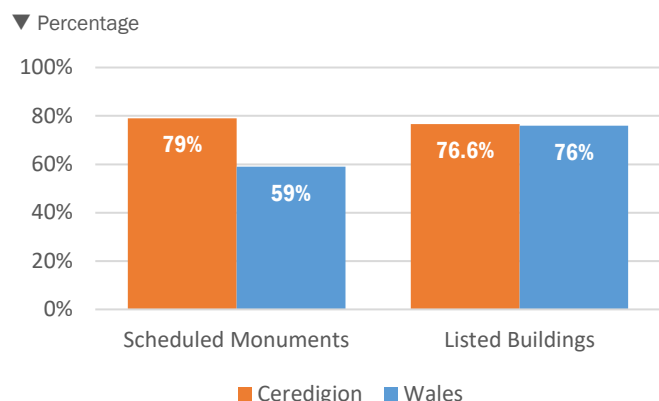
The library plays a central role in ensuring culture and heritage is accessible to all and enable people locally and across Wales to learn, research and enjoy. There are a number of services offered within the library which include reading rooms, exhibitions and events. The National Library is of great 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).¹⁷⁴

¹⁷³ 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

¹⁷⁴ 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 industries¹⁷⁵ 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.

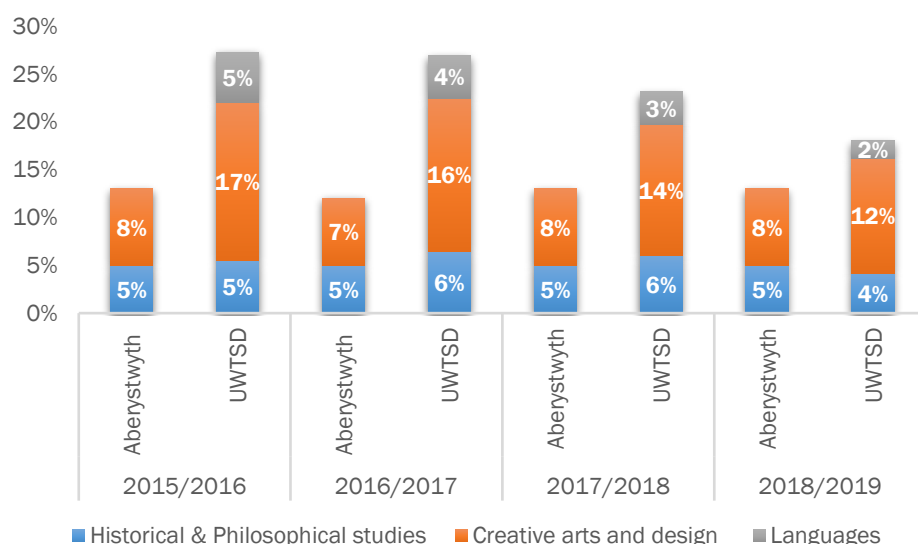
Although, the exact number of employees within the creative industry in Ceredigion is unknown, we do know that the County has a wide-range of organisations that cater to the industry. For example, Coleg Ceredigion, Aberystwyth Art's Centre, The National Library of Wales, Aberystwyth University and University 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)

¹⁷⁵ 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



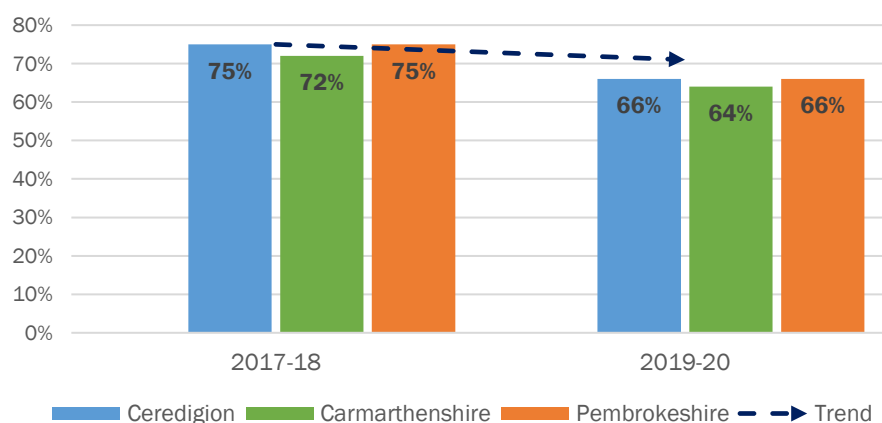
Source: Higher Education Statistics Agency (HESA)

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 2018/19.¹⁷⁶ 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

▼ Percentage

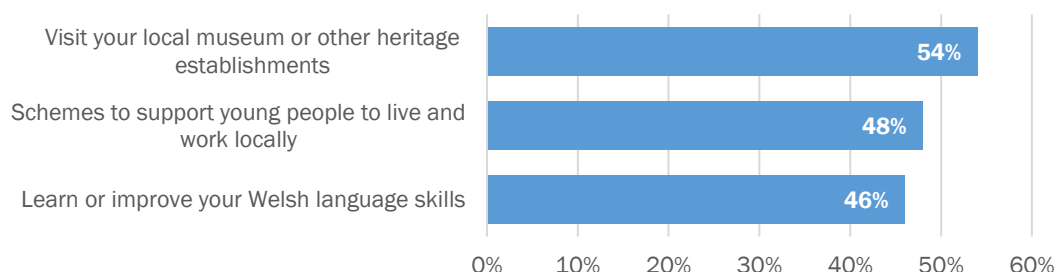


Source: Stats Wales, National Survey for Wales (2021)

¹⁷⁶ 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).

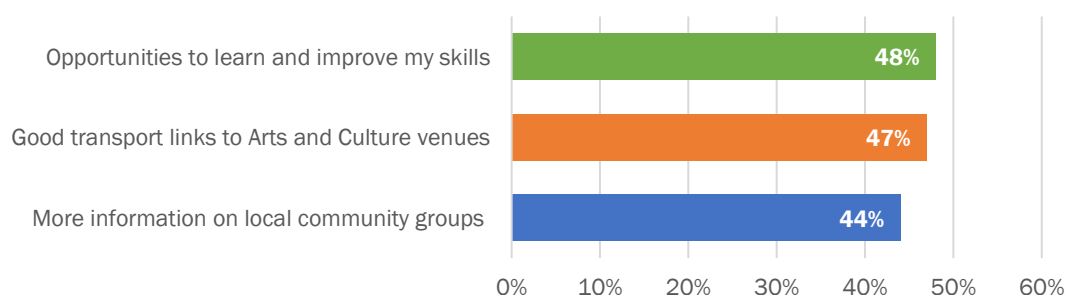
Figure 7.4: Top 3 actions respondents would take to achieve a vibrant community with a thriving Welsh language



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).

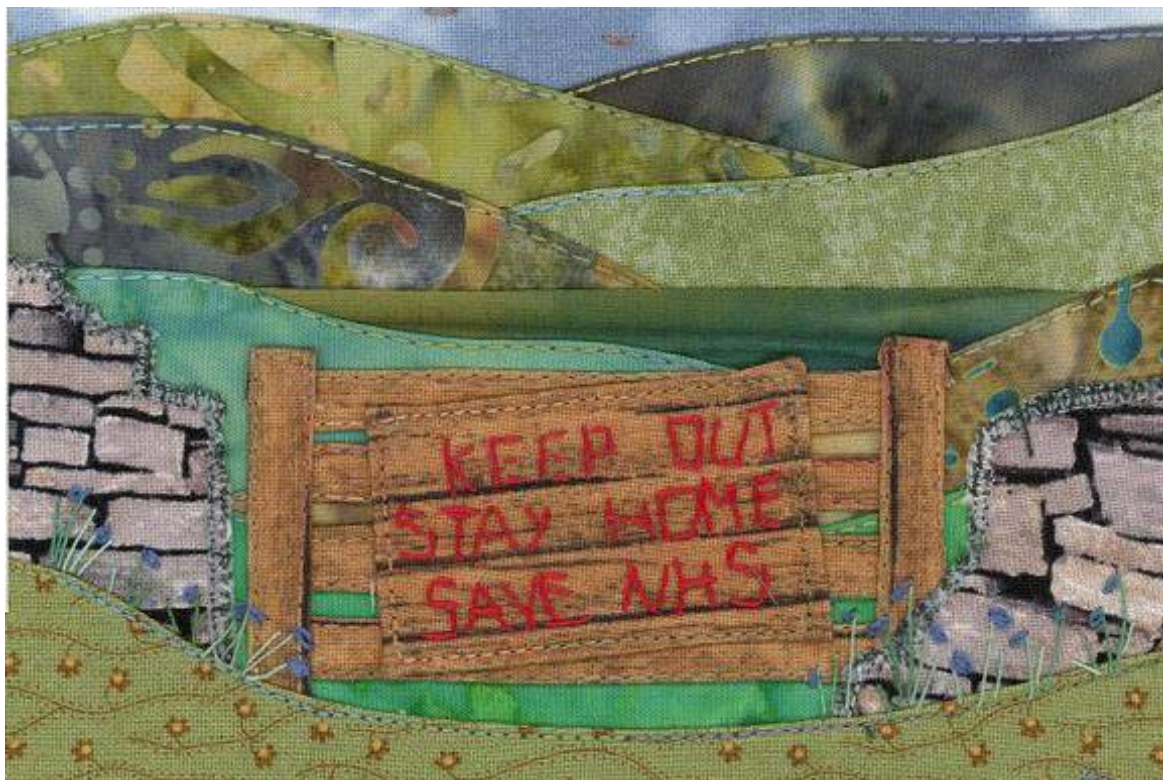
Local arts and cultural organisations and facilities in Ceredigion have used alternative and innovative methods to continue their service and provide support through the COVID-19 pandemic in a creative manner. The Libraries across Ceredigion offered a click and collect service and have recently opened 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.¹⁷⁷

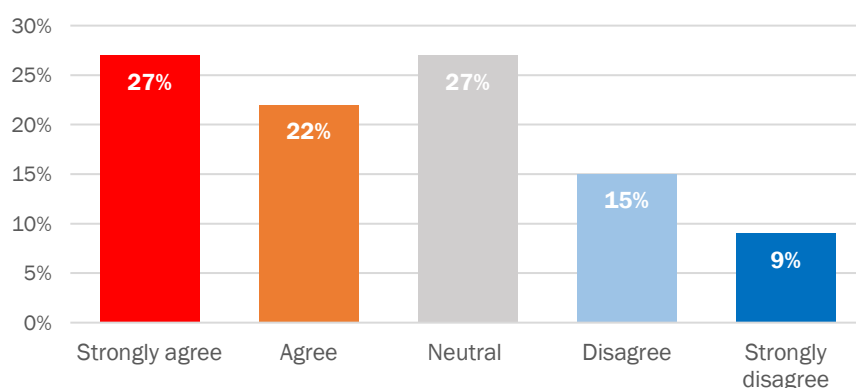
The National Survey of Wales includes three national indicators that relate to community cohesion. According to these indicators, community cohesion in Ceredigion has improved in some areas since 2016-17, (such as, feelings of belonging to the local area; people getting on well from different backgrounds; 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'

▼ Percentage



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 is 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

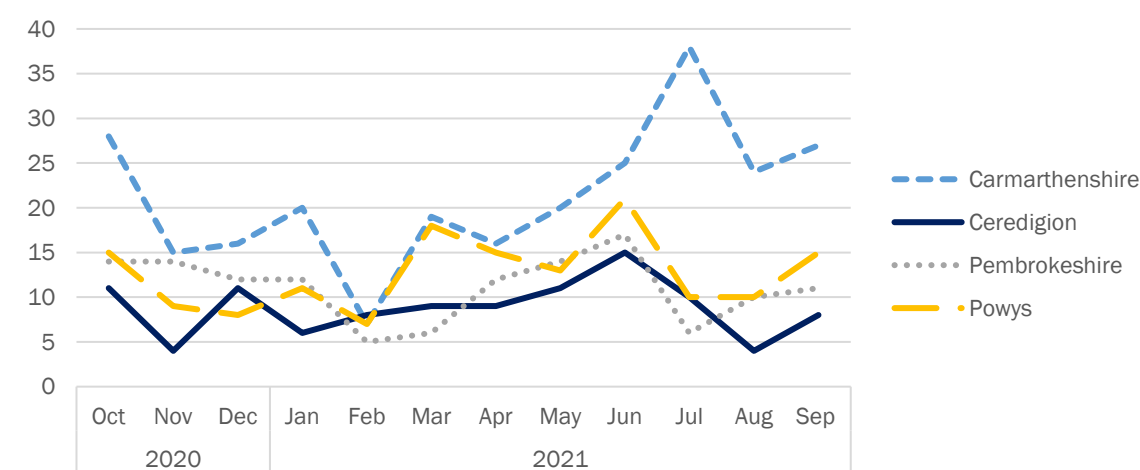
¹⁷⁷ Welsh Government (2020). 'The Future Generations Report 2020: Chapter 3: A Wales of Cohesive Communities'. [Online]. Available at: <https://www.futuregenerations.wales/wp-content/uploads/2020/07/Chapter-3-A-Wales-of-Cohesive-Communities.pdf> (Accessed: 13.10.21).

(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.¹⁷⁸

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.

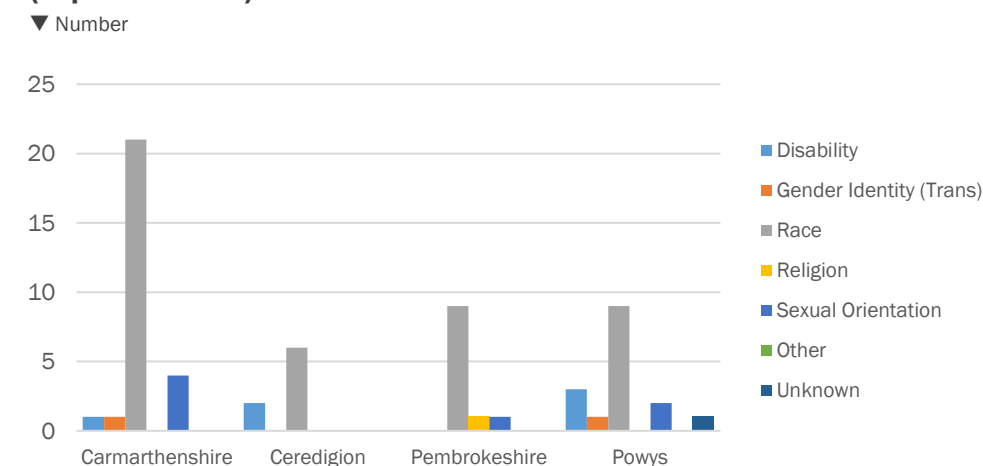
Figure 7.8: Hate crime incidents across the Dyfed-Powys region (2020-21)



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)

¹⁷⁸ 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.¹⁷⁹ 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.¹⁸⁰ Hope not Hate have found that the economic challenges and deepening inequality exacerbated by the pandemic, is feeding frustrations and resentments in Wales¹⁸¹.

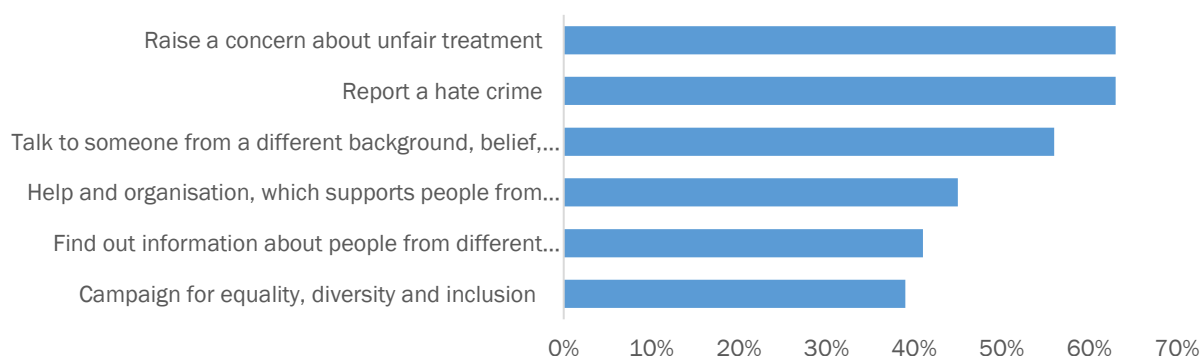
The following lived experience provides an insight into the day-to-day hardships faced by a disabled person living in Ceredigion. The individual highlights that they have been victimised and bullied throughout their life, and this has not changed since moving to Ceredigion. The individual provides examples 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)

¹⁷⁹ 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).

¹⁸⁰ Hate Hope Charitable Trust (2021). 'Fear and Hope: Wales. Identity, politics and belonging in today's Wales'.

¹⁸¹ Ibid.

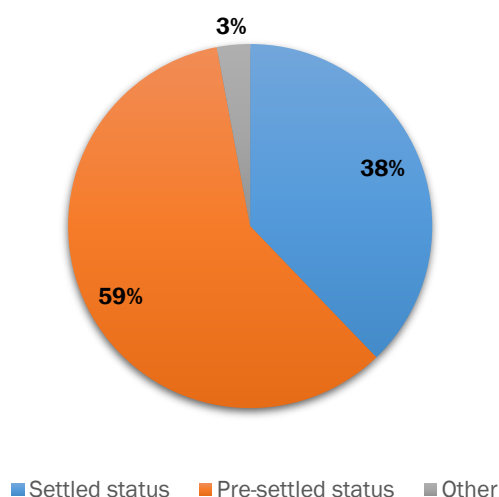
To support residents in doing so, 56% (or 206 respondents) said that they needed support in *‘being confident that raising concerns of unfair treatment/ reporting a hate crime would not have negative consequences for me or my family’*, 55% (or 200 respondents) required the *‘availability of accurate 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 7.11.¹⁸²

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)

¹⁸² 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 2021.¹⁸³ 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.

¹⁸³ "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.¹⁸⁴ 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 2021.¹⁸⁵ 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 2016¹⁸⁶, 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.¹⁸⁷ This investment is crucial for the long-term

¹⁸⁴ 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).

¹⁸⁵ Llwybr Newydd The Wales Transport Strategy 2021. Welsh Government. Cardiff, 2021.

¹⁸⁶ Sustrans Cymru (2016) [Online]. Available at: [Microsoft Word - FINAL WelTAG Stage One Aberystwyth to Carmarthen Improving Strategic Transport \(gov.wales\)](#)

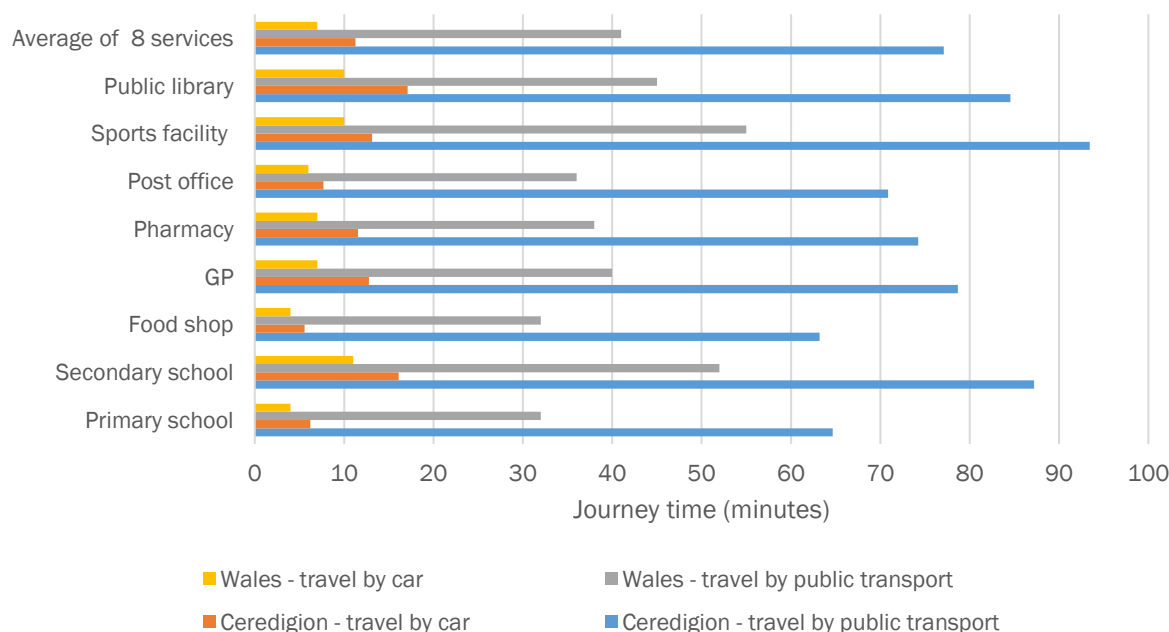
¹⁸⁷ UK Government (2021). 'Levelling Up Fund: Prospectus'. [Online]. Available at: [Levelling Up prospectus.pdf \(publishing.service.gov.uk\)](#) (Accessed: 14.09.21).

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

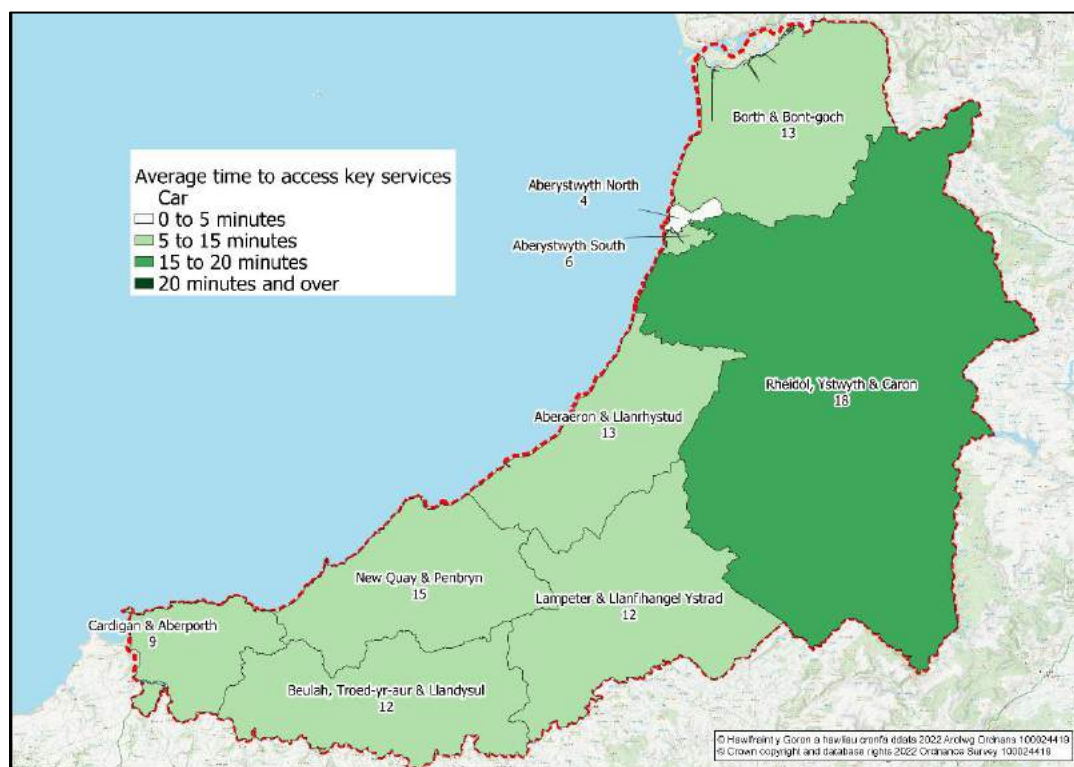


Source: Welsh Government (2019), WIMD

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.

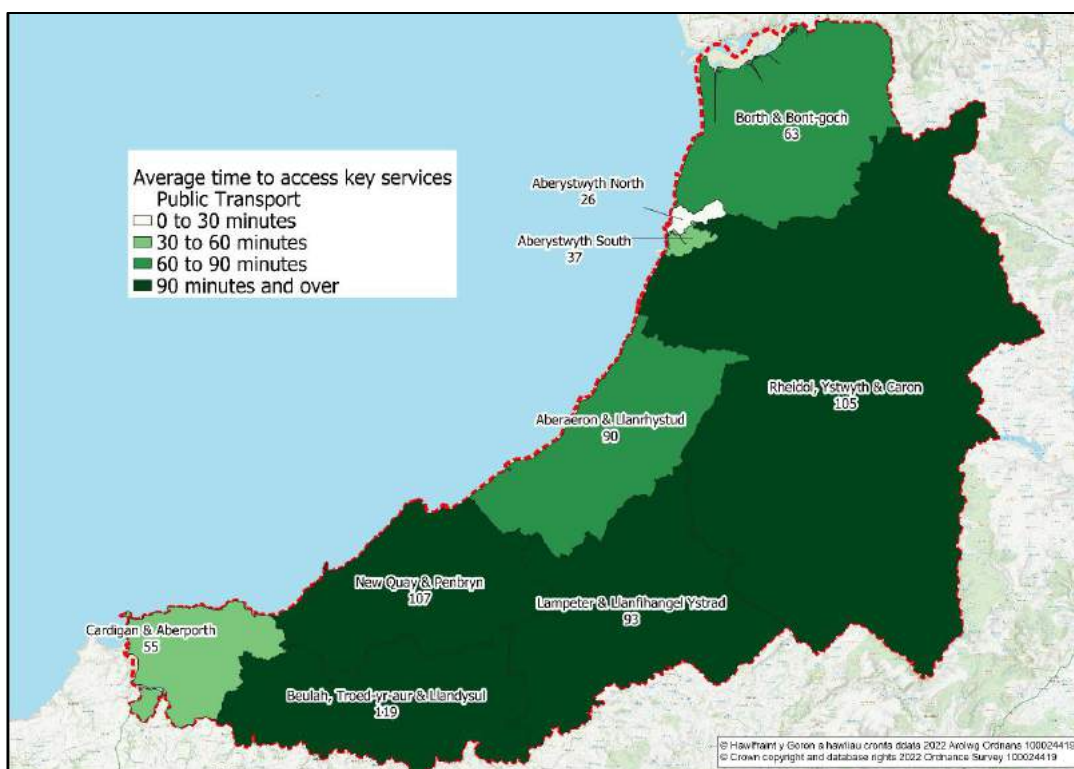
The maps in Figures 7.13 and 7.14 provide a breakdown of the average return time to access eight key services (public library, sports facility, post office, pharmacy, GP, food shop, secondary School and Primary school) by mode of travel for each community area in Ceredigion. Aberystwyth South and Aberystwyth 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

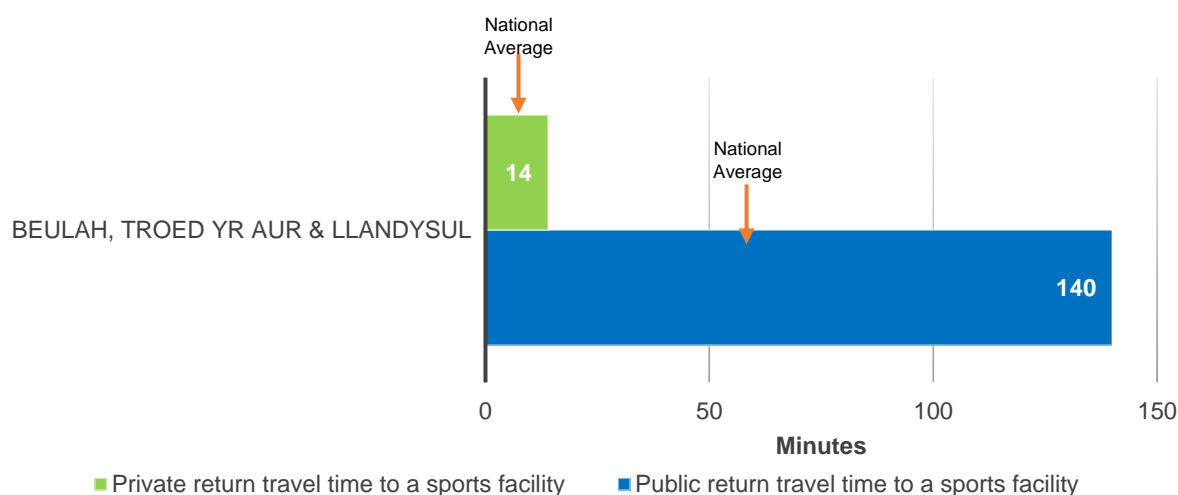
7.14: Average public transport return time to access key services by Community Area – 2019



Source: Welsh Government (2019), WIMD

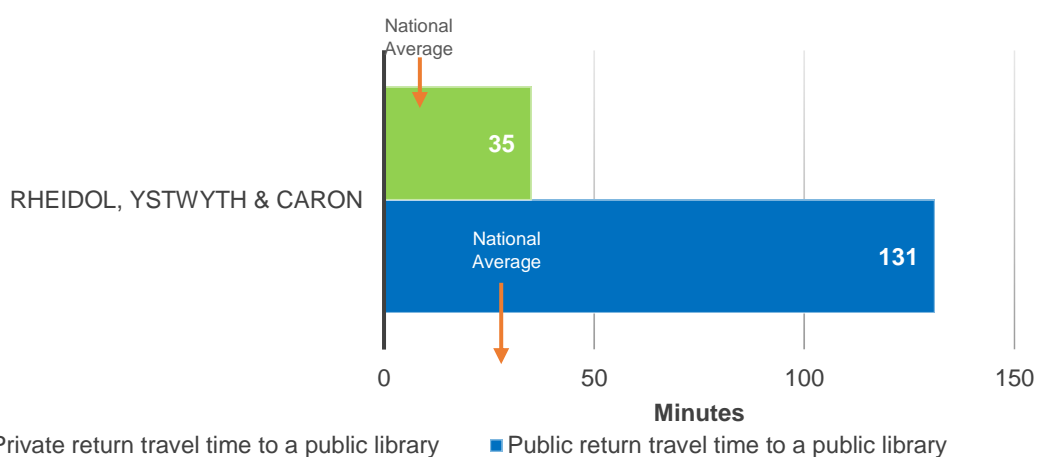
The journey times are significantly longer for those residing in the more rural settlements, such as, Beulah, Troed-Yr-Aur & Llandysul with an average return time of just under 2.5 hours to a sports centre and Rheidol, Ystwyth & Caron with an average return time of over 2 hours to a public library¹⁸⁸ (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

¹⁸⁸ 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.¹⁸⁹ 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 sets 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.

¹⁸⁹ 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%). ¹⁹⁰ 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. ¹⁹¹
	<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,

¹⁹⁰ 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).

¹⁹¹ 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.¹⁹² 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).¹⁹³</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 Wales¹⁹⁴ 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>

¹⁹² 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)

¹⁹³ Ceredigion County Council (2020). Active Travel Report 2019-20. [Online]. Available at: [Active Travel - Ceredigion County Council](#) (Accessed: 31.01.22).

¹⁹⁴ 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 infrastructure¹⁹⁵. 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'.¹⁹⁶ 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).¹⁹⁷ 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 future¹⁹⁸. 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.

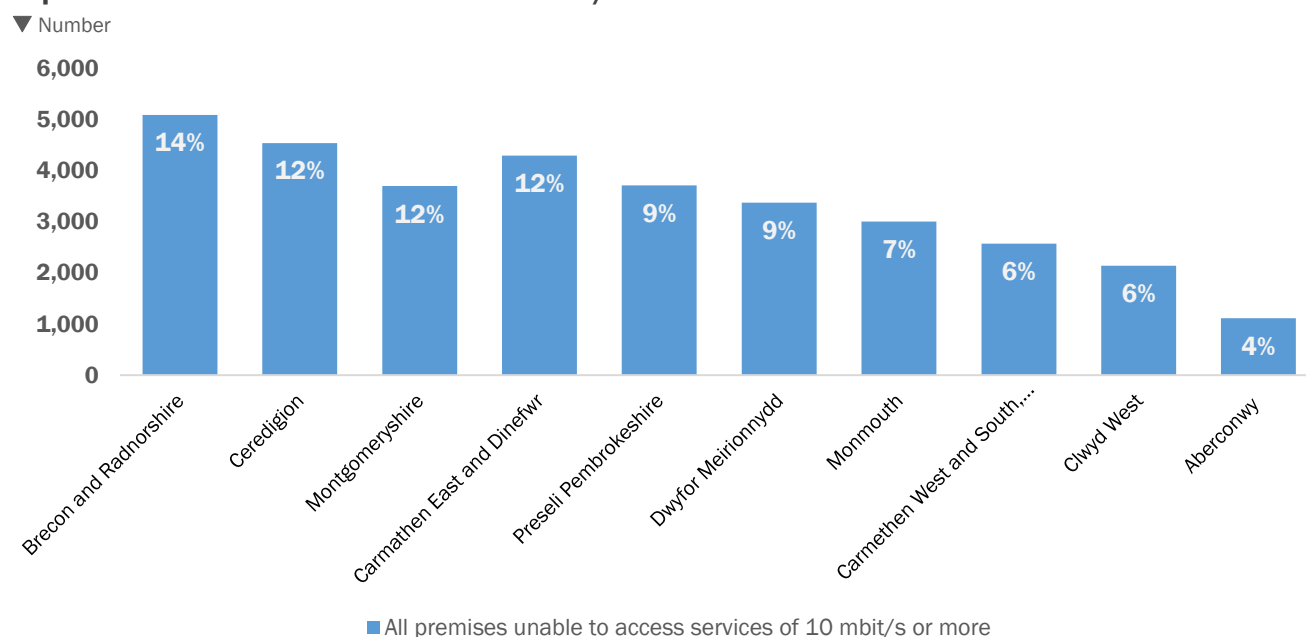
¹⁹⁵ Welsh Government (2021) Mobility in Wales: Background report for Llwybr Newydd – The Wales Transport Strategy 2021. [Online]. Available at: [Llwybr Newydd the Wales transport strategy 2021: Mobility in Wales \(gov.wales\)](#) (Accessed: 31.01.22).

¹⁹⁶ 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).

¹⁹⁷ OfCom (2019) 'Connected Nations 2019: Wales Report'. [Online]. Available at: [Connected Nations 2019 Wales report \(ofcom.org.uk\)](#) (Accessed: 09/09/21)

¹⁹⁸ 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.¹⁹⁹

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%.

¹⁹⁹ 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%

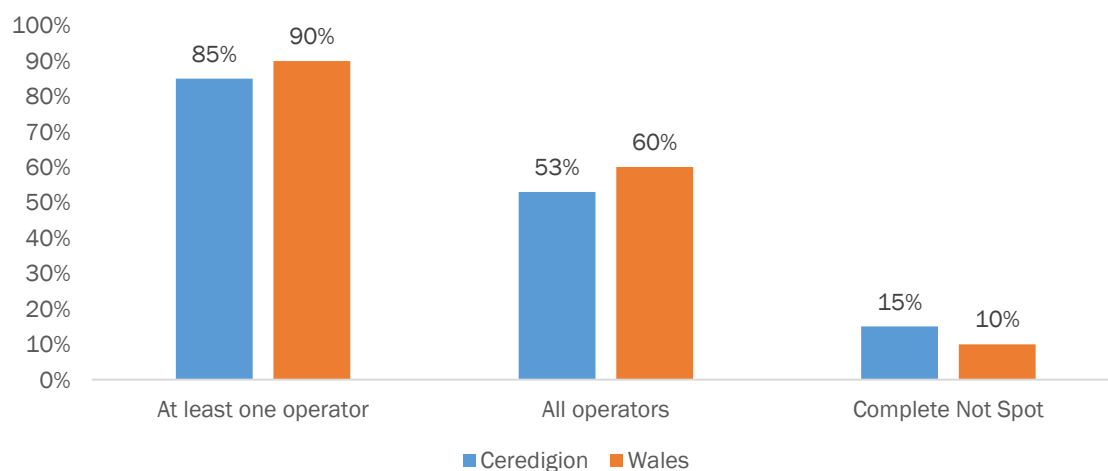
Key to table shading:

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
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Source: OfCom (2021), Connected Nations Report 2021

Figure 7.18: Coverage of premises by mobile network - 2021

▼ Percentage



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 2025²⁰⁰.

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.²⁰¹

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.²⁰² 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.²⁰³

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%.²⁰⁴ 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.

²⁰⁰ 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).

²⁰¹ 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

²⁰² 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).

²⁰³ 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).

²⁰⁴ 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%
Ceredigion Total	47%	38.8%	42.2%

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.²⁰⁵ 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
Able to speak Welsh 2001 Census	8,232 (77.2%)	22,195 (45.9%)	13,868 (54.0%)	37,918 (52.0%)
Able to speak welsh 2011 Census	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.

²⁰⁵ 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 \(gov.wales\)](http://gov.wales/welsh-language-skills-by-local-authority-gender-and-detailed-age-groups-2011-census)(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.²⁰⁶ 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, 2011²⁰⁷

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 2021.²⁰⁸ 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.

²⁰⁶ 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).

²⁰⁷ 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)

²⁰⁸ 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.

