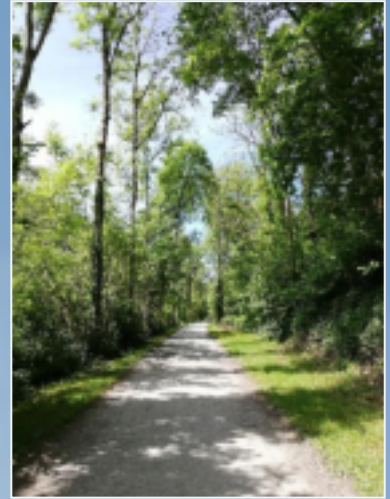




CEREDIGION **ASSESSMENT OF** **LOCAL WELL-BEING**

Ceredigion Public Services Board

2021



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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 some examples of what we know from each life stage:

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 recognising **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, 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 a need to attract more **Welsh speaking childminders** to Ceredigion, especially in the north and mid areas of the county, in particular the Aberystwyth and Aberaeron community areas.
- 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 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 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 had widened.

- It is unlikely that the **childcare provision** available is sufficient in meeting the needs of parents in Ceredigion. Provision of childcare in the county will need to adapt 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 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 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.



- 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.
- 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**.
- **Hate crime** incidents have increased across the Dyfed-Powys region during 2020-21, which may partly explain the decline in perceptions of safety.
- 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
- 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.
- **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.
- 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.
- 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.
- **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.
- 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.
- **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.
- **Better access to health care services** was one of the most important things identified by survey respondents to maintain their **physical and mental well-being** over the next ten years.
- **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.

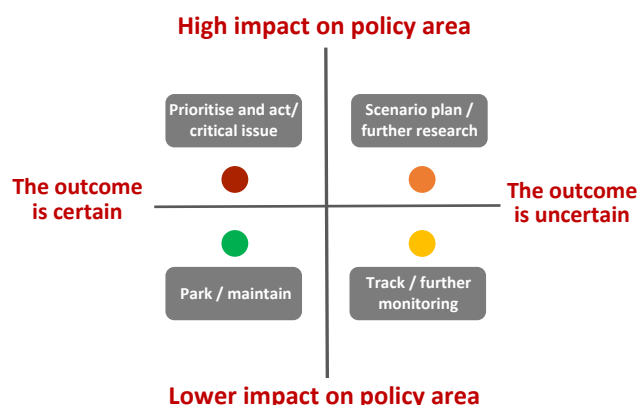
Older People



- 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 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.

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 conditions			●	
Low birth weights better than average, except in Aberystwyth South	●			
Childhood immunisation is high in Ceredigion	●			
Breastfeeding rates are high in Ceredigion	●			
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 a need for more Welsh speaking childminders			●	
Ensuring children have the opportunities to socialise in the language of their local area			●	
CHILDHOOD				
Childhood obesity decreasing and better than average		●		
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 unlikely to be sufficient, and 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				●

ADULTHOOD				
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	●			
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			●	
Opportunities to learn Welsh or improve existing Welsh skills are essential, as are the ongoing initiatives to promote the use of the Welsh language				●
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 '			●	
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	●			
Ceredigion's air quality is very good	●			
Additional support for first time buyers, better quality housing and more affordable housing are needed				●
Victims of emotional and psychological abuse and domestic abuse has decreased in Ceredigion	●			
Violence against the person incidents are increasing			●	
The need for greater work-life balance and flexible working in the future		●		
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			●	
Poverty remains one of the biggest challenges for the county.				●
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			●	
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 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.				●
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

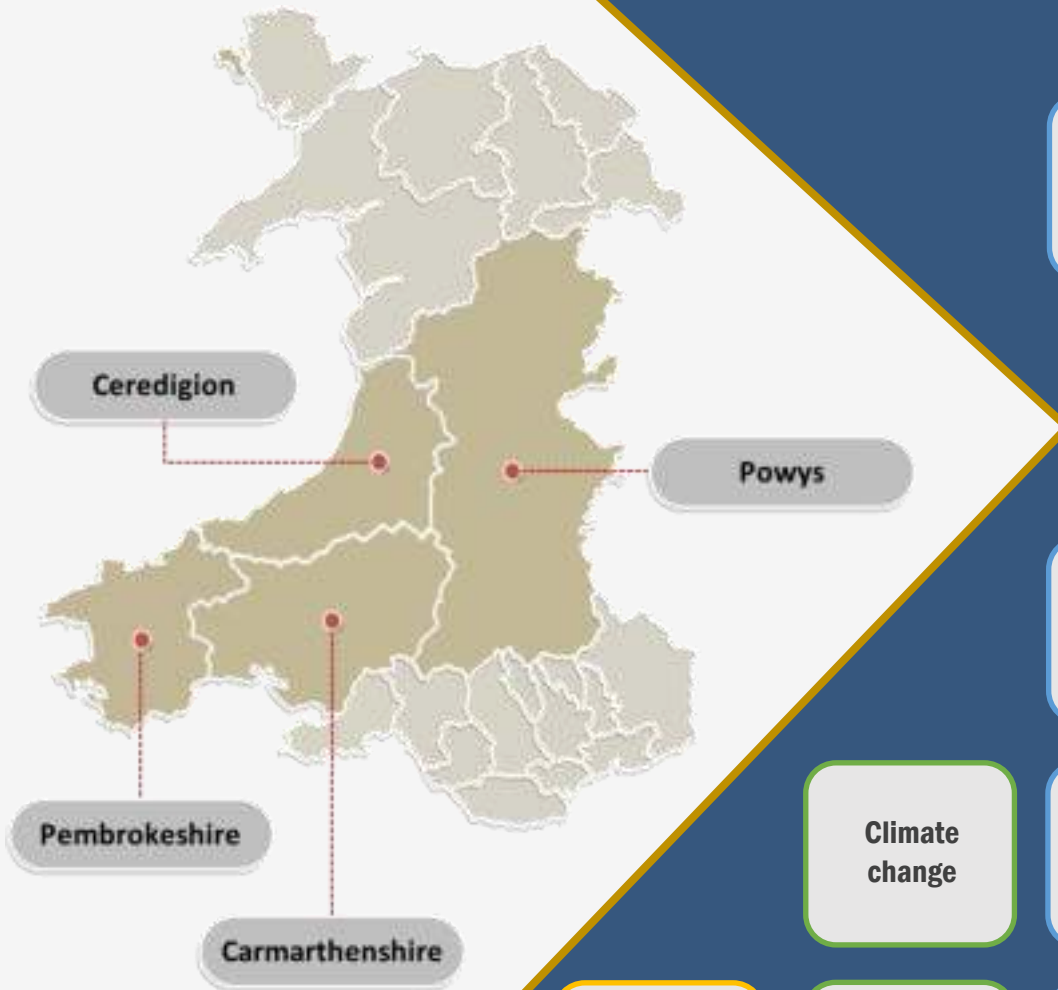
Opportunities for older residents to remain actively engaged in the economy			●	
Opportunities to volunteer and be active in the local community			●	
A higher level of provision will be needed in Housing for Older People , Housing with Care and Nursing Care in the county			●	
The cost of residential 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

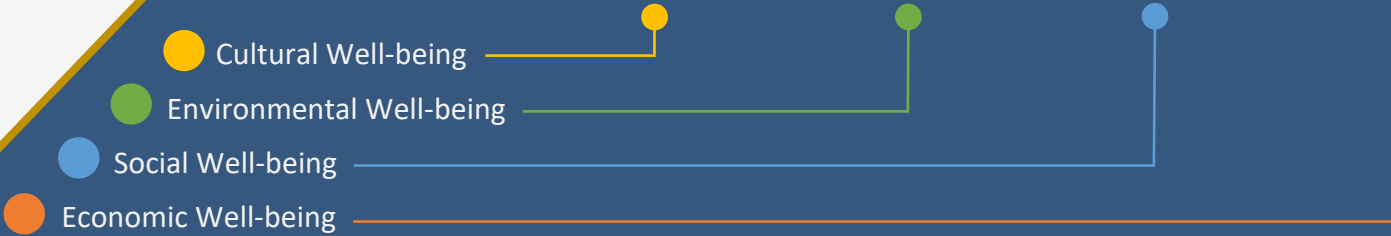
The collaborative working we have undertaken during the production of this assessment with regional partners has given rise to a number of cross-boundary or regional issues affecting the whole of the West Wales or Mid-Wales Regions. Ceredigion has regional partners in both **West** and **Mid Wales** - 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
- Rising living costs
- Affordable & Accessible Childcare
- Climate change
- Increase in Dementia
- Loss of biodiversity
- Renewable energy capacity
- Increased demand and strain on local health services
- Decrease in participation in arts, culture or heritage activities
- Opportunities to use, and promotion of, Welsh Language



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



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'

INTRODUCTION



Introduction

1.1 Introduction: The Well-being of Future Generations (Wales) Act 2015

The Well-being of Future Generations (Wales) Act 2015 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



- **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.

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

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

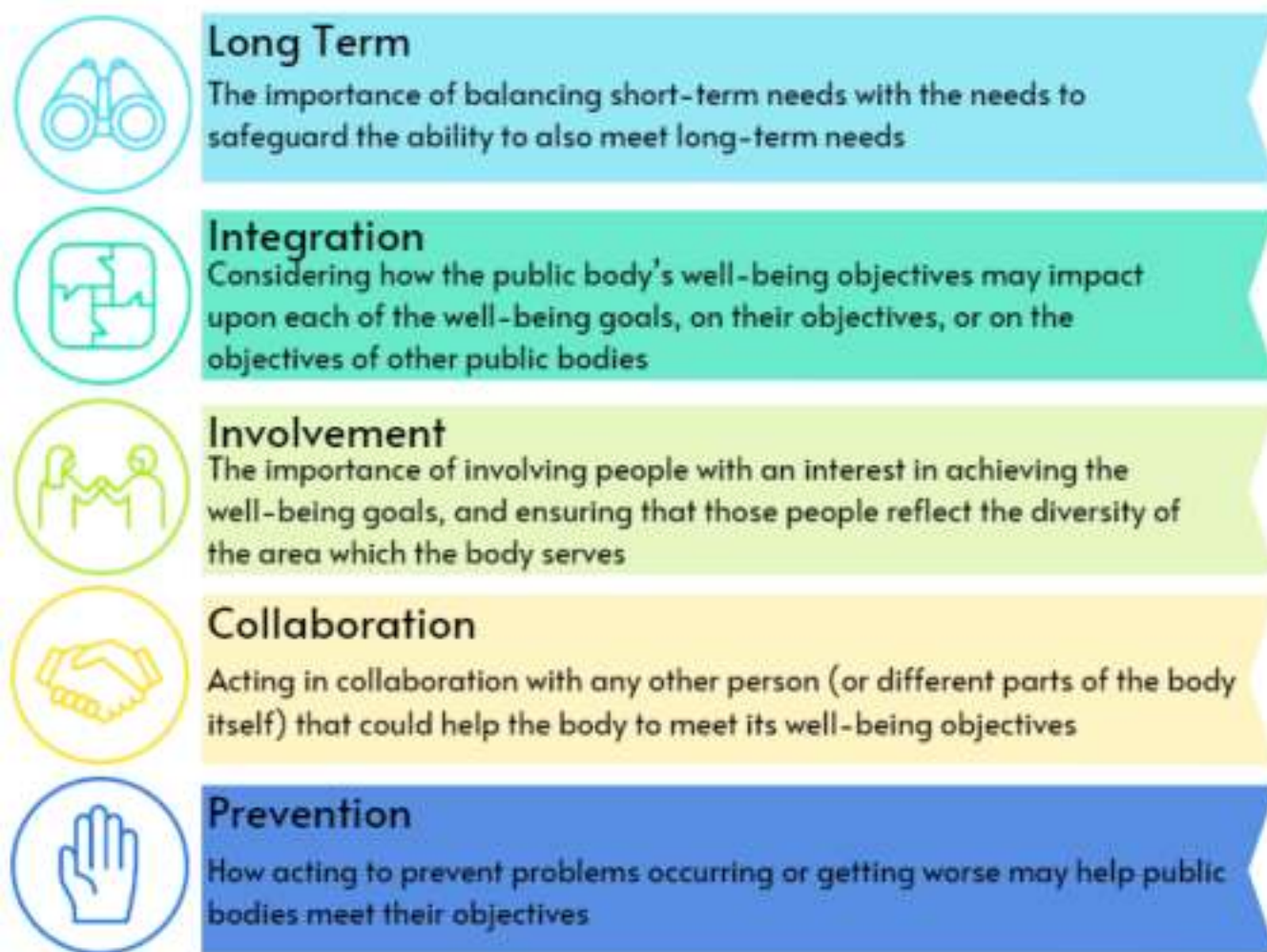


Source: Adapted from Public Health Wales (2019)

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 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



1.2 About the Assessment of Local Well-being

This Assessment of Local Well-being has been produced by Ceredigion Public Services Board. 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 impact on 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



METHODOLOGY



How did we undertake the Assessment?

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 4.

2.2 Role of the Third Sector

Our thriving and active third sector is one of Ceredigion's key assets. 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. Our third sector

will also play an important role in the on-going dialogue with the communities of Ceredigion as we move from Assessment to Local Well-being Plan.

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 well-being plan and also 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, Working Age Adults, Older Adults (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



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 MSOA Geography



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 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 132% 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 they are 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.

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.”ⁱ

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 Well-being Plan. In preparing for the engagement, workshops were held with regional PSB partners in May and June to explore their ideas on how to conduct the engagement and the actual content of the regional Well-being Survey and stakeholder events. The engagement activities were developed based on these views, some examples of which were the desire to include more open-ended questions in the Well-being Survey, run the Well-being Survey in September after the summer holidays and conduct a specific schools survey to record responses from younger people.

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 autumn/winter of 2021/22.