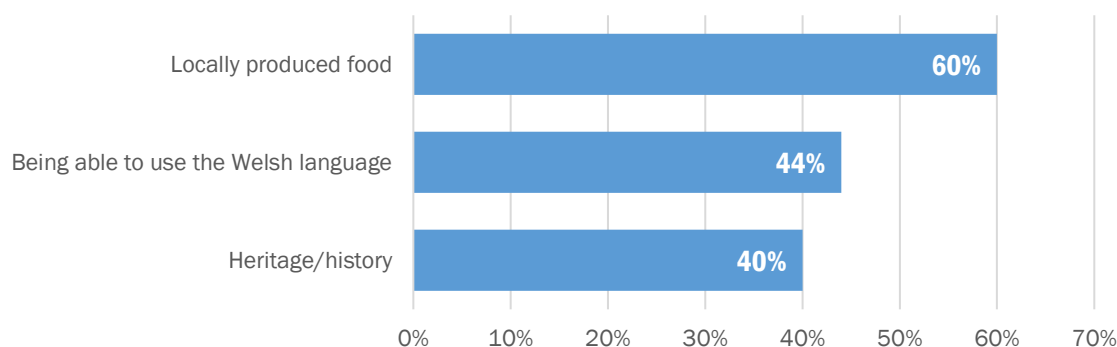
The out-migration of the younger population also poses challenges to the socio-cultural and economic landscape in Ceredigion. There is a perception among some that there are few professional opportunities for young people to follow a rewarding career in Ceredigion, and that the only option is to move 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.²⁰⁹ 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.²¹⁰

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%),²¹¹ 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.

²⁰⁹ 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).

²¹⁰ 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).

²¹¹ 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.²¹² Ceredigion recorded the lowest number of fly tipping incidents in Wales during 2019-20 (159), reducing by 59% since 2015-16²¹³. 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.²¹⁴ 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

²¹² 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).

²¹³ 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).

²¹⁴ 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.²¹⁵

Ceredigion is known to have very good air quality, for example in 2018 Ceredigion had the second lowest level of NO² concentration at just 5 compared to 9 nationally.²¹⁶ NO² 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.²¹⁷ 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).²¹⁸ This change driven by global warming is reflected in the 2021 Future Trends Report, whereby sea level rise in Aberystwyth is

²¹⁵ Gov.uk. Health Matters: Air Pollution. Online: <https://www.gov.uk/government/publications/health-matters-air-pollution/health-matters-air-pollution>

²¹⁶ Data Cymru: Assessment of Local Well-being Core Data Set, 2021.

²¹⁷ 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).

²¹⁸ 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 Solutions²¹⁹ (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)²²⁰** 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:

- Hold 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

²¹⁹ Natural Resources Wales (NRW) (2022). Welsh Information for Nature-based Solutions (WINS). [Online]. Available at: [Welsh Information for Nature-based Solutions \(WINS\) \(wincis.com\)](https://wincis.com/) (Accessed: 09.02.22).

²²⁰ 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
ABERAERON HARBOUR	Current flood defences are unlikely to provide adequate protection in the future.	HL	HL	HL
LLANRHYSTUD BAY	Naturally eroding cliffs vulnerable to sea level rise. Potential flood risk to the Caravan Park.	MR	MR	MR
TAN Y BWLCH (ABERYSTWYTH)	Slowly eroding shingle ridge, sensitive to sea level rise. Present risk of normal tidal flooding to local areas of the valley.	MR	MR	NAI
SOUTH MARINE TERRACE, MARINE TERRACE AND VICTORIA TERRACE (ABERYSTWYTH)	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
BORTH VILLAGE	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), SMP2²²¹

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.²²²

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.²²³ 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.²²⁴ As reflected in the **CCRA3 (Wales Summary)**,²²⁵ 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.

²²¹ Cardigan Bay and Ynys Enlli to the Great Orme Coastal Group. [Online]. Available at: [Main Document | GABC \(grwparfordirolgorllewincymru.cymru\)](#) (Accessed: 10.02.22).

²²² 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).

²²³ 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).

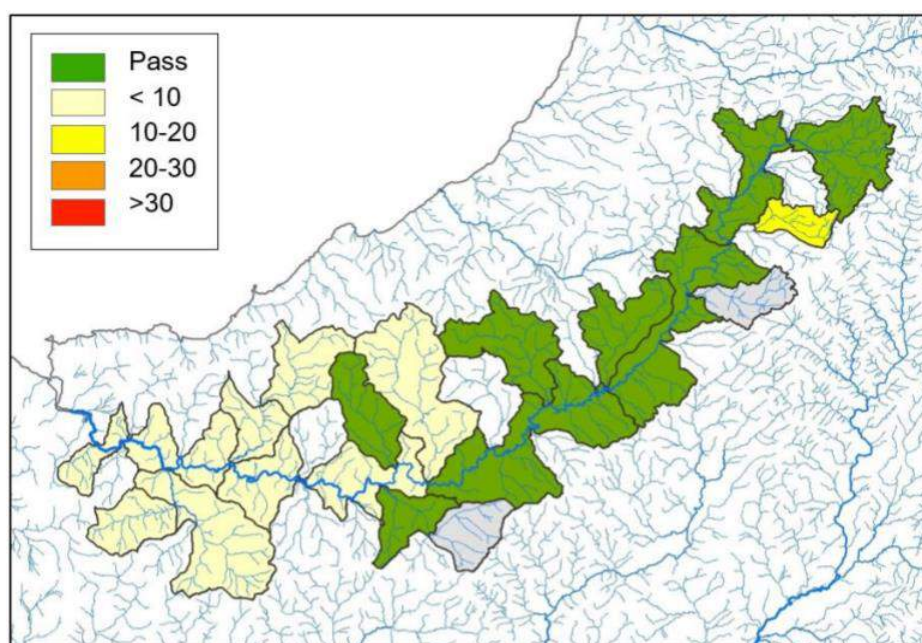
²²⁴ Natural Resources Wales (2021). 'Mid Wales Area Statement: Sustainable land, water and air'. [Online]. Available at: [Natural Resources Wales / Sustainable land, water and air](#) (Accessed: 27.09.21).

²²⁵ 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.²²⁶ 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 2017.²²⁷ 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)²²⁸

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

²²⁶ Natural Resources Wales (2021). 'Mid Wales Area Statement: Sustainable land, water and air'. [Online]. Available at: [Natural Resources Wales / Sustainable land, water and air](https://naturalresources.wales/sustainable-land-water-and-air) (Accessed: 27.09.21).

²²⁷ 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).

²²⁸ 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)²²⁹ 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**²³⁰, 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 4,500²³¹ (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**.²³² 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.²³³ We know that many farmers rely on income support to make a profit.²³⁴ 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 land²³⁵) 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-

²²⁹ 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).

²³⁰ 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).

²³¹ ONS (2021) Annual Population Survey - [Workplace employment by Welsh local areas and broad industry \(gov.wales\)](#)

²³² 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).

²³³ 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).

²³⁴ Ibid.

²³⁵ 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.²³⁶ 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)²³⁷ (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.²³⁸ 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 CO₂e).²³⁹ 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.

²³⁶ 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).

²³⁷ 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).

²³⁸ DataCymru Core Data Set (2021) Local Authority territorial CO₂ emissions estimates 2005-2019 (kt CO₂).

²³⁹ 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
<u>Aim 1:</u> Stocks of Natural Resources are Safeguarded and Enhanced	<ul style="list-style-type: none"> 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)
<u>Aim 2:</u> Ecosystems are Resilient to Expected and Unforeseen Change	<ul style="list-style-type: none"> 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) 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. Rhododendron is an issue in the lower Dyfi, it affects both woodlands and protected sites. (MWAS- improving biodiversity)
<u>Aim 3:</u> Wales had Healthy Places for People, Protected from Environmental Risks	<ul style="list-style-type: none"> 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) 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)
<u>Aim 4:</u> Contributing to a Regenerative economy	<ul style="list-style-type: none"> 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) 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)

Source: NRW, SoNaRR2020 (2020)²⁴⁰ & Mid Wales Area Statement²⁴¹

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.

²⁴⁰ Natural Resources Wales (2020) The Second State of Natural Resources Report (SoNaRR2020). [Online]. Available at: [SoNaRR2020 Executive Summary \(cyfoethnaturiol.cymru\)](#)(Accessed: 28.01.22)

²⁴¹ 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**,²⁴² 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 renewables²⁴³). 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**²⁴⁴, routes into 'green' jobs are often through construction training. In 2019/20, 95% of all construction apprenticeships were men²⁴⁵, 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.²⁴⁶ 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.

²⁴² 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)

²⁴³ Welsh Government (2018). 'Energy Generation in Wales: 2018'. [Online]. Available at: [energy-generation-in-wales-2018.pdf \(gov.wales\)](#) (Retrieved: 17.01.22)

²⁴⁴ 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).

²⁴⁵ 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)

²⁴⁶ 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. ²⁴⁷
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

²⁴⁷ 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).

Keeping the heat in (Insulation, draught, proofing, double glazing) and better temperature management

Make your buildings and/ or equipment and vehicles more energy efficient

Source: Welsh Government (2021), All Wales Plan 2021-25: Working Together to Reach Net Zero²⁴⁸

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.²⁴⁹ 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.²⁵⁰

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)²⁵¹ 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

²⁴⁸ 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)

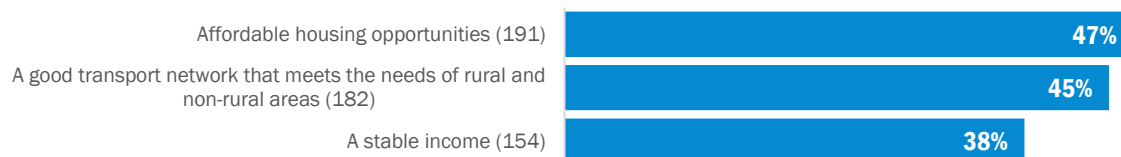
²⁴⁹ ONS (2019). 'Personal and economic well-being: what matters most to our life satisfaction?' [Online]. Available at: [Personal and economic well-being - Office for National Statistics \(ons.gov.uk\)](#) (Accessed: 4.10.21).

²⁵⁰ 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.

²⁵¹ 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 Ceredigion²⁵² 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.²⁵³ The combination of local house prices above the national average (£183,750 compared to £175,000²⁵⁴) and local earnings below the national average (£26,400 compared to £28,300²⁵⁵) 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).

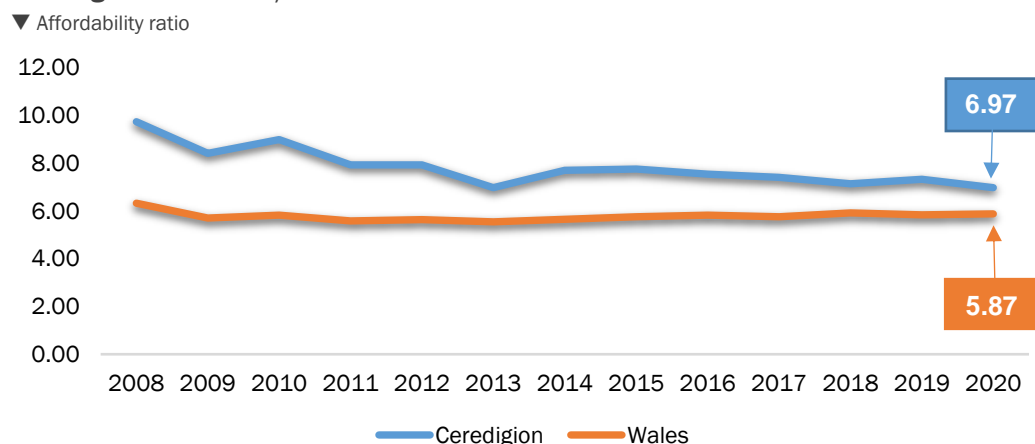
²⁵² Department for Work and Pensions (2021). 'Universal Credit Statistics'. [Online]. Available at: <https://www.gov.uk/government/collections/universal-credit-statistics>. (Accessed: 5.10.21).

²⁵³ 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/2019-01-22) (Accessed: 4.10.21).

²⁵⁴ 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).

²⁵⁵ 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)

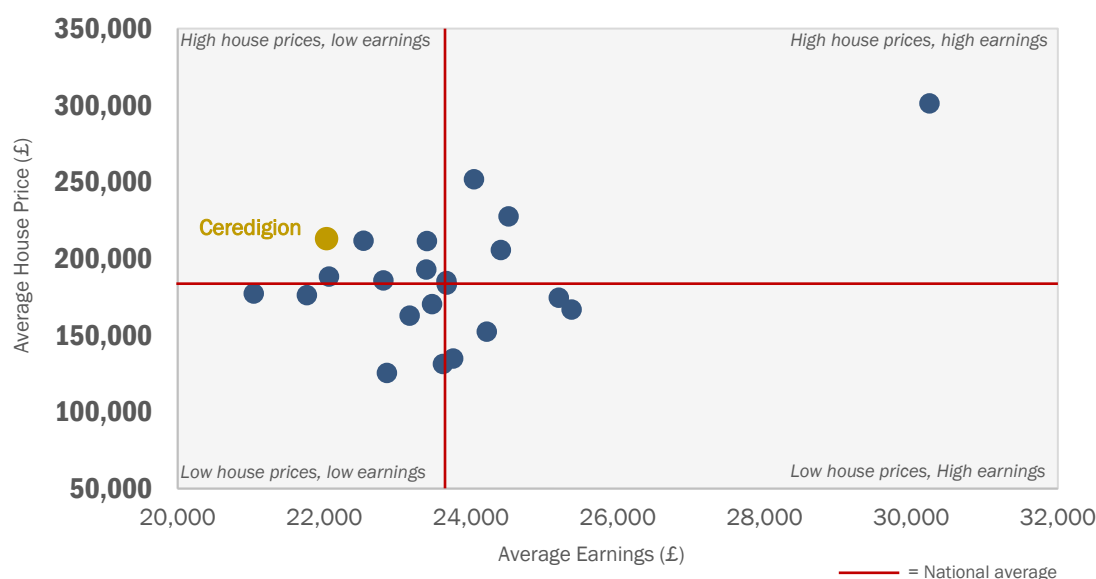
However, for the first time since 2013 the housing affordability ratio dropped below 7 in Ceredigion, as earnings increased by more than house prices. The COVID-19 pandemic however, is very likely to have reversed that trend during 2020, as the West Wales region along with other parts of the nation saw 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.²⁵⁶ 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.

²⁵⁶ [Home.co.uk](https://www.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 £6,634.²⁵⁷ 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.²⁵⁸ 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.²⁵⁹ 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.²⁶⁰ 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.²⁶¹

²⁵⁷ 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.

²⁵⁸ 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).

²⁵⁹ 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).

²⁶⁰ Ibid.

²⁶¹ 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.

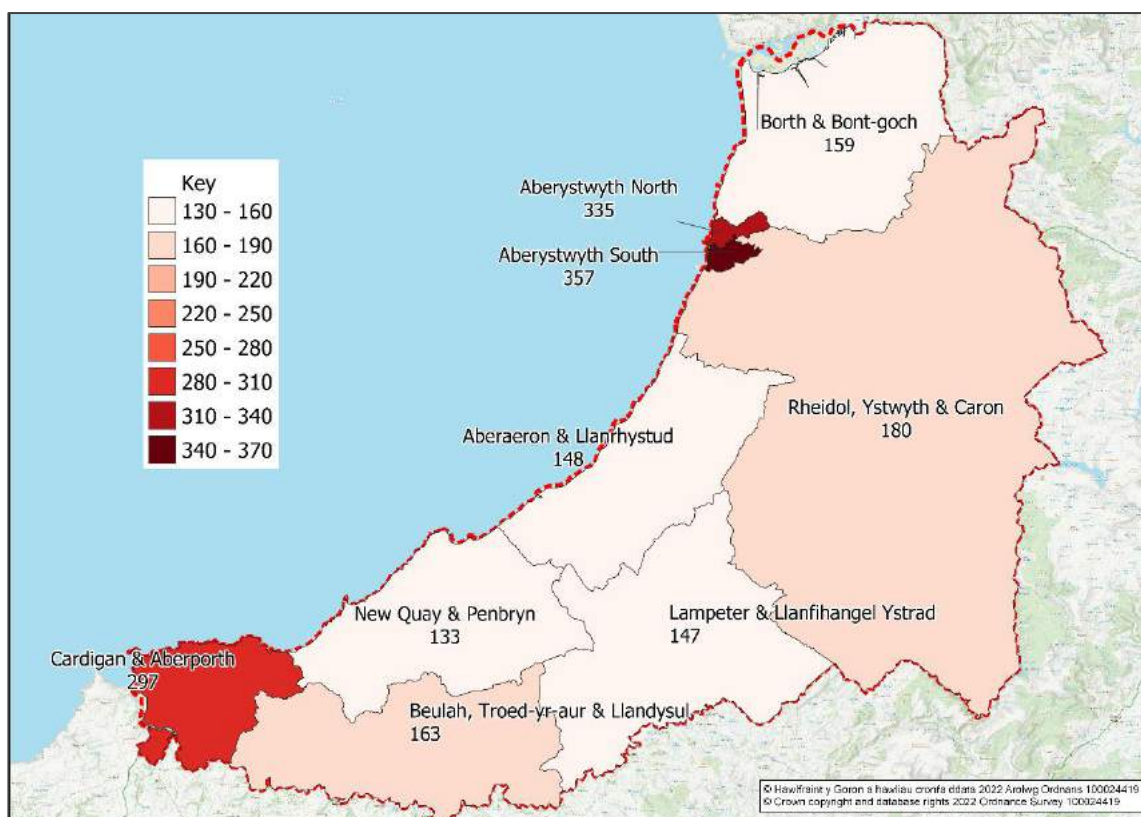
In 2015, the Welsh Government introduced the 'Violence against Women, Domestic Abuse and Sexual Violence (Wales) Act', which resulted in a National Strategy (2016-2021) that seeks to bring about improved public sector response to violence against women, gender-based violence, domestic abuse and sexual 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 2018-19.²⁶² 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 2020-21.²⁶³ 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)



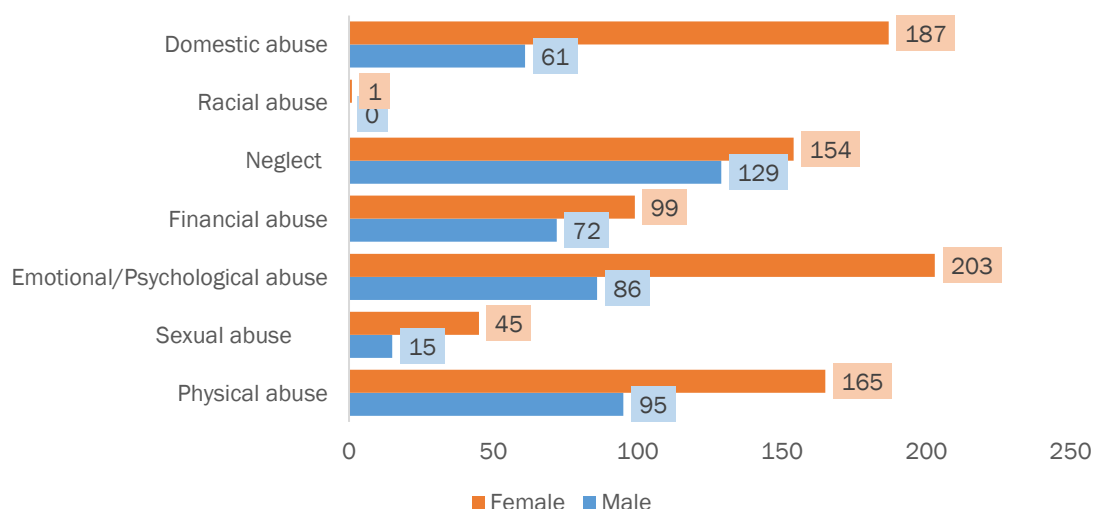
Source: Dyfed Powys Police (2021)

²⁶² Dyfed Powys Police (2021) Crimes by Community Area.

²⁶³ 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)²⁶⁴

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 2020.²⁶⁵

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.²⁶⁶ 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.

²⁶⁴ 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 \(gov.wales\)](https://gov.wales/types-of-alleged-abuse-by-local-authority-measure-and-age-of-alleged-victim) (Accessed: 18.10.21).

²⁶⁵ 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 \(ons.gov.uk\)](https://ons.gov.uk/domestic-abuse-in-england-and-wales-overview) (Accessed: 18.10.21).

²⁶⁶ 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.²⁶⁷

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).²⁶⁸ Furthermore, the proportion of full-time workers in Ceredigion (72.4%) is higher than the national average (71.0%).²⁶⁹ 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

²⁶⁷ Kelly, E. L. and Phyllis, M. (2020). *Overload: How good jobs went bad and what we can do about it*. Princeton University Press.

²⁶⁸ 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 \(ons.gov.uk\)](https://www.ons.gov.uk/employmentandhours/articles/earningsandhoursworkedplaceofresidencebylocalauthority/ashe-table-8) (Accessed: 6.10.21).

²⁶⁹ 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.²⁷⁰ 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.²⁷¹ This is a slight increase from the 2001 Census (+1,000), whereby 10.7% (or 7,700) of Ceredigion's population were unpaid carers.²⁷²

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.²⁷³ 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.²⁷⁴

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.

²⁷⁰ West Wales Care Partnership (2021). 'Carers'. [Online]. Available at: <http://www.wwcp-data.org.uk/carers> (Accessed: 6.10.21).

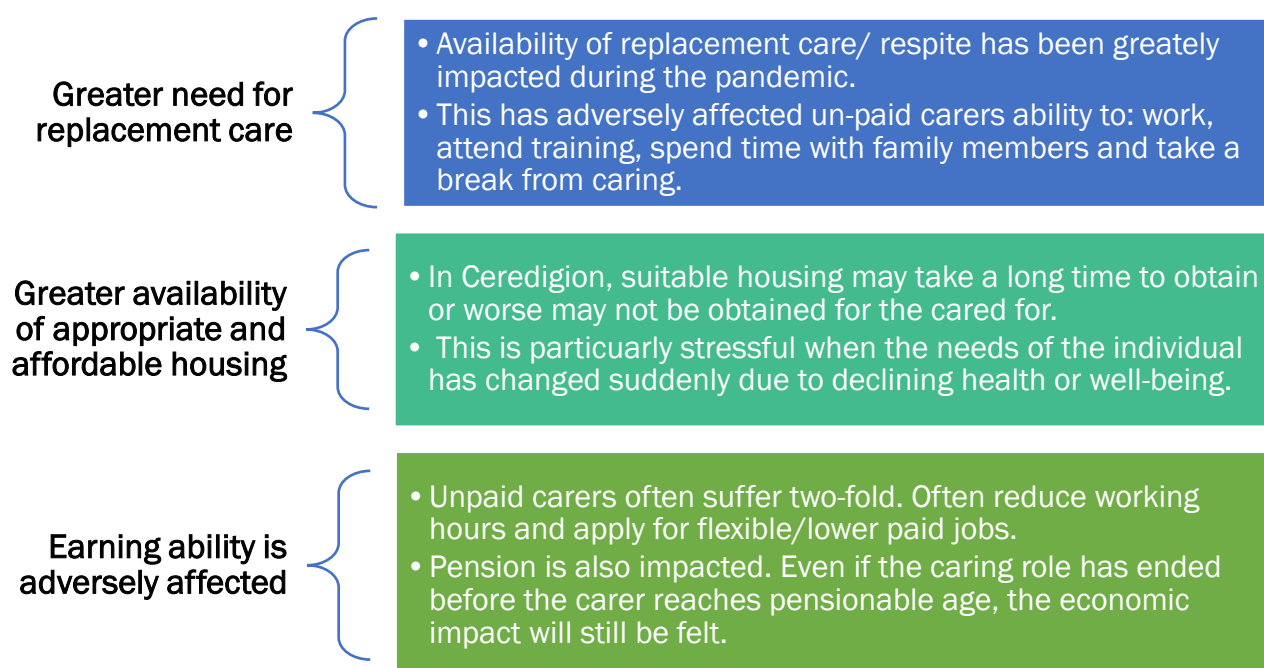
²⁷¹ NOMIS (2013). 'Provision of unpaid Care: QS301EW'. [Online]. Available at: <https://www.nomisweb.co.uk/census/2011/qs301ew> (Accessed: 5.10.21).

²⁷² NOMIS (2003). 'Health and provision of unpaid care: KS008'. [Online]. Available at: <https://www.nomisweb.co.uk/census/2001/ks008> (Accessed: 5.10.21).

²⁷³ 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).

²⁷⁴ 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.²⁷⁵ 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.²⁷⁶ 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.

²⁷⁵ 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).

²⁷⁶ 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.²⁷⁷

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.

²⁷⁷ 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).

Learning Disability	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).
Substance Misuse	The Welsh Government has recently launched its new Substance Misuse (drug and alcohol) Delivery Plan for 2019-2022. ²⁷⁸ 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.
Unpaid Carers	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.).
Older People	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.
Dementia	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.
VAWDASV	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%).²⁷⁹ 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 & 2019-20.²⁸⁰²⁸¹ 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 2030.²⁸²

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.²⁸³ 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.²⁸⁴ Furthermore, over 100,000 cases of type 2 diabetes in Wales are estimated to be associated with obesity.²⁸⁵ 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

²⁷⁸ 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).

²⁷⁹ 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).

²⁸⁰ Ibid.

²⁸¹ Welsh Government (2014). Local Area Summary Statistics Ceredigion. [Online]. Available at: [LA profile framework document \(gov.wales\)](#) (Accessed: 18.02.22).

²⁸² 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).

²⁸³ NHS (2022). Overview: Obesity. [Online]. Available at: [Obesity - NHS \(www.nhs.uk\)](#) (Accessed: 18.02.22).

²⁸⁴ 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).

²⁸⁵ 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.²⁸⁶ 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.²⁸⁷

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.²⁸⁸ 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.).²⁸⁹

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.²⁹⁰ 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%.²⁹¹ 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.²⁹² 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 2025,²⁹³ whilst 311,000 people in Wales could have diabetes by 2030.²⁹⁴

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).²⁹⁵ 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.²⁹⁶ Crucially however, Type 2 Diabetes can be prevented through

²⁸⁶ 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).

²⁸⁷ Ibid.

²⁸⁸ Welsh Government (2019). Healthy Weight: Healthy Wales Strategy. [Online]. Available at: [North Wales Regional Partnership Board Annual Report \(gov.wales\)](#) (Accessed: 18.02.22).

²⁸⁹ 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>

²⁹⁰ Diabetes UK (2021). Diabetes in Wales. [Online]. Available at: [Diabetes in Wales | Diabetes UK](#) (Accessed: 18.02.22).

²⁹¹ 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).

²⁹² 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).

²⁹³ Ibid.

²⁹⁴ Diabetes UK (2021). Diabetes in Wales. [Online]. Available at: [Diabetes in Wales | Diabetes UK](#) (Accessed: 18.02.22).

²⁹⁵ 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).

²⁹⁶ 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.²⁹⁷ Positively, **Hywel Dda University Health Board's Diabetes Plan (refresh 2016)**,²⁹⁸ 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).²⁹⁹ 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.³⁰⁰ 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.³⁰¹

Research by the ONS highlights that Long COVID disproportionately affects certain groups,³⁰² 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.³⁰³

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.³⁰⁴ NHS Wales and other partners are working together to gain a better understanding of the syndrome.³⁰⁵ 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**

²⁹⁷ Diabetes UK (2021). Diabetes in Wales. [Online]. Available at: [Diabetes in Wales | Diabetes UK](#) (Accessed: 18.02.22).

²⁹⁸ 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).

²⁹⁹ 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).

³⁰⁰ 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).

³⁰¹ Hywel Dda University Health Board (2021). Director of Public Health Annual Report 2020-21: Reducing Health Inequalities and Promoting Health Equity.

³⁰² 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).

³⁰³ 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).

³⁰⁴ Hywel Dda University Health Board (2021). Director of Public Health Annual Report 2020-21: Reducing Health Inequalities and Promoting Health Equity.

³⁰⁵ 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-COVID³⁰⁶ 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.³⁰⁷

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%.³⁰⁸ 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

³⁰⁶ 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).

³⁰⁷ Department of Health

³⁰⁸ Public Health Wales (2016/18-2018/19) Adults who smoke.

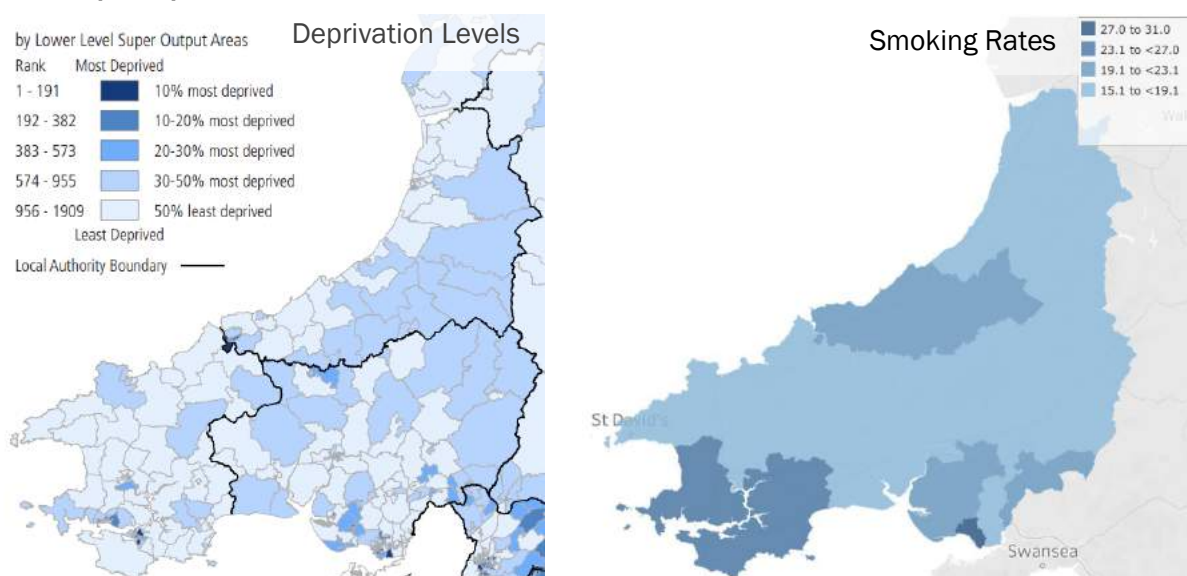
rates have been steadily falling in the HDdUHB area, Ceredigion has experienced a reversal of this trend, with annual prevalence increasing each year since 2013/14.³⁰⁹

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 2013.³¹⁰

Smoking rates are higher in south Ceredigion compared to north Ceredigion, and research shows that smoking rates are higher in more deprived areas.³¹¹ 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.^{312 & 313}

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)³¹⁴

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,

³⁰⁹ Public Health Wales (2021)

³¹⁰ 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).

³¹¹ 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).

³¹² 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).

³¹³ 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).

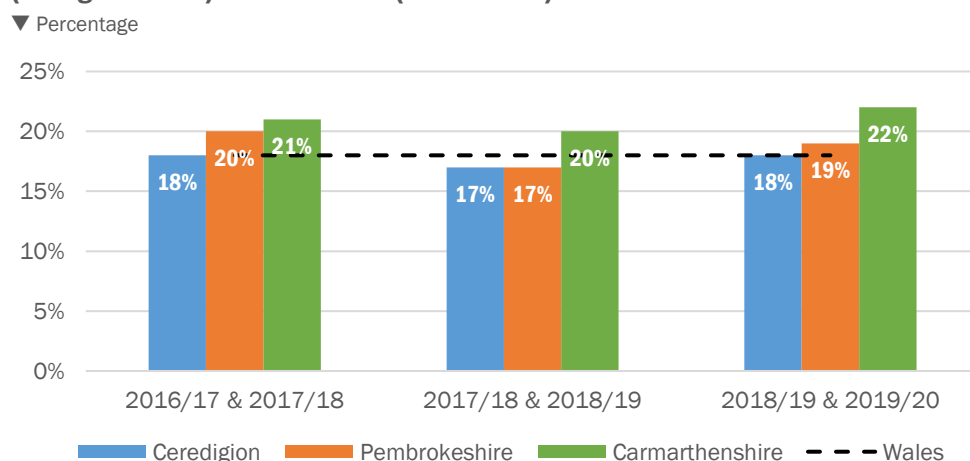
³¹⁴ Hywel Dda University Health Board (2021). A Rapid Desktop Tobacco and Smoking Health Needs Assessment for Hywel Dda University Health Board 2021.

such as that by Cancer Research UK, identified significant increases in smoking during the first nationwide lockdown.³¹⁵ 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.³¹⁶ 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.³¹⁷ 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.³¹⁸ 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)³¹⁹

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).

³¹⁵ 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).

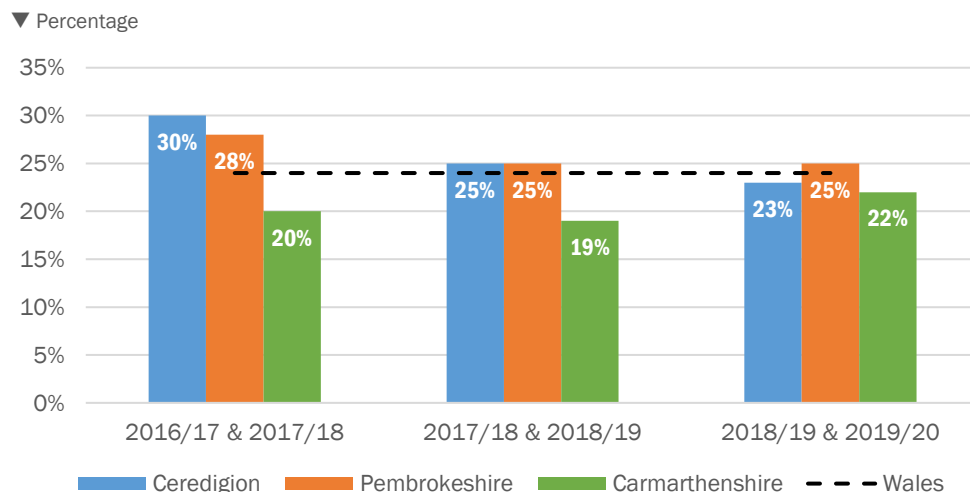
³¹⁶ Stats Wales (2018-19/2019-20) Adult Lifestyles by local authority and health board.

³¹⁷ Public Health Wales (2019). Alcohol specific admissions European age-standardised rates, persons, Hywel Dda local authorities, 2017/18.

³¹⁸ 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).

³¹⁹ 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)

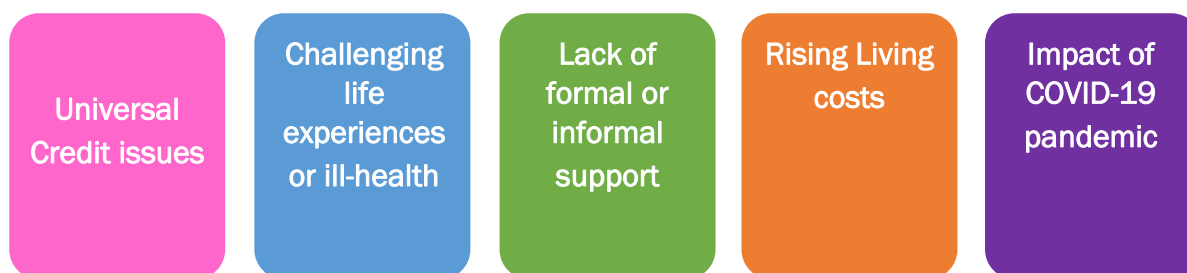


Source: Stats Wales, National Survey for Wales (2021)³²⁰

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.³²¹ 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.³²² 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.

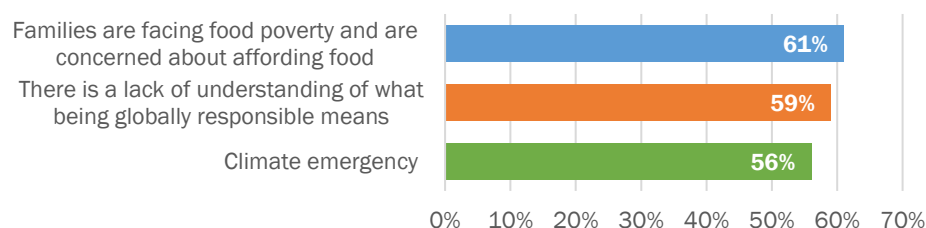
The Well-being Survey highlighted the level of concern amongst survey respondents regarding families facing food poverty and the affordability of food in the future. When asked – ‘*what concerns you most about your county’s global responsibility in the future?*’ food poverty was identified as the top concern, with 61% of respondents selecting this answer (Figure 7.36).

³²⁰ 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).

³²¹ The Trussell Trust (2021). ‘Latest Stats’. [Online]. Available at: [End of Year Stats - The Trussell Trust](https://www.trusselltrust.org/latest-stats/)(Accessed: 25.10.21).

³²² 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.³²³ 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.³²⁴ 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.³²⁵

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.³²⁶

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.³²⁷ 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.

³²³ 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).

³²⁴ 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).

³²⁵ Ibid.