We designed a **Regional 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 600 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 **Well-being 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 214 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 is 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 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 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 regional Well-being Survey and stakeholder events. - Worked as a West Wales Cluster to deliver the Assessment under the PSB/RPB Network. - Developed regional 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 Needs 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.

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.

		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	First Independence		●	●	●			

24	Employment, Access to Services and Affordable Housing	●	●		●	●			
25	Starting Work	●	●		●	●			
Adulthood									
26	Nurturing Creativity				●	●	●		
27	Community Cohesion			●	●	●	●		
28	Well-Connected Communities	●		●	●	●	●	●	●
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	Dementia and Age-related Conditions			●	●	●	●		
42	Staying Connected		●	●	●	●	●	●	
43	At the End			●	●	●	●	●	

Prosperous	Resilient	Healthier	More Equal	Cohesive	Culture	Global
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CEREDIGION CONTEXT





In this chapter: Population, Geography, Natural Environment, Economy, Rurality, Well-being and Deprivation, Connectivity, COVID-19

3.1 Ceredigion 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. The table below shows each town's population, according to the 2011 Census, the Census data is the latest official figures.

Town	Census 2011 Population	2019 Population Estimate (using LSOA boundaries)
Aberystwyth	18,749	10,756
Cardigan	5,301	4,217
Lampeter	2,970	2,926
Aberaeron	1,422	1,331
Llandysul	1,484	1,384
Tregaron	1,213	1,228

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. The main towns are serviced by buses that run throughout the day 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 the 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.

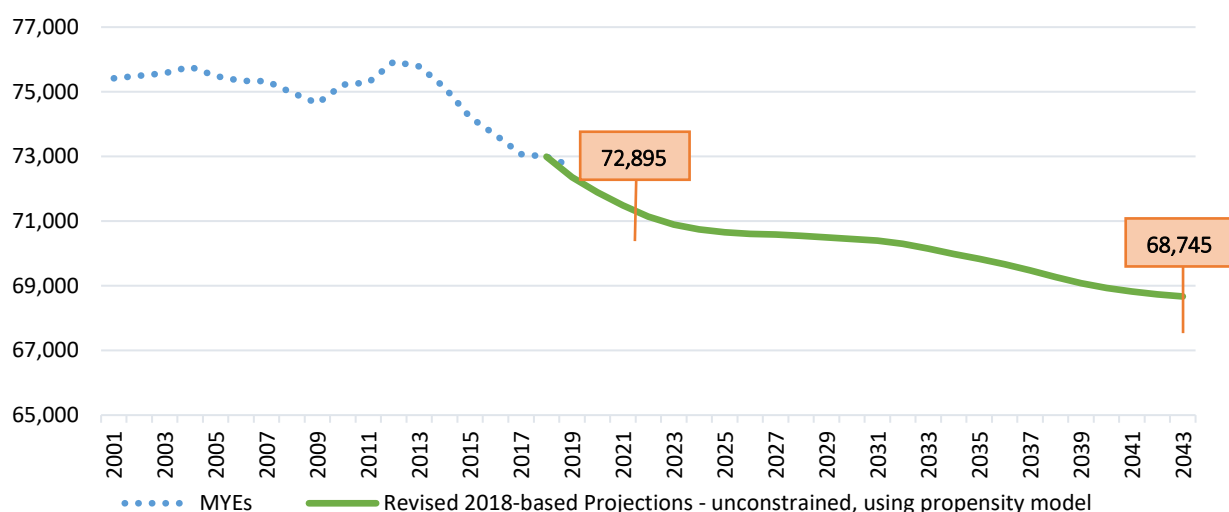
However, the rail line in Ceredigion does not run to the south; for example, taking a train from Aberystwyth to Carmarthen would take over 6 hours and would mean firstly travelling North to Shrewsbury and then Southeast Wales, eventually linking up with the Carmarthen line. By car this journey would take just under 1 hour 30 minutes.

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 1.1 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 1.1: 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 1.2 and Figure 1.3.

Figure 1.2 : Ceredigion population pyramid - 2018 estimate

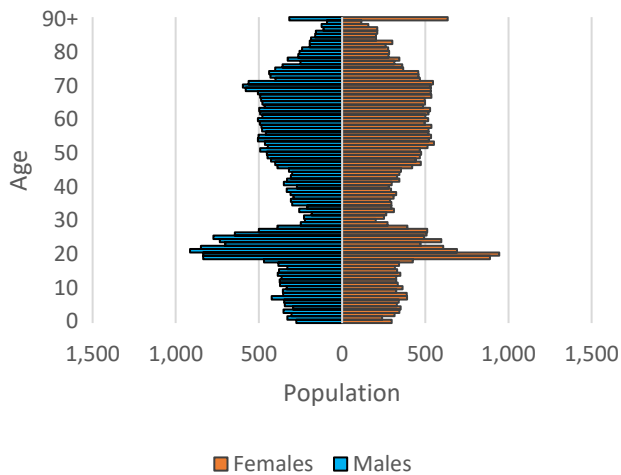
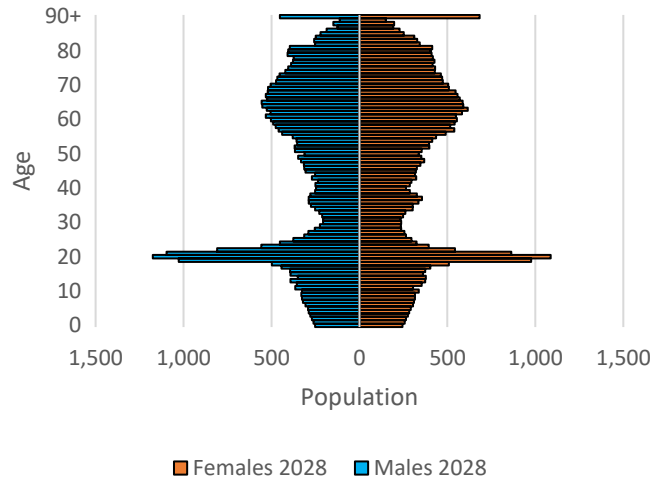


Figure 1.3: Ceredigion population pyramid - 2028 projection



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 services.

Natural Environment

Ceredigion has a variety of natural landscapes and habitats: coastal cliffs and beaches and 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.ⁱⁱ

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 valued because of their value to community and educational enjoyment.

Ceredigion is boarded 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, 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.

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.ⁱⁱⁱ

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
- 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, longer travelling distances and

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 survival rates of businesses in Ceredigion, for example, are consistently above the national average and some of the highest amongst all areas in Wales. This is one of the County's strengths and unique selling points along with a strong knowledge sector, higher than average economic growth in recent years and higher than average skills and qualifications levels.

The latest Annual Survey of Hours and Earnings 2020 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.

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. 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.

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 4.2 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.

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 increase 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 situated across the county, museums, 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 produce.

Results from the National Survey for Wales shows that in 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).

NEW BEGINNINGS





In this chapter: Welcome to the World and 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.^{iv} 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. Mother's that 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. 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 between 10% and 20% of women develop a mental illness during pregnancy or within the first year of childbirth. Some examples of these include antenatal and postnatal depression, obsessive compulsive disorder, posttraumatic stress disorder and postpartum psychosis.^v 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.^{vi} 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 Figure 4.1. 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.

Figure 4.1: Average healthy life expectancy in Ceredigion

The average healthy life expectancy	
 <p>Male 67.9 years</p>	<p>Female 69.7 years</p> 
The gap between the most and least deprived areas	
 <p>9.3 years</p>	<p>6.7 years</p> 

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.^{vii}

Figure 4.2 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.^{viii} Research shows that deprivation levels could be driving the disparity in low birth weights between community areas^{ix}, which impacts our progress towards achieving **An Equal Wales**.

Figure 4.2: 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%

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^x. Many different professionals and practitioners in Hywel Dda University Health Board (HDdUHB), Ceredigion County Council, and the third sector lead and provide preparation for parenthood programmes and activities for upcoming parents.

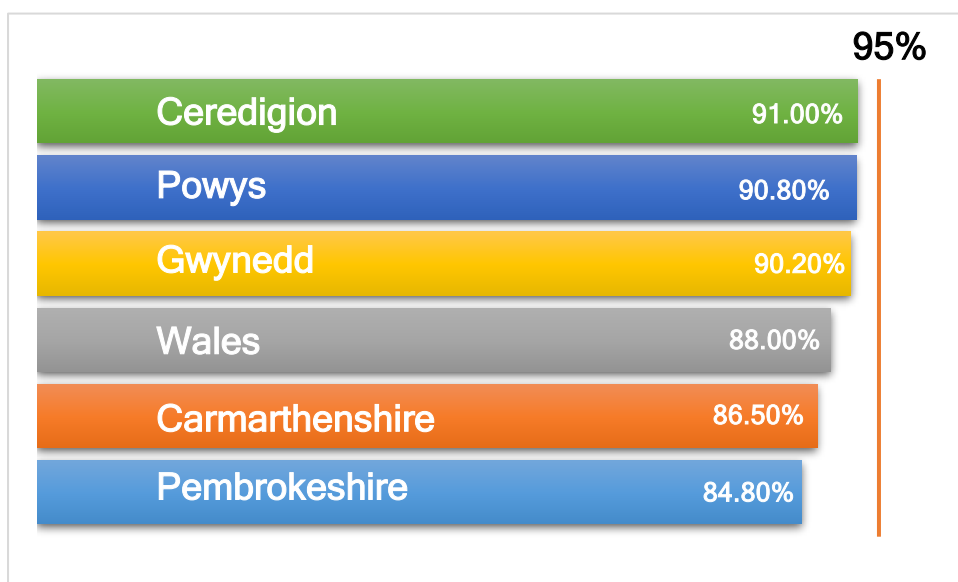
Currently in Ceredigion, community midwives provide antenatal sessions to prospective parents. During the peak of the COVID-19 pandemic in 2020, some face-to-face antenatal appointments continued, however, partners were not allowed to attend certain appointments nor were they allowed to be present during labour and birth. A recent UK-wide study highlighted that the lack of access to antenatal care and reduced perceived social support during the pandemic, potentially intensified pregnancy specific stress^{xi}. 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. Further research is required to understand whether there is a potential need for provision of additional

supportive care, both formally and informally in Ceredigion, particularly with prospective parents who may be more vulnerable during a pandemic.

Flying Start provides childcare 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. This initiative 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%^{xii}. 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).

Parents in Ceredigion are more likely to **immunise their children** compared to the national average (91% of children aged 4 were up to date, compared to 88%). Immunisations not only protect children against dangerous diseases, but protects the health and well-being of future generations from *preventable* diseases. Welsh Government have set a target of 95% uptake for childhood vaccinations as this is the level known to be necessary to prevent disease circulating within the community. Uptake rates in Ceredigion are higher than its neighbouring areas in Mid and West Wales, see Figure 4.3. Ceredigion residents frequently travel outside of the county for work, education and leisure purposes, therefore, achieving stable and high immunisation rates at both a local and a regional level is of vital importance.

Figure 4.3: Percentage of children by age 4 up to date with routine immunisations 2019-20



Source: Public Health Wales, COVER Report 2019-20

Long-term trends in childhood immunisation uptake in Ceredigion are improving and remain positive, increasing by 5.8 percentage points since 2012-13. However, 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 Wales³. 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%). Research by Public Health Wales, UNICEF, NHS and others found that breastfeeding is important for the health and development of babies and their mothers, and is linked to the prevention of major health inequalities. 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. It is

acknowledged that breastfeeding may not be every mother's first choice, nonetheless, parents must have access to support and information on how to optimise the health of their new born baby.

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 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%).^{xiii}

Nationally, breastfeeding rates in Ceredigion fare very well, however, the UK has one of the lowest breastfeeding rates globally^{xiv}. Surveys show us that most mothers want to breastfeed, but often don't get the support they need. Recent trends highlight that breastfeeding rates in Ceredigion are slowly declining, down 3% from 2016-2018, 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.^{xv}

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 little as 2% of fathers or partners in the UK were in receipt of Shared Parental Leave (SPL) in 2020^{xvi}. This exceptionally low figure could be due to the fact that the primary earner's income could fall significantly, with some estimates being as little as £600 a month^{xvii}, 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.

Relationships

A stable family is considered key to providing a supportive, nurturing and stimulating environment for babies. Past research has identified that stable families have the greatest influence on child outcomes and general well-being.^{xviii}

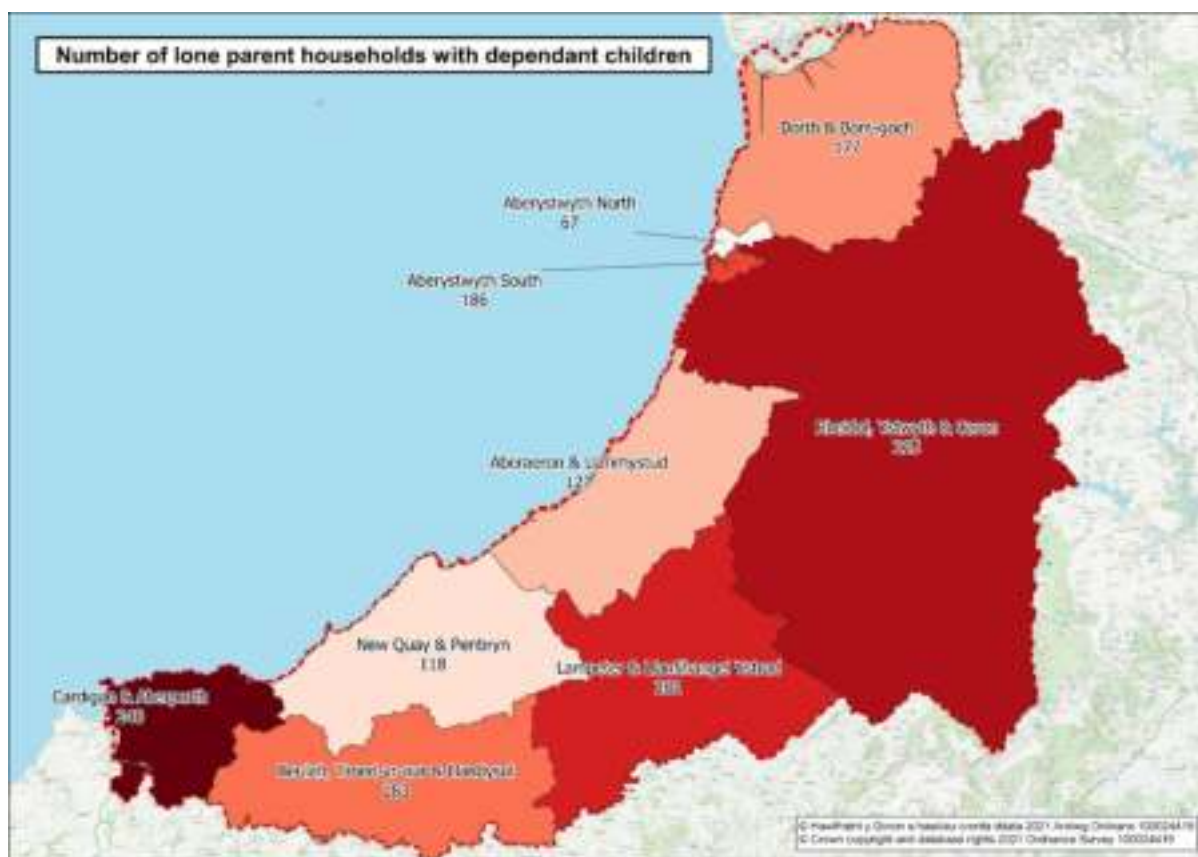
According to research, a fifth of couples break up during the first 12 months after welcoming a baby. Common reasons for separating include, dwindling sex lives, lack of communication and arguments.^{xix}

A family's stability can be affected by poverty, as social, economic and emotional aspects of life can all be affected poorly by poverty and deprivation. Increased parental distress and relationship break-ups have been associated with economic hardship.

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.

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. Cardigan & Aberporth MSOA has the highest rate of lone parent households (240) and Aberystwyth North MSOA has the lowest (67).^{xx} More recent data collected from the Annual Population Survey revealed that there were around 1,300 lone parent households in Ceredigion (2015-17),^{xxi} a slight decrease since the 2011 Census.

Figure 4.4: Number of lone parent households with dependant 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.^{xxii} 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’.

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 are challenging for some parents.

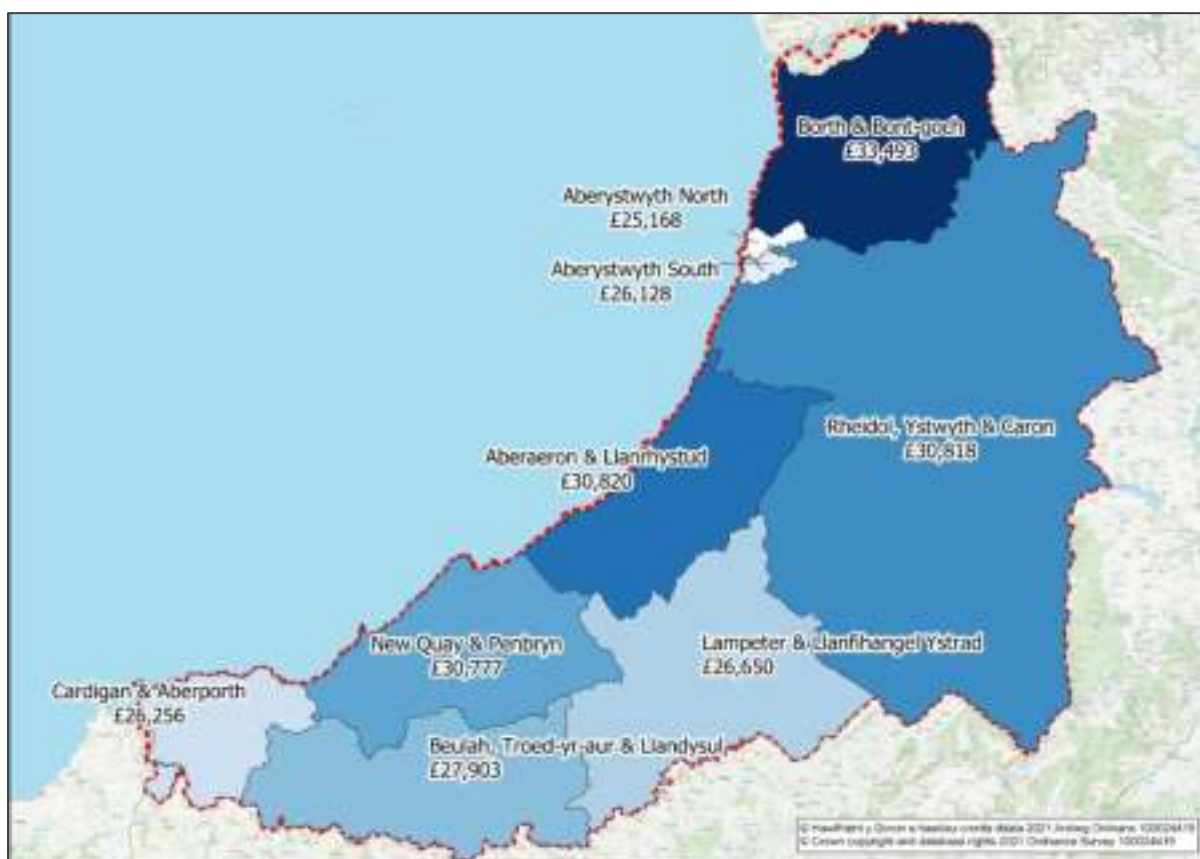
According to the Welsh Index of Multiple Deprivation, the Cardigan & Aberporth area has the highest proportion of its population in income deprivation at 19%, which is higher than the national average (16%) and equates to 1,685 people. At the other end of the scale Aberystwyth North has the lowest percentage at 6%, see Figure 4.5.

Figure 4.5: 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%

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 4.6 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.^{xxiii}

Figure 4.6: Median Income in Ceredigion by Community Area



Having a baby is expensive. The Child Poverty Action group suggest that the cost of raising a child across 18 years could be over £150,000. This is around £8,333 a year^{xxiv} and amounts to 29.1% of income across Ceredigion, rising to 33.1% in Aberystwyth North where incomes are lowest in the County. These figures are before household bills and other expenditure are factored in.

Figure 4.7: Estimated percentage of median gross income spent on raising a child per year

Aberystwyth North	Ceredigion	Borth & Bont-goch
33.1%	29.1%	24.9%

The changes in priorities that naturally arise from becoming a parent can also affect the level of household incomes in Ceredigion. For some, careers feel less important than before, and parents often decide to reduce their working hours or move to part-time employment, placing a strain on household finances.^{xxv} The high cost of childcare means changes to working patterns can make economic sense and look after children. The Childcare Survey 2019 noted that prices for childcare were on the rise in Wales - parents pay an average of £117 a week or over £6,000 a year for just a part time nursery place in Wales.^{xxvi} 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.^{xxvii}

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^{xxviii}. Furthermore, 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 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 2017-2022, there are 872 pre-school/nursery/'Cylch Meithrin' places for 3 year olds in Ceredigion and 81% are in Welsh-medium settings^{xxix}. Welsh-medium childcare is the most commonly used of all types of childcare in Ceredigion, this is highest for sessional care through the 'Cylchoedd Meithrin' and free breakfast clubs available in schools. Families residing in the Flying Start areas in Ceredigion receive free 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 4.1 provides a breakdown of the type of childcare used and the language medium in Ceredigion.

Table 4.1 Number of childcare providers by language of provision (December 2019)

	Welsh	Welsh and English	English with elements of Welsh	English	Total settings
Number of registered child minders	12	12	16	11	51
Number of registered Day Nurseries	3	4	0	1	8
Number of registered Care Sessions	25	2	0	0	27
Number of registered after school sessions	9	6	0	0	18
Total	49	24	16	15	104

Source: Ceredigion County Council, *Welsh in Education Strategic Plan (2021)*

There is a need to attract more Welsh speaking childminders to Ceredigion, especially in the north and mid areas of the county (Aberystwyth and Aberaeron). *The Welsh 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: **Childhood**



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 recognising **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, 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 a need to attract more **Welsh speaking childminders** to Ceredigion, especially in the north and mid areas of the county, in particular the Aberystwyth and Aberaeron community areas.

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 Experience, Coming Together, Play and Well-being Outcomes, Social Isolation

5.1 Growing Up Healthy

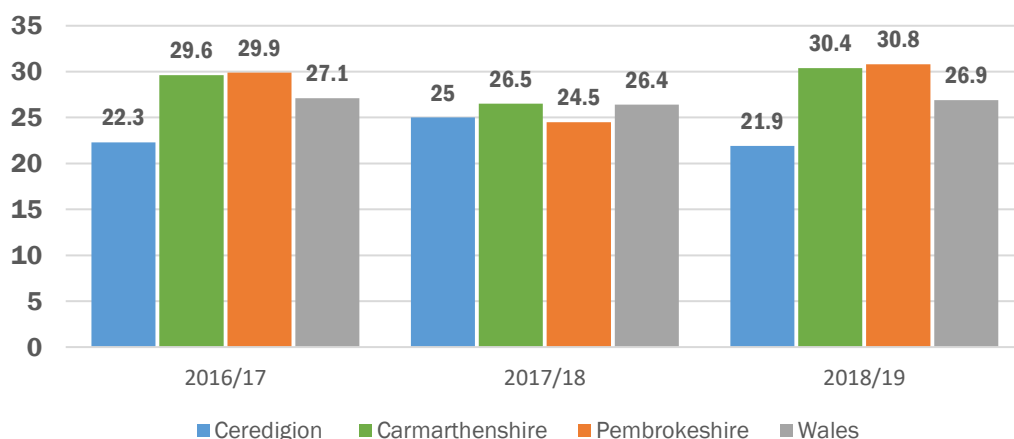
Children's Physical Health

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.

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 30.1% during 2014/15 to 21.9% during 2018/19, which is lower than the national average for Wales at 26.9%.^{xxx} Obesity had been increasing in Ceredigion and across the region prior to this, and is continuing to increase in the neighbouring counties in West Wales (Figure 5.1).

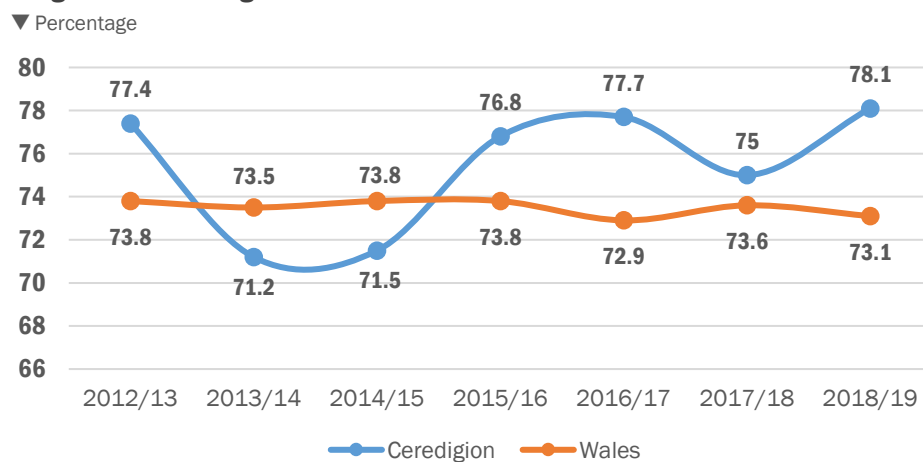
Figure 5.1: % of Children aged 4 to 5 years who are overweight or obese

▼ Percentage



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%.^{xxxii}

Figure 5.2: % of Children aged 4 to 5 years who are a healthy weight or underweight



Exercise is important for our well-being. Studies indicate that physical activity helps to reduce symptoms of depression, anxiety, pain and loneliness. Staying active can improve our health and help us maintain a healthy weight.

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%).^{xxxii} Increasing participation of females in sport, particularly since the COVID-19 pandemic, has been recognised as a national issue by Sport Wales.

The recent review of Ceredigion’s Sport and Recreation Activity Strategy also revealed that whilst Primary school age children are much more likely to undertake at least three occasions of activity peer week compared to the national average, secondary age children are slightly less likely to do so - 47% compared to 48% nationally.

Physical Education lessons in schools are mandatory and most children are encouraged to take part. According to Sport Wales, 87.8% of children in Ceredigion also take part in sport in other settings outside of school.^{xxxiii} 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 Hywel Dda University Health Board 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%).^{xxxiv} Tooth decay can be a sign of a diet high in sugars and starches or poor oral hygiene. 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.