³²⁶ 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](#)

³²⁷ 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 – Plasrugg 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.³²⁸ 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 Plasrugg Leisure Centre remained closed.³²⁹

Mental illness is something that one in four adults will experience in their lifetime.³³⁰ 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 5th lowest (joint with Caerphilly) on mental well-being among adults.³³¹

³²⁸ Public Accountability Measures. Ceredigion County Council, 2021.

³²⁹ Ceredigion Actif

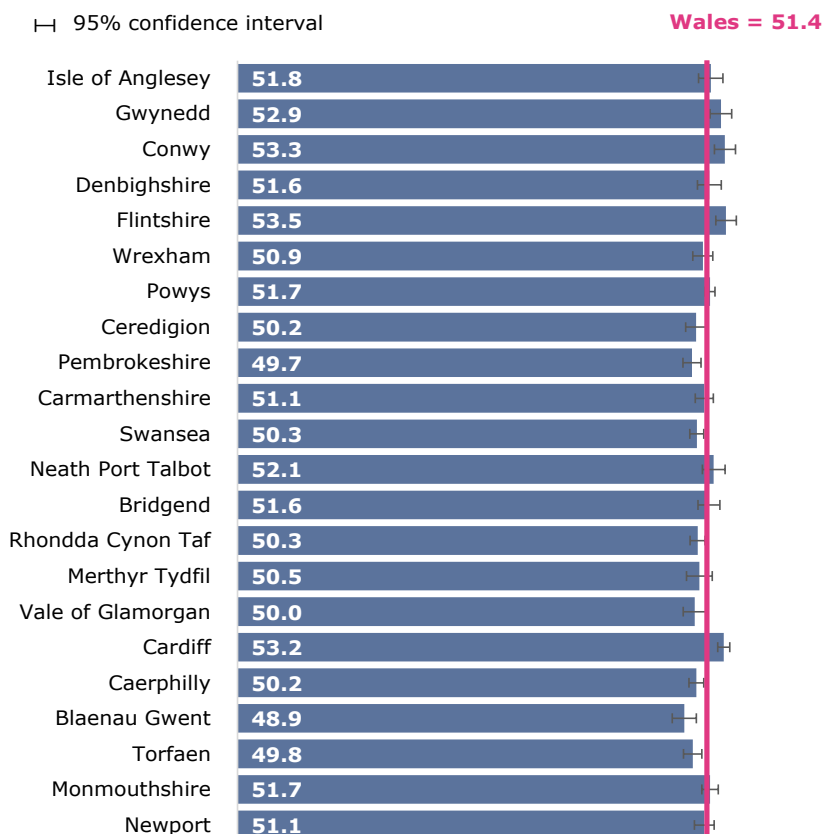
³³⁰ Hywel Dda University Health Board (2021). 'Adult Mental Health'. [Online]. Available at: [Adult mental health - Hywel Dda University Health Board \(nhs.wales\)](https://www.nhs.uk/healthboards/hywel-dda-university-health-board/adult-mental-health/) (Accessed: 26.10.21).

³³¹ 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.³³² 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,³³³ 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 7.38.³³⁴ Nationally, Samaritans report that the overall trend in Wales is a decrease since 2018, which adds to the concern in Ceredigion.³³⁵

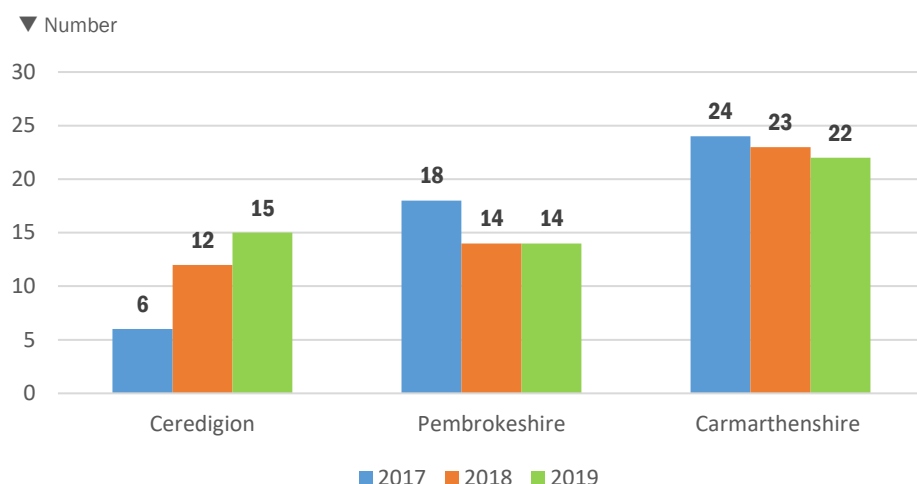
³³² O'Connor, C. Gray, N. C. Knowles, J. Pink, J. Simkiss, N. J. Snowden, R. J. Williams, S. D. (2020). *The influence of the COVID-19 Pandemic on mental well-being and psychological distress: impact upon a single country*. *Frontier Psychiatry*, 594115(11), pp. 1-11.

³³³ 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 \(cardiff.ac.uk\)](https://www.cardiff.ac.uk/media/08-07-2021.pdf) (Accessed: 17.02.22).

³³⁴ ONS (2021) Suicides in England and Wales by local authority.

³³⁵ "Suicides in Wales 2020". Samaritans, 2020. Online: 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.³³⁶ 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.³³⁷ 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.³³⁸ Data from the ONS note that in 2019, males aged 45 to 49 years had the highest age-specific suicide rate in the UK.³³⁹

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.³⁴⁰

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 3rd behind "affordable housing opportunities" and a "good transport network" (Figure 7.39).

³³⁶ Samaritans. Middle-aged men and suicide. Online: <https://www.samaritans.org/about-samaritans/research-policy/middle-aged-men-suicide/> Retrieved 17/02/22.

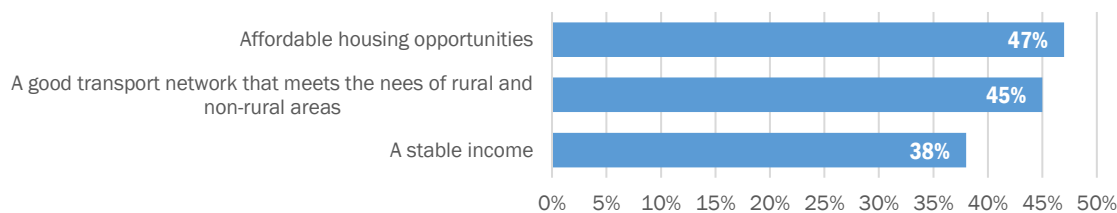
³³⁷ Priory Group. Why are suicides so high amongst men? Online: <https://www.priorygroup.com/blog/why-are-suicides-so-high-amongst-men> Retrieved: 17/02/22

³³⁸ Hywel Dda University Health Board (2021) Pharmaceutical Needs Assessment.

³³⁹ ONS (2019) Suicides in England and Wales: 2019 registrations

³⁴⁰ 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)

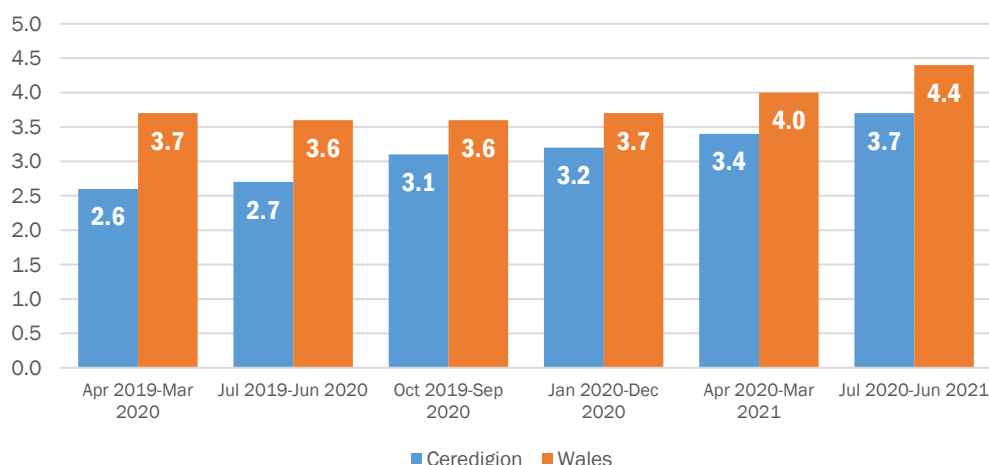
We also know from the chapter on *Youth* that job opportunities, particularly higher paid jobs, are a primary factor in young people's decisions to remain in Ceredigion or search for employment opportunities outside of the County.

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.³⁴¹

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).³⁴² 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

▼ Percentage



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

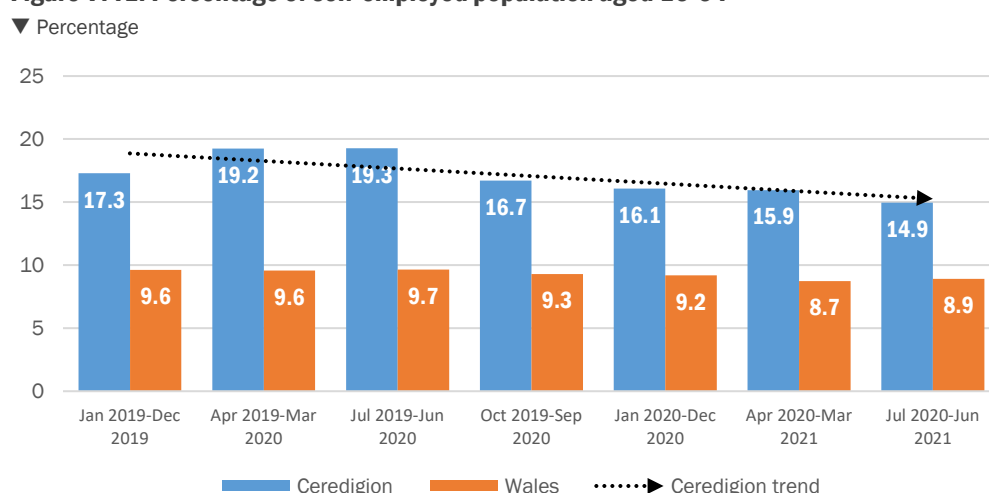
³⁴¹ NOMIS Local Authority Profile: Ceredigion. Online: <https://www.nomisweb.co.uk/reports/lmp/la/1946157390/report.aspx#tabempunemp>. Retrieved: 11/11/2021.

³⁴² 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.

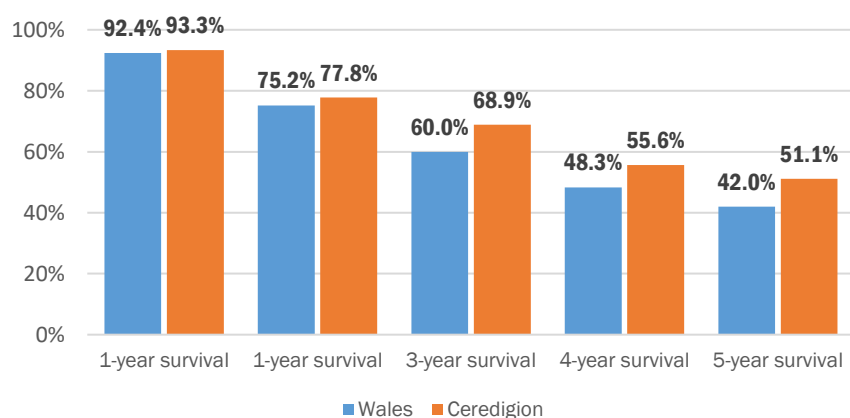
Job creation, and in particular higher paid jobs, featured highly in the results of our Well-being Survey, but was also raised as a key theme in every engagement event conducted in support of the Assessment. It was one of the main discussion points with private sector representatives at the Enterprise 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 2016.³⁴³ 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.³⁴⁴

Figure 7.42: Survival of newly born enterprises in Ceredigion 2019

▼ Percentage



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

³⁴³ “Business demography, UK: 2019” Office for National Statistics. Online:

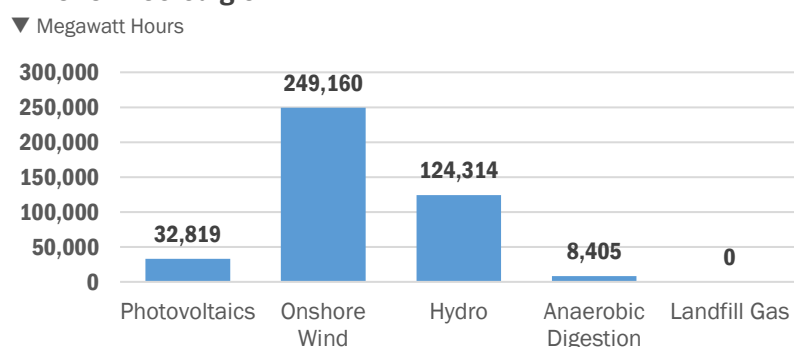
<https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/bulletins/businessdemography/2019>. Retrieved: 10/11/2021.

³⁴⁴ 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.³⁴⁵ **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).³⁴⁶

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.

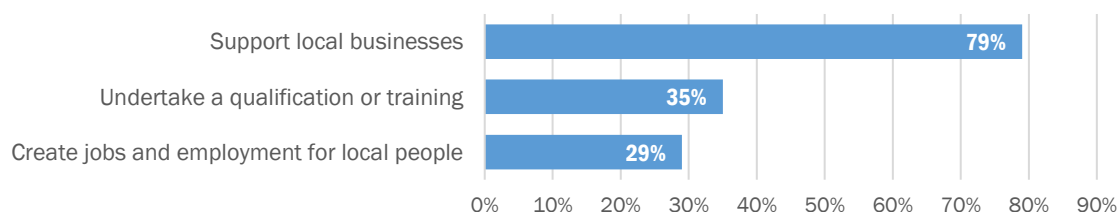
Indeed, the results of the Well-being Survey present a very strong desire on the part of respondents to **support local businesses** and **buy local produce**. The written responses to the survey do not reveal exactly why there has been a sudden increase in support. One possible explanation is the impact 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)*.

³⁴⁵ “Energy Generation in Wales”. Welsh Government. 2019. 4.

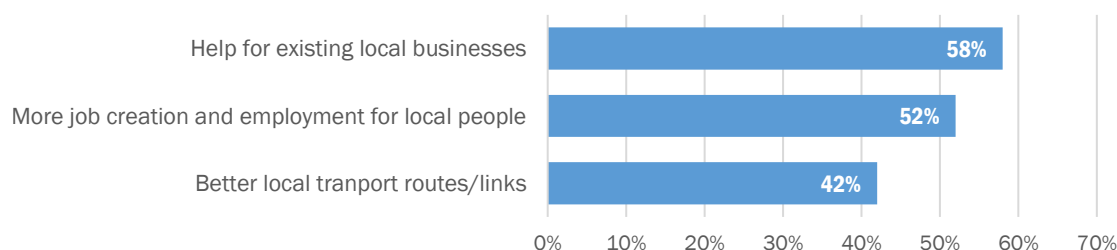
³⁴⁶ “Renewable Energy by Local Authority 2014-2020”. Department for Business, Energy and Industrial Strategy. 2020.

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 2020.³⁴⁷

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%.³⁴⁸ (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.³⁴⁹ 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 2020.³⁵⁰ Although this is still much higher than pre-pandemic levels, it is one

³⁴⁷ “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.

³⁴⁸ “CC01 Regional labour market: Claimant Count by unitary and local authority”. Office for National Statistics. Online: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/unemployment/datasets/claimantcountbyunitaryandlocalauthorityexperimental>. Retrieved: 10/11/2021.

³⁴⁹ Ceredigion County Council.

³⁵⁰ “CC01 Regional labour market: Claimant Count by unitary and local authority”. Office for National Statistics. Online: <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/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.³⁵¹

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.

³⁵¹ 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

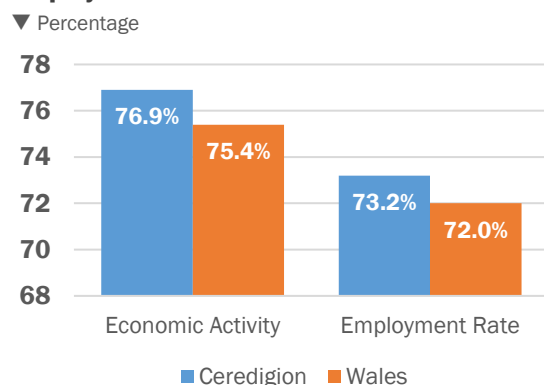
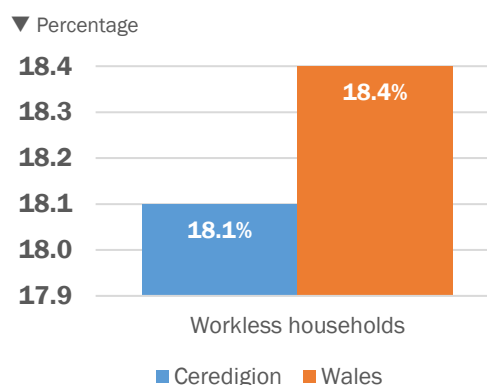


Figure 7.47: Workless Households



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

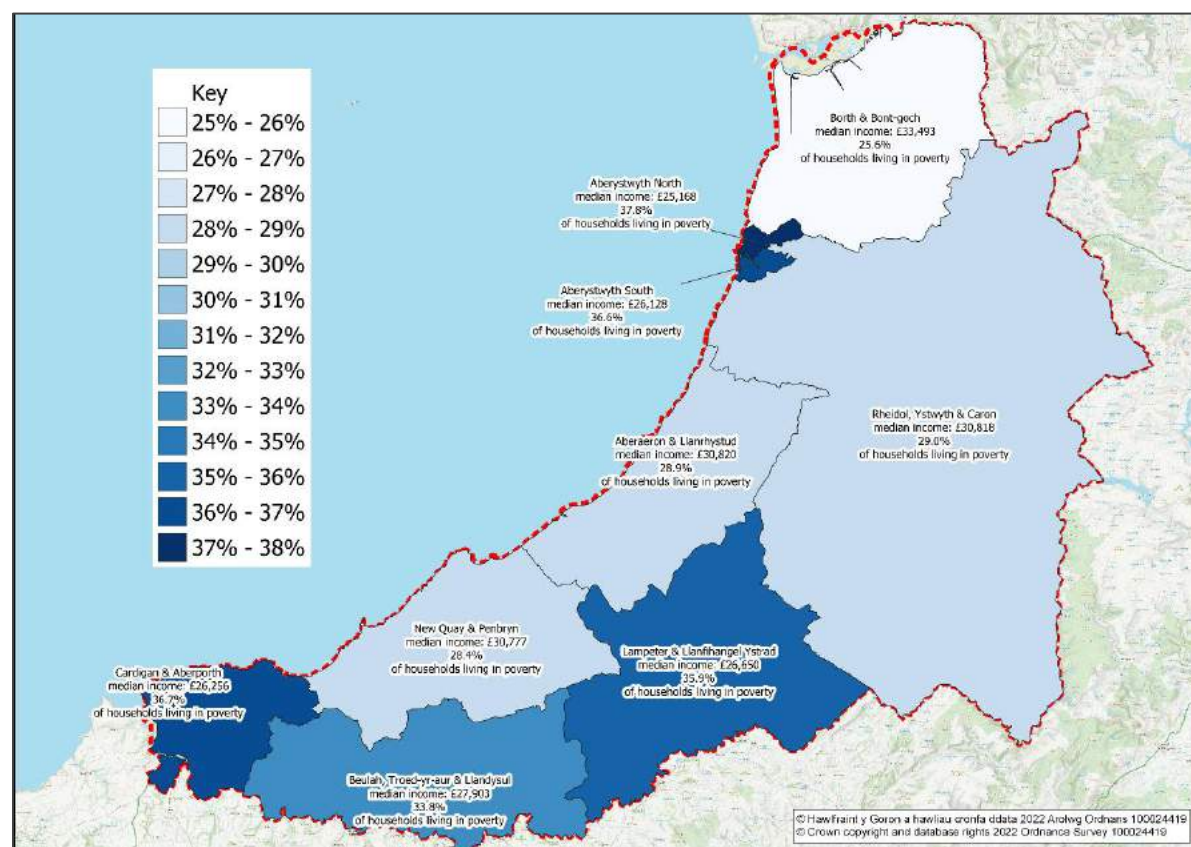
Source: ONS ASHE 2020, Table 8.7a Annual gross pay for all employee jobs by place of residence

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.³⁵² 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.³⁵³ 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 2021³⁵⁴ and the average first time buyer deposits are estimated to have increased by 25% since 2019.³⁵⁵ 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.³⁵⁶ 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.

³⁵² Hick, Rod and Alba Lanau. "IN-WORK POVERTY IN THE UK: Problem, policy analysis and platform for action". Cardiff University. Cardiff, 2017. 3-4.

³⁵³ Ibid. 4, 28 & 30.

³⁵⁴ HM Land Registry UK House Price Index. Online: <https://landregistry.data.gov.uk/app/ukhpi>

³⁵⁵ 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.

³⁵⁶ 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
A greater awareness of employee well-being 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.	Working remotely can be challenging Working remotely has made it more challenging to support people who are struggling with their mental health as they are not face-to-face.
Flexible working has improved 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.	Social media needs to be used responsibly 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.
Greater acceptance of flexible working There is now a greater acceptance that flexible working can benefit an organisation and does not impact negatively on productivity.	
Utilising social media to support well-being 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.³⁵⁷

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.

³⁵⁷ "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+. ³⁵⁸ 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. ³⁵⁹

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.

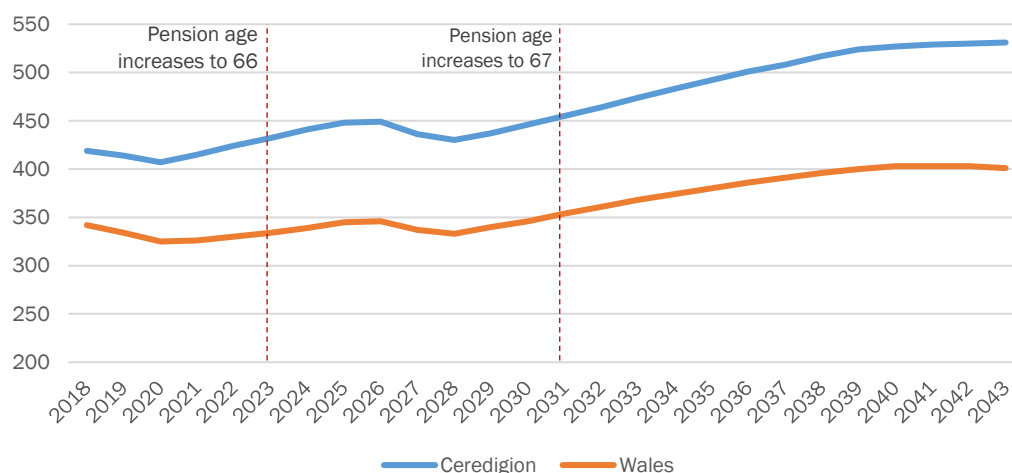
The challenges brought about by an ageing population are multifaceted. Figure 8.1 demonstrates one of the challenges that Ceredigion faces, brought about by a shrinking workforce and an ageing population.

³⁵⁸ ONS (2020) Mid-year Population Estimates.

³⁵⁹ ONS (2018) Population Projections.

Figure 8.1: Ceredigion's projected dependency ratio (2018-2042)

▼ Dependents 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.³⁶⁰ Currently, there is a gap in social care provision in Wales.³⁶¹ 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.³⁶² 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**,³⁶³ 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

³⁶⁰ 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).

³⁶¹ *ibid*

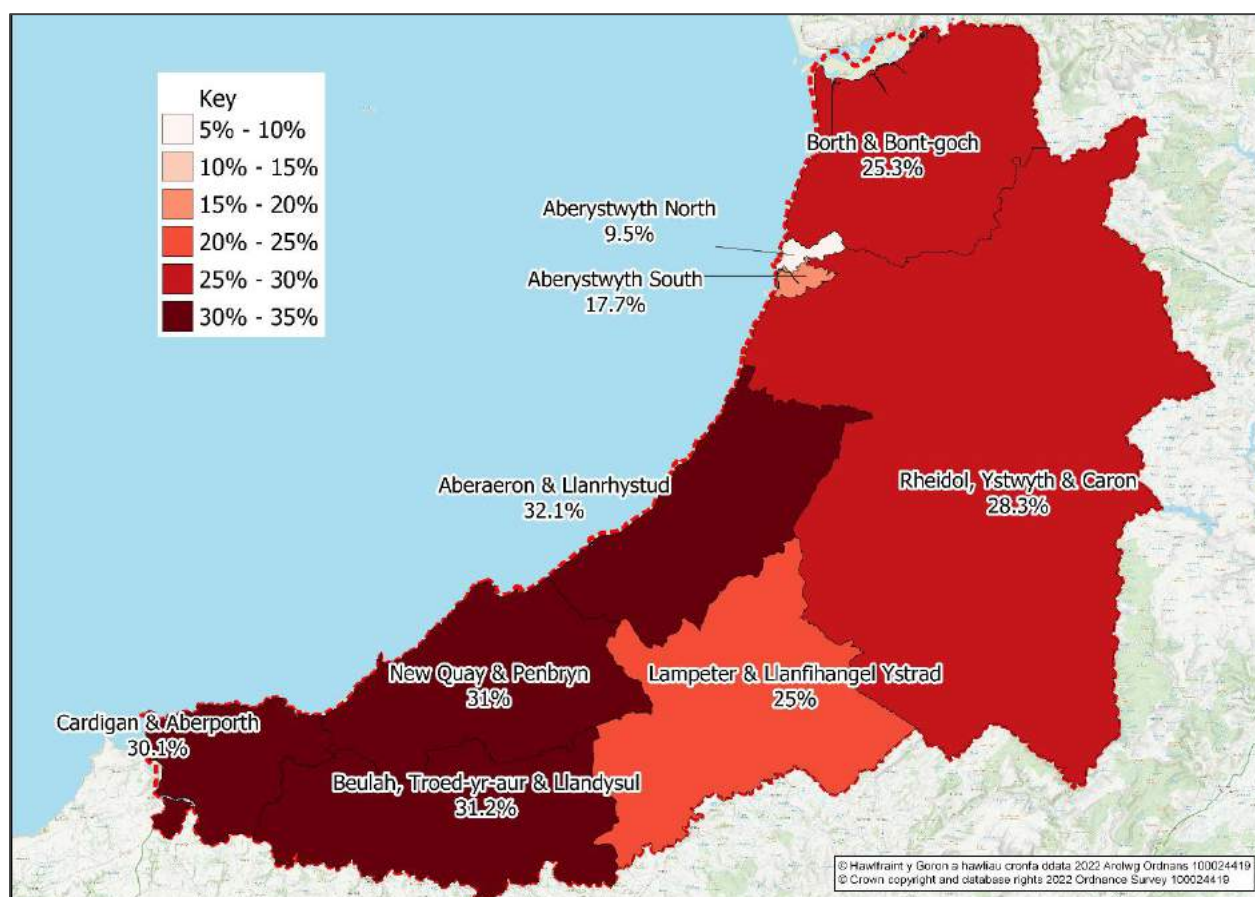
³⁶² ONS (2019). Living longer: caring in later working life. [Online]. Available at: [Living longer - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk/) (Accessed: 07.02.22).

³⁶³ 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'.³⁶⁴

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.³⁶⁵

³⁶⁴ National Survey for Wales

³⁶⁵ 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.

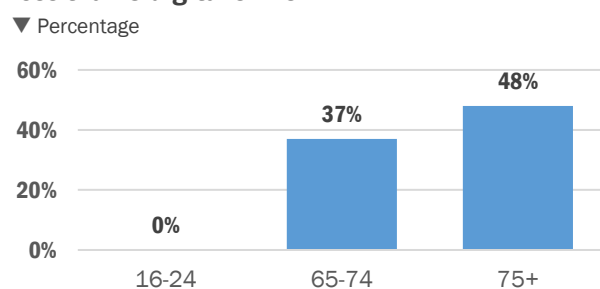
In the year ending June 2019, the economic activity rate in Ceredigion amongst the 65+ population was 15.2%. Within just twelve months this had decreased to 10.8%.³⁶⁶ It is likely that the COVID-19 pandemic impacted on the economic activity rate of the 65+ population, as this age group were more at risk 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%.³⁶⁷ 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+.³⁶⁸

The state pension age is gradually increasing for both men and women and is currently 66. However, by 2028 it will rise to 67.³⁶⁹ 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.³⁷⁰ 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 16-24.³⁷¹ 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.³⁷²

Figure 8.3: Proportion of population with less than 3 digital skills



Source: Welsh Government, National Survey for Wales, 2018/19

³⁶⁶ ONS, Annual Population Survey, Employment and unemployment.

³⁶⁷ Ibid.

³⁶⁸ Ibid.

³⁶⁹ 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.

³⁷⁰ Wales Co-operative Centre (2018) Digital Inclusion in Wales.

³⁷¹ National Survey for Wales

³⁷² 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 2017-2018.³⁷³

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.

³⁷³ 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.³⁷⁴ 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 2041.³⁷⁵ 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).³⁷⁶ 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.

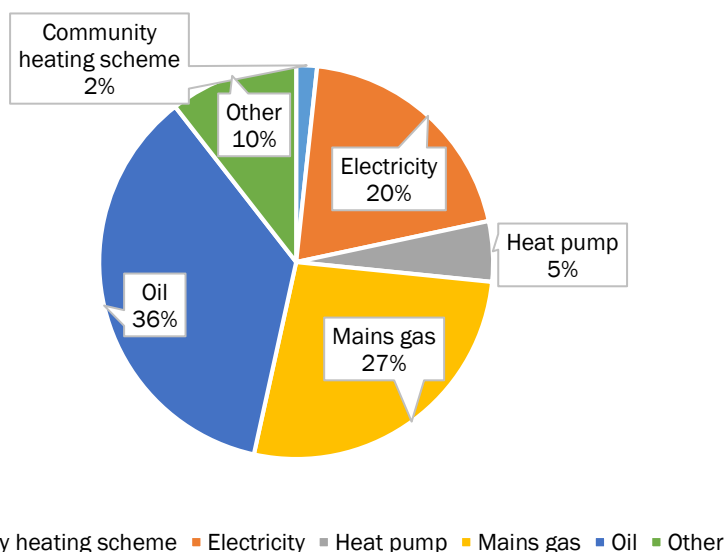
Furthermore, a high proportion of Ceredigion's households are located off the main gas network, which leaves residents reliant on more expensive fuels such as oil, electricity or LPG and dual fuel tariffs. Figure 8.4 highlights the main types of heating methods used by dwellings in Ceredigion. In-line 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.

³⁷⁴ Maliene, V. Mulliner, E. and Riley, M. (2020). 'Older people's preferences for housing and environmental characteristics'. Sustainability, 12(5723), pp. 1-25.

³⁷⁵ 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 (Accessed: 20.10.21).

³⁷⁶ 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).

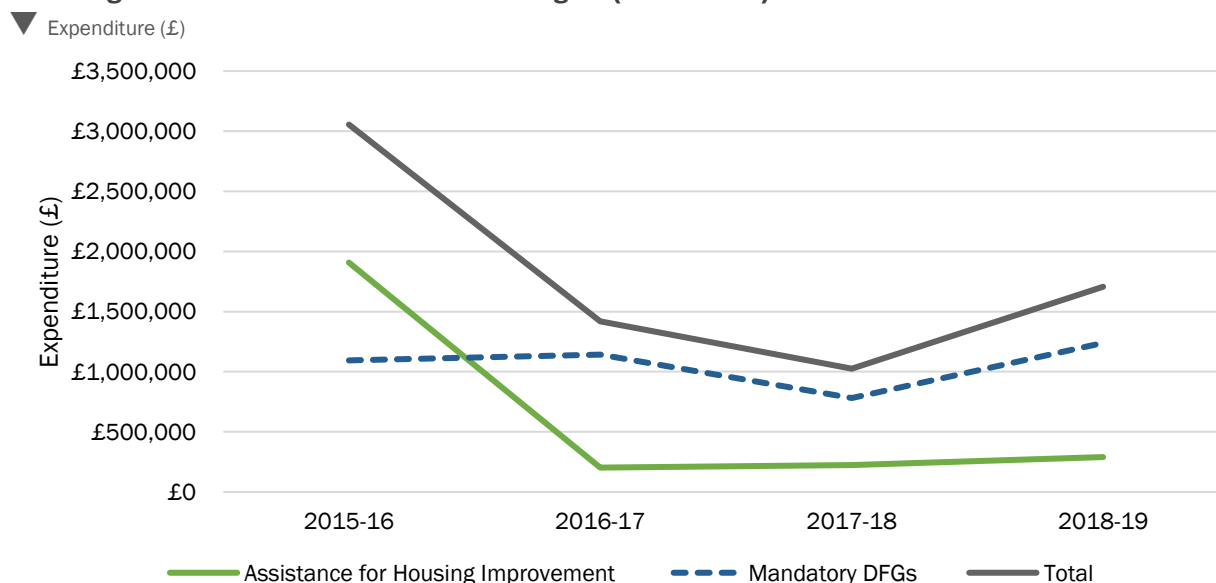
Figure 8.4: Estimated proportion of dwellings by main type of fuel type or method of heating used in central heating in Ceredigion (2019)



Source: ONS (2020)³⁷⁷

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)^{378,379}

³⁷⁷ 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).

³⁷⁸ 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)

³⁷⁹ 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.³⁸⁰

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 22nd out of the 22 local authority areas in Wales.³⁸¹ **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.

³⁸⁰ “Ceredigion Social Services: Statutory Director’s Annual Report 2019/20”. Ceredigion County Council, 2021. 8.

³⁸¹ 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 (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-£686,³⁸² 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.³⁸³ 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 Wales³⁸⁴ (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.

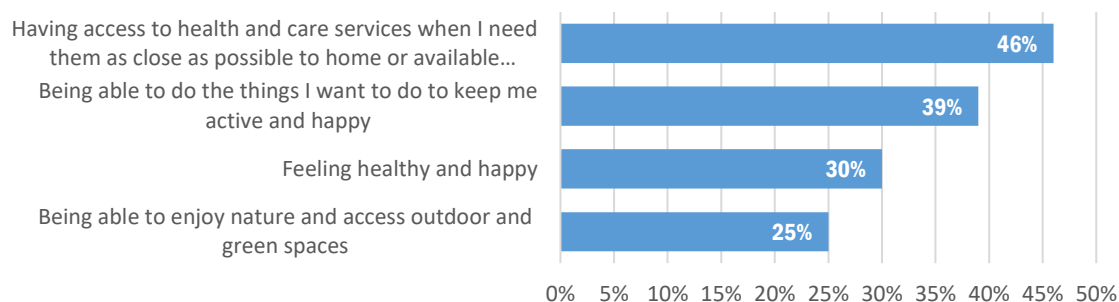
The desire to remain active in order to maintain physical and mental well-being was reflected in the results of the Well-being Survey (Figure 8.7), where 39% of respondents aged 65 and over said they valued being able to do the things they want to keep them active and happy, which was the second highest 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.

³⁸² 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/charging-for-residential-care-and-support-2021-2022) (Accessed: 20.10.21).

³⁸³ Ibid.

³⁸⁴ 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)

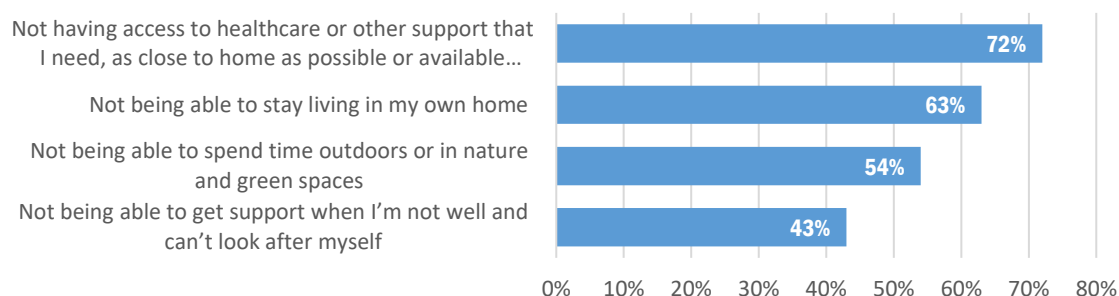
Figure 8.7: Aged 65 and over - which three things do you value the most in relation to your physical health and/or mental well-being?



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?