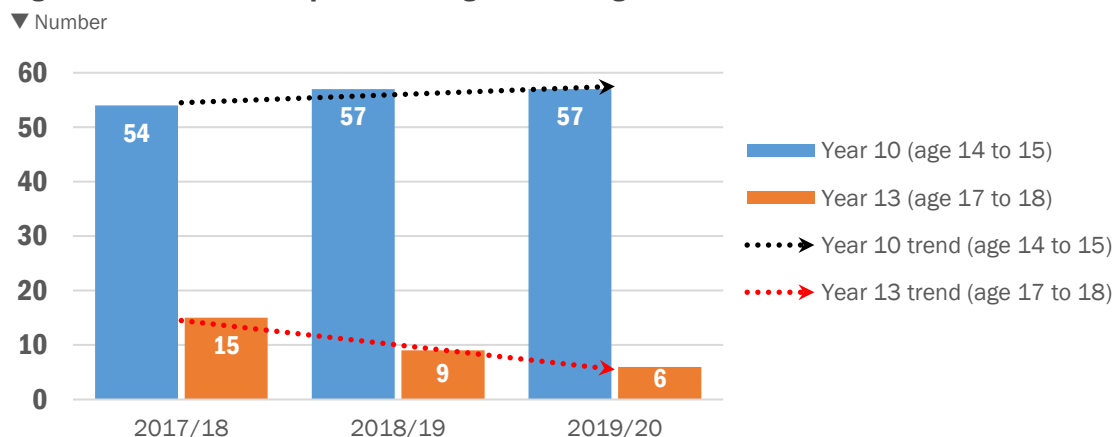
Children’s Mental Health

Leading on from physical health, a child’s mental health can also influence 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.^{xxxv} There is a link between childhood mental health and mental health later in life. Research shows that experiencing mental health issues in childhood makes it more likely to experience mental health issues as an adult.^{xxxvi}

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.^{xxxvii} 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.^{xxxviii} 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.

Figure 5.3: Number of Pupils Receiving Counselling



Bullying is one example 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 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%).^{xxxix}

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 School Health Research Network for the Hywel Dda University Health Board region shows that 17% of participants said they had been cyberbullied in the “past couple of months”.^{xl} This is an increase of 7% since 2017/18^{xi}, suggesting that it is a growing concern in 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% have their own tablet and 4% of 5-7 year olds have social media accounts^{xlii}.

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. 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.

Case Study ▶

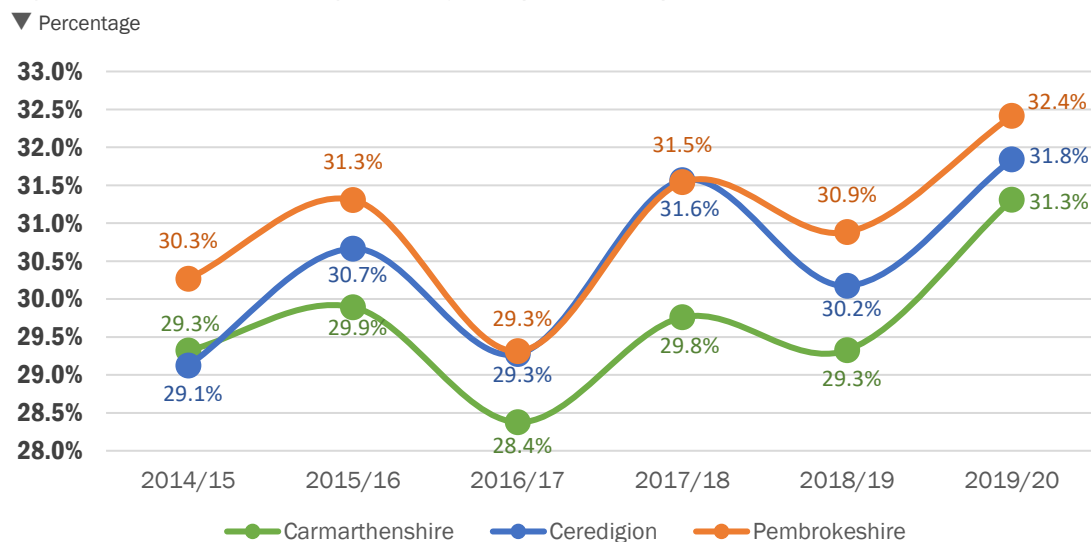
Counselling and Emotional Well-being Support

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.^{xliii}

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



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.^{xliiv}

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.^{xliv} 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%). 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 who have the largest proportion of households living in poverty, are Aberystwyth North, Cardigan & Aberporth and Aberystwyth South, as shown in Table 5.1.^{xlvi} 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%

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 could 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, as 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.^{xlvii} These concerns are shared with parents – a Welsh Government survey revealed that parents with young children aged under five were concerned about their child's use of technology.^{xlviii}

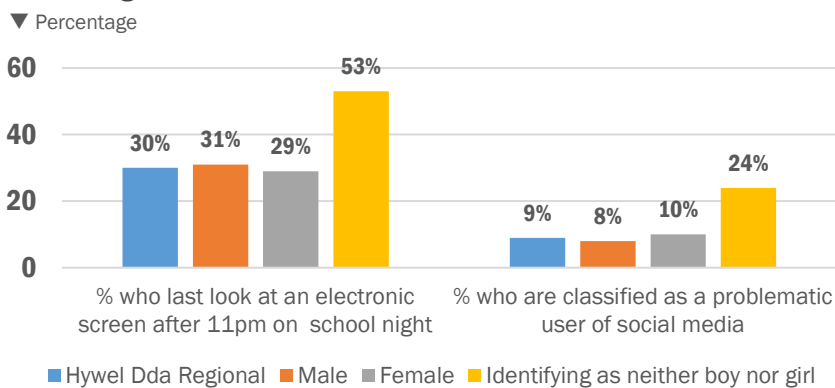
Research by OFCOM, the UK's communications regulator, showed that parents in Wales are most likely to have concerns about their child's time spent gaming in particular. This included concerns over the *content* of the games, *how much time* the child spends gaming, the pressures to make *in-game purchases*, the possibility of their child being *bullied*, and the *amount of advertising* in games.^{xlix}

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.ⁱ

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 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%.ⁱⁱ 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



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 relaxing, 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.

5.2 Strong Foundations

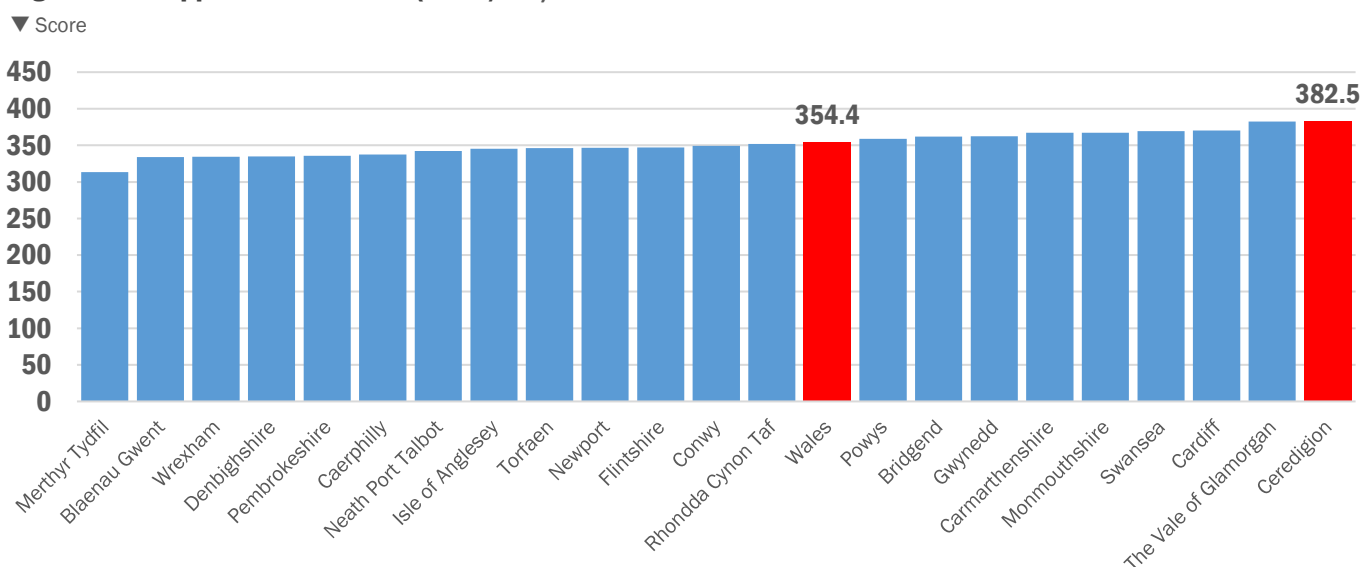
A Rich and Rounded Education

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).^{lii}

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.^{liii}

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 (382.4), much higher than the national average (353.8).^{liiv}

Figure 5.6: Capped 9 Point Score (2018/19)



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, pressure 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.^{lv} 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.^{lvi} 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 Ceredigion compared to 18.4% nationally (2019/20), and the take-up in Ceredigion has been increasing over the last five years.

Furthermore, in 2021, the gap between the top GCSE results of pupils from deprived backgrounds and those from non-deprived backgrounds had widened in Wales^{lvii}, 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, Table 5.2.^{lviii} 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.^{lix}

Table 5.2: Level 2 qualifications in Ceredigion

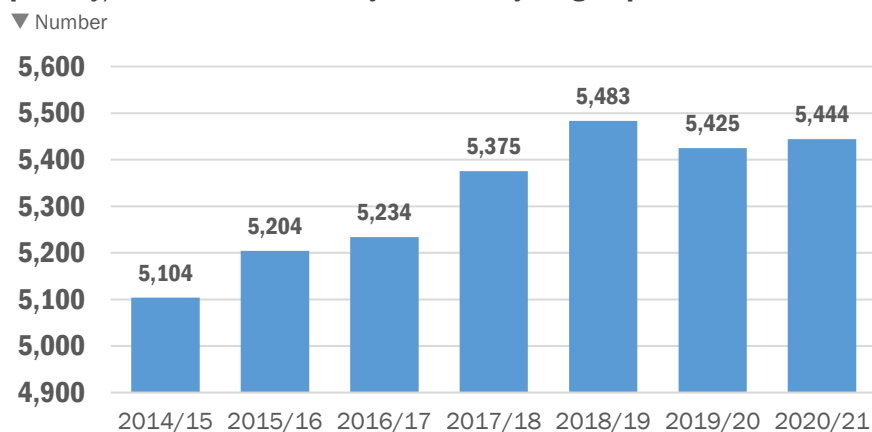
	Eligible for FSM	Not Eligible for FSM	Difference
2016/17	34.9%	68.2%	33.3% pts
2017/18	33.3%	65.0%	31.7% pts
2018/19	31.5%	65.5%	34.0% pts

In 2020/21 there was a school population of 9,305 (primary, middle and secondary schools) in Ceredigion.^{lx} Around 3,125 or 33.6% pupils in Ceredigion are considered to have special educational needs (SEN).^{lxi} 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.^{lxii}

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.^{lxiii} 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.^{lxiv}

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.^{lxv} 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 5.3.^{lxvi}

Figure 5.3: Pupils taught Welsh as first language in primary, middle and secondary schools in year groups 1-11



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.

Deprived families were more likely to be negatively affected by this; 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 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.^{lxvii}

The pandemic is 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.

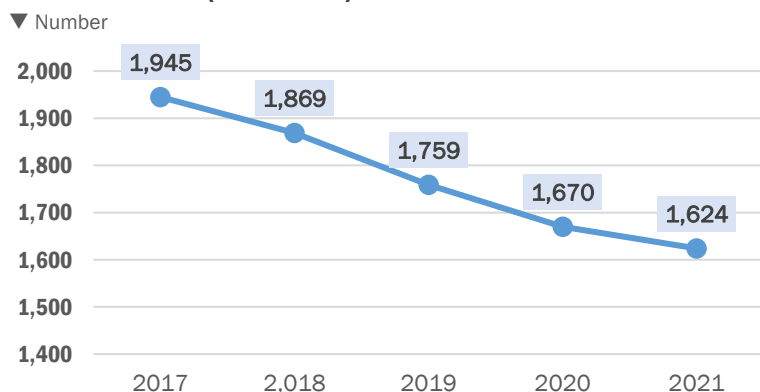
Childcare Sufficiency

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.^{lxviii} 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 1,624 in March 2021, a reduction of 3% (or 46 places)^{lxix} (see Figure 5.4), due to the closure of the two after school clubs (Cardigan Play Scheme and Clwb Mes Bach – Ysgol Y Dderi). The Out of School sector is now in a fragile state, with the likelihood of more closures in the coming year. This is concerning, particularly if we are to ensure that parents in Ceredigion can access training, education or employment.

The Full Day Care sector in Ceredigion experienced one of the steepest declines in childcare places during the 5 year period, a reduction of 146 places (or a 30% decline). Childminders tend to be more expensive than full-day care nursery, which presents a problem to parents, particularly those on a low income in Ceredigion.

Figure 5.4: Number of registered childcare places based on CIW list (2017-2021)



Source: Ceredigion County Council (2021): Progress Report 2020-21

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 Ceredigion. According to the last Childcare Sufficiency Assessment in 2017, the sector lacked: childminders in the main towns (particularly welsh speaking childminders), full day care nurseries, flexible childcare services and affordable childcare. Earnings also continue to be lower in Ceredigion than across Wales, which impacts parents’ ability to afford childcare provision. 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!)”

The Ceredigion childcare sector is currently experiencing a **staffing crisis**. As a result of additional funding for classroom assistants, the 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 Plan as many welsh speaking staff are leaving. 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^{lxx}.

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^{lxxi}. Of particular concern was the lack of availability of childcare during the school holidays in Ceredigion during 2020-21, leaving many parents relying on family members or were forced to change their working patterns.

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 more flexible working patterns in the future. Consultation is currently underway with families on the next Childcare Sufficiency Assessment, which 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, 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.^{lxxii} Other studies indicate that those experiencing ACE's are 4.7 times more likely to have **low mental well-being** and increased risk of developing a mental illness as an adult.^{lxxiii} In particular, disadvantaged children and children growing up in poverty are more likely to experience multiple ACE's.^{lxxiv}

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%.^{lxxv} 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%).^{lxxvi}

Experiencing an ACE can increase the likelihood of coming into contact with the criminal justice system. The number of offences committed by children in Ceredigion was 54 in 2019/20, the lowest number across Wales^{lxxvii}. 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.^{lxxviii}

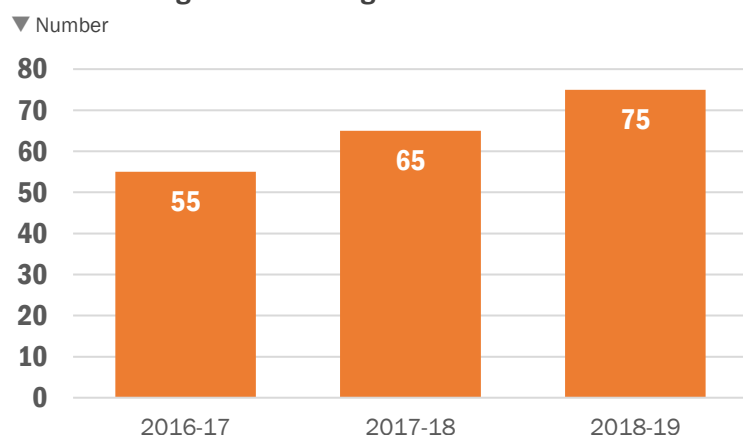
In some extreme cases ACE's can lead to the strongest official action, including taking children into care. Looked after children (LAC) are known as children in care; 75 children in Ceredigion were looked after in 2020. The number of LAC in Ceredigion has been gradually increasing since 2018 (60) and this number is likely to increase further due to the detrimental effects of the COVID-19 pandemic.^{lxxix}

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.^{lxxx} 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 5.5).^{lxxxii} 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 5.5: Number of Children on the Child Protection Register in Ceredigion



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.^{lxxxiii}

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.

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.^{lxxxiii} There is a need for more up to date data on young carers in the county to ensure that in the future they can receive the level of support needed to counter some of these issues.

5.4 Coming Together

Play and Well-being Outcomes

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.

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. Outdoor play can help reduce these stresses and improve well-being.

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.^{lxxxiv} 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.

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 its ok, not good or rubbish and needs improvement.

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.

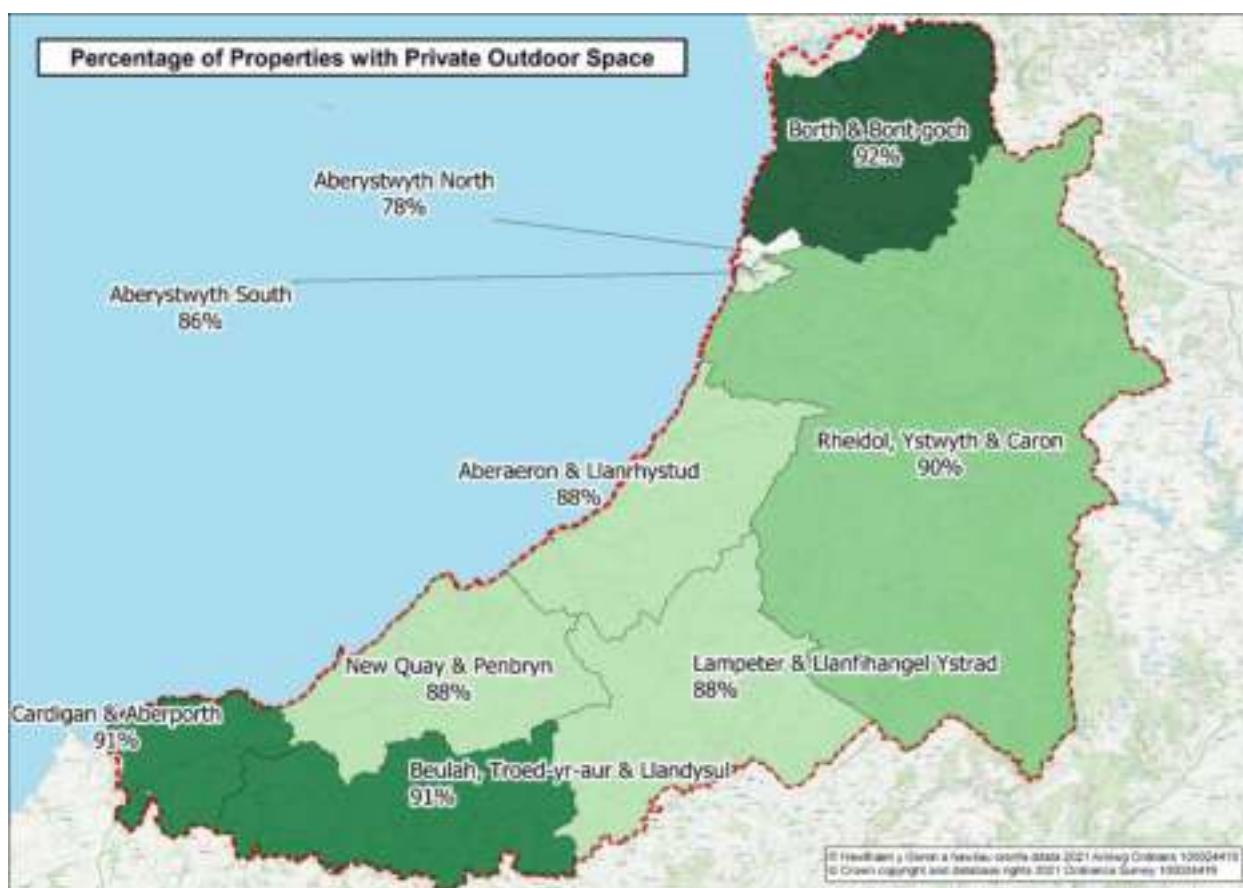
In the Give Us Support group, stakeholder event, which was facilitated by RAY Ceredigion, the concerns around sufficiency of play were reiterated. The young people that were part of this group noted that there were a lack of things to do in their area because there was no hall or park to meet other people 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.

However, 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%).^{lxxxv}

Aberystwyth North (shown in Figure 5.6) 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 garden. 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 5.6: Percentage of properties with private outdoor space in Ceredigion



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.^{lxxxvi}

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 Service 21% said that the environment (green spaces and beaches) was the best thing about their community and 90% of pupils recognised that 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 peers^{lxxxvii}. 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.^{lxxxviii}

The ‘How Are You Doing in Wales’ study run by Public Health Wales showed that at August 2021 more than half of the respondents (65%) were worried about their child’s well-being. 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. The North Ceredigion Primary Care Cluster have forewarned a tsunami of children with mental health issues following the pandemic.

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.

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 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 had widened.

It is unlikely that the **childcare provision** available is sufficient in meeting the needs of parents in Ceredigion. Provision of childcare in the county will need to adapt 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 Adults, Out and About as Part of the Community, First Home and Job, Broadening Horizons

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

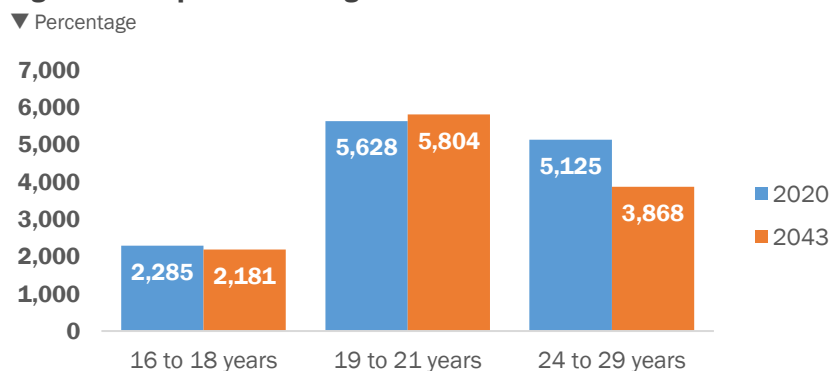
In 2020, there were 2,285 people aged 16 to 18 in Ceredigion, representing 3.1% of the county's population. This figure is projected to decrease over the longer term to 2,181 by 2043 which is a 4.6% reduction. For those aged 19-21 the population is much larger at 5,628 primarily due to the significant 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. 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	-1,257	-24.5%

Figure 6.1: Population change 2020 to 2043



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 opportunity 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 the 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.^{lxxxix}

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.



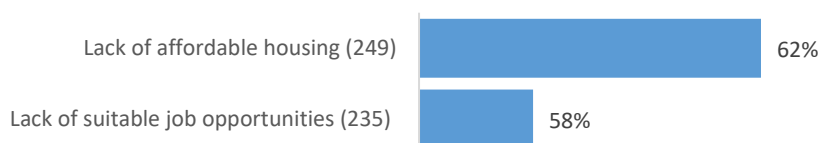
These themes have been high on the agenda for some time, but the COVID-19 pandemic has exacerbated each – digital connectivity in particular has become essential over the last twelve months where online access has largely been the only way to keep in touch, the impact on the economy has heightened concerns 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 schools survey, jobs were identified as the biggest concern in their local area as they grow up, 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.

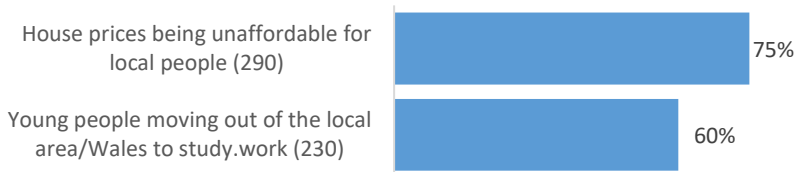
These issues were also reflected in the general Well-being Survey. Lack of affordable housing and suitable job opportunities were the two biggest concerns amongst respondents on the economy in the future. While 60% recognised young people moving out of the local areas as being their second biggest concern in relation to the thriving language and culture of Ceredigion, through the loss of Welsh speakers (Table 6.2).

Table 6.2 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)



Looking ahead, what concern you the most about your County's vibrant community and thriving Welsh language? (Please tick all that apply)



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.

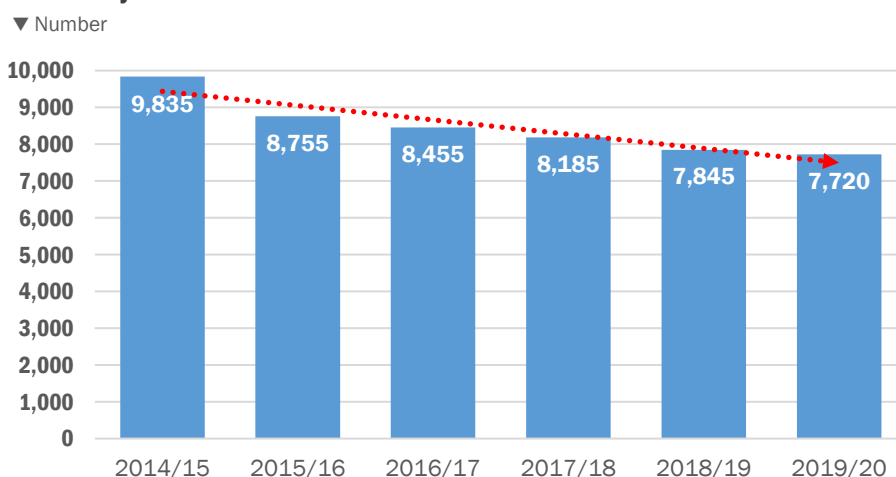
But there is also a fundamental link to culture and language, for retaining younger people is essential to continuing the long-held traditions of the county as one of the bastions of Welsh language and culture. Young people leaving the county will most likely lead to a loss of Welsh speakers and the 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 6.2).^{xc} This comes despite the University continually being ranked the highest in Wales for student satisfaction over the last six years.^{xcii}

Figure 6.2: Number of HE student enrolments at Aberystwyth University



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. It is thought that Ceredigion's economy has benefited from almost £80 million because of the impact new international students also.^{xciii} Education in Ceredigion also employs 3,500 people or 14% of the jobs in the county and is one of the largest sectors.

First Independence

Between the ages of 16 and 24, young people are expected to develop their independence. As a result, this life stage is often associated with risk-taking behaviours.

Although it isn't legal to buy or drink alcohol until the age of 18, young people often begin drinking before this. 11.1% of adults reported very heavy (binge) drinking in Ceredigion according to Public Health Wales data^{xciii}, which is in-line with the rest of Wales. Although these figures do include all those aged 16+, binge drinking and heavy drinking are often seen in younger people, particularly students.^{xciv}

The COVID-19 pandemic has increased anxiety and stress levels which are also linked to an increase in alcohol consumption during the pandemic period. Various sources such as the British Liver Trust suggest there have been substantial increases in consumption during the last eighteen months^{xcv}, and the Public Health Wales' ongoing "How are we doing in Wales?" survey recorded a 22% increase in alcohol consumption as at February 2021.^{xcvi}

Excessive alcohol consumption can have detrimental effects on our health and well-being. Many 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, drug misuse can negatively affect our health and well-being but it is also a criminal offence to use 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 has the lowest number of offences, 1.1 per 1,000 population (8 offences) Figure 6.3.

Figure 6.3 Number of Drug Related Offences 2020-21 (by 1,000 population)



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 needs to enable us 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.^{xcvii}

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 last 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.^{xcviii} 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 pressures 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 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.^{xcix} The most commonly reported conditions were anxiety and depression.^c

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.^{ci}

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.