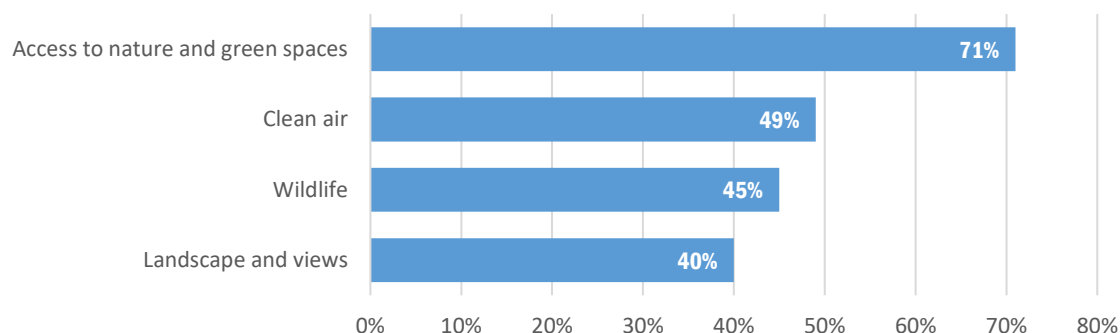


Source: Ceredigion PSB, Regional Well-being Survey (2021)

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.³⁸⁵

³⁸⁵ "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)³⁸⁶, a higher than average proportion of charities (4.48 per 1,000 population compared to 2.65 across Wales)³⁸⁷ and a higher than average percentage of people who volunteer (30% compared to 26%).³⁸⁸

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.³⁸⁹ 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”.³⁹⁰ 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.³⁹¹

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.

³⁸⁶ “Third Sector Data Hub”. Wales Council for Voluntary Action (WCVA), 2019. 6 & 12.

³⁸⁷ Ibid.

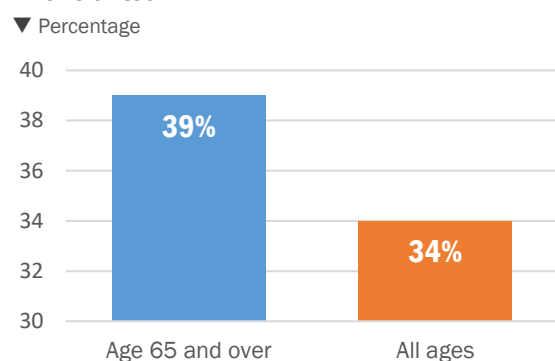
³⁸⁸ “Wellbeing of Wales: national indicators”. National Survey for Wales, 2019/20.

³⁸⁹ Ceredigion County Council (2022) Physical Activity Development Plan Consultation.

³⁹⁰ “Enabling Sport in Wales to Thrive”. Sport Wales. (Online: <https://futures.sport.wales/#2>). Retrieved: 24/02/2022.

³⁹¹ 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,³⁹² 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.³⁹³

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.³⁹⁴ 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 1,993.³⁹⁵ 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 2035.³⁹⁶

³⁹² Age UK. Conditions and illnesses. Online: <https://www.ageuk.org.uk/information-advice/health-wellbeing/conditions-illnesses/> Retrieved: 25/10/2021.

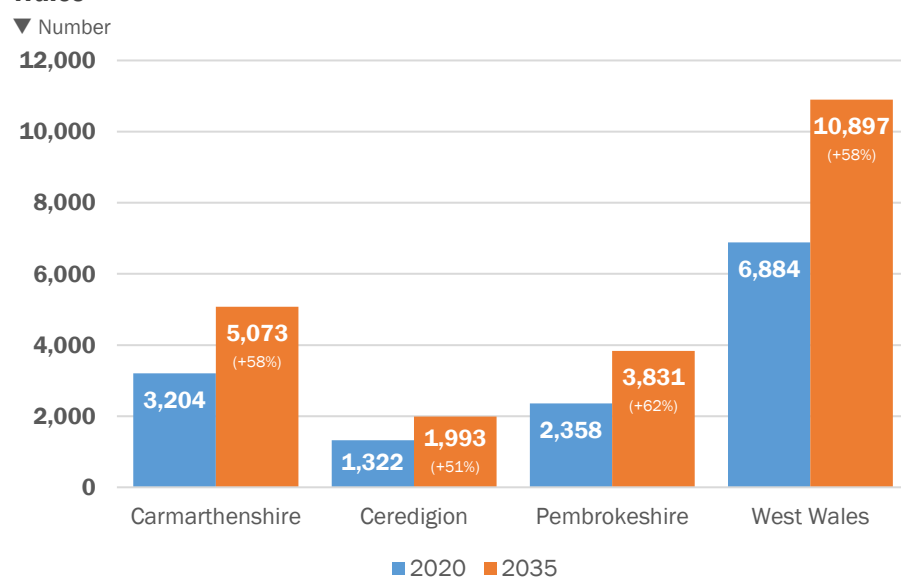
³⁹³ Nomis Mortality Statistics – Underlying cause, sex and age.

³⁹⁴ Healthline. Dementia and Alzheimer's: What Are the Differences? Online: <https://www.healthline.com/health/alzheimers-disease/difference-dementia-alzheimers> Retrieved: 25/10/2021.

³⁹⁵ West Wales Care Partnership. Older People. Online: <http://www.wwcp-data.org.uk/older-people> Retrieved: 25/10/2021.

³⁹⁶ 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.³⁹⁷ 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.

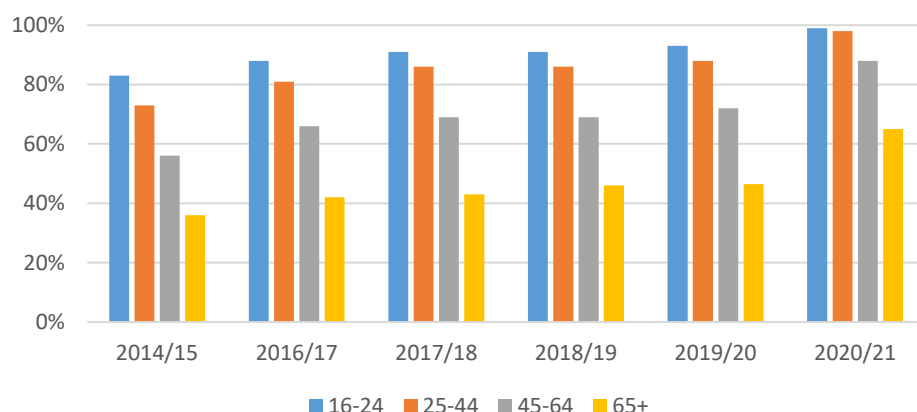
We know from the National Survey for Wales that any age group can be affected by isolation and loneliness including the very young, but concerns over the impact of COVID-19 are of a particular concern for older people, who may be more vulnerable and concerned about leaving home.

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).³⁹⁸ 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.³⁹⁹ 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

▼ Percentage



Source: National Survey for Wales, 2020/21

Physical Transport can also be a challenge for some of Ceredigion's residents 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.

³⁹⁷ "Cylch Caron Extra Care Housing Scheme: Evidence and Consultation Report." Ceredigion County Council, 2020.

³⁹⁸ National Survey for Wales (2020/21).

³⁹⁹ 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.⁴⁰⁰ 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.

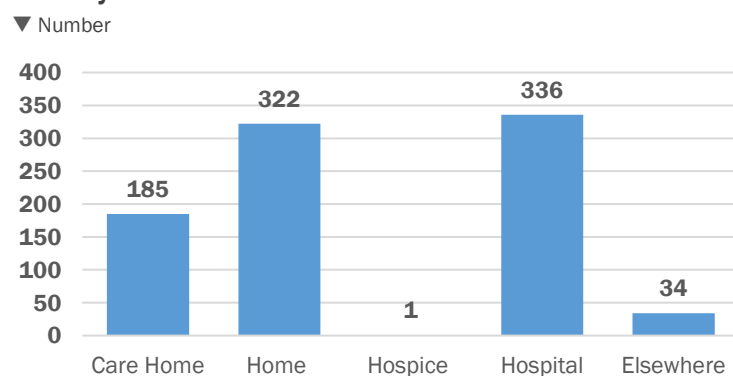
Table 8.4: Top 3 causes of death in Ceredigion

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.⁴⁰¹

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

⁴⁰⁰ Nomis Mortality Statistics – Underlying cause, sex and age.

⁴⁰¹ CARE At Home Group. Online: <https://careathomegroup.com/> Retrieved: 19/10/2021.

during the day,⁴⁰² which is likely to be prohibitive for many in Ceredigion given that the average household income is just £26,605.⁴⁰³

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.⁴⁰⁴

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.⁴⁰⁵

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.

⁴⁰² Care Sourcer Online: <https://www.caresourcer.com/caresupport/financing-care/care-at-home-wales/> Retrieved: 19/10/2021.

⁴⁰³ CACI Paycheck 2021.

⁴⁰⁴ 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/

⁴⁰⁵ 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.

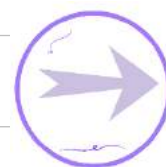
Buildings without **level access** and lack of **disabled parking** were identified as particular barriers to accessing venues and services by Ceredigion's disabled residents.

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 18th 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 7th March 2022, and published on the Ceredigion PSB website on or before 21st March 2022.

Table 9.1: Timetable for the Next Steps

Date	Activity
10 th November 2021	Completion of Draft Assessment of Local Well-being
18 th November 2021	Draft Assessment of Local Well-being presented to Ceredigion PSB
18 th November 2021	Consultation on the draft Assessment of Local Well-being opens and runs for 8 weeks
17 th January 2022	Consultation on the draft Assessment of Local Well-being closes
18 th January 2022 to 28 th February 2022	Assessment of Local Well-being updated and final version produced
7 th March 2022	Final version of Assessment of Local Well-being presented to Ceredigion PSB
21 st 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 7th 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**

Appendices 1-12

2022



1: Joint Regional Methodology

Methodoleg ar y cyd Joint Methodology



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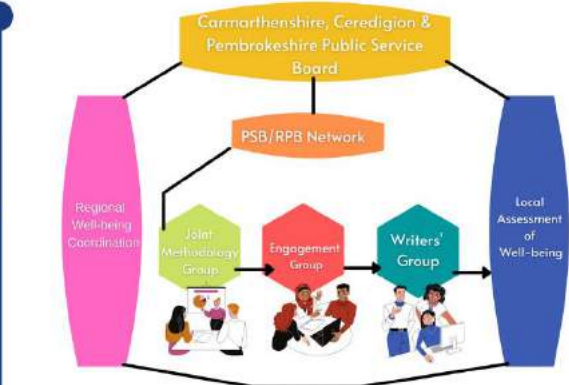
Assessment of Local Well-being

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

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

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"> Identify more local community areas and understand the issues within these communities. 	<i>Review the local community areas adopted in each assessment.</i>
<ul style="list-style-type: none"> Greater focus on Well-being of individual groups and/or communities across the area. 	<i>Produce area profiles for the adopted community areas based on a standard template.</i>
<ul style="list-style-type: none"> Link/map the life stages approach with the Well-being goals. 	<i>Diagrammatically evidence the linkages between the five life stages and the Well-being Goals.</i>
<ul style="list-style-type: none"> Analyse the impact of Well-being over short, medium and long term. 	<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"> Identify the gaps in evidence to understand what might be needed in the short, medium and long term. 	<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"> Statement on how we are undertaking the process. 	<i>The agreed methodology summary will be included in the assessment.</i>

<ul style="list-style-type: none"> Situational Analysis had too much emphasis on Quantitative work and need more on the Qualitative. 	<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 clear 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



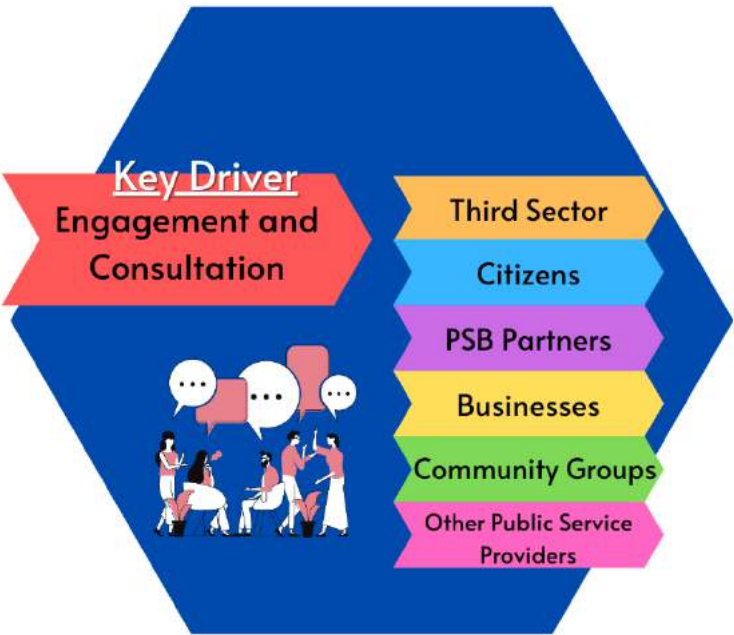
Engagement is the key driver for the Assessment of Local Well-being, allowing us to record and consider views from a range of partners, stakeholders and citizens to gain a truly reflective understanding of the needs of each PSB area.

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

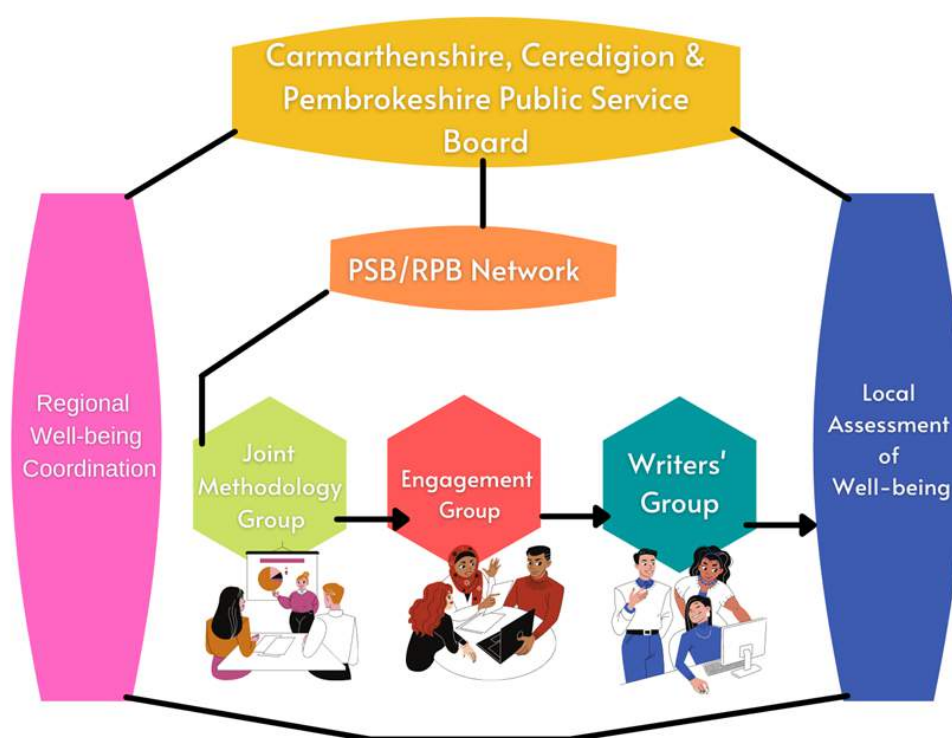
A detailed timeline has been developed, outlining the main deliverables of the assessment up to the publication date in March 2022 (see Appendix 1). A project action plan will also be developed, detailing what needs to be done, when it needs to be done by, who needs to be involved and the resources that 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.

Timeline

LOCAL ASSESSMENT OF WELL-BEING



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 th 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 th 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 th 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 th 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 th June 2021	Corporate Equalities Working Group	Gathered the views of the group across the engagement themes from the perspective of equalities.
11 th 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 th 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 th 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 th 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 th 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 st September 2021	Carer’s Alliance	Gather views across the engagement themes from the perspective of carers in Ceredigion.
16 th September 2021	Community Town and Community Councils – North Ceredigion	Gather views across the engagement themes with Town and Community Councils.
20 th 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 nd September 2021	Armed Forces Community	Gather views across the engagement themes from the perspective of armed forces veterans.
5 th 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 th 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 Public 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

Future Trends Report Wales 2021 (Public Services Boards version)

Evidence for the third UK Climate Change Risk Assessment (CCRA3): Summary for Wales 2021

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.

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).

Ceredigion Childcare Sufficiency Assessment 2017-2022 & Draft Childcare Sufficiency Assessment 2022-27

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).

Ceredigion Play Sufficiency Assessment 2019 & Draft Play Sufficiency Assessment 2022

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.

West Wales Population Assessment 2017 & West Wales Population Assessment 2022 (West Wales Care Partnership)

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).

Dyfed-Powys Police and Crime Commissioner: Police and Crime Plan 2017-22

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.

Alcohol and Drug Misuse Desktop Health Needs Assessment 2019

Strategic assessment prepared in accordance with regulations under that section relating to combating substance misuse in the local authority area.

NRW Area Assessment for Ceredigion and Mid-Wales

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.

HM Prisons and Probation Service Reducing Reoffending Plan

Strategic assessment prepared in accordance with regulations under that section relating to the reduction of reoffending in the local authority area.

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
Methodology	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.
New Beginnings	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.
Childhood	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.
Youth	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.
Adulthood	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.

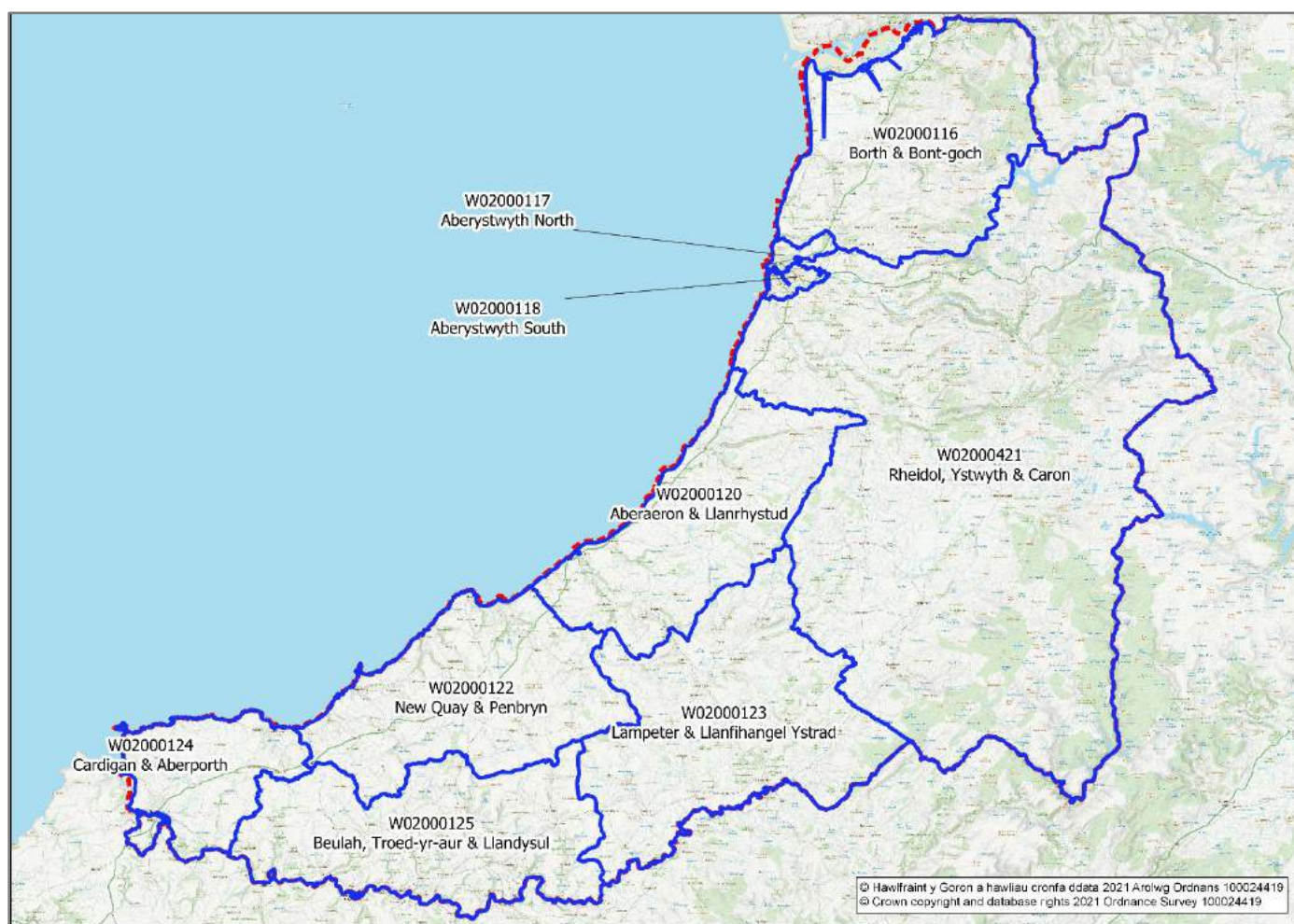
PHW	Public Health Wales (PHW) is the national public health agency in Wales and exists to protect and improve health and wellbeing and reduce health inequalities for people in Wales.
PSB	Public Services Board (PSB) was established by the Well-Being of Future Generations Act Wales 2016 and brings together 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 12th 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



8: Community Area Profiles

- 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

Aberaeron & Llanrhystud



! 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.

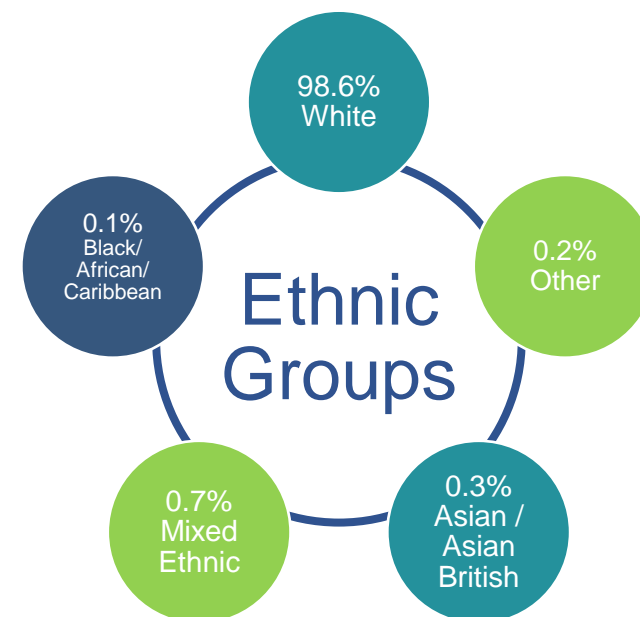
£30,820

The Aberaeron & Llanrhystud area runs along the very western side of Ceredigion and covers around 173.3km². 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
Mid-year population 2020	7,113	9.7%	72,895	3,169,586
Males	3,523	49.5%	36,262	1,563,524
Females	3,590	50.5%	36,633	1,606,062
Aged 0-15	981	13.8%	10,774	562,730
Aged 16-64	3,846	54.1%	43,453	1,938,266
Aged 65+	2,286	32.1%	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



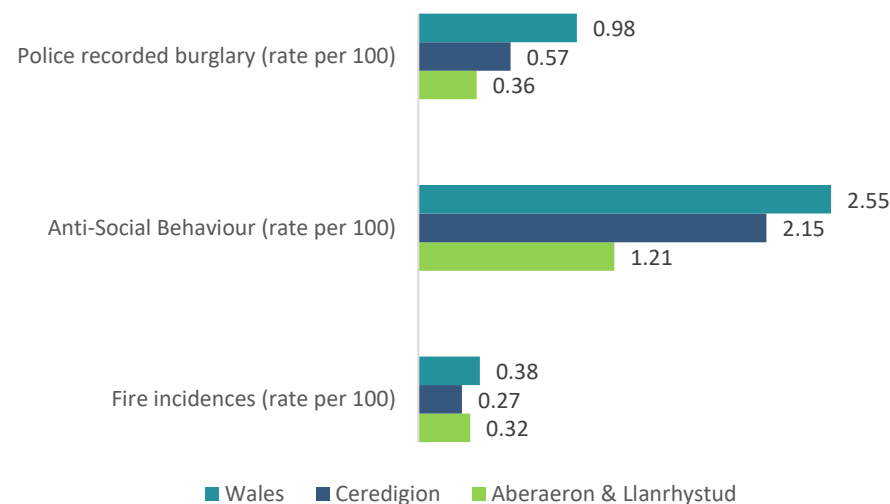
Health:

	Aberaeron & Llanrhystud	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	13.6	12.7	14.3
Limiting long-term illness (rate per 100)	19.9	20.0	22.7
Premature death (rate per 100,000)	315.5	322.4	382.4
GP-recorded mental health condition (rate per 100)	21.6	19.9	23.2
Cancer incidence (per 100,000)	496.3	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	4.3	4.8	5.5
Children aged 4-5 who are obese (%)	7.4	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	-

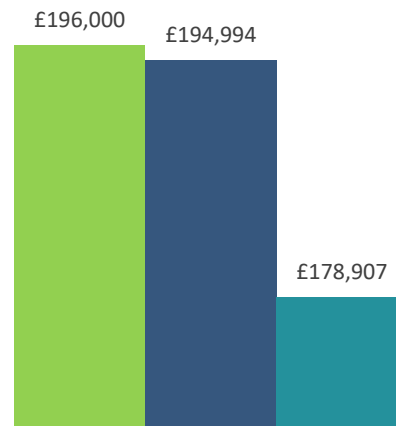
Source: WIMD 2019 & ONS 2021

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

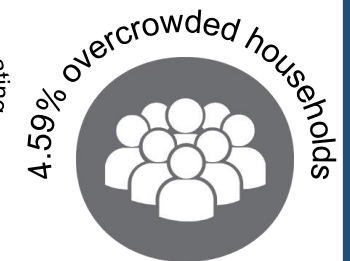
Source: Census 2011

Average House Prices:



■ Aberaeron & Llanrhystud ■ Ceredigion ■ Wales

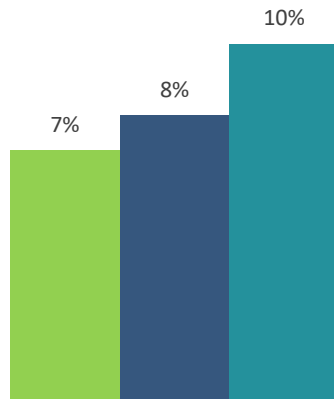
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

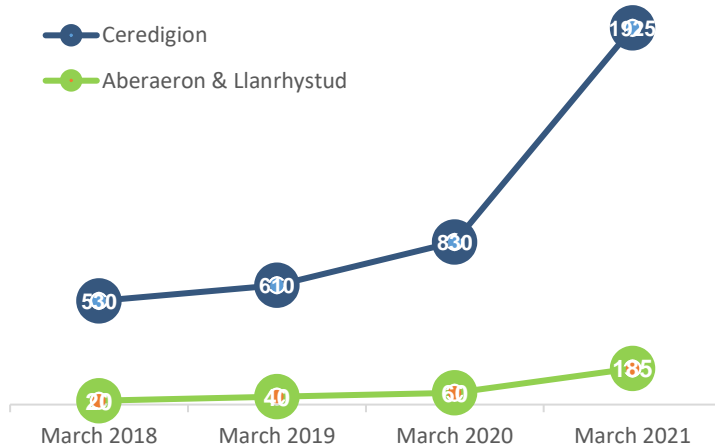
% of working-age people in employment deprivation:



Aberaeron & Llanrhystud Ceredigion Wales

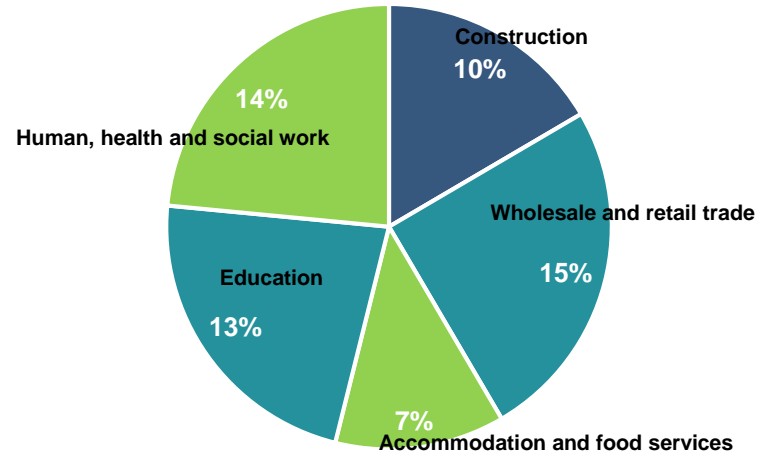
Source: WIMD 2019

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
Economically Active	3,562 66.2%	61.1%	65.8%
Economically Inactive	1,822 33.8%	38.9%	34.2%

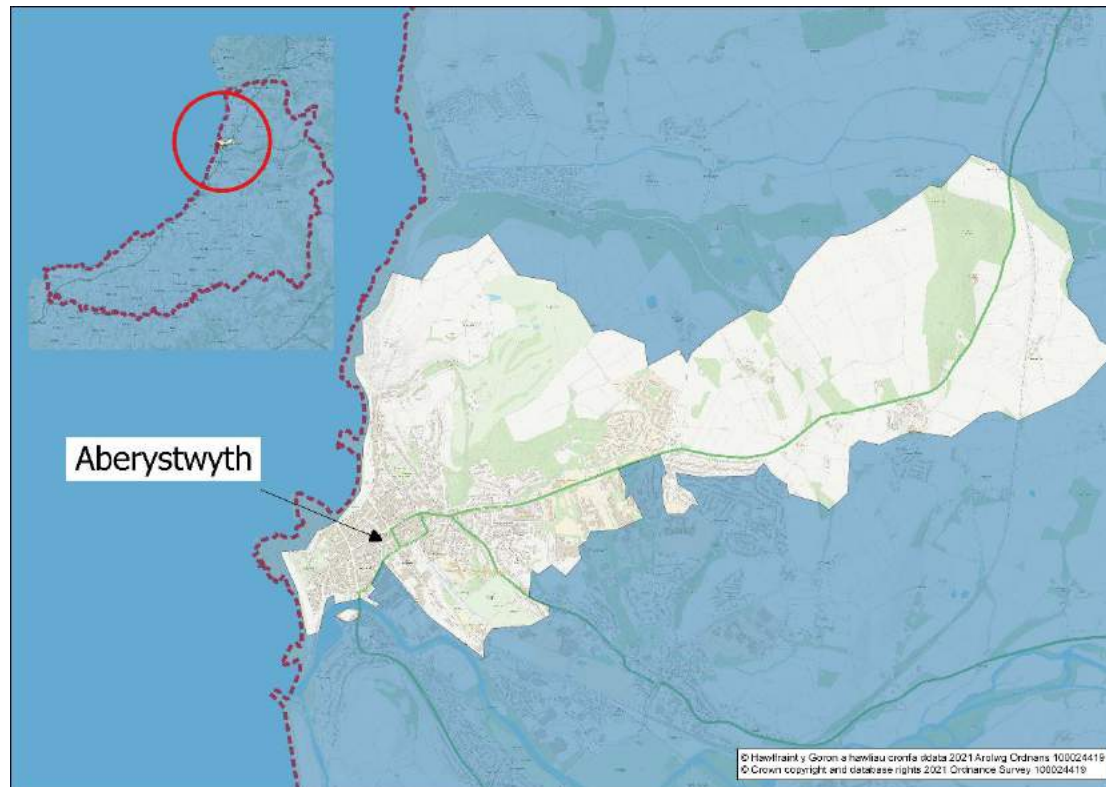
Source: ONS 2021

Median Household Income:



Source: CACI Paycheck 2021

Aberystwyth North



! 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.

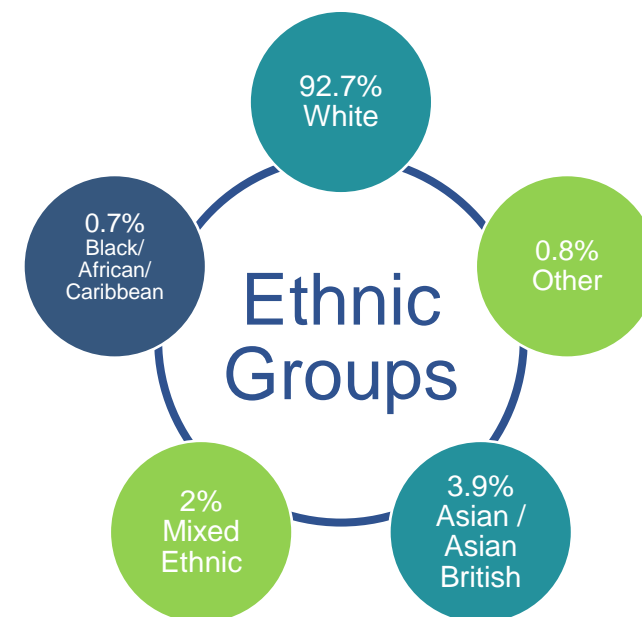
12.7 per 100 population

Aberystwyth North is situated on Ceredigion's north-western coast and covers approximately 5.7km² 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
Mid-year population 2020	9,001	12.3%	72,895	3,169,586
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

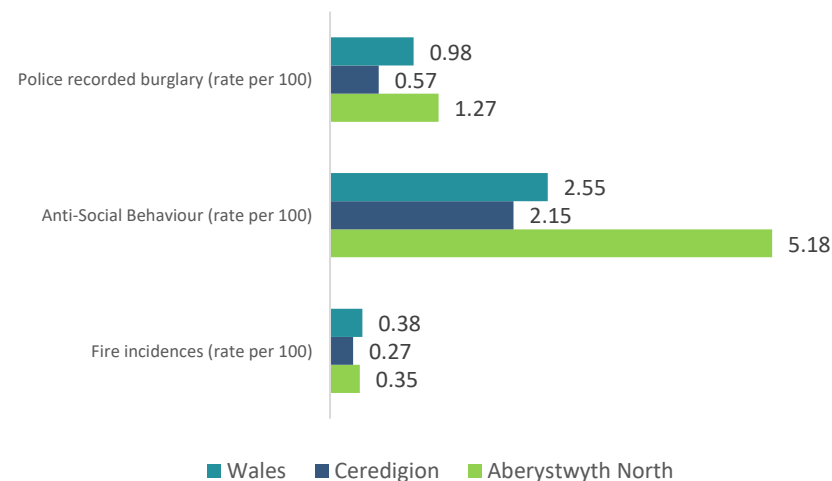
Health:

	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	-

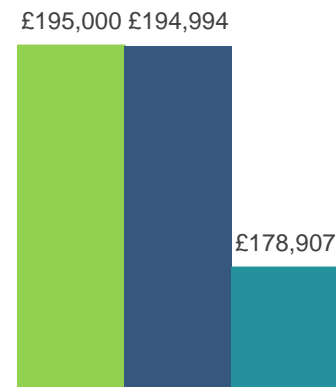
Source: WIMD 2019 & ONS 2021

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

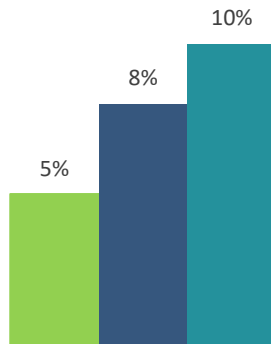
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

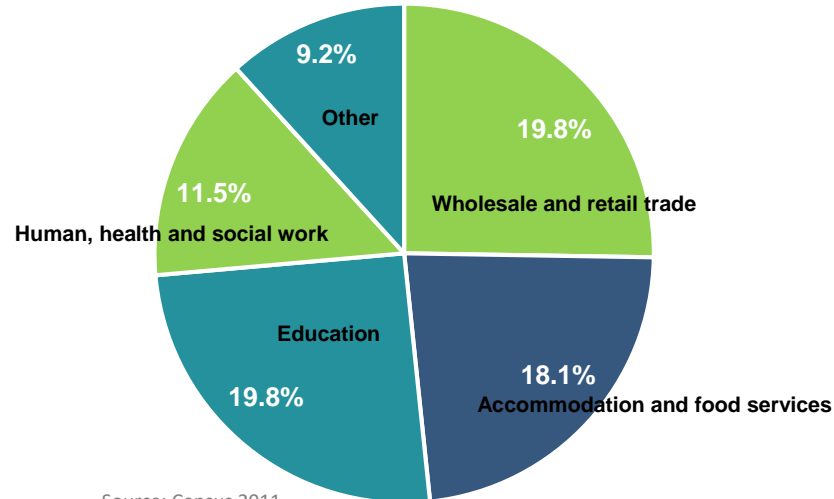
% of working-age people in employment deprivation:



■ Aberystwyth North ■ Ceredigion ■ Wales

Source: WIMD 2019

Top 5 Industries of Employment:



Source: Census 2011.