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.^{cii} Additionally, a study by ONS revealed that almost 10% of 16-24 year olds felt lonely "always or often".^{ciii}

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.^{civ}

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’ was 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 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

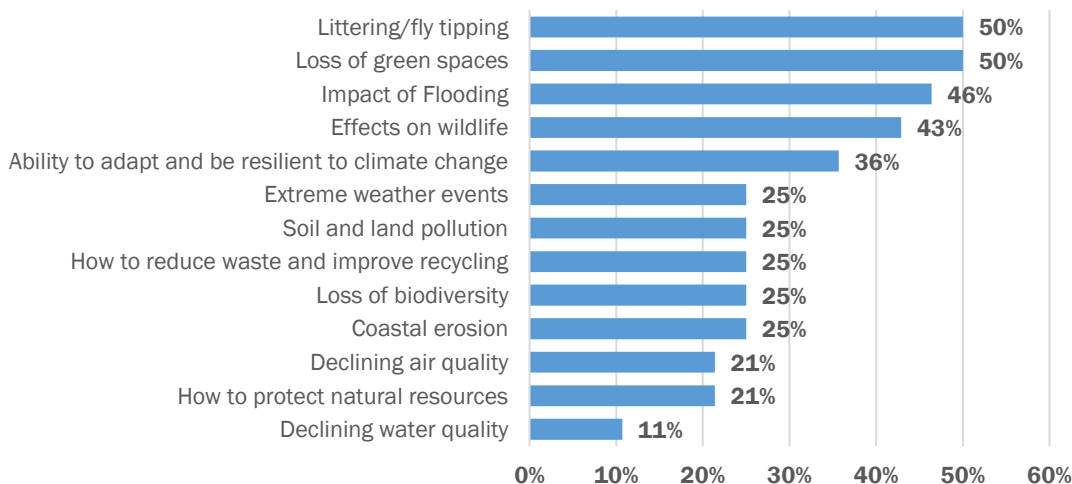
Environmental Awareness

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 6.4) 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 in our survey.

Figure 6.4: Looking ahead, what concerns you the most about your local environment? (Responses from 17-24 year olds)



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.^{cv} 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.^{cvi}

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 6.5)

Figure 6.5: Crime rate per 1,000 population 2020/21

▼ Number per 1,000 population

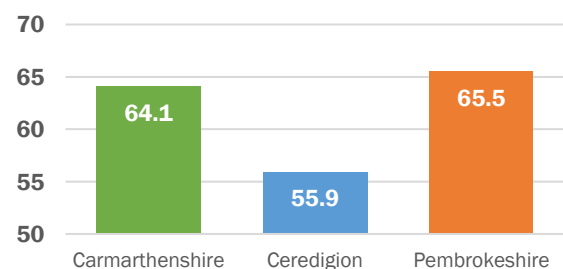
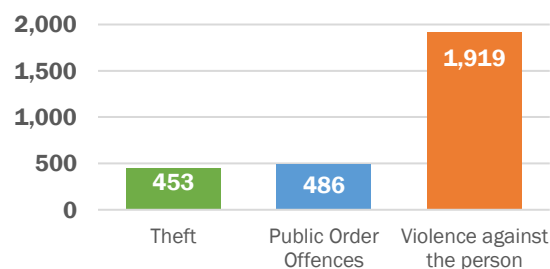


Figure 6.6: Most prevalent types of crime in Ceredigion 2020/21

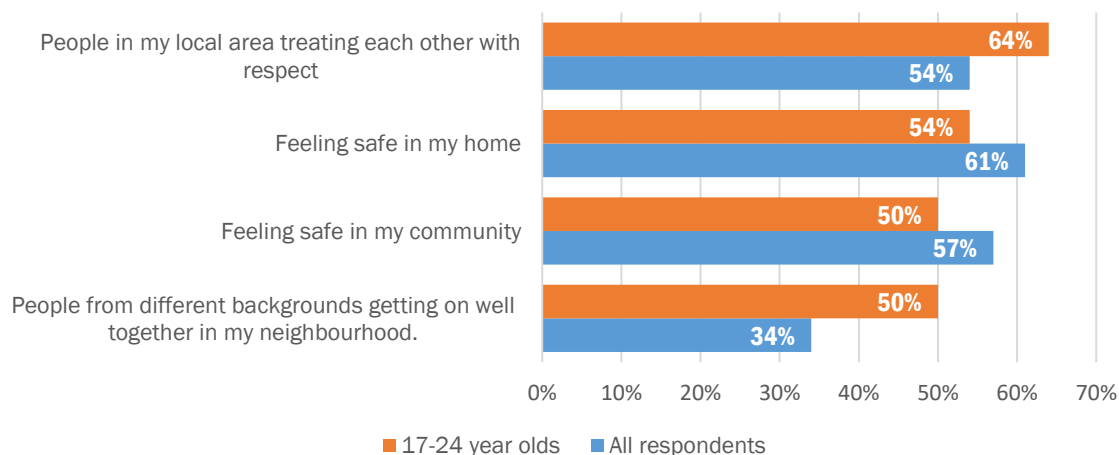
▼ Number of incidents



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 6.6).

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 respondents (Figure 6.7).

Figure 6.7: Which three things do you value the most in relation to the community that you live in?



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 Figure 6.8.

Figure 6.8: 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. ”

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.

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 just can be 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.

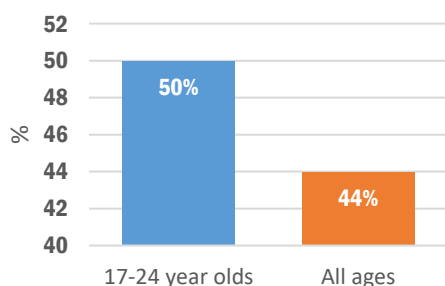
Welsh Language and Culture

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.

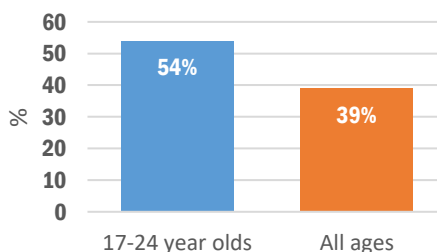
For example, exactly 50% said that being able to use the Welsh language was the most important thing in relation to a vibrant community and Welsh language, higher than the overall results for this question. Furthermore, over half (54%) identified “traditions being lost” as the thing that concerns them 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 than across the survey results as a whole (Figure 6.9)

Figure 6.9: Well-being Survey Results 17-24 year olds

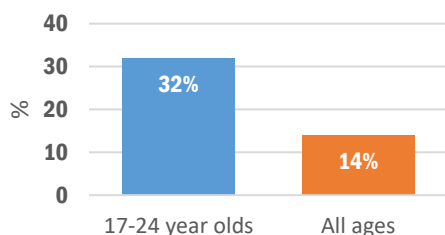
What three things do you value the most? Being able to use the Welsh language



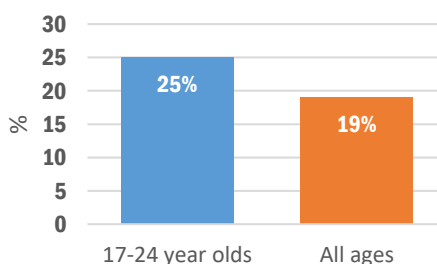
What concerns you the most about your County's vibrant community and thriving Welsh language? Traditions being lost



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



Activities through the medium of Welsh with other young people are essential for to ensure that they continue to use the Welsh language and develop skills, outside education. Young Farmers Clubs are a good example of this and 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 a variety of opportunities and experiences.^{cvi}

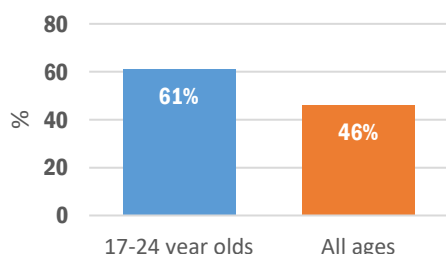
The National Eisteddfod is due to take place in Tregaron in 2022 and a holds great opportunity for young people in Ceredigion to take part and celebrate Welsh language and culture. Although the Eisteddfod attracts people of all ages, Maes B, is a campsite dedicated to young people that showcases Welsh bands, enabling young people to experience Welsh language music and culture.^{cvi}

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.

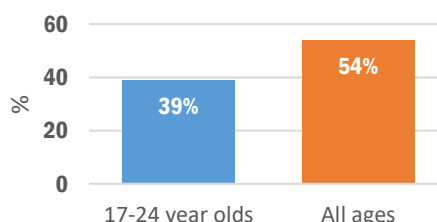
However, from our Well-being Survey, we do know that younger people not only have a connection with language and culture, but also have a desire to maintain it for future generations and support the vibrant culture and thriving Welsh language well-being goal. For example, 61% said they would consider “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%.

Table 6.10 Well-being Survey Results 17-24 year olds

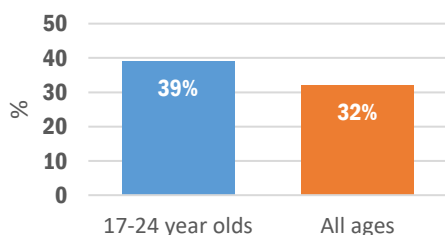
What would you consider doing to help achieve a vibrant community with a thriving Welsh language? Learning or improving your Welsh



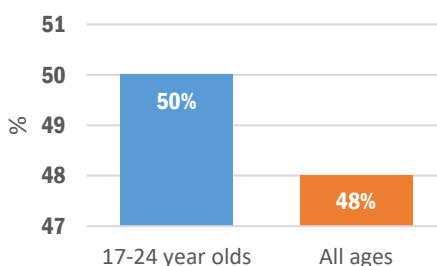
What would you consider doing to help achieve a vibrant community with a thriving Welsh language? Visit your local museum or other heritage establishments



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



Case Study ►

Ceredigion representative on National Youth Board for well-being and mental health

A pupil from Ysgol Gyfun Aberaeon 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.

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.

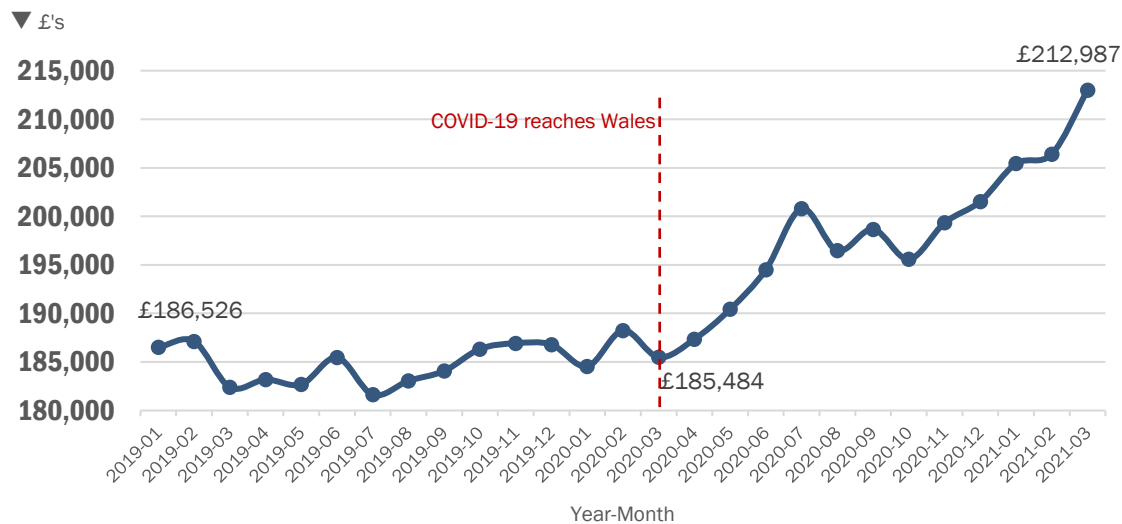
Employment and affordable housing

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 6.11.^{cx}

Figure 6.11: Average Property Price in Ceredigion for all types of property



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.^{cx}

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 show in Figure 6.12.^{cx}

Figure 6.12: Younger Persons Economic Survey 2020 – Top Three Priorities



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.

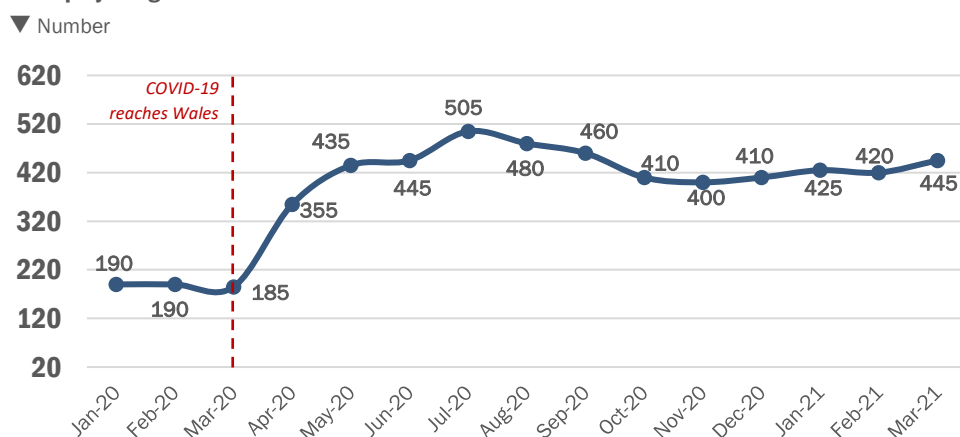
For example, the increase in demand for properties in Ceredigion since the pandemic began, and the subsequent increase in house prices highlight the struggle many first time buyers face in trying to gain a footing on the housing ladder. Although Wales as a whole is witnessing a housing boom, the growth 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.^{cxii}

Furthermore, the challenges of gaining and maintaining employment as they 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.^{cxiii} 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 6.13. (The Claimant Count is the number of people claiming benefit principally for the reason of being unemployed).