Source: WIMD 2019

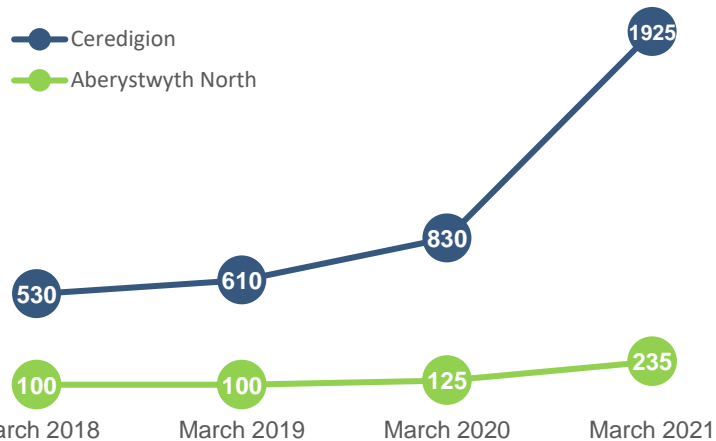


Adults aged 25-64 with no qualifications
7.6%

Key Stage 4 leavers entering Higher Education
37.5%



Claimant Count:



Source: ONS 2021

Source: ONS 2021

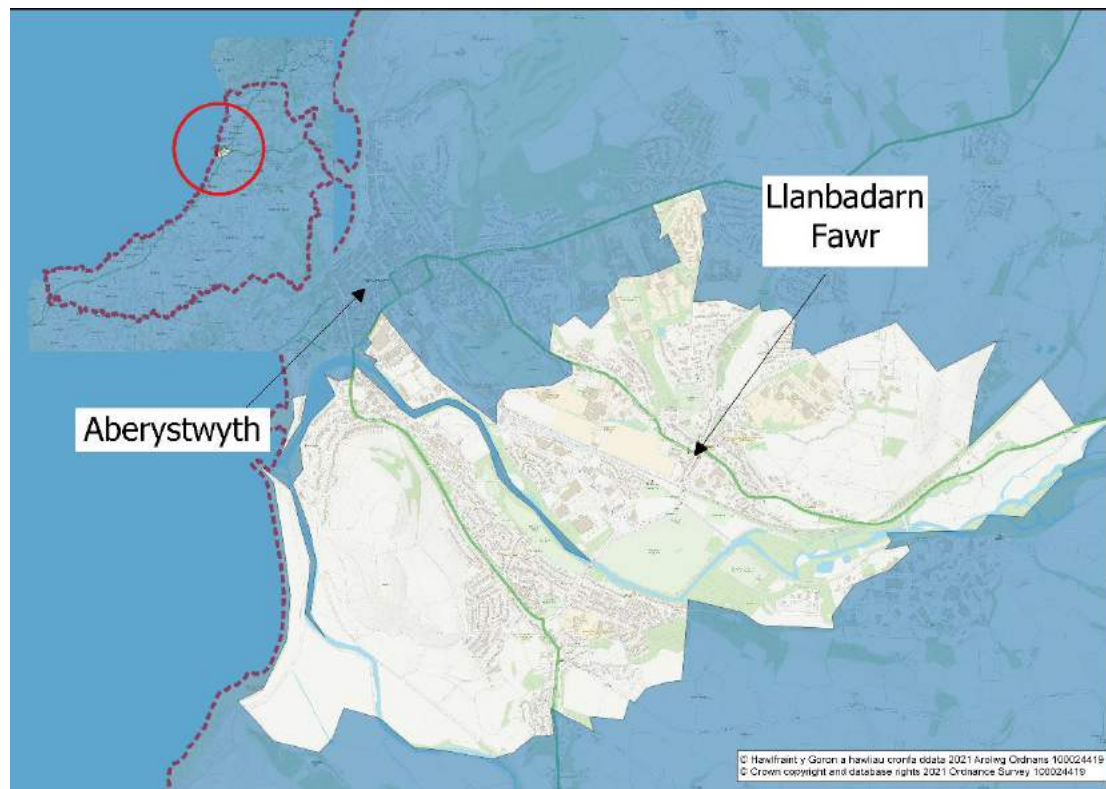
	Aberystwyth North		Ceredigion	Wales
Economically Active	4,068	45.5%	61.1%	65.8%
Economically Inactive	4,878	54.5%	38.9%	34.2%

Median Household Income:



Source: CACI Paycheck 2021

Aberystwyth South



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.

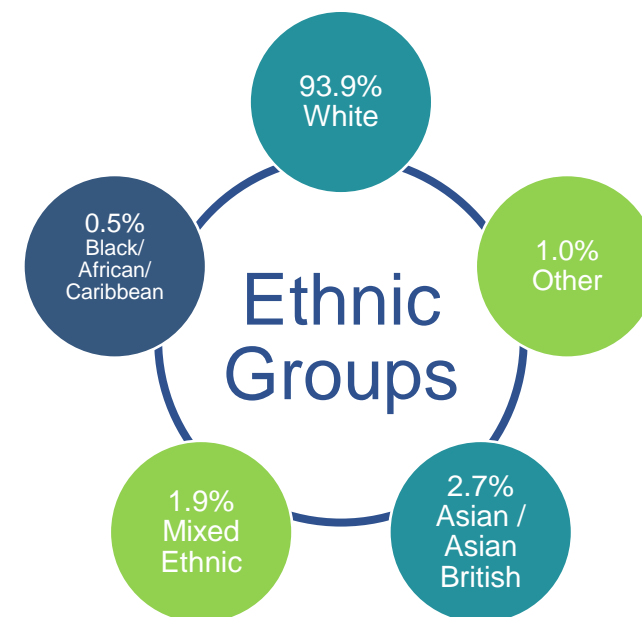
367m

Aberystwyth South is situated on Ceredigion's north-western coast and covers a fairly small area, of the county, around 5.9km². 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
Mid-year population 2020	6,629	9.1%	72,895	3,169,586
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





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

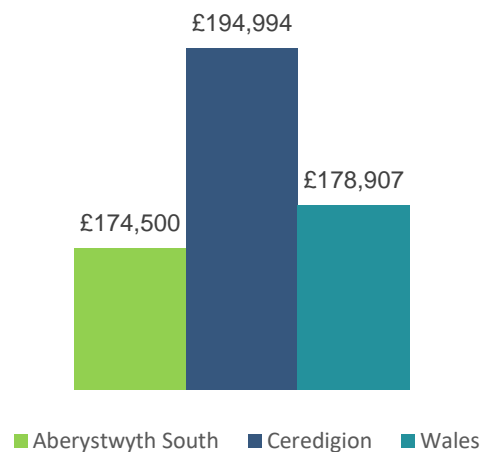


Housing and living arrangements:

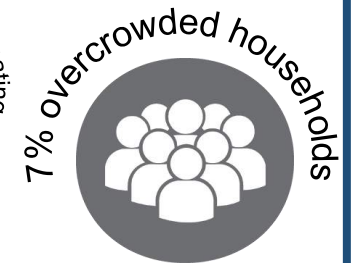
	Aberystwyth South		Ceredigion
	Number	%	
Total households	2,840	-	31,562
All one person households	933	32.9%	10,456
All households with dependent children	742	26.1%	7,203
All households aged 65+	620	21.8%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

Average House Prices:



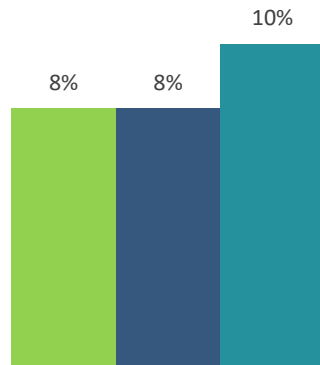
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

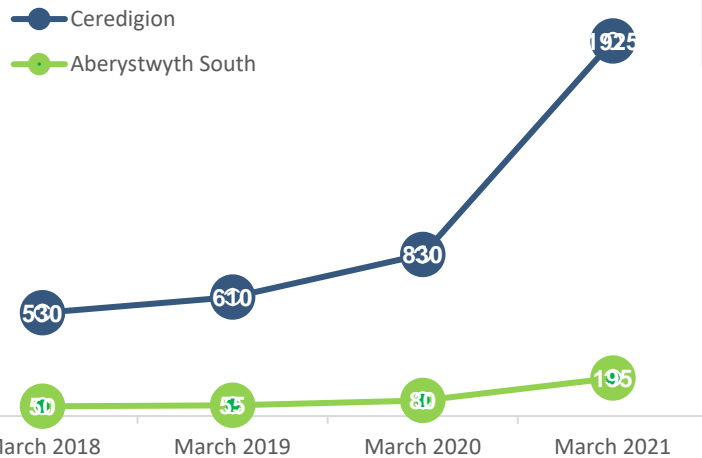
% of working-age people in employment deprivation:



■ Aberystwyth South ■ Ceredigion ■ Wales

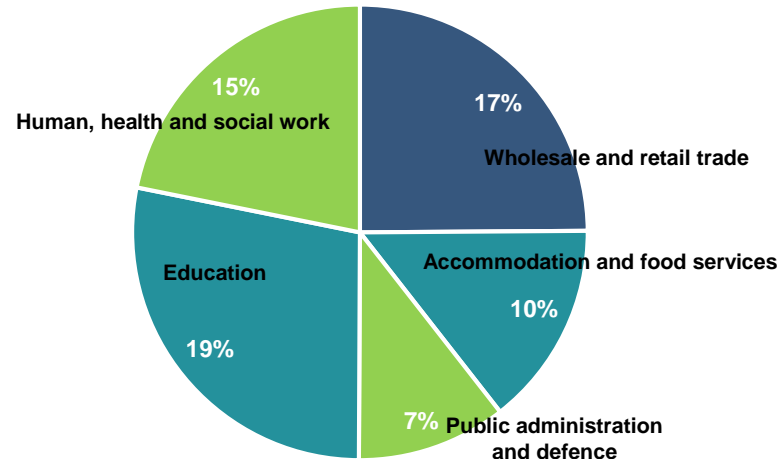
Source: WIMD 2019

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

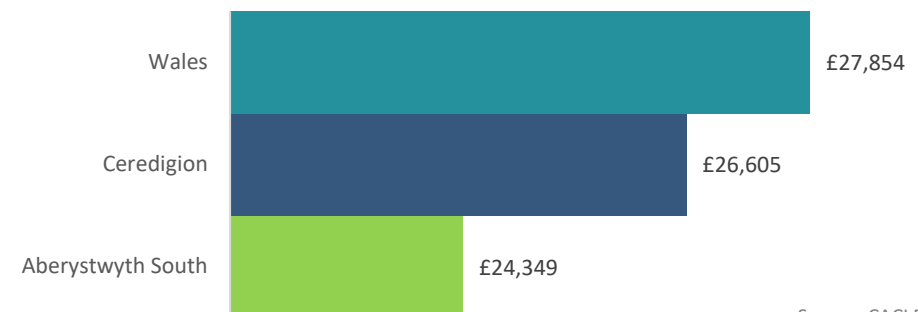
28.4%



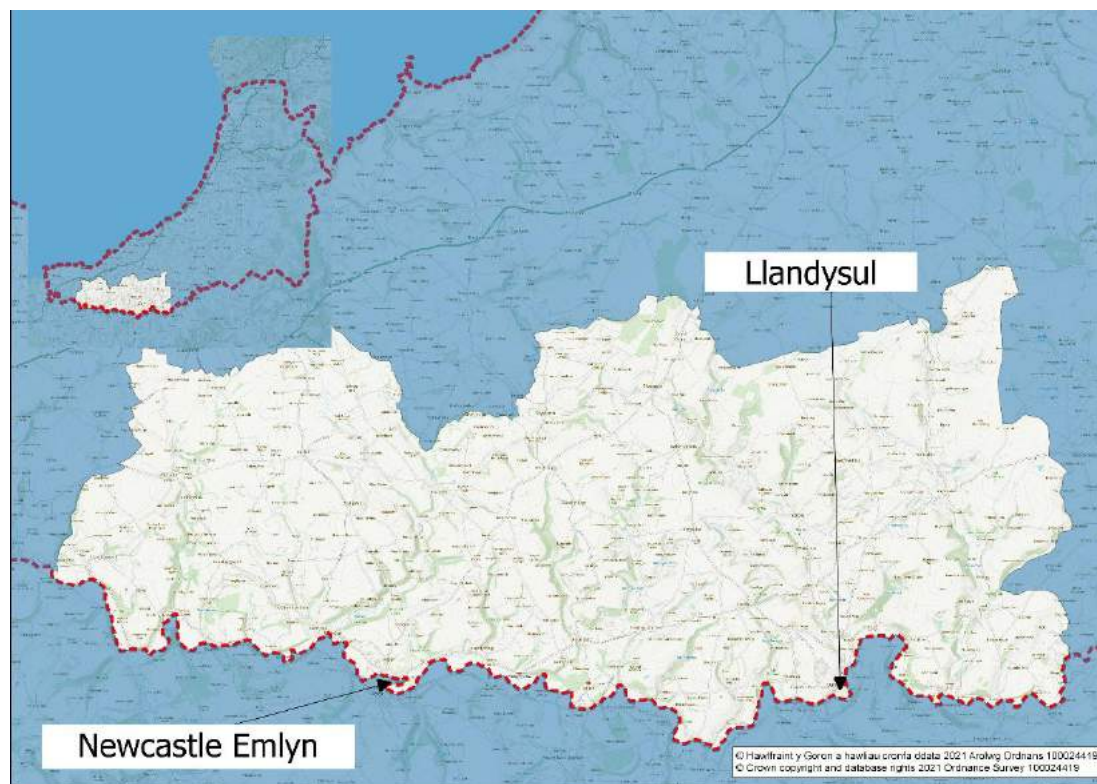
	Aberystwyth South		Ceredigion	Wales
Economically Active	3,522	58.0%	61.1%	65.8%
Economically Inactive	2,552	42.0%	38.9%	34.2%

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.

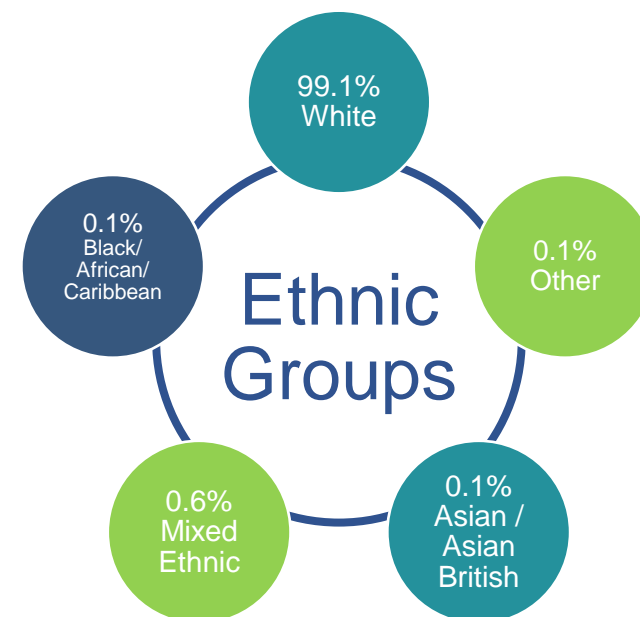
119
minutes

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 177.7km² 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
Mid-year population 2020	7,420	10.1%	72,895	3,169,586
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

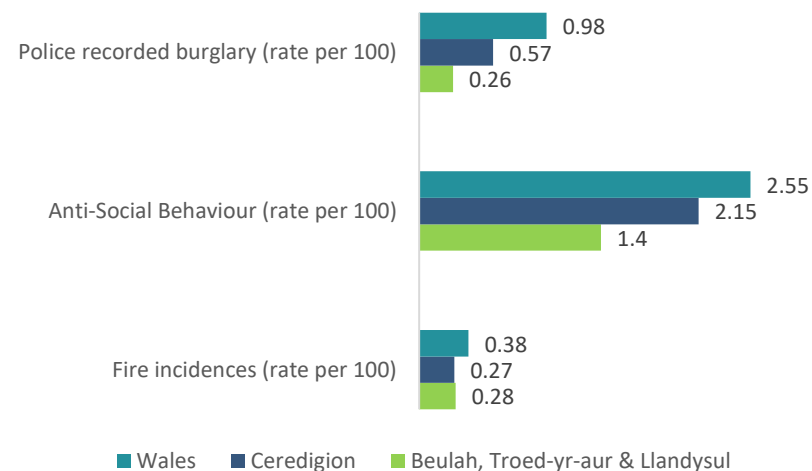
Health:

	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	-

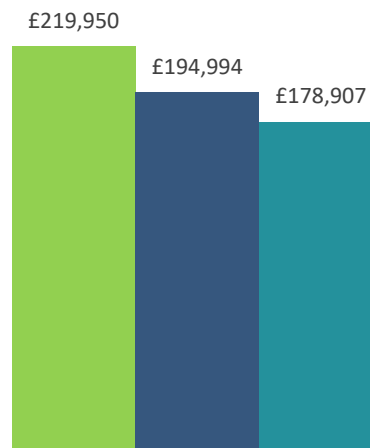
Source: WIMD 2019 & ONS 2021

Housing and living arrangements:

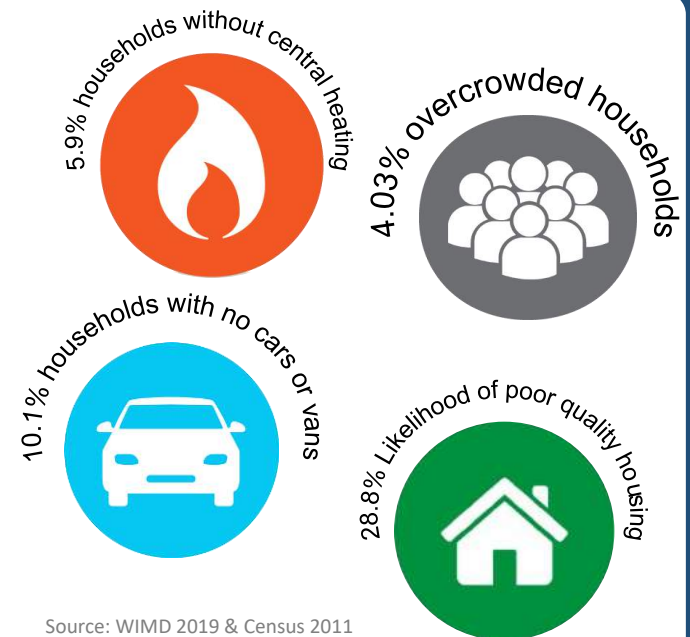
	Beulah, Troed-yr-aur & Llandysul		Ceredigion
	Number	%	
Total households	3,308	-	31,562
All one person households	1,032	31.2%	10,456
All households with dependent children	833	23.4%	7,203
All households aged 65+	916	27.8%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

Average House Prices:



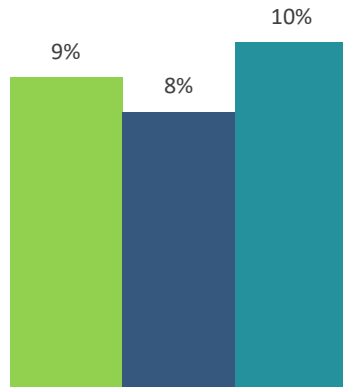
■ Beulah, Troed-yr-aur & Llandysul ■ Ceredigion ■ Wales
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

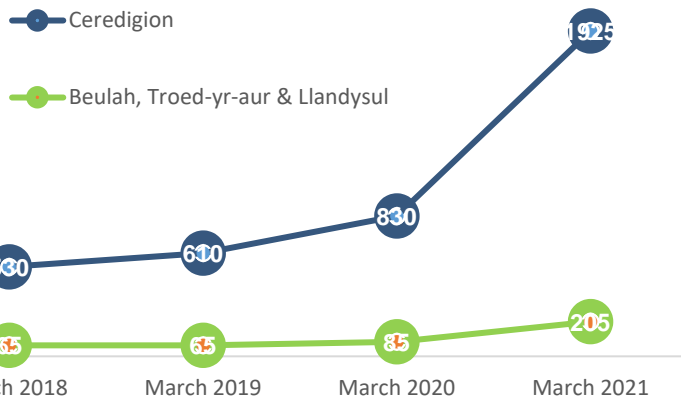
% of working-age people in employment deprivation:



■ Beulah, Troed-yr-aur & Llandysul ■ Ceredigion ■ Wales

Source: WIMD 2019

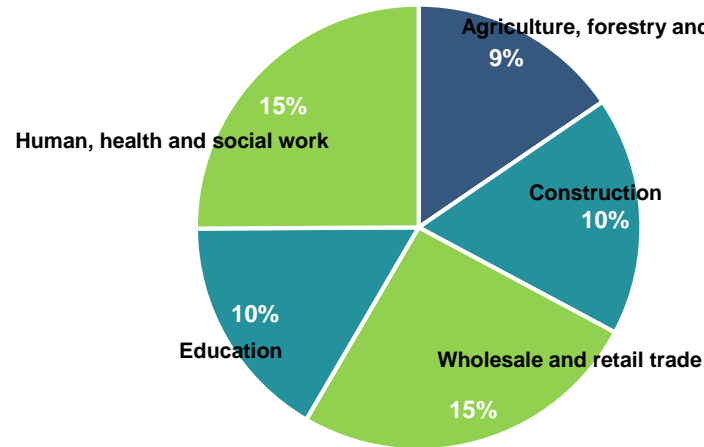
Claimant Count:



Source: ONS 2021

Top 5 Industries of Employment:

Source: WIMD 2019



Source: Census 2011.



Adults aged 25-64 with no qualifications
15.6%

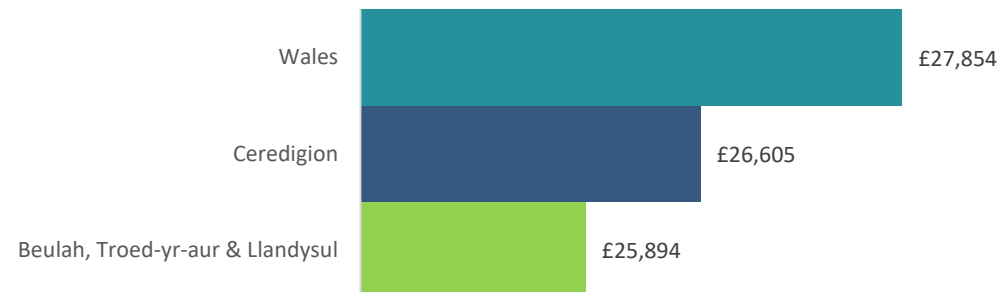
Key Stage 4 leavers entering Higher Education
29.2%



	Beulah, Troed-yr-aur & Llandysul	Ceredigion	Wales
Economically Active	3,460 62.7%	61.1%	65.8%
Economically Inactive	2,056 37.3%	38.9%	34.2%

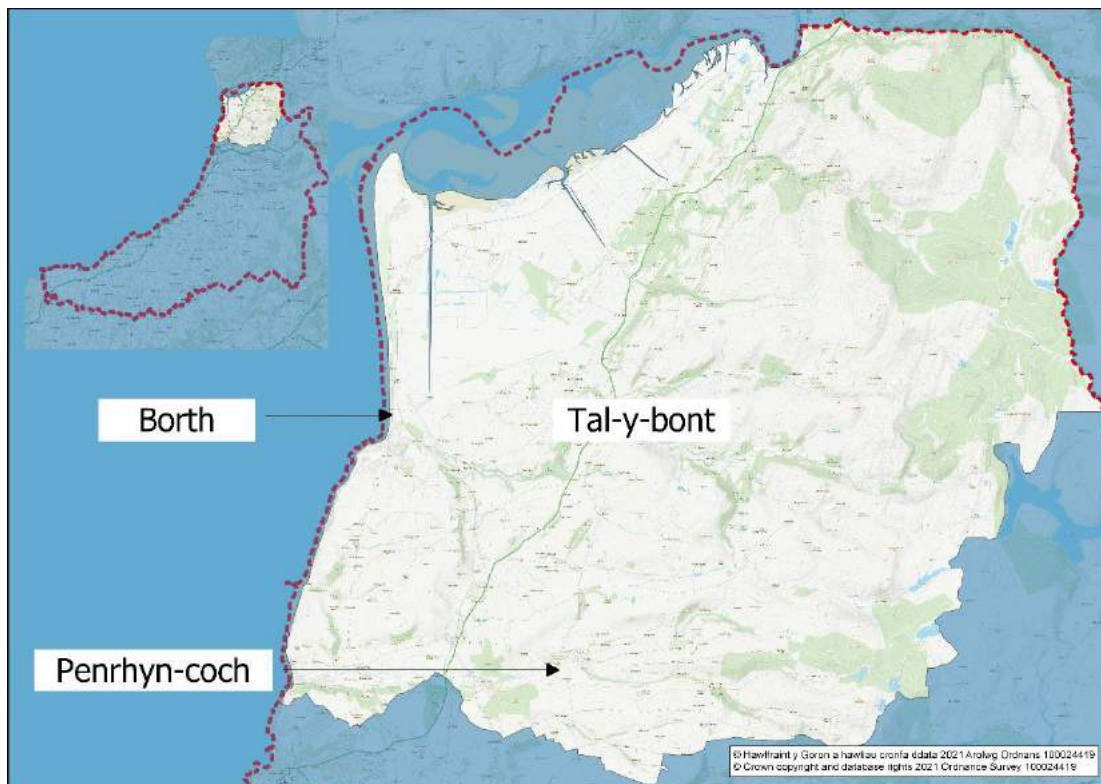
Source: ONS 2021

Median Household Income:



Source: CACI Paycheck 2021

Borth & Bont-goch



! 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

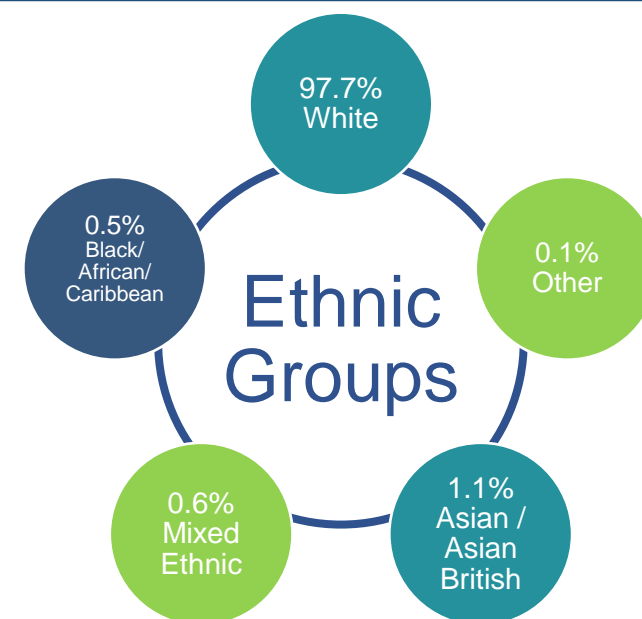
92%

Borth & Bont-goch is one of the largest community areas, covering around 195.5km² 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
Mid-year population 2020	7,466	10.2%	72,895	3,169,586
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

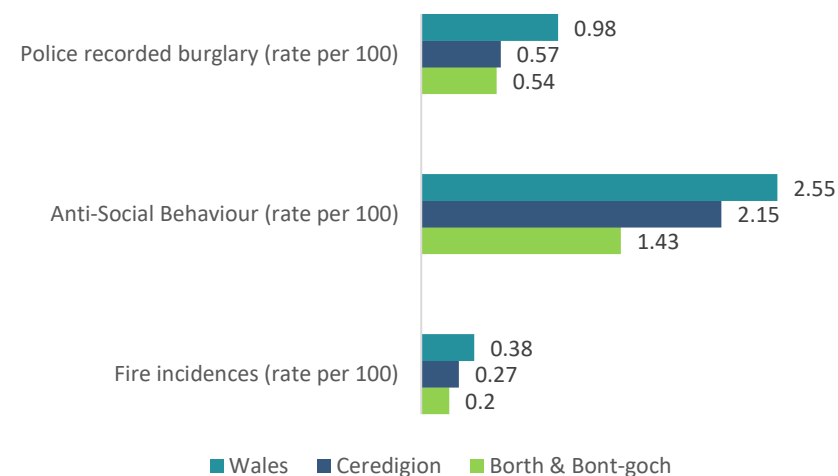
Health:

	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	-

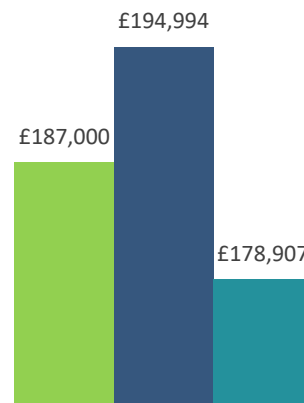
Source: WIMD 2019 & ONS 2021

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

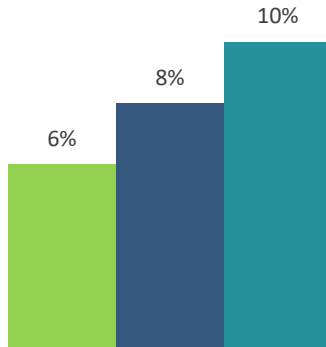
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

% of working-age people in employment deprivation:



■ Borth & Bont-goch ■ Ceredigion ■ Wales

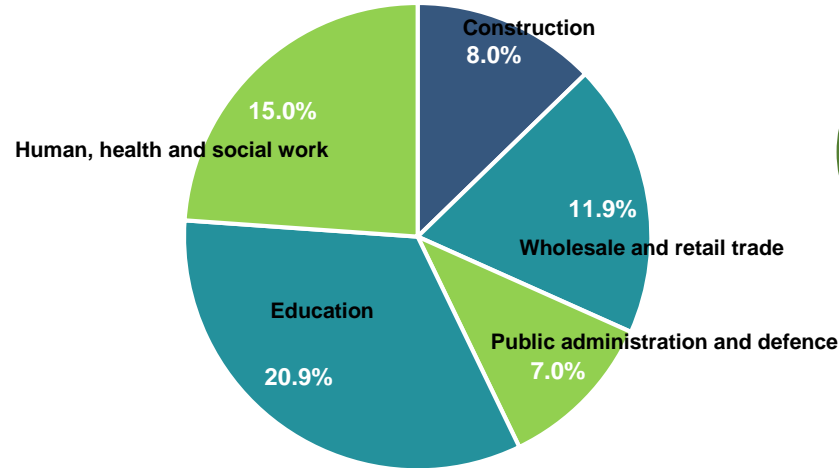
Source: WIMD 2019

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

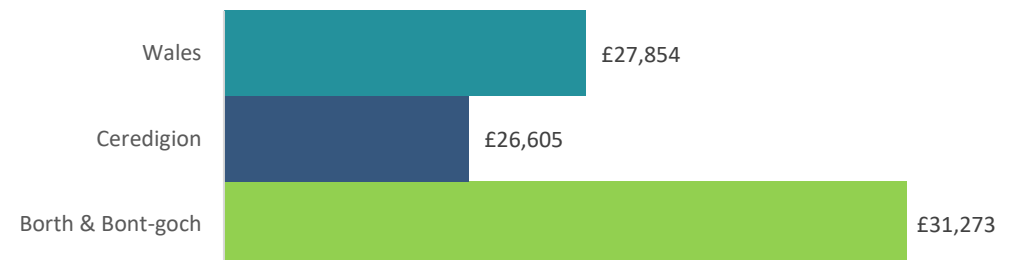
33%



	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.

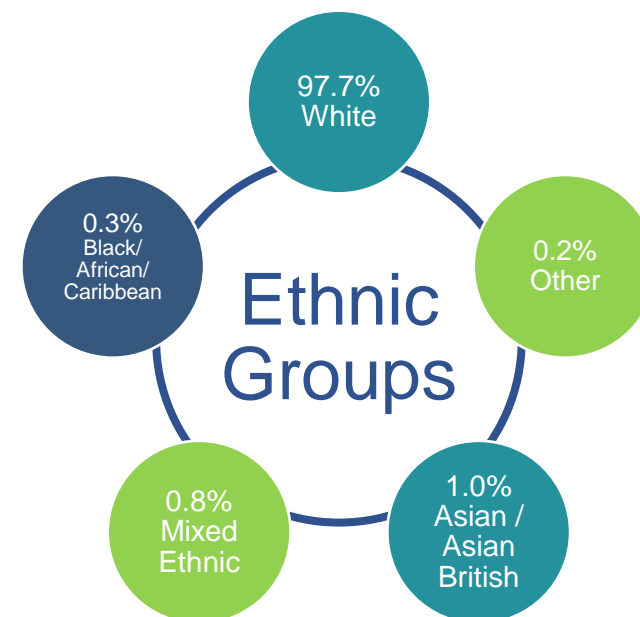
4.3%

The Cardigan and Aberporth area is situated at the very southern tip of Ceredigion and covers around 78.6km². 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
Mid-year population 2020	8,873	12.2%	72,895
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

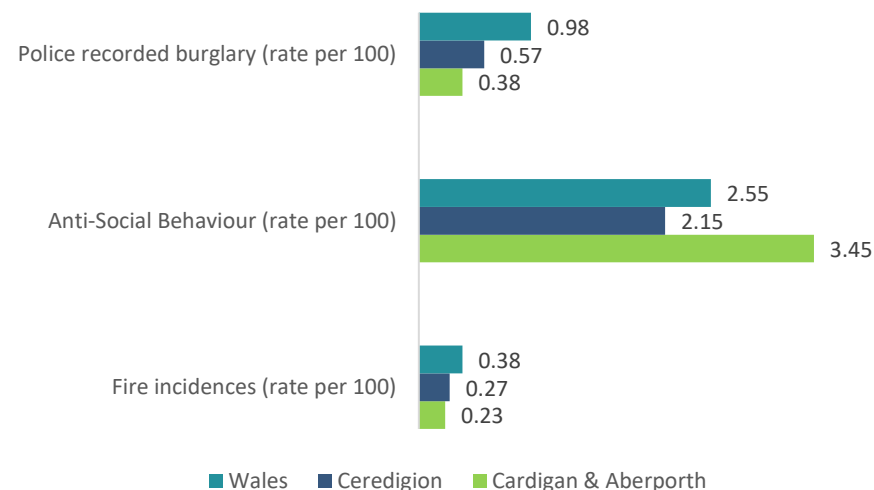
Health:

	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	-

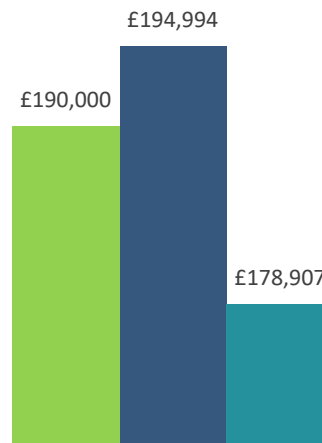
Source: WIMD 2019 & ONS 2021

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:



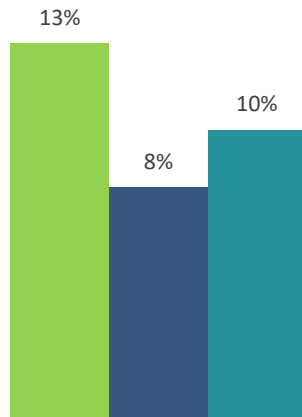
■ Cardigan & Aberporth ■ Ceredigion ■ Wales
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

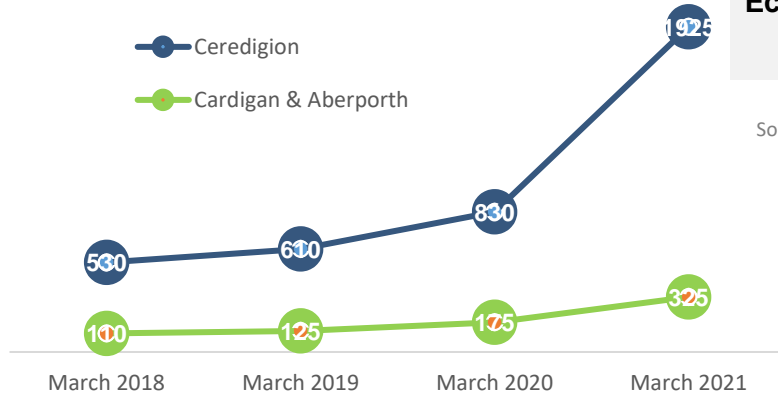
% of working-age people in employment deprivation:



■ Cardigan & Aberporth ■ Ceredigion ■ Wales

Source: WIMD 2019

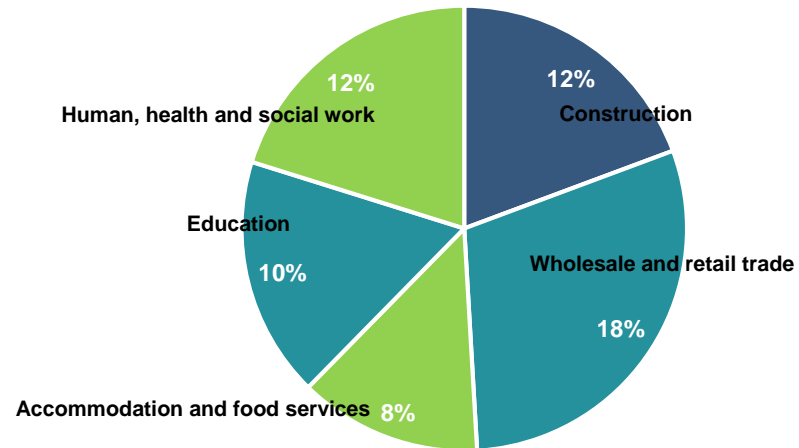
Claimant Count:



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

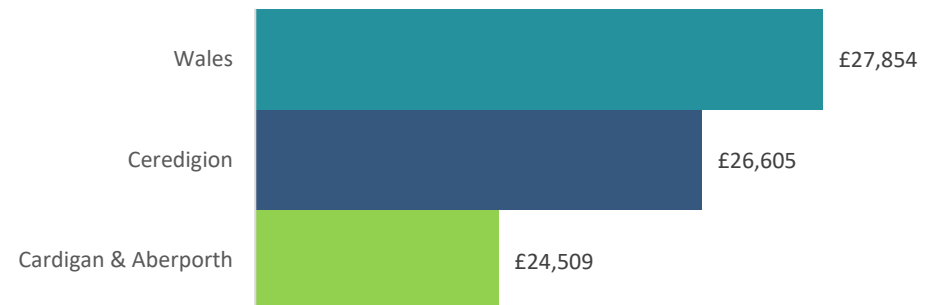
31.0%



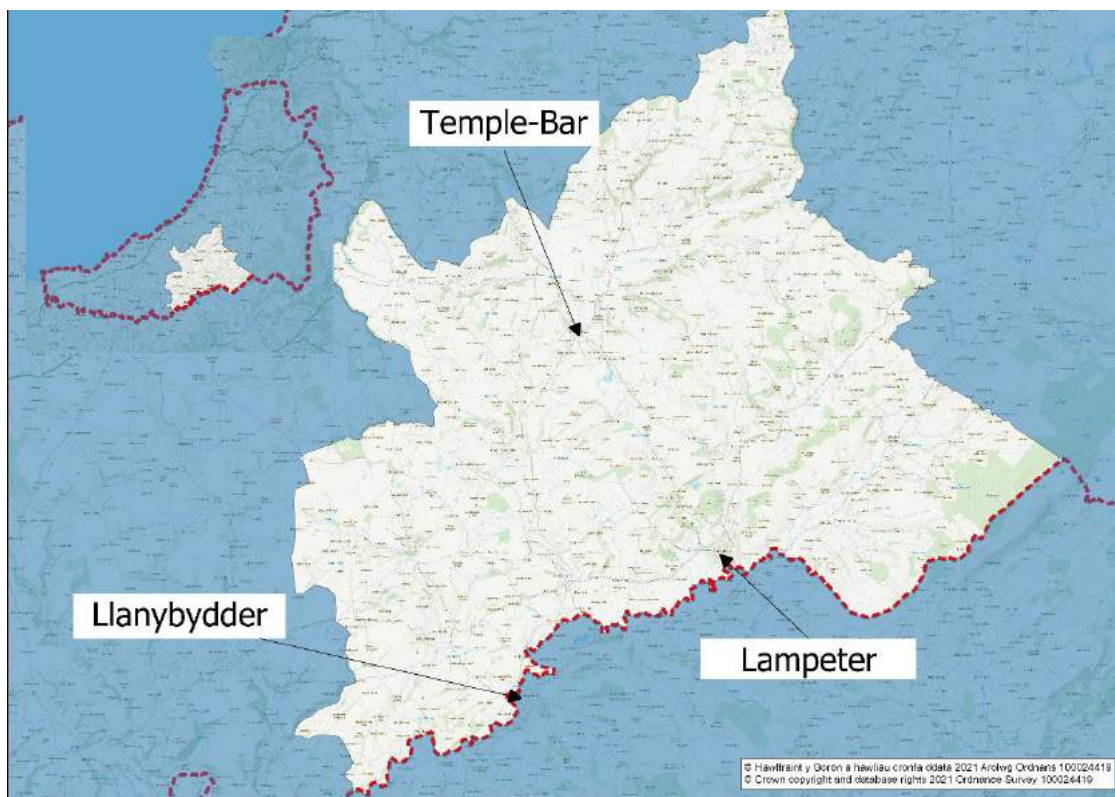
	Cardigan & Aberporth	Ceredigion	Wales
Economically Active	3,813 60.4%	61.1%	65.8%
Economically Inactive	2,495 39.6%	38.9%	34.2%

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.

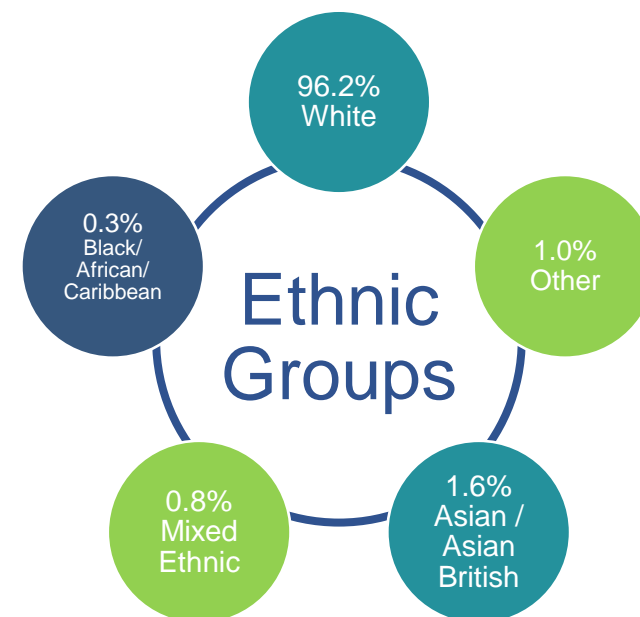
24.4

Lampeter & Llanfihangel Ystrad is situated to the south east of the county, is a fully in-land area and is approximately 226.7km². 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
Mid-year population 2020	8,191	11.2%	72,895	3,169,586
Males	4,086	49.4%	36,262	1,563,524
Females	4,145	50.6%	36,633	1,606,062
Aged 0-15	1,430	17.5%	10,774	562,730
Aged 16-64	4,626	56.5%	43,453	1,938,266
Aged 65+	2,136	26.1%	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



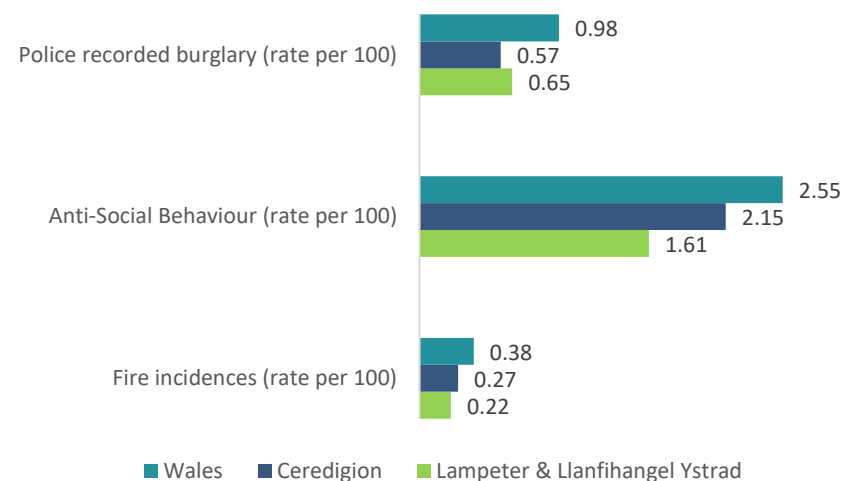
Health:

	Lampeter & Llanfihangel Ystrad	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	12.5	12.7	14.3
Limiting long-term illness (rate per 100)	20.4	20.0	22.7
Premature death (rate per 100,000)	344.0	322.4	382.4
GP-recorded mental health condition (rate per 100)	19.0	19.9	23.2
Cancer incidence (per 100,000)	523.6	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 (%)	9.2	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	-

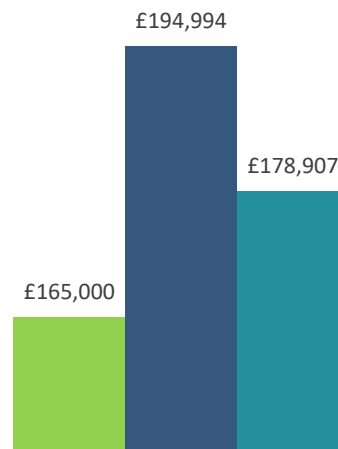
Source: WIMD 2019 & ONS 2021

Housing and living arrangements:

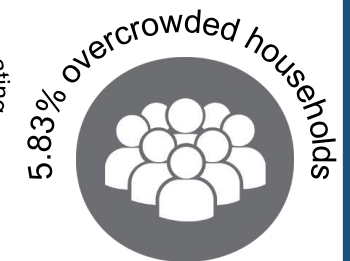
	Lampeter & Llanfihangel Ystrad		Ceredigion
	Number	%	
Total households	3,432	-	31,562
All one person households	1,093	32.0%	10,456
All households with dependent children	833	24.0%	7,203
All households aged 65+	916	26.7%	8,261
Average household size (persons)	2.3	-	2.3

Source: Census 2011

Average House Prices:



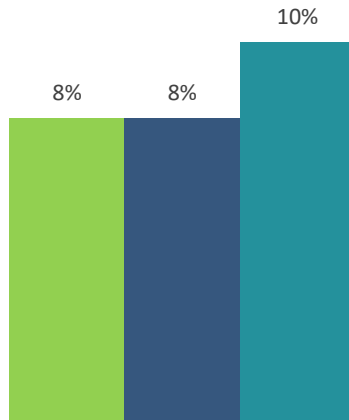
■ Lampeter & Llanfihangel Ystrad ■ Ceredigion ■ Wales
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

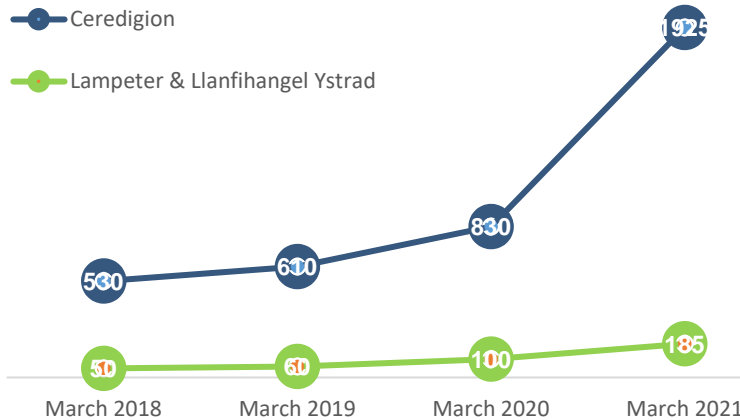
% of working-age people in employment deprivation:



■ Lampeter & Llanfihangel Ystrad ■ Ceredigion ■ Wales

Source: WIMD 2019

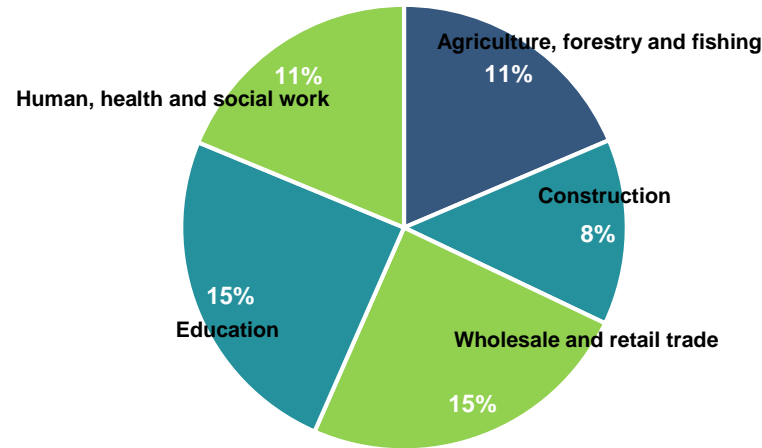
Claimant Count:



Source: ONS 2021

Top 5 Industries of Employment:

Source: WIMD 2019



Source: Census 2011.



Adults aged 25-64 with no qualifications
16.8%

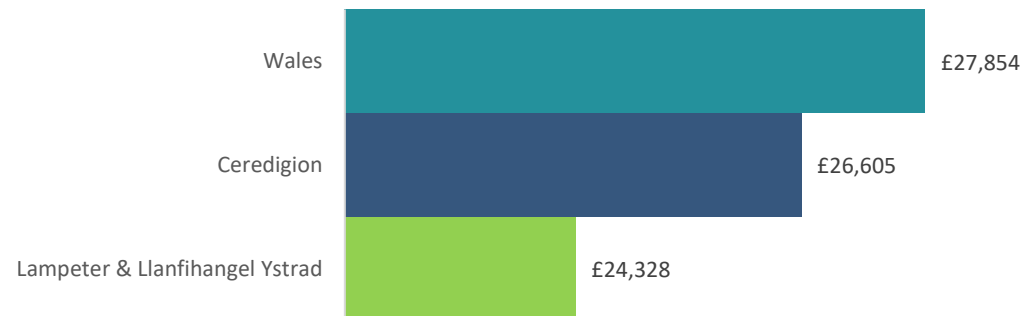
Key Stage 4 leavers entering Higher Education
33.6%



	Lampeter & Llanfihangel Ystrad	Ceredigion	Wales
Economically Active	3,868 62.2%	61.1%	65.8%
Economically Inactive	2,348 37.8%	38.9%	34.2%

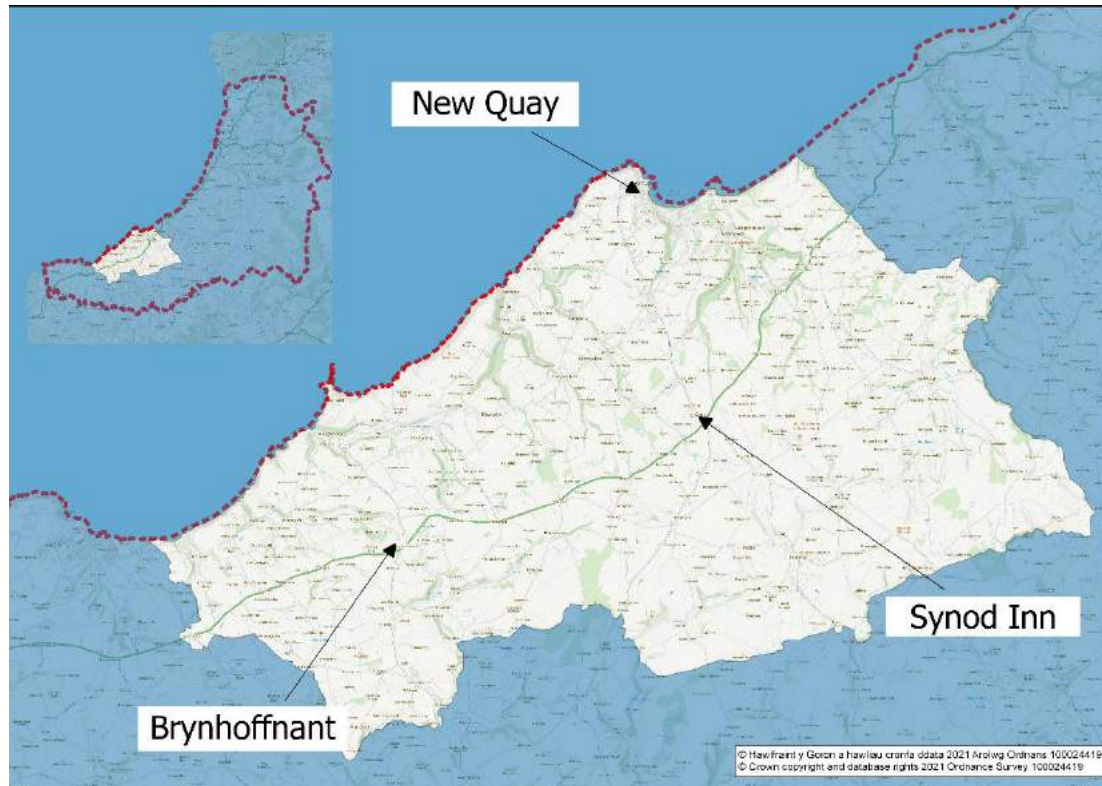
Source: ONS 2021

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.

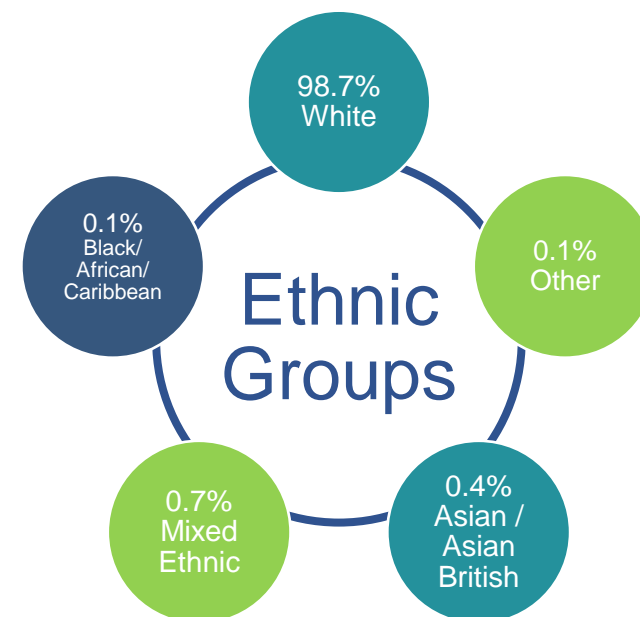
14.5 per 100 population

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
Mid-year population 2020	6,579	9.0%	72,895	3,169,586
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

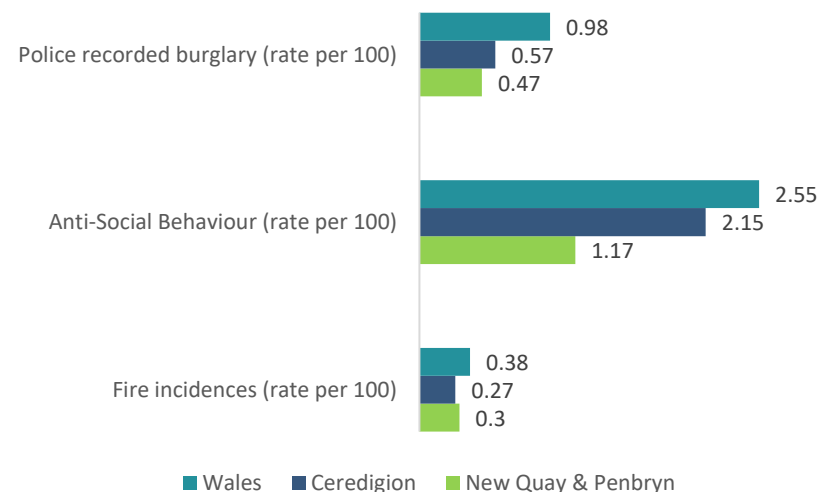
Health:

	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	-

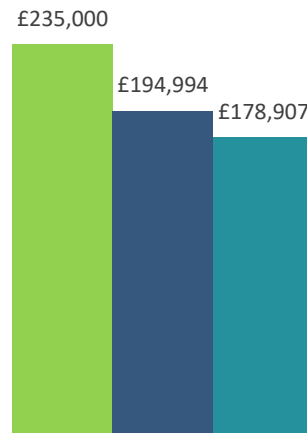
Source: WIMD 2019 & ONS 2021

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

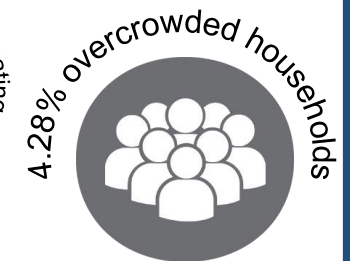
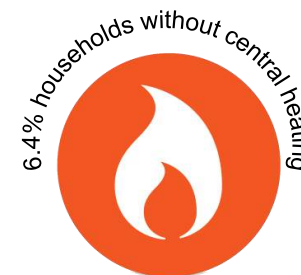
Source: Census 2011

Average House Prices:



■ New Quay & Penbryn ■ Ceredigion ■ Wales

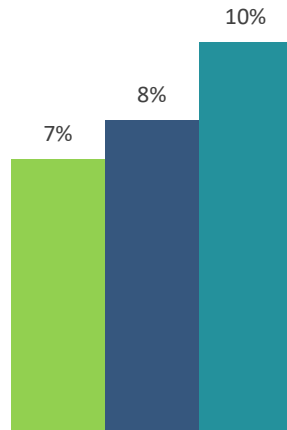
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

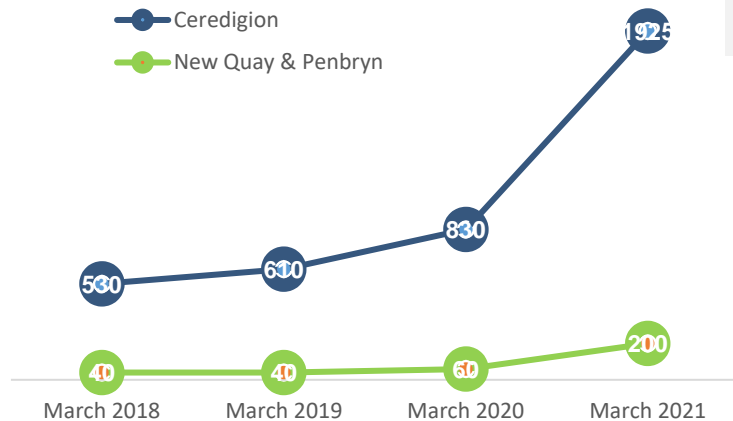
% of working-age people in employment deprivation:



■ New Quay & Penbryn ■ Ceredigion ■ Wales

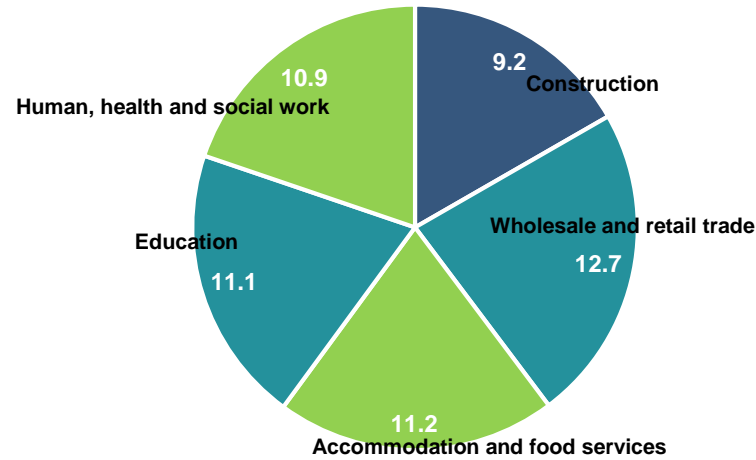
Source: WIMD 2019

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

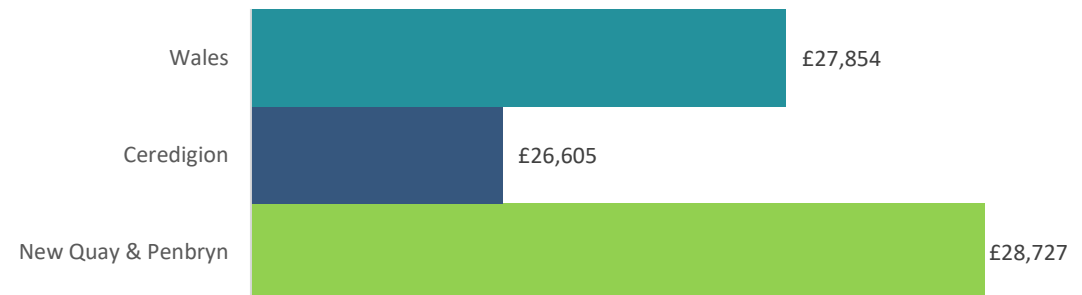
30.0%



	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%

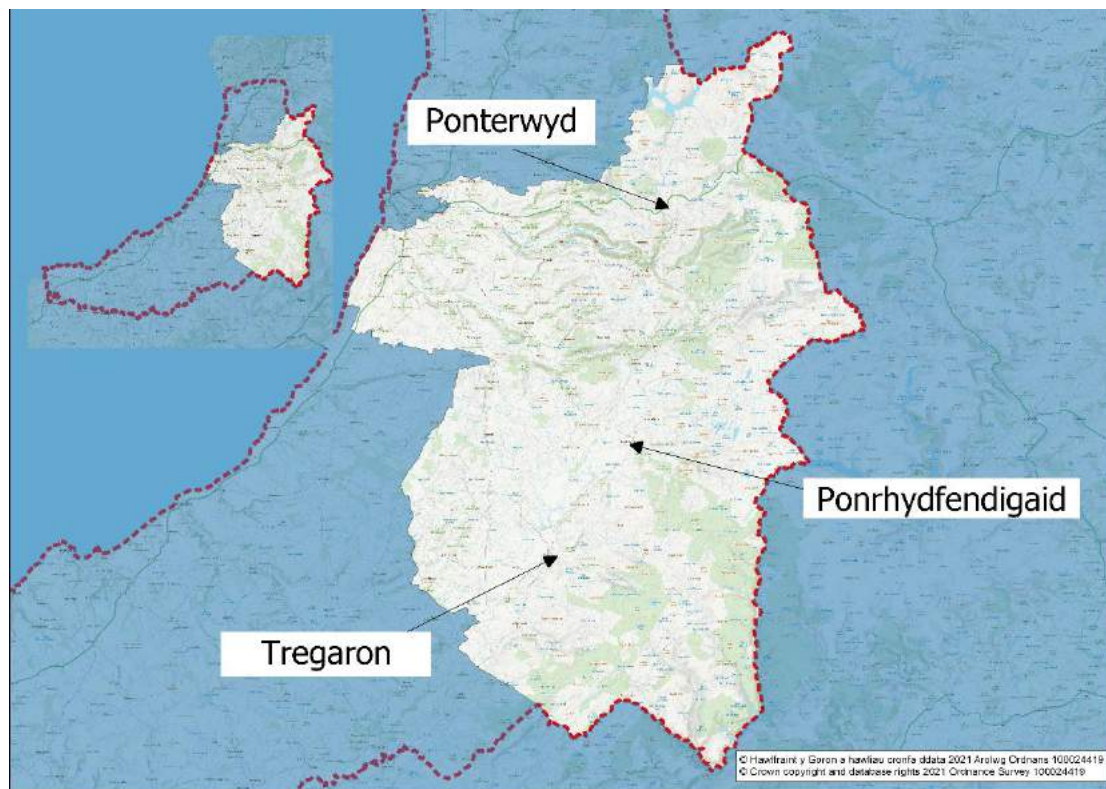
Source: ONS 2021

Median Household Income:



Source: CACI Paycheck 2021

Rheidol, Ystwyth & Caron



! 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.

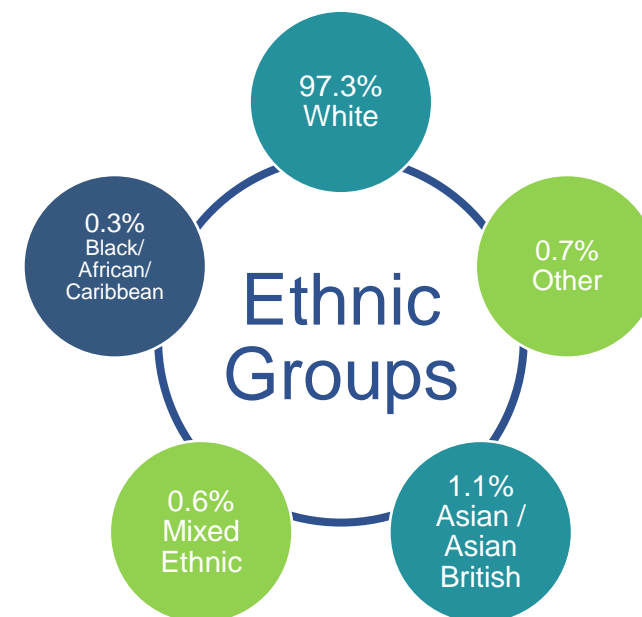
0.98 per
100 population

Rheidol, Ystwyth & Caron is by far the largest community area in Ceredigion, covering approximately 758.2km² 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
Mid-year population 2020	11,623	15.9%	72,895	3,169,586
Males	5,686	48.9%	36,262	1,563,524
Females	5,937	51.1%	36,633	1,606,062
Aged 0-15	1,896	16.3%	10,774	562,730
Aged 16-64	6,433	55.3%	43,453	1,938,266
Aged 65+	3,294	28.3%	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

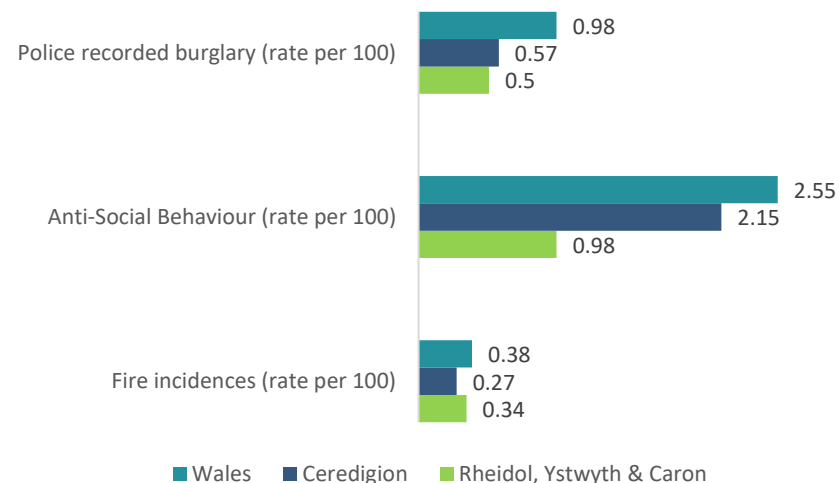
Health:

	Rheidol, Ystwyth & Caron	Ceredigion	Wales
GP-recorded chronic condition (rate per 100)	12.8	12.7	14.3
Limiting long-term illness (rate per 100)	18.3	20.0	22.7
Premature death (rate per 100,000)	285.2	322.4	382.4
GP-recorded mental health condition (rate per 100)	19.9	19.9	23.2
Cancer incidence (per 100,000)	505.4	545.5	611.9
Low birth weight (live single births less than 2.5kg) (%)	4.7	4.8	5.5
Children aged 4-5 who are obese (%)	10.5	10.5	11.8

Source: WIMD 2019



Community Safety:



Source: WIMD 2019



Access to Services:



Average public return
travel time to a food
shop

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

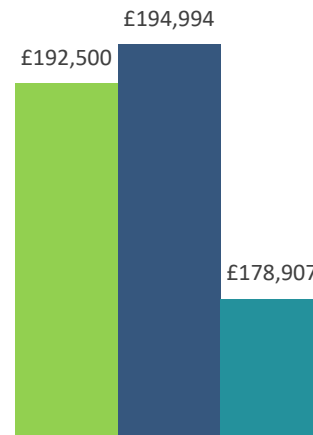


Housing and living arrangements:

	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

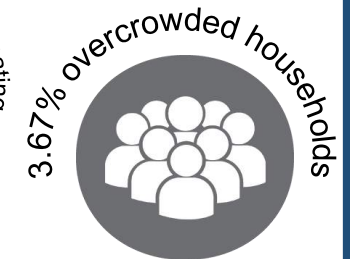
Source: Census 2011

Average House Prices:



■ Rheidol, Ystwyth & Caron ■ Ceredigion ■ Wales

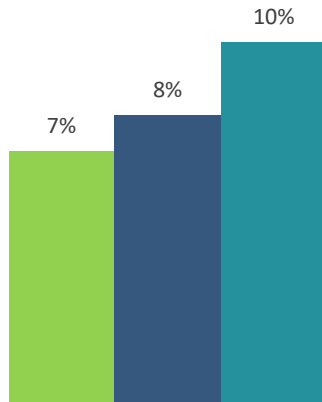
Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

£ Economy & Employment:

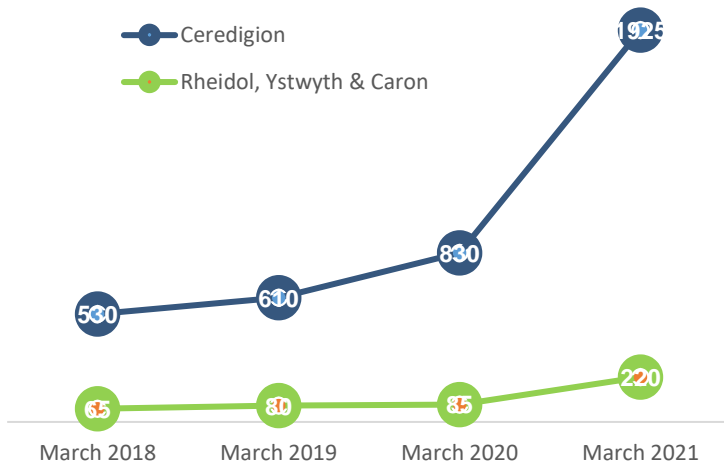
% of working-age people in employment deprivation:



■ Rhiedol, Ystwyth & Caron ■ Ceredigion ■ Wales

Source: WIMD 2019

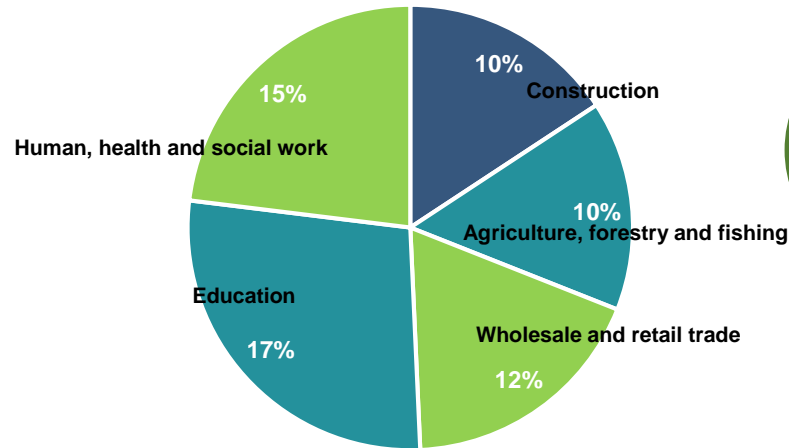
Claimant Count:



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

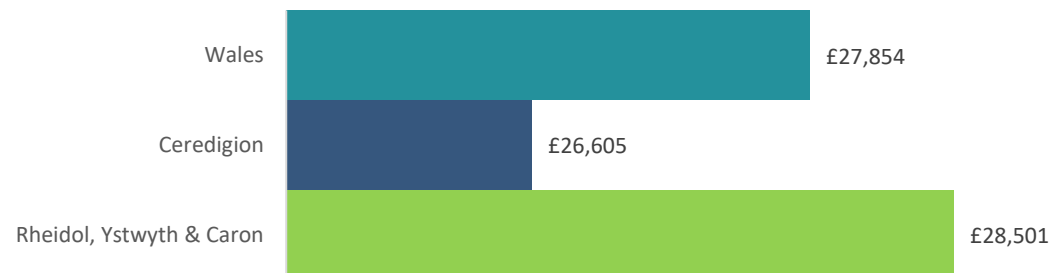
34.5%



	Rheidol, Ystwyth & Caron	Ceredigion	Wales
Economically Active	5,738 67.8%	61.1%	65.8%
Economically Inactive	2,724 32.2%	38.9%	34.2%

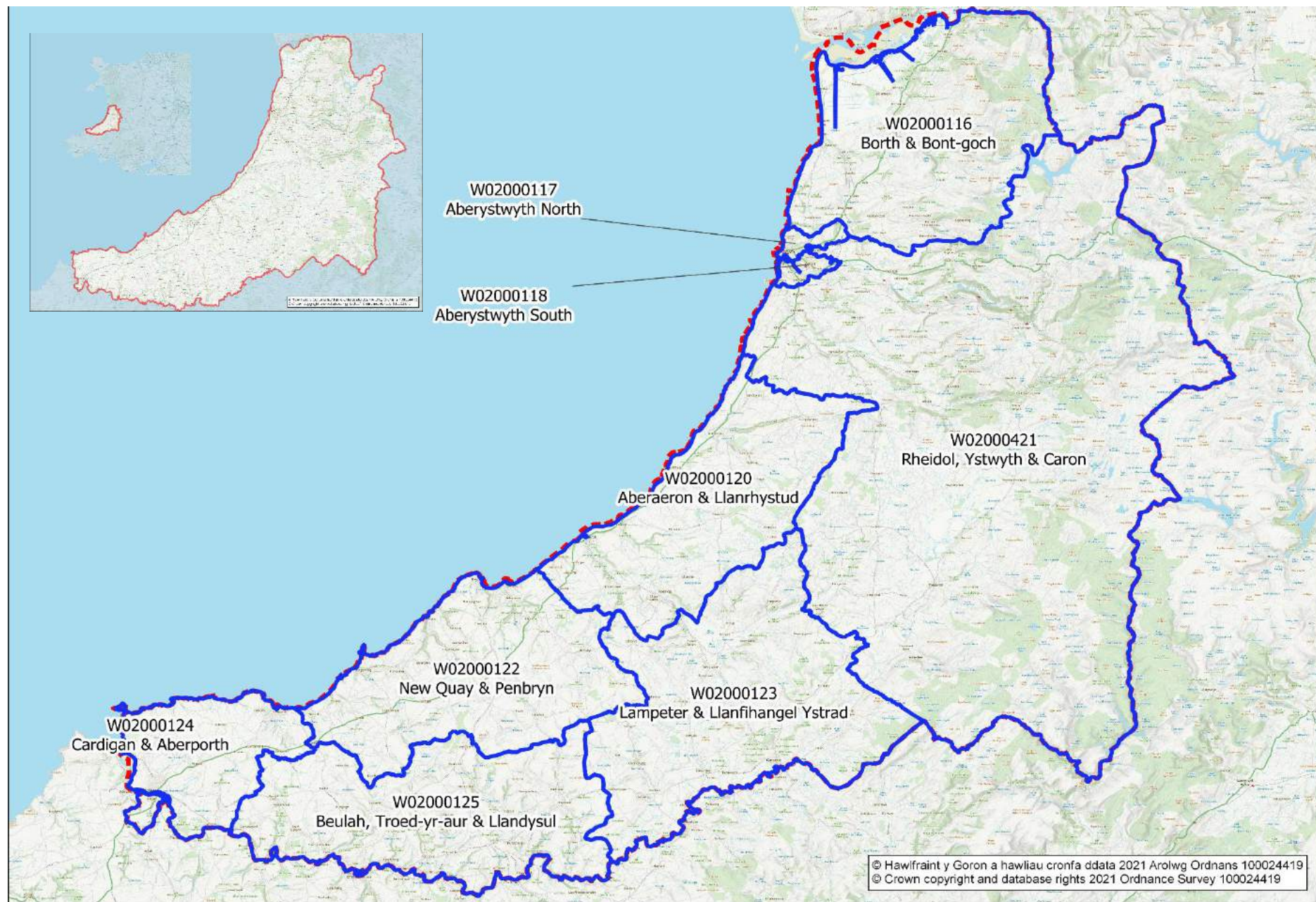
Source: ONS 2021

Median Household Income:



Source: CACI Paycheck 2021

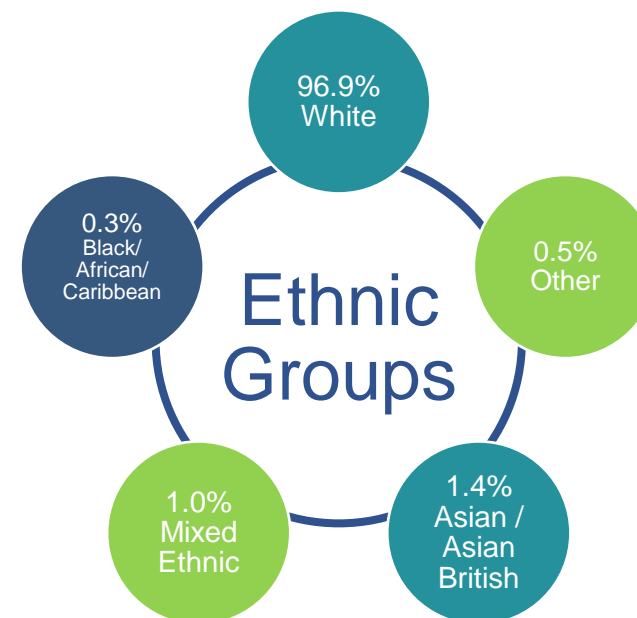
Ceredigion



Population Characteristics:

	Ceredigion		Wales
Mid-year population 2012	75,932	2.5%	3,049,971
Mid-year population 2020	72,895	2.3%	3,169,586
Males	36,262	49.7%	1,563,524
Females	36,633	50.3%	1,606,062
Aged 0-15	10,774	14.8%	562,730
Aged 16-64	43,453	59.6%	1,938,266
Aged 65+	18,668	25.6%	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

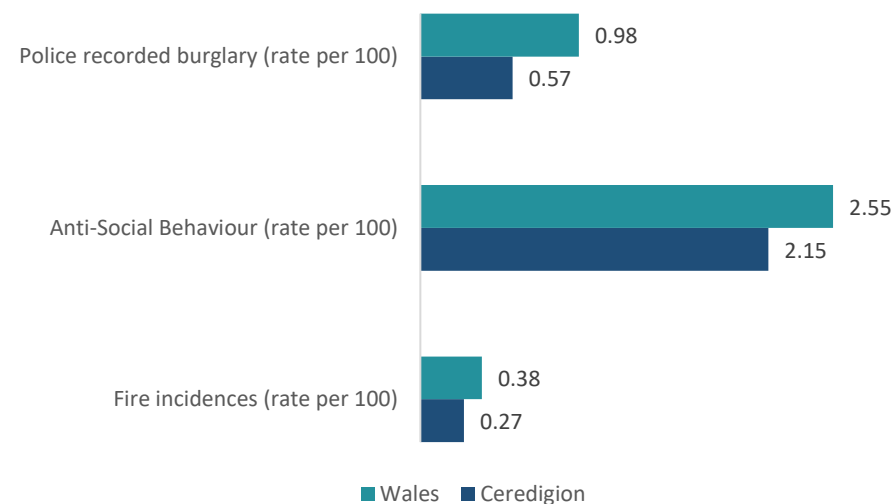
Health:

	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	-

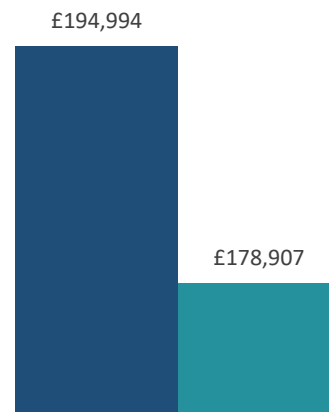
Source: WIMD 2019 & ONS 2021

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	-

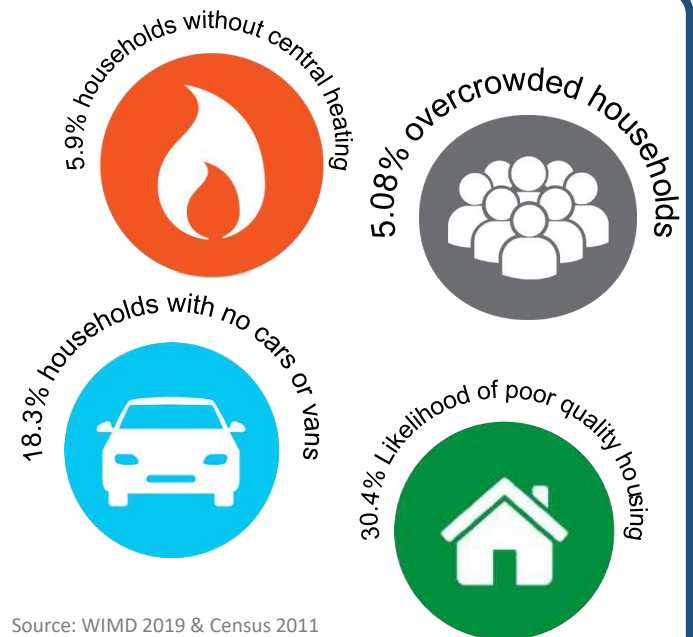
Source: Census 2011

Average House Prices:



■ Ceredigion ■ Wales

Source: ONS, Median House Prices 2020



Source: WIMD 2019 & Census 2011

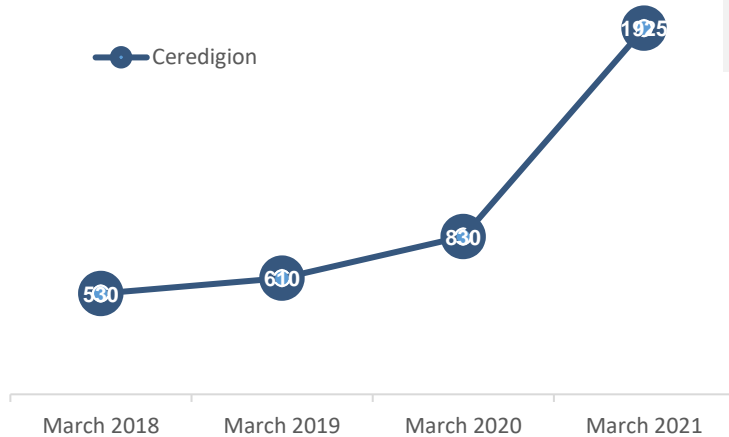
£ Economy & Employment:

% of working-age people in employment deprivation:



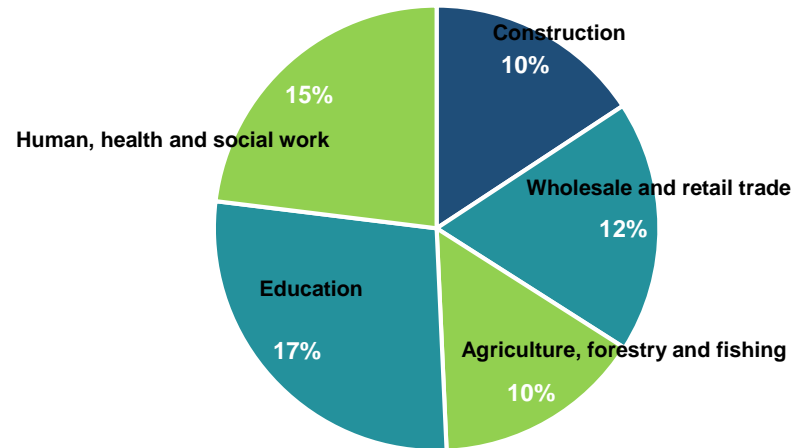
Source: WIMD 2019

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%

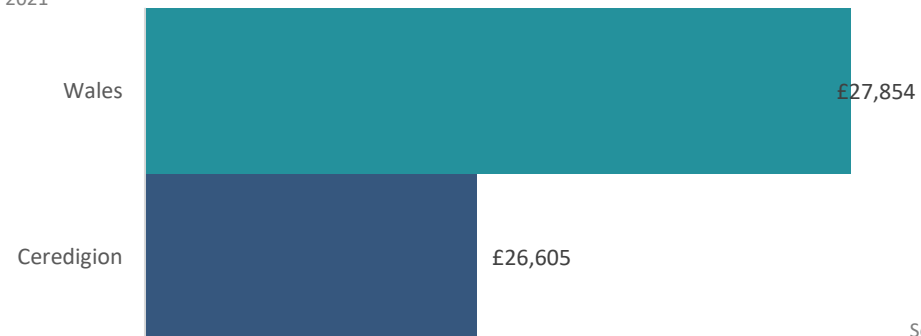
Key Stage 4 leavers entering Higher Education
32.2%



	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) 32.9% All ages Wales (2020)	30.6% Children 22.35% Working age 17.86% Pensioners	2017-20	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
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>

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



Pembrokeshire Public Services Board
Bwrdd Gwasanaethau Cyhoeddus Sir Benfro



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.

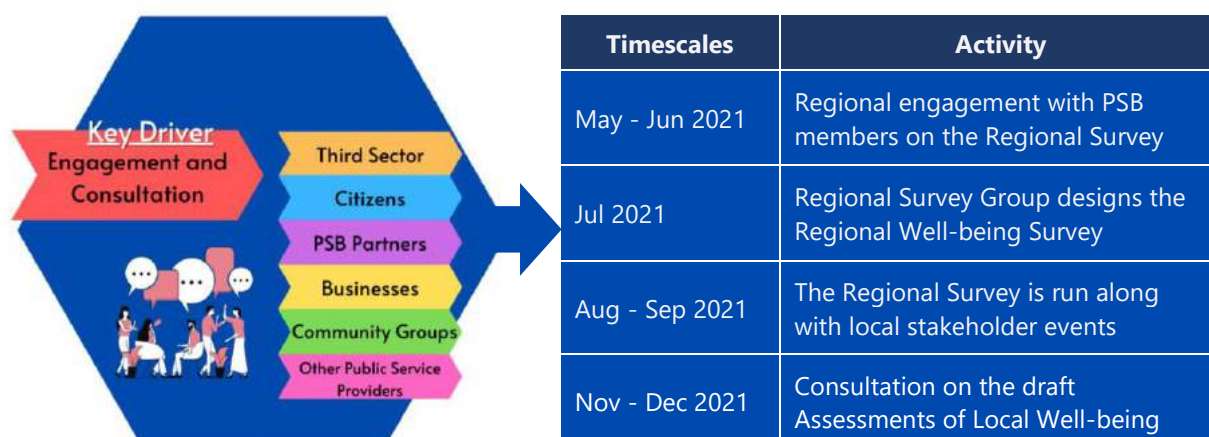
3. Regional Approach to Engagement and Consultation

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
Regional Wellbeing Survey	<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"> ▪ Cost ▪ Time – each county to coordinate dissemination and input of surveys ▪ Inclusion of demographic Qs to disaggregate / cross-tab results. ▪ Ensure that the paper survey methods are Covid-19 risk assessed and comply with Local Authority guidelines. ▪ Ensure that methods are available to citizens who do not have digital access. ▪ Survey fatigue 	Regional	<ul style="list-style-type: none"> i) Preparatory work (survey design & sampling) July 2021 ii) Delivery (response time, data input & mailout on request) – 26th July to 9th August iv) Aim to run Regional Well-being Survey 10th August to 8th October 2021 <u>9 weeks</u> iii) Analysis – 11th October to 29th October
Stakeholder Events	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"> • Target audience • Attendance • Stakeholder toolkit • Access to those without digital access 	Common approach agreed regionally and delivered local	<ul style="list-style-type: none"> ▪ Lead-in time of 3 weeks (publicity, setting agenda)
Focus Groups	Focus groups from PSB organisations to sense check the draft Assessment of Well-being and gather expert views.	<ul style="list-style-type: none"> • Attendance • Focus Group membership • Capacity of all PSB Member organisations 	Local	<ul style="list-style-type: none"> • Once events listed and format established, reactive approach can be taken.
‘Piggy-backing’ events & meetings	Join meetings virtually which have already been established.	<ul style="list-style-type: none"> ▪ Identifying suitable events / meetings 	Local	<ul style="list-style-type: none"> • Once events listed and format established, reactive approach can be taken

Engagement HQ	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"> • Success of trial • Timeliness 	Regional	<ul style="list-style-type: none"> • Dependent on whether the software is available in time and the success of the trial.
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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.

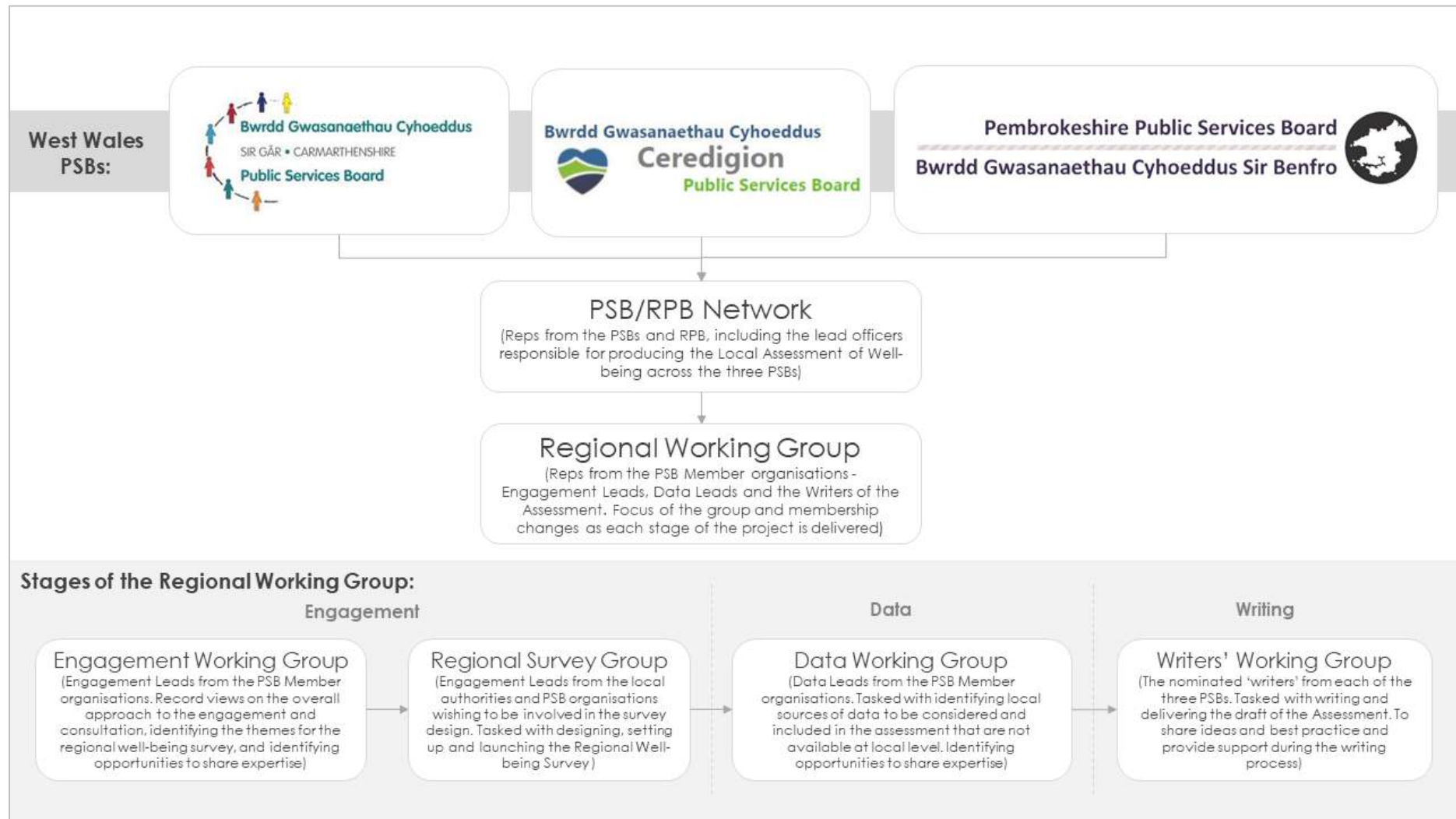
What	How	When (completion)	Who	Comment
Overall approach to the engagement and consultation for the Assessment of Local Well-being	Agreed through each of the PSBs	February 2021	All	Agreement to will in partnership with regional colleagues which will enable the sharing of resources, capacity and expertise across the three counties.
Identify engagement leads from PSB member organisations	Leads identified through organisational contacts	1- 21 May 2021	All	To establish the appropriate contacts to be involved in the Regional Engagement Working Group
Regional Engagement Working Group Meetings	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
Regional Survey Group	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.
Agree common format for stakeholder engagement sessions	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.
Build the Regional Well-being Survey	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'.
Run Regional Well-being Survey	Live SNAP survey available online and physical formats and advertised locally	10 th August to 8 th 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
Deliver engagement sessions to identified stakeholder meetings	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.
Deadline for all stakeholder engagement feedback reports	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.
Formal consultation on Wellbeing Assessment report	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 10th August and 8th 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.

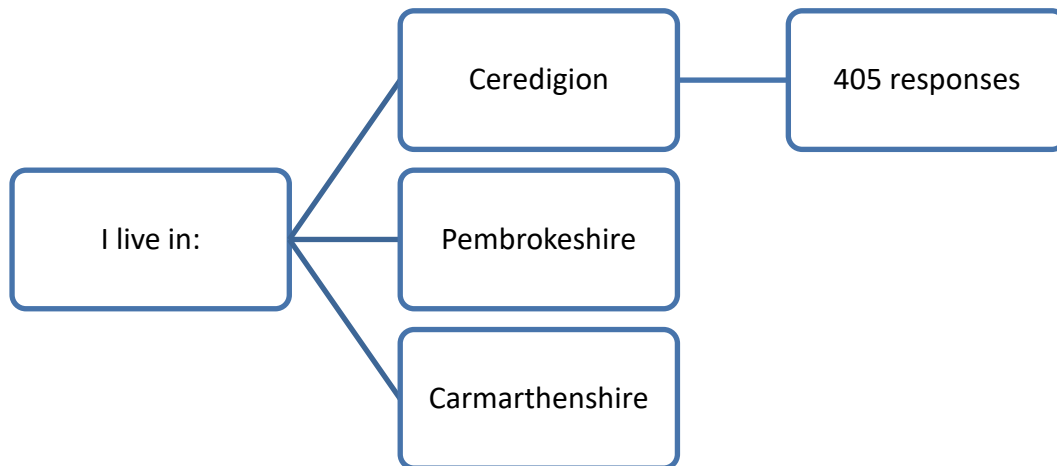
The PSB will use the feedback of residents, businesses and other groups to help inform the Assessment of Local Well-being and subsequently the five year Well-being Plan.

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.

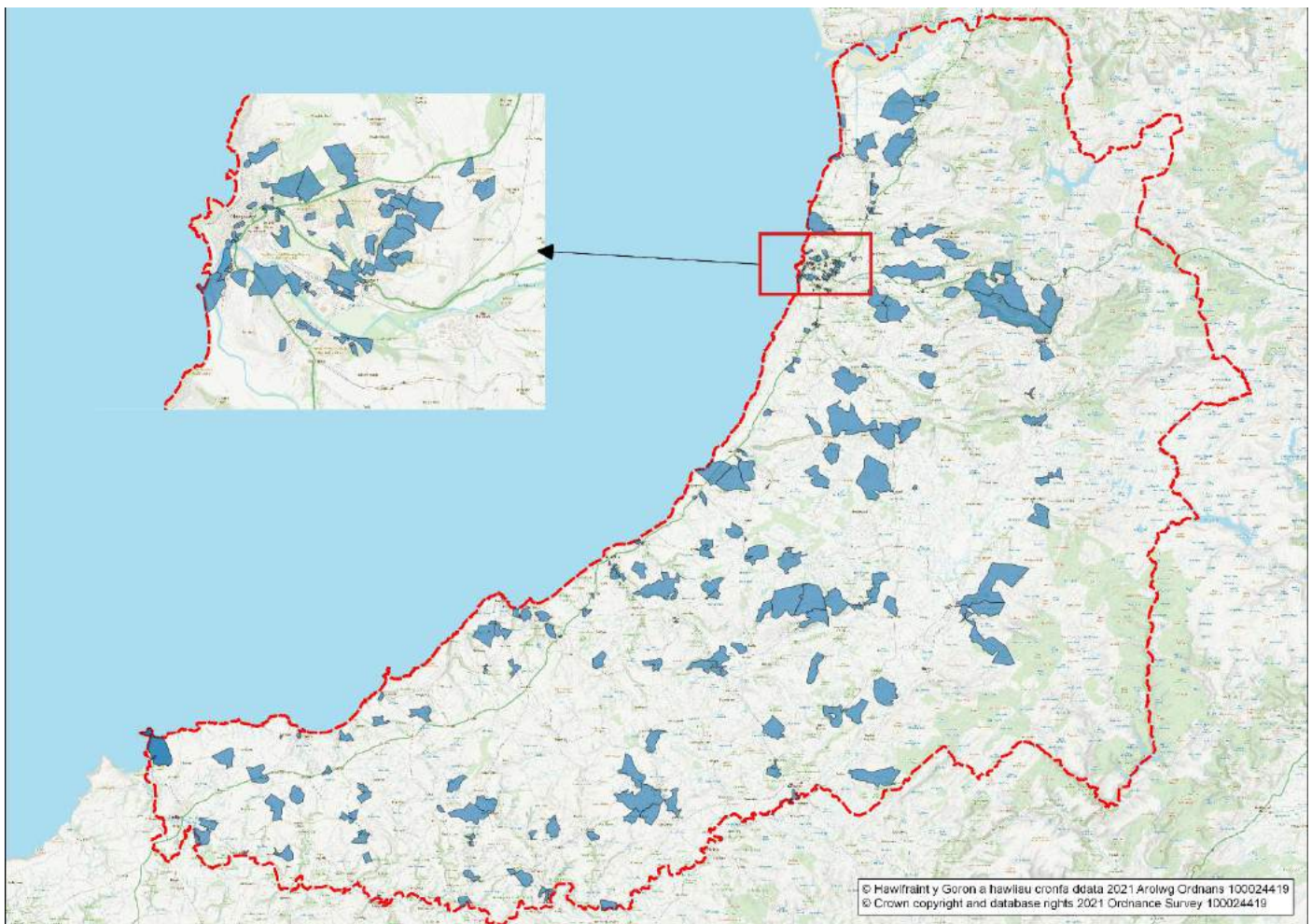
The paragraphs that follow provide a summary of the findings.

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.

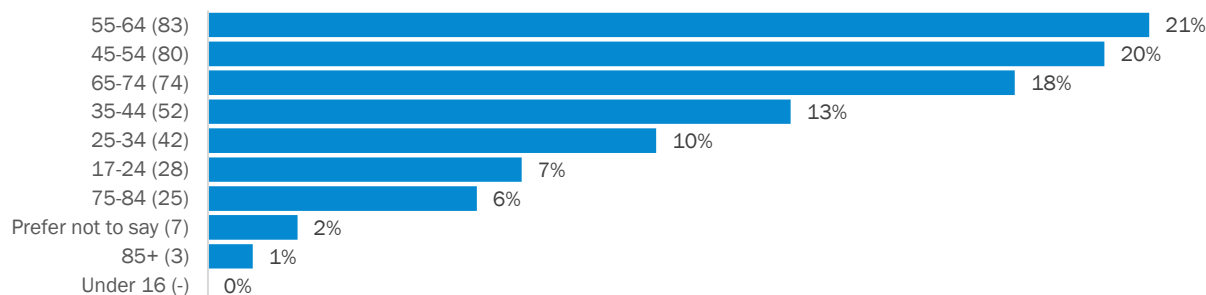


Q2. Please specify your home postcode without using any spaces (e.g. SA154EA)



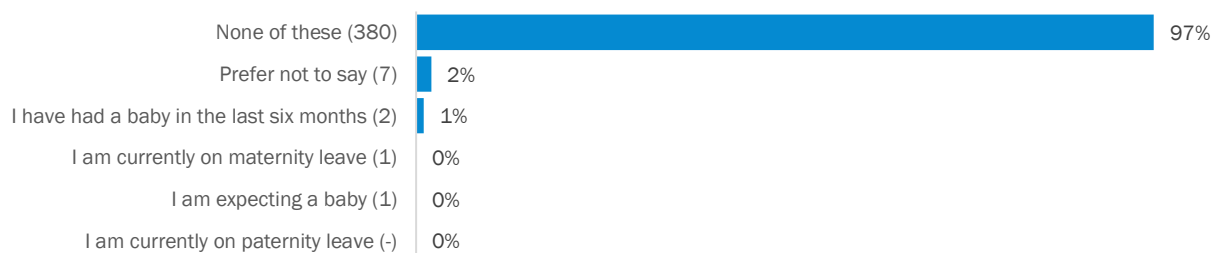
The map above demonstrates where responses have come from in Ceredigion. The second question of the Survey asked respondents to note down their full postcode. A total of approximately 225 different postcodes were noted down for this question. Even though there were 405 responses in total, we must take 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?



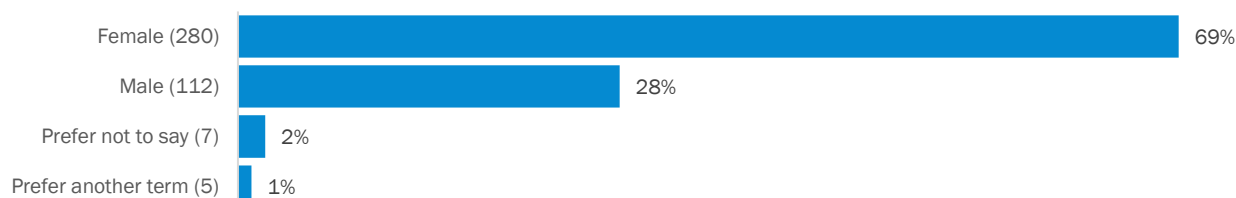
The majority of respondents to our Well-being Survey were aged between 55 and 64 years of age (21%). Very close behind this was the 45 to 54 age group (20%). 18% of responses were from those aged 65 to 74 and 13% from those aged 35 to 44. Just 1% of responses were from those aged 85+. 2% of respondents 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?



20% of our respondents said that their day-to-day activities were limited because of a health problem or disability which has lasted, or is expected to last, at least another 12 months.

76% said that their day-to-day activities were not limited because of health problem or disability which has lasted, or is expected to last, at least another 12 months.

16 respondents (4%) preferred not to disclose this information.

Q7. Gender reassignment: Is your present gender the same as the one assigned to you at birth?



Almost 90% of respondents (89%) to our well-being survey said that their gender was the same as the one assigned at birth.

8% answered no to this question, meaning that their gender was not the same as the one assigned at birth and 3% preferred not to say.

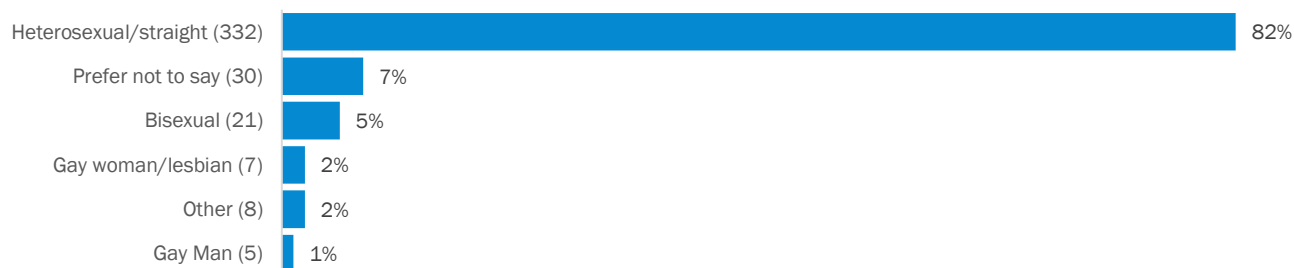
Q8. Caring Responsibilities: Do you provide regular, unpaid, substantial care for a relative, friend or neighbour who is unable to manage at home without help because of sickness, age or disability?



80 of our respondents (20%) said that they had caring responsibilities and provided 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.

Almost 80% of respondents (77%) noted that they did not have caring responsibilities and 3% preferred not to disclose this information.

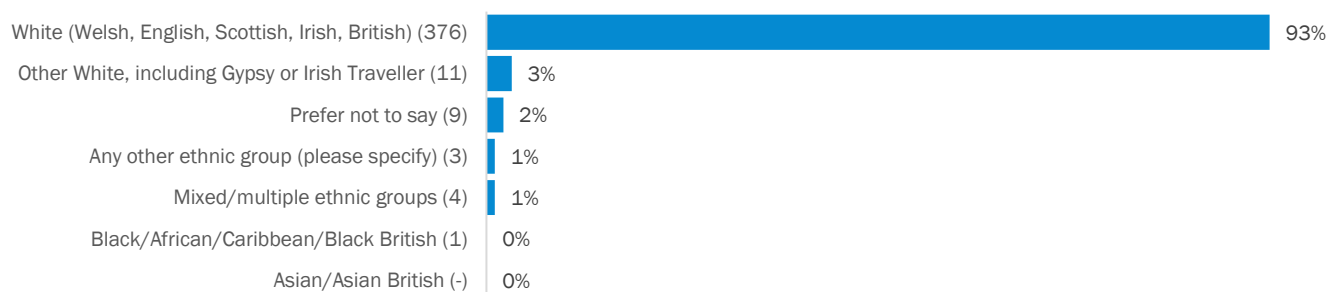
Q9. Sexual Orientation: What is your sexual orientation?



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?



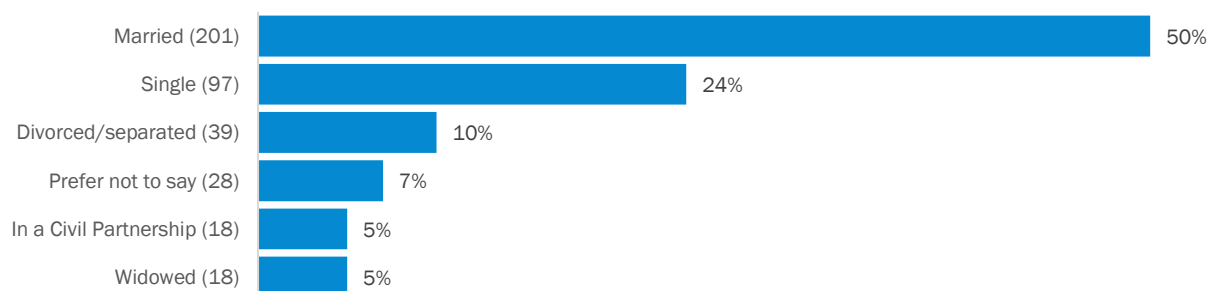
Please specify 'any other ethnic group'

- 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.

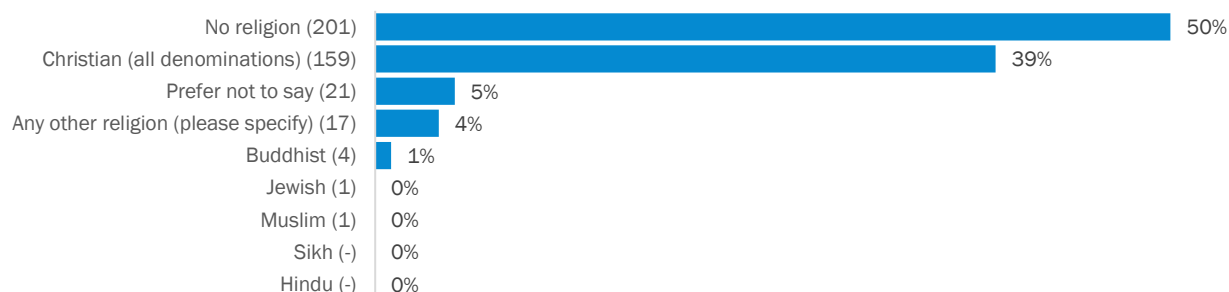
Q11. Marriage and civil partnership: Are you?



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?

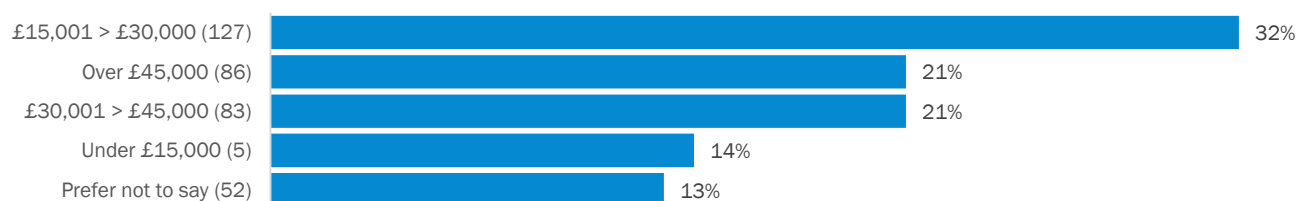


Please specify any other religion:

- Pagan
- Spiritualist
- Pagan
- Pagan
- Pagan
- Quaker
- Pagan
- Roman Catholic
- Panentheist
- Pagan
- Pagan
- Pagan
- Tolkienism
- Spiritual
- Pagan
- Ietsism
- 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

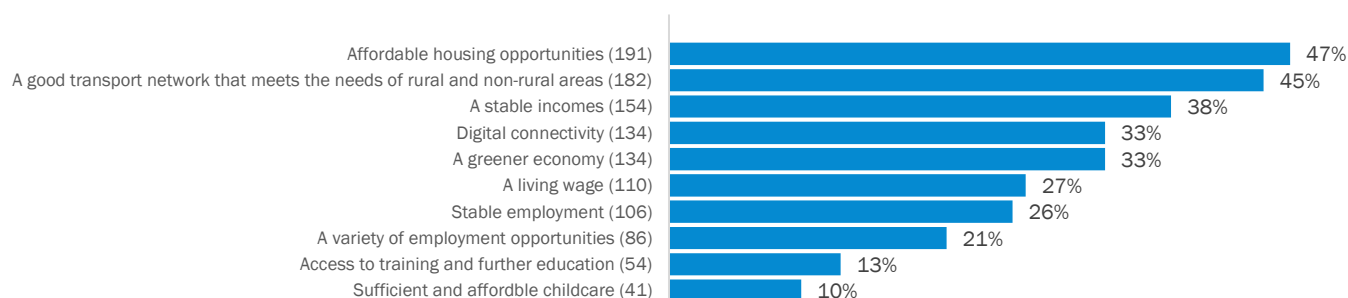
Q16. Do you volunteer?



The majority of our respondents noted that they do not volunteer (66%). With this said 34% said they do volunteer.



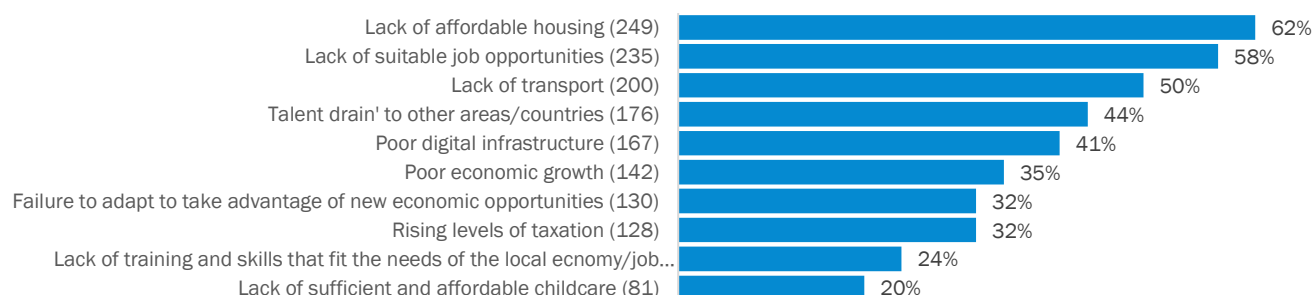
Q18. Which three things do you value most in a prosperous community?