Figure 6.13: Claimant Count 18-24 Year Olds

The number of people claiming benefit principally for the reason of being unemployed aged 18-24



Office for National Statistics, Claimant count by sex and age

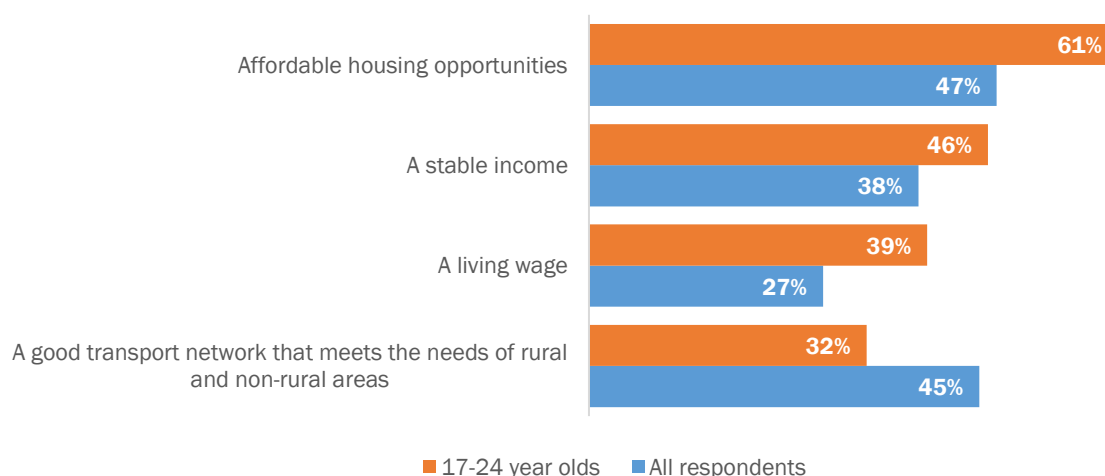
Recent research by The Prince’s Trust and the Learning and Work Institute has warned that young people will increasingly bear the brunt of the unemployment crisis.^{cxiv} Their study, demonstrates that while some areas of the economy might begin on the road to recovery following the pandemic, young workers 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 subsequent move away. These issues sparked a strong response in the Well-being Survey and have brought these issues to 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.

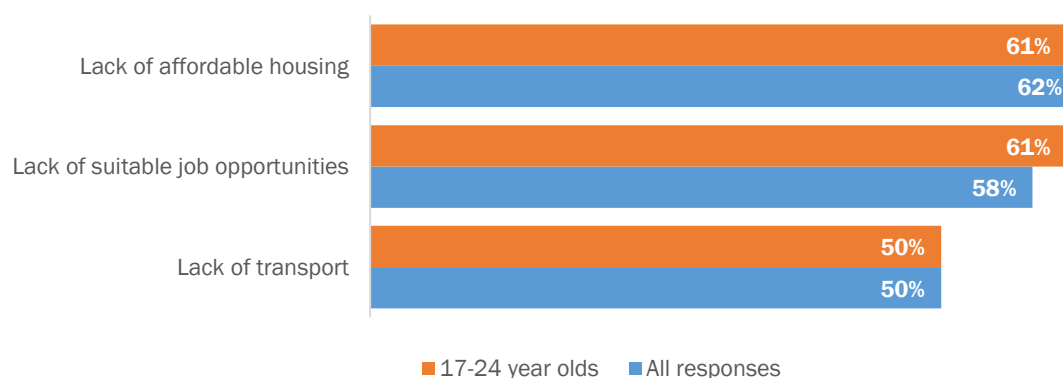
The results largely speak for themselves and confirm that housing affordability generally, but particularly for younger people and first time buyers, is rapidly ascending the agenda in Ceredigion. For example, when asked which three things they valued the most in relation to a Prosperous Ceredigion, 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 6.14)

Figure 6.14: Q18. Which three things do you value most in a prosperous community?



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 6.15)

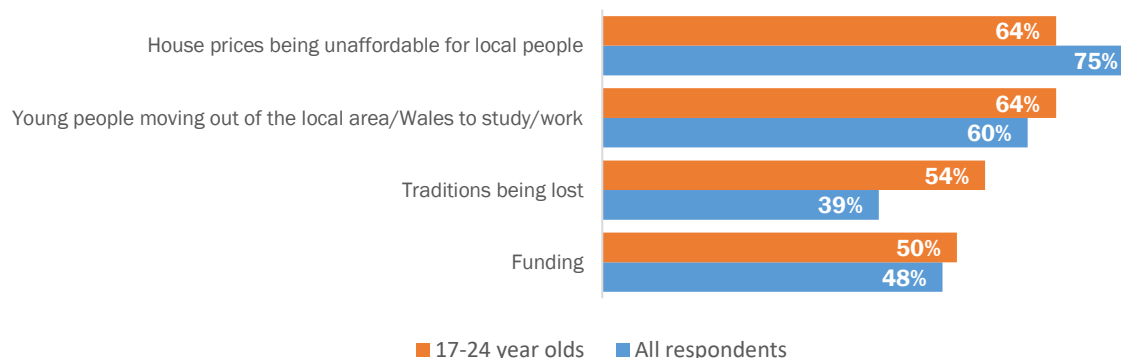
Figure 6.15: Q19. Looking ahead, what concerns you the most about prosperity in the county?



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 off all ages, this

was even higher at 75% (Figure 6.16). 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 6.16: Q44. Looking ahead, what concerns you the most about your County's vibrant community and thriving Welsh language?



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 Figure 6.17.

Figure 6.17: Sample comments from the Ceredigion Well-being Survey

<p>“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' “</p>	<p>“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.”</p>
<p>“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.”</p>	<p>“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.”</p>
<p>“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.”</p>	<p>“We really need affordable rented accommodation particularly for single people.”</p>

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 6.18 summarises the main challenges around housing affordability.

Figure 6.18. Summary of issues affecting housing affordability

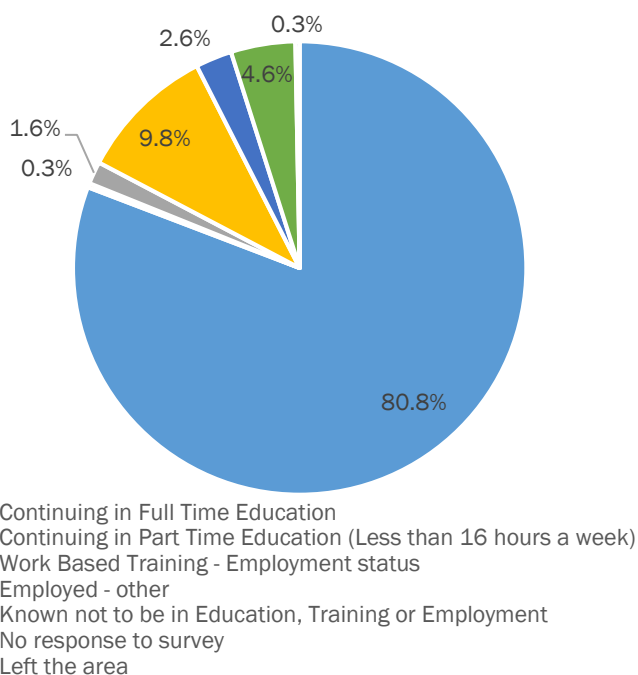


Starting Work

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 6.19 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 6.19 Destination of school leavers (Year 13) in Ceredigion – 2020

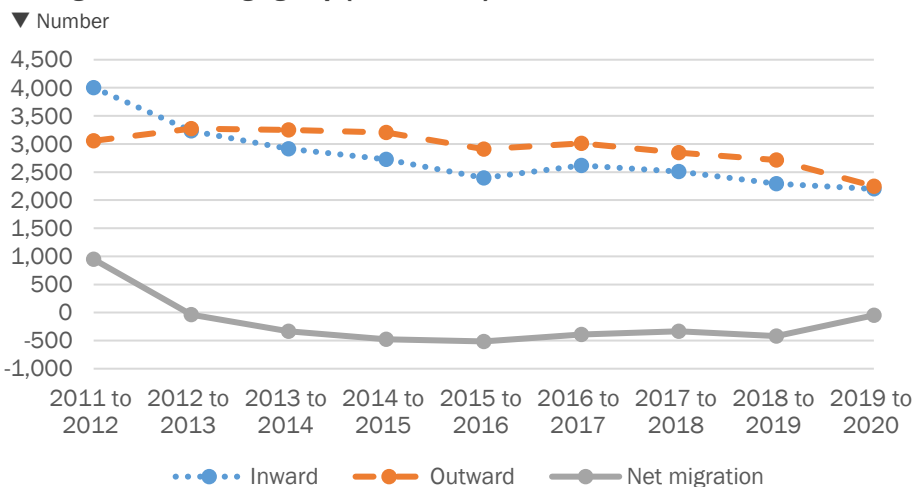


Source: Careers Wales (2021)^{cxv}

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 below 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 6.20: Migration between Ceredigion and the rest of the UK amongst the 16-24 age group (2011-2020)

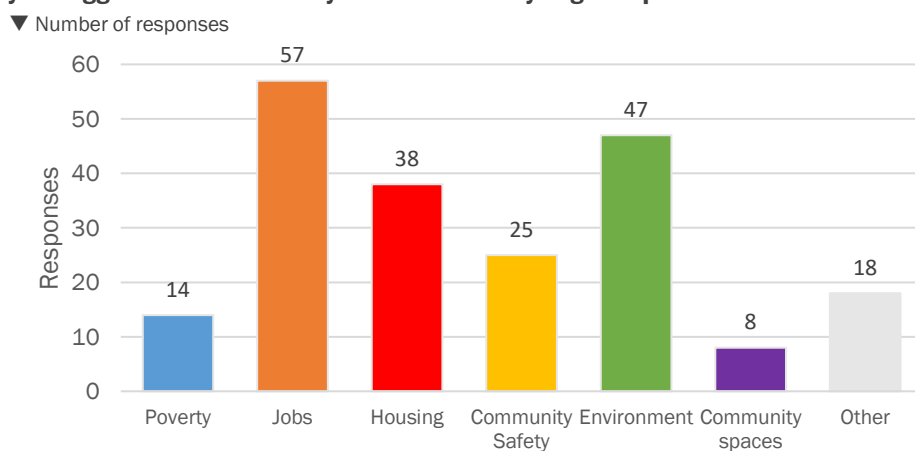


Source: Stats Wales (2021)^{xxvi}

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 6.21 below.

Figure 6.21: School Survey responses to the question – ‘What are your biggest concerns about your local area as you grow up?’



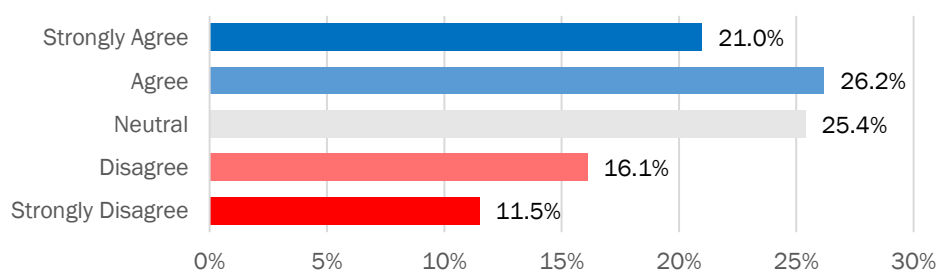
Source: School Survey (2021)

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^{cxvii}. 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 6.22). 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 than those 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.

Figure 6.22: 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)^{cxviii}. 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^{cxix}. 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)^{cxx}. 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)^{cxxi}, 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.

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.

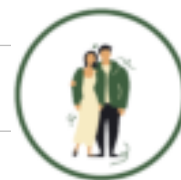
Housing affordability remains a key driver in the well-being of future generations in Ceredigion.

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, Core Infrastructure

7.1 Being an Adult

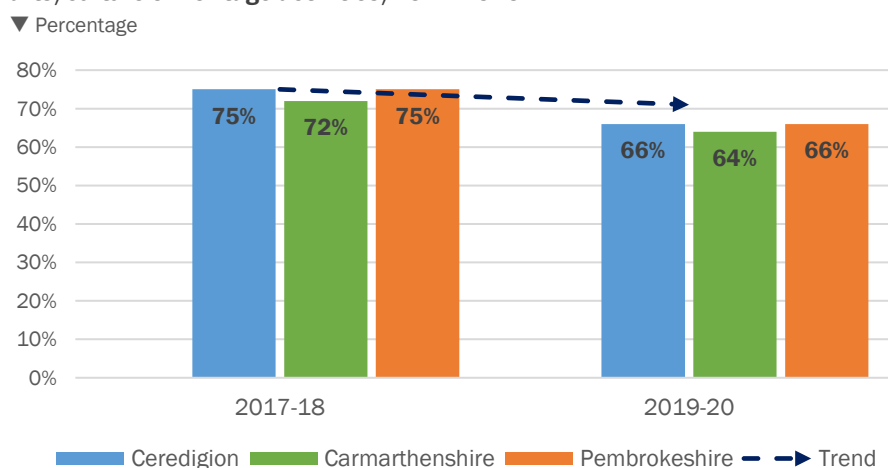
Nurturing Creativity

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^{cxvii}. 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 Mwdan, the National Library of Wales and the Arad Goch centre. It is therefore, surprising that 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 7.1). 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 7.1: The number of people attending or participating in arts, culture or heritage activities, 2017-2020



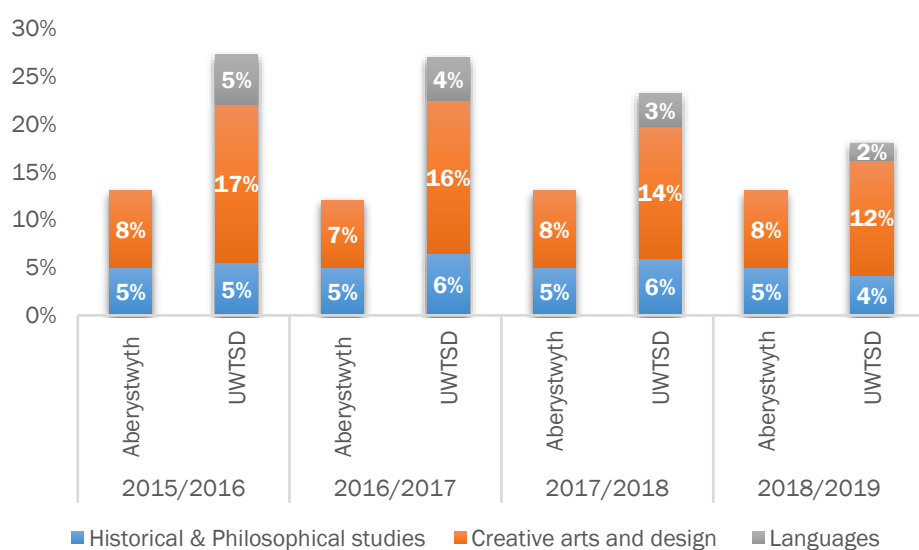
Source: Stats Wales, National Survey for Wales (2021)

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.