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.

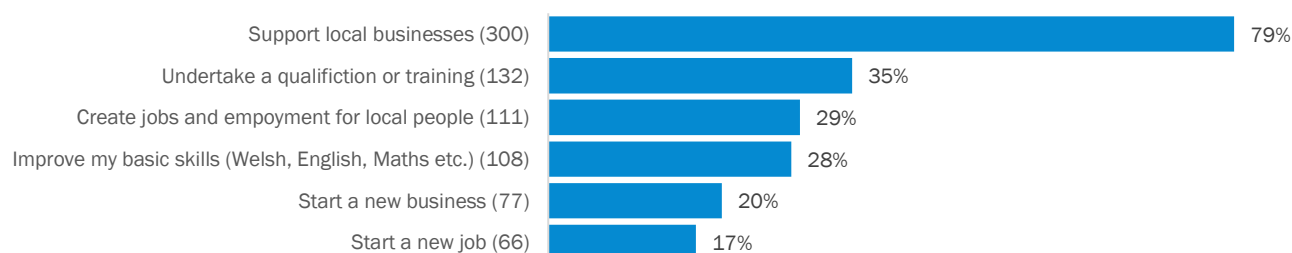
Q19. Looking ahead, what concerns you the most about prosperity in the county?



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.

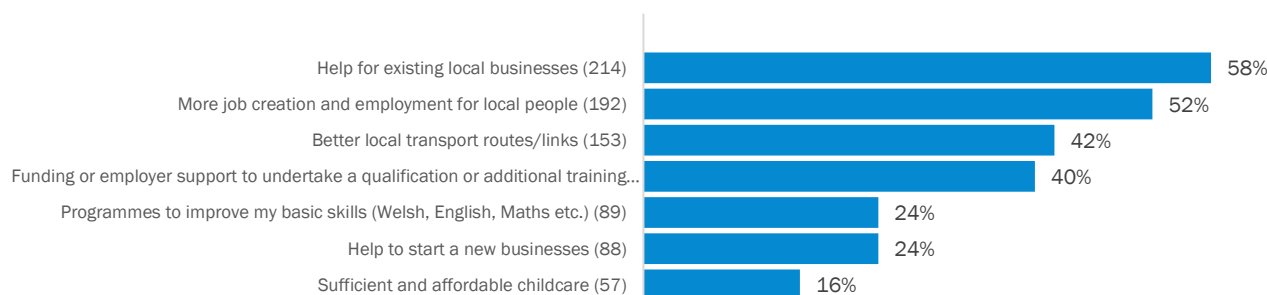
Q20. What would you consider doing to improve your own or your community's economic circumstances?



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 an 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.

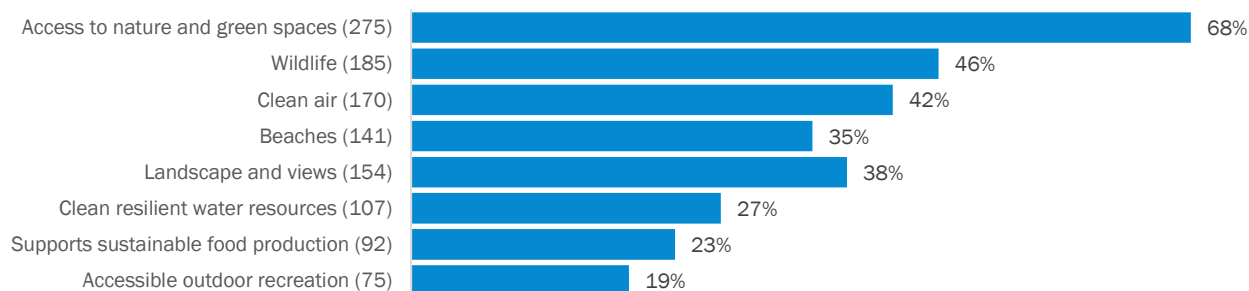
Supporting local businesses also comes out in these written responses with a participant noting that we cannot continue as we are and must make changes so that people can support businesses locally.

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."

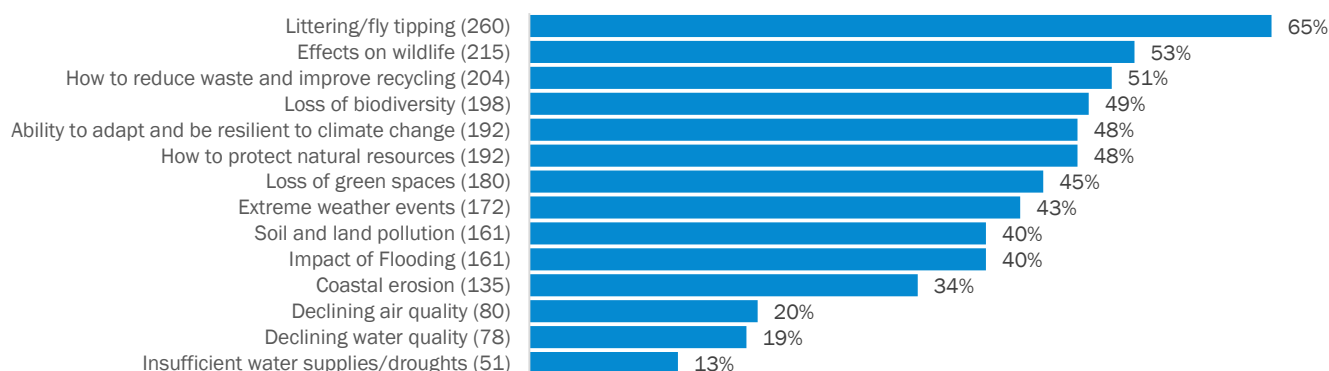


Q23. Which three things do you value the most about your local environment??



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%).

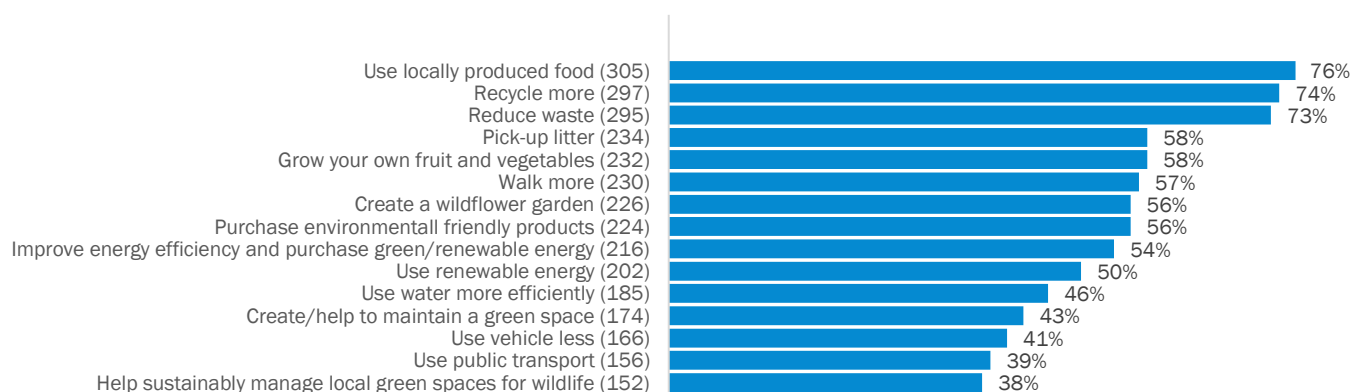
Q24. Looking ahead, what concerns you the most about your local environment?



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%).

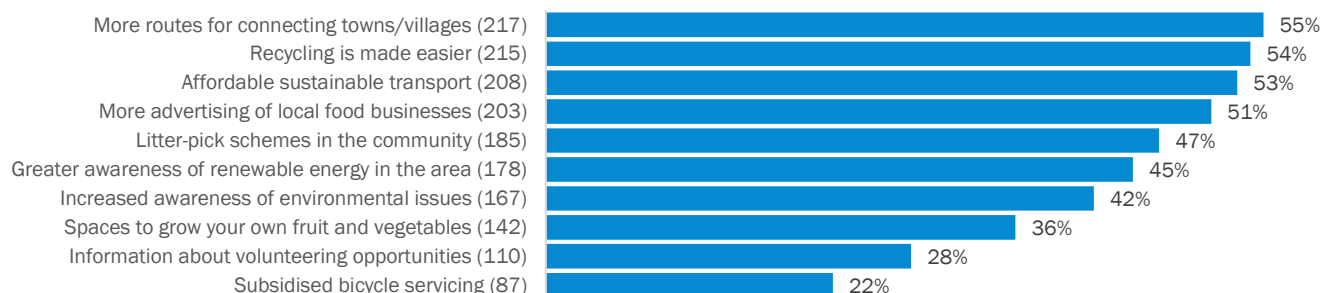
Q25. What would you consider doing to improve your local environment?



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.

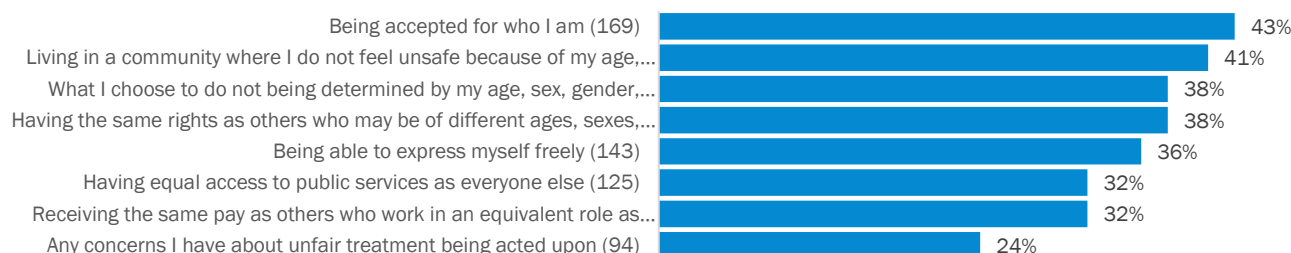
Additionally, maintaining and improving cycle paths and cycle routes away from vehicle traffic would mean that people are more likely to choose greener transport.

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."

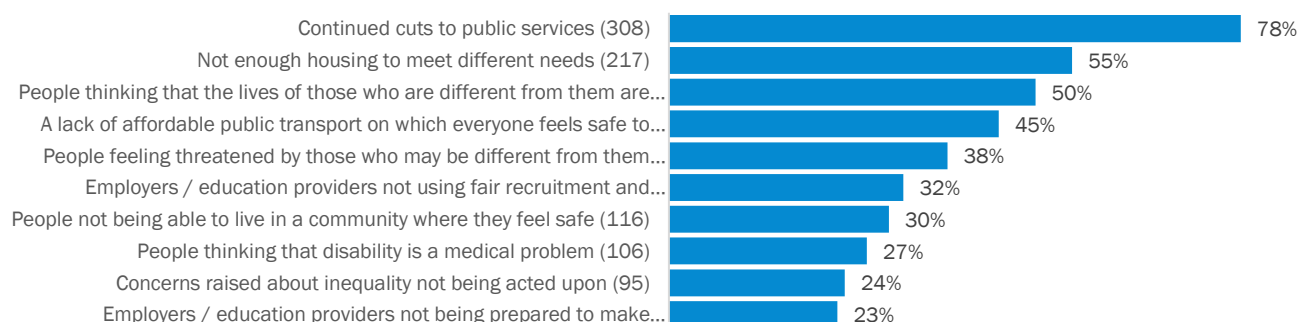


Q28. Which three things do you value the most about living in a society which strives to be equal for all?



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.

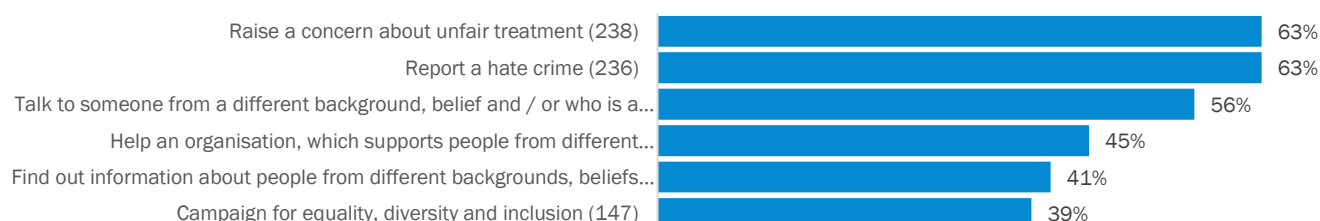
Q29. Looking ahead, what concerns you the most about your community becoming fairer for everyone?



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.

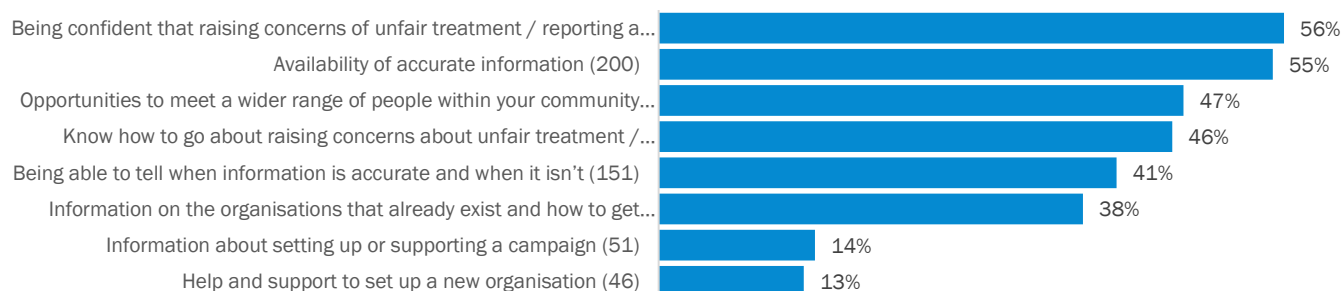
Two other concerns were not enough housing to meet different needs (55%) and people thinking that the lives of those who are different from them are less valuable than their own (50%). Housing to meet different needs is a theme seen often throughout the responses to our Well-being Survey. As we have 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

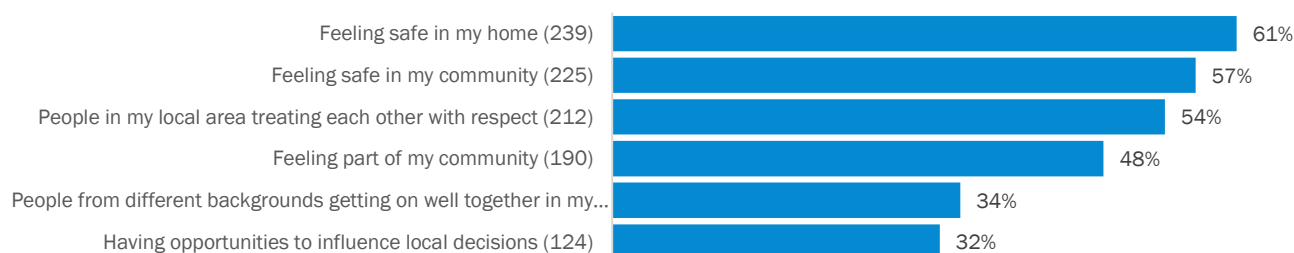
When asked for any other comments, this was less commonly answered than the previous two questions with 59 (15%) text responses. It was felt that the answers to this question were predominantly a reiteration of previous points, very specific/ personal or very broad/ unrelated to the topic of health and 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."

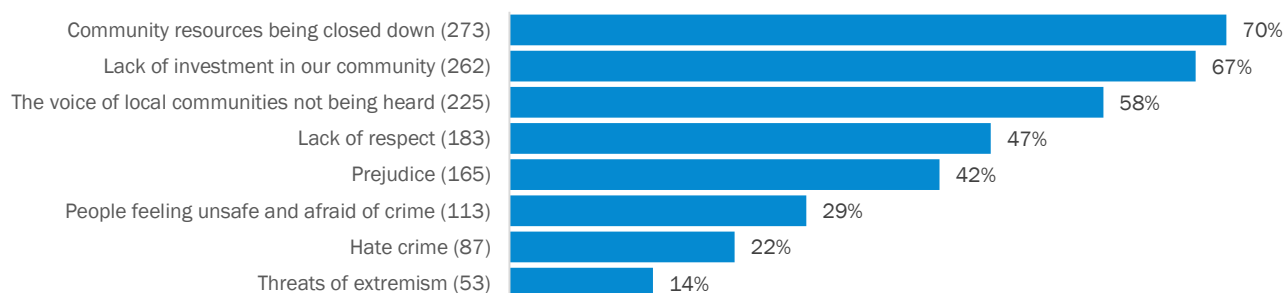


Q38. Which three things do you value the most in relation to the community that you live in?



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 things in future. Our respondents think that investing in our communities and ensuring that resources are not closed down are most important.

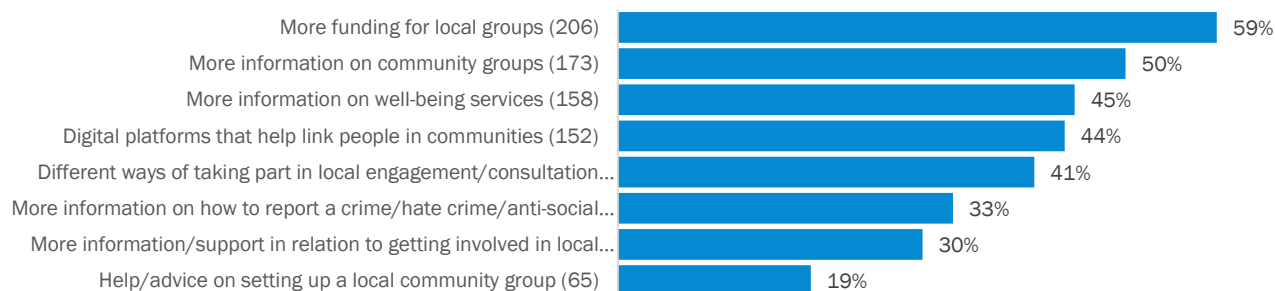
At the other end of the scale threats of extremism was the thing that concerned respondents the least (14%).

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.

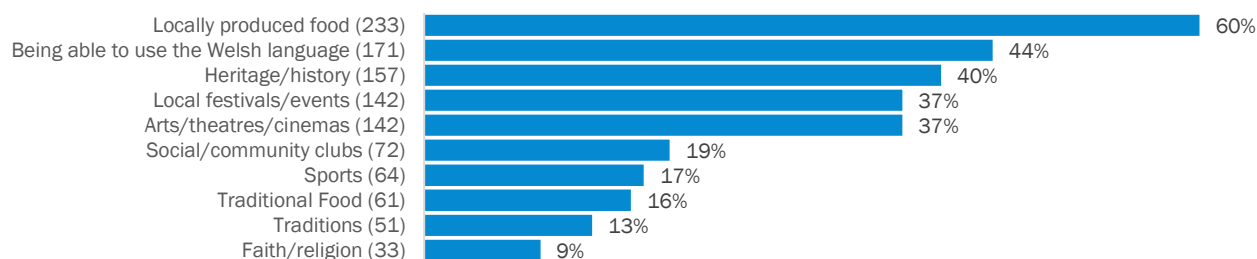
A fair few of the written comments for this section note that the respondents are already doing the things noted in the previous questions. This said, respondents are calling for more opportunities locally to be made available to them, so they can do more. One comment mentions that there is no community 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 retired 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%).

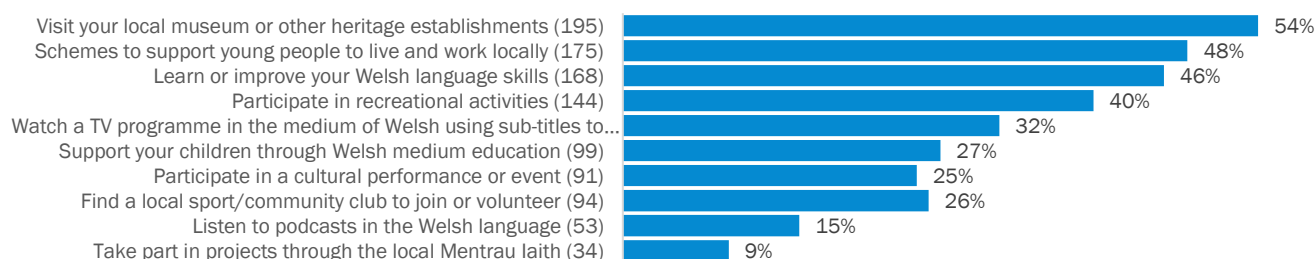
Q44. Looking ahead, what concerns you the most about your County's vibrant community and thriving Welsh language?



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.

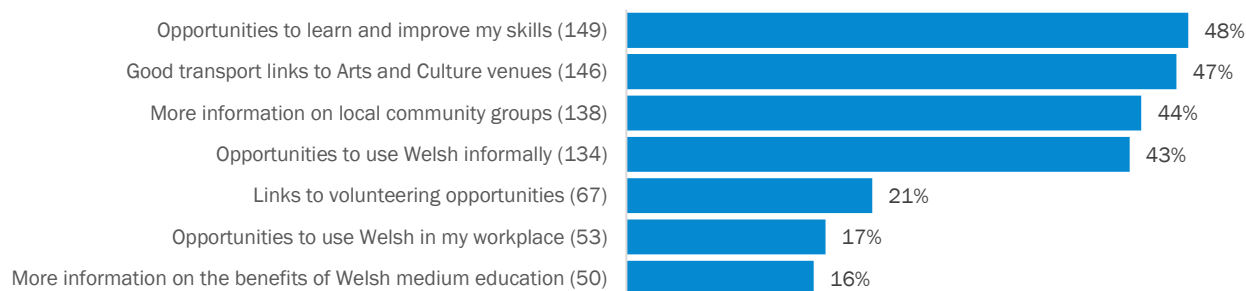
The thing that concerned respondents the least was lack of Welsh education schools/colleges (14%). Ceredigion's education system is one of its major assets, a majority of Ceredigion's schools are Welsh medium or bilingual and therefore it isn't out of the ordinary for respondents being less concerned 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."

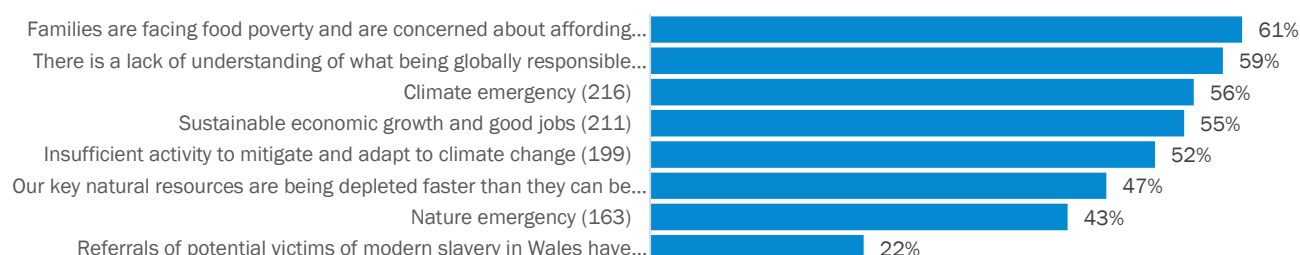


Q48. Which three things do you value the most in your county's global responsibility?



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%).

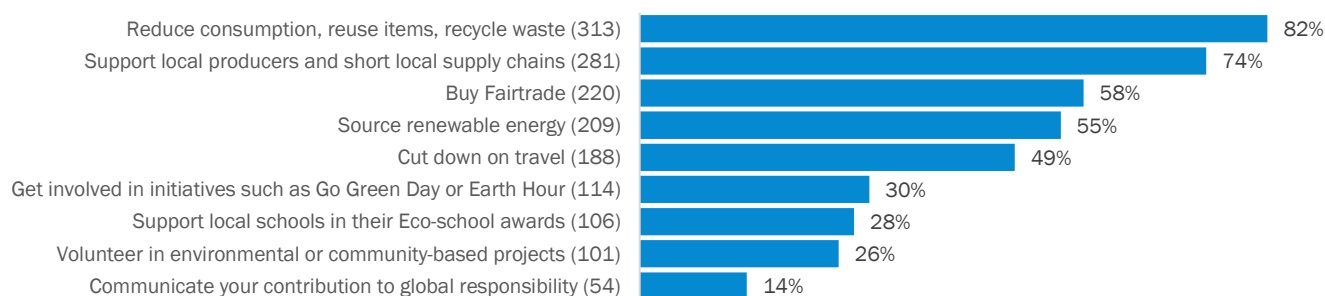
Q49. Looking ahead, what concerns you the most about your county's global responsibility?



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, reusing 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.

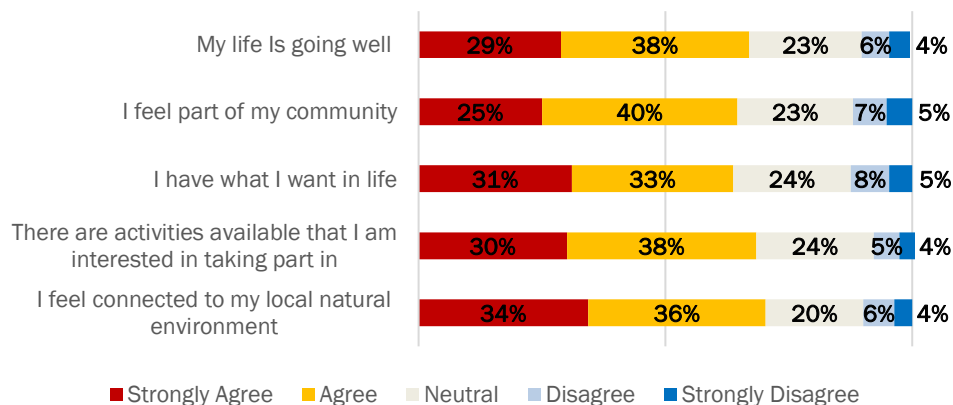
Sample comments	
"In order to support local businesses and fair trade enterprises prices need to be competitive."	"Lack of local meat and vegetables, support local businesses."
"Supporting local is essential, but must compete with Tesco/Asda/Morrisons."	"Support and promote local farmers to produce our 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.

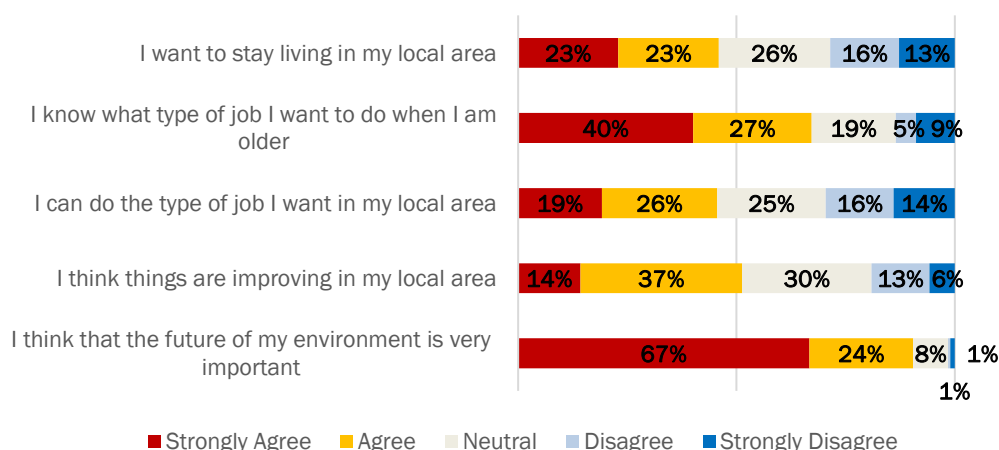
When pupils were asked questions on how their life was going, the answers that gained the most positive response were in relation to **general well-being** and the **environment**. The majority of respondents (71%) felt that *their life is going well*, 11% neither agreed nor disagreed with this statement, 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



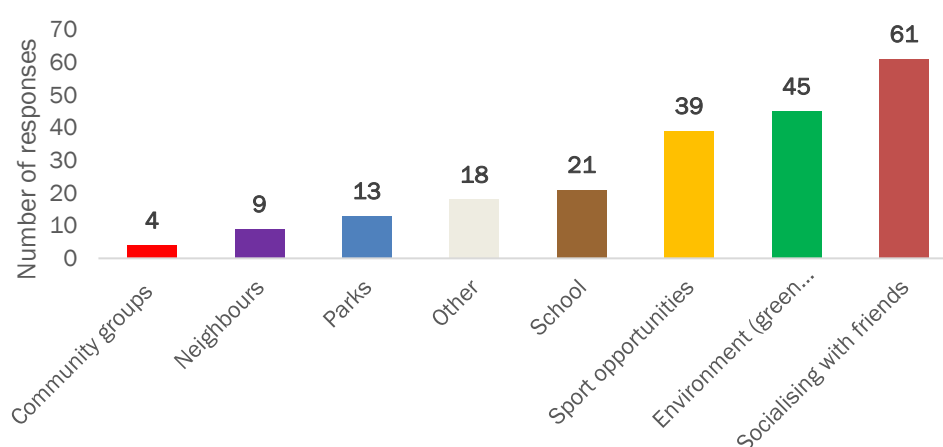
Interestingly, Welsh respondents felt more optimistic about their life in general, compared to those who participated in English. This was particularly acute when respondents were asked if they *felt part of their community*, 77% of Welsh respondents either strongly agreed or agreed with this statement, 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



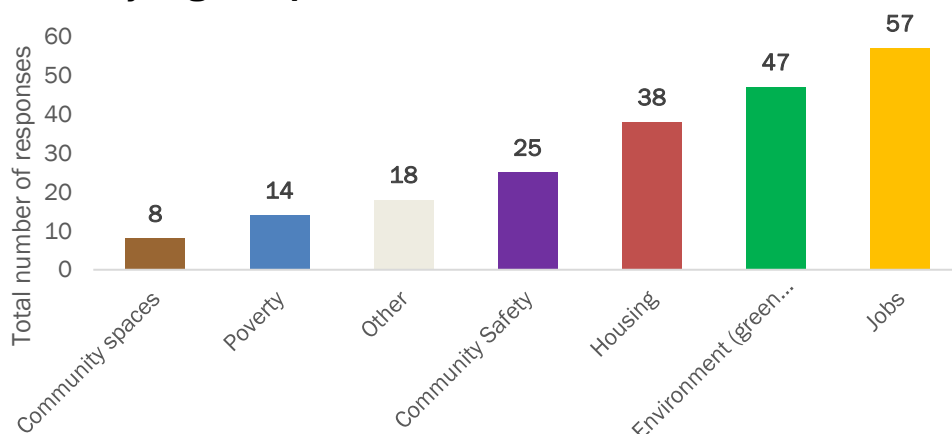
When pupils were asked questions in relation to their life in the future, again, the value of the **environment** was reflected very strongly, with 91% of participants agreeing that the *future of the environment is very important*. Overall, this statement gained the highest proportion of agreement amongst 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?



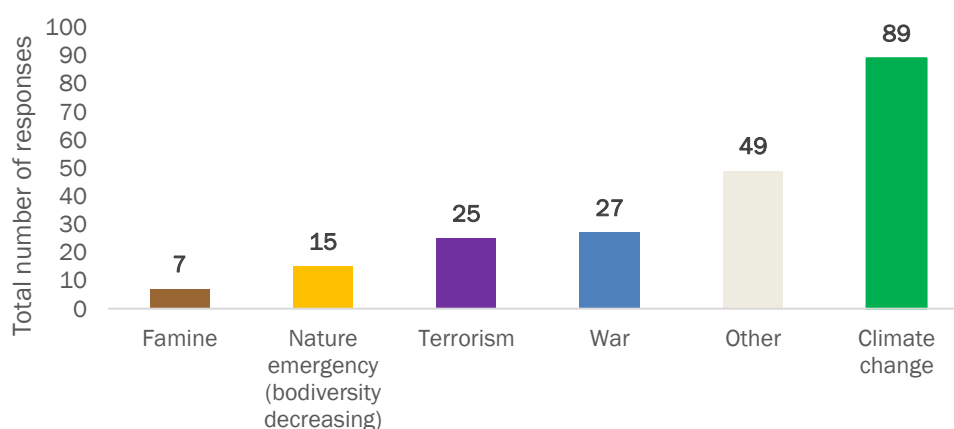
Out of the eight options provided, on average, **socialising with friends** was noted by participating pupils as the best thing about their community, with 61 respondents selecting this answer. This was followed by the **environment** (45 responses), **sports opportunities** (39 responses) and **school** (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 7th 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

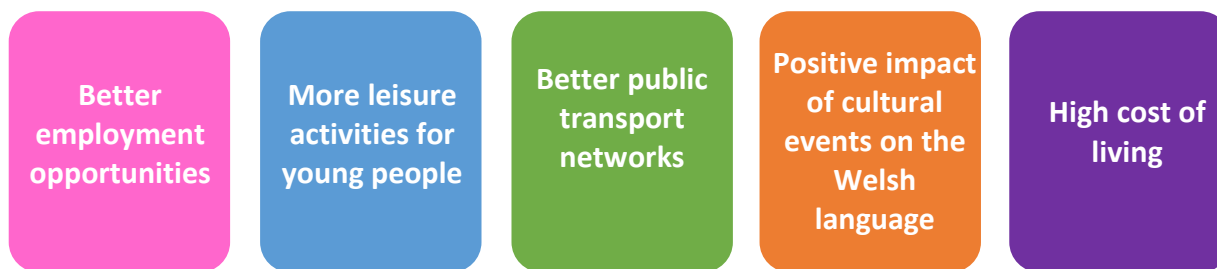
More
affordable
prices for
cultural
activities

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 20th 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



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 5th 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

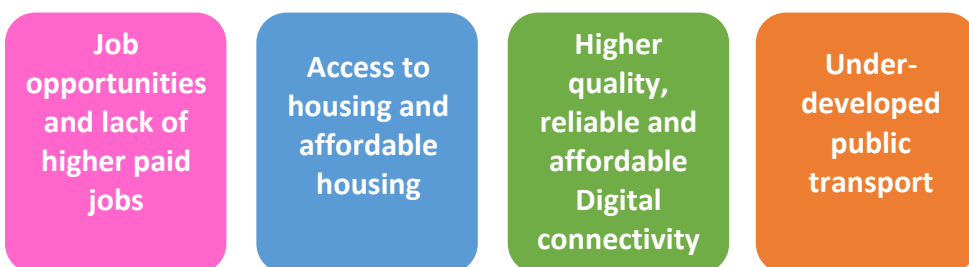
The **Youth Council** held their stakeholder event with 17 young people in attendance. The following provides an overview of the key points raised during the event.

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

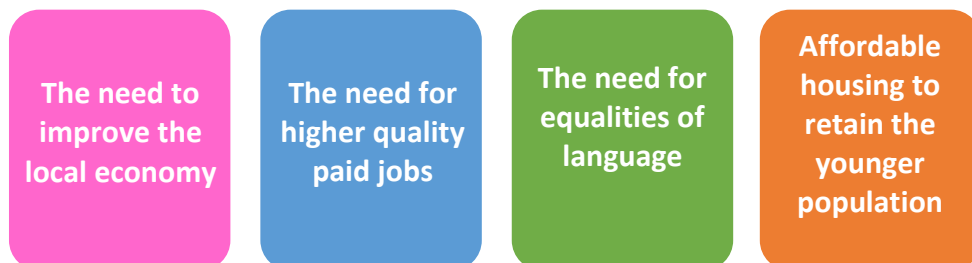
A stakeholder event was held with the **Corporate Equalities Working Group** on the 9th of July 2021, nine people attendant this event to give their views on well-being in Ceredigion in terms of equalities.

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

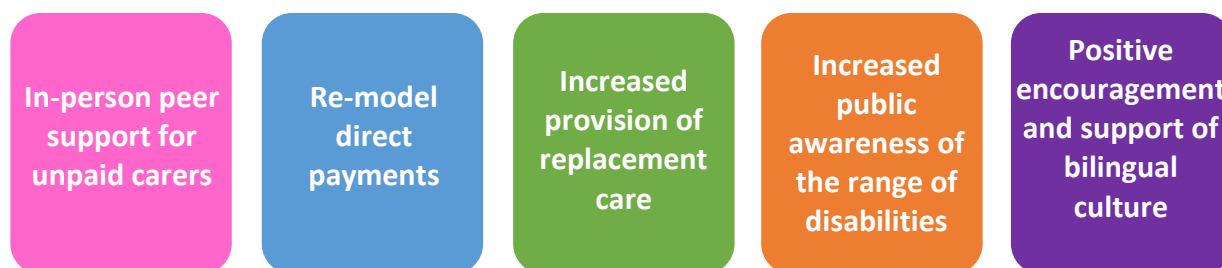


Ceredigion Carers' Alliance

The PSB ran a stakeholder event with **Ceredigion Carers Alliance** on the 8th 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 years old 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.

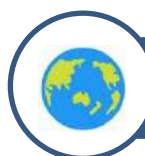
12: Feedback from Project Group Workshops

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.