Conversely, the **Ceredigion Museum in Aberystwyth** 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%^{cxixiii}. 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, it is likely that the visitor numbers will be significantly down this year as social distancing measures have imposed a restriction on visitor numbers.

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). However, 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^{cxixiv}. However, it is difficult to ascertain whether the decline was experienced in the Lampeter Campus.

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 impact of the pandemic on the arts 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 £2.5 million was reserved by the Arts Council for Wales. £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 as the sudden onset of the global pandemic saw the suspension of the arts and cultural sector overnight. 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).

However, local arts organisations and facilities in Ceredigion have used alternative and innovative methods to continue their service and provide support 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 7.3 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.

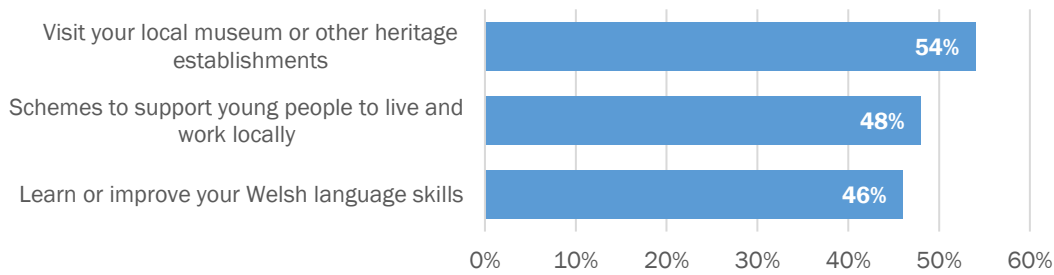
Figure 7.3: A patchwork created by one of the participants as part of the quilt in the new “Human Threads” exhibition at Ceredigion Museum



Source: Ceredigion Museum

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).

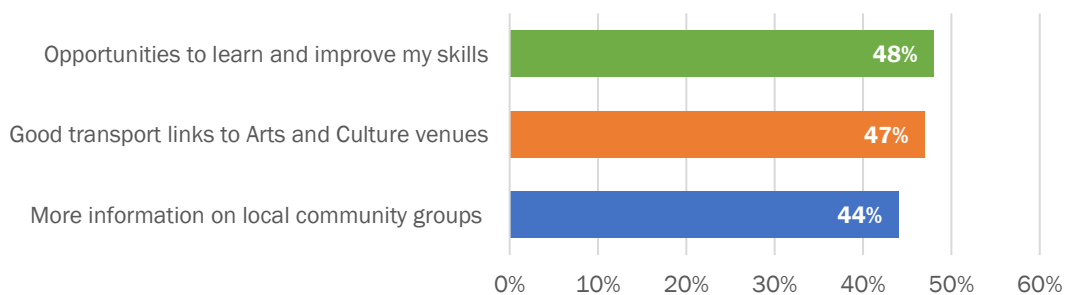
Figure 7.4: Top 3 actions respondents would take to achieve a vibrant community with a thriving Welsh language



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 7.5a). Inadequate public transport within the county has been identified as a considerable challenge for residents, particularly those who cannot drive or don't own a car, and for individuals who live in the more rural settlements (refer to 4.2 Well Connected Communities).

Figure 7.5a: Top 3 types of support needed to enable vibrant communities in Ceredigion



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

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.

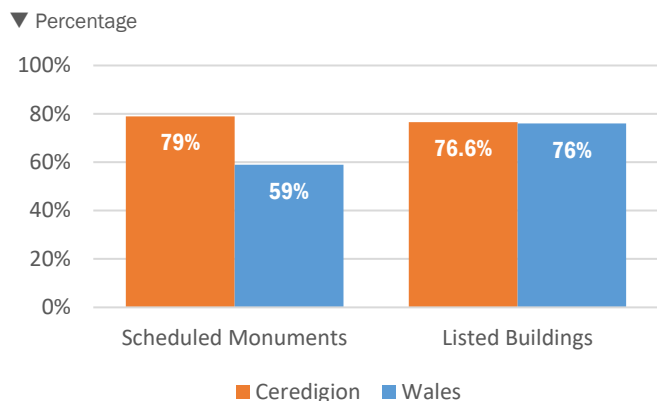
Ceredigion is home to the **National Library of Wales** which is one of six legal deposit libraries in the UK. (A legal deposit library means that by law a copy of every UK print publication must be given to the Library by its publishers). Legal deposit libraries also cover digital and online publications, 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 7.5b).^{cxxv}

Figure 7.5b: National Well-being Indicator 40 - Percentage of designated historic environment assets that are in stable or improved conditions



7.2 Part of 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.

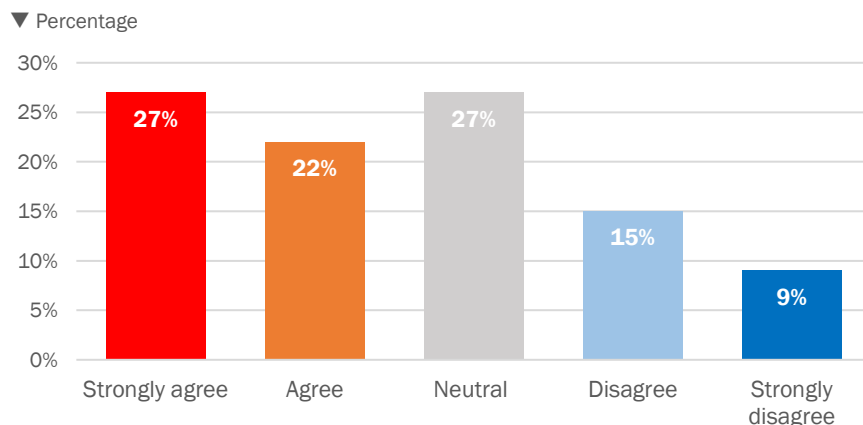
Research by the World Health Organisation indicated that lack of agency, trust, belonging and insecure neighbourhoods explain 19% of the gap in poor health between the top and bottom averages for people in Europe^{cxxvi}.

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 7.6 below for a breakdown of responses.

Figure 7.6: School Survey breakdown of responses according to the statement – ‘I want to stay living in my local area’



Source: School Survey (2021)

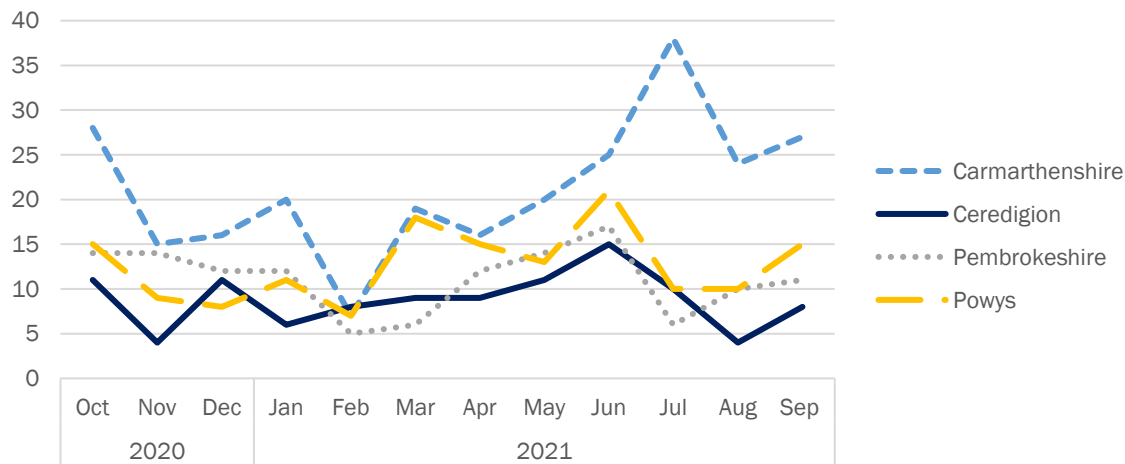
The National Survey of Wales reported that 74% of Ceredigion respondents agreed with the three statements that: **they belong to their local area; people in the area from different backgrounds get on well together; and people in their local area treat people with respect** (compared to 67% in 2016-17). This 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 (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 feeling 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 signposting to resources by the National Trading Standards Scams Team.^{cxxvii}

Evidence from Victim Support indicates that the **number of hate crime incidents** in Ceredigion have remained relatively stable since October 2020 (Figure 7.7). 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 7.7: Hate crime incidents across the Dyfed-Powys region (2020-21)

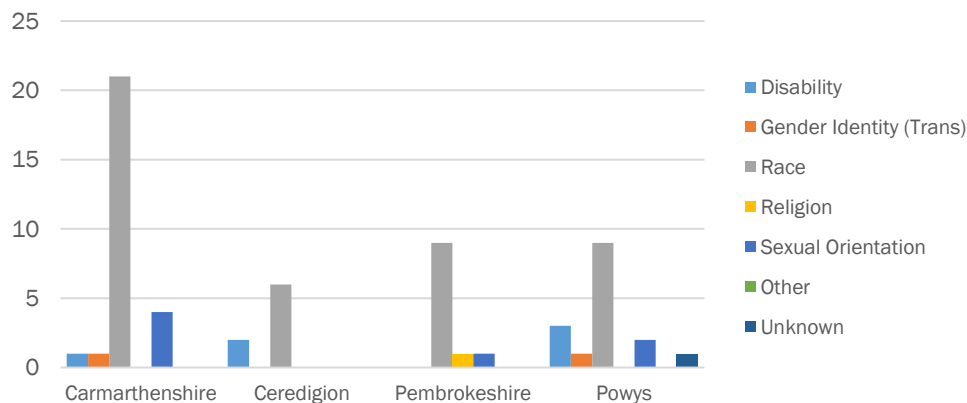


Source: Victim Support (2021)

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 7.8). 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 7.8: Hate Crimes by type across the Dyfed-Powys region (September 2021)

▼ Number



Source: Victim Support (2021)

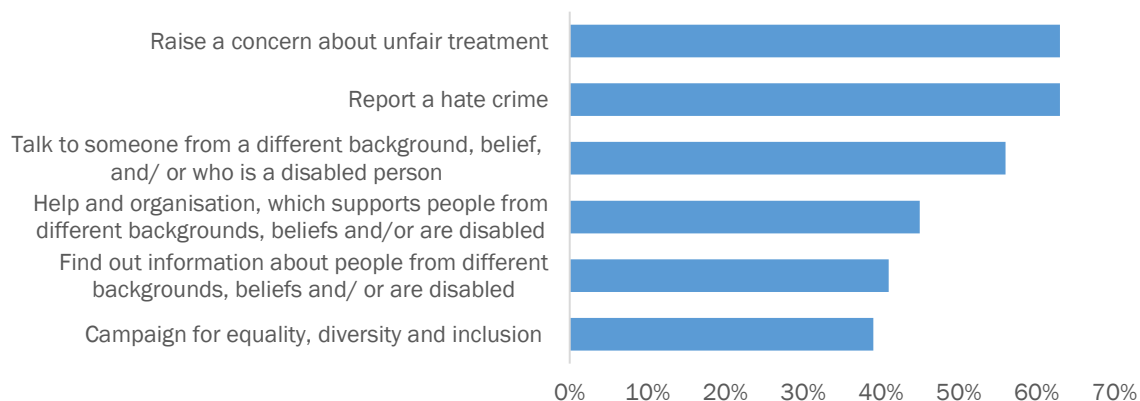
On a national scale, Victim Support saw an increase of 11% in the number of people seeking support after experiencing a hate crime during 2020-21, compared to the previous year^{cxxviii}. The overwhelming majority of the charity’s hate crime cases were race and nationality related (71%), which increased 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^{cxxix}. Hope not Hate have found that the economic challenges and deepening inequality exacerbated by the pandemic, is feeding frustrations and resentments in Wales^{cxxx}.

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 7.7 below).

Figure 7.7: What would you consider doing to help make things fairer for everyone in your community?



Source: Regional Well-being Survey (2021)

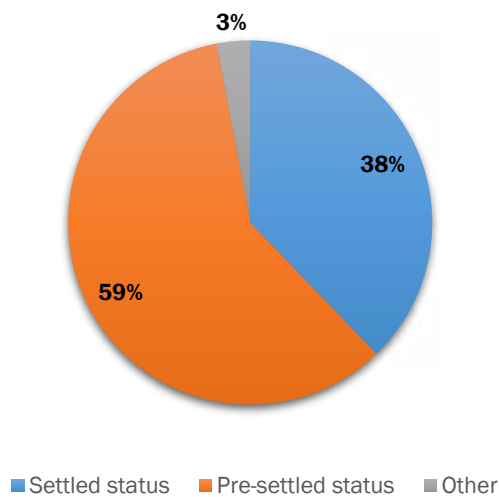
To support residents in doing so, 56% (or 206 respondents) said that they needed support in 'being confident that raising concerns of unfair treatment/ reporting a hate crime would not have negative consequences for me or my family', 55% (or 200 respondents) required the 'availability of accurate information', 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 but 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 7.8 below)^{cxxxii}.

Figure 7.8: 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) 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.

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.^{cxxxii} 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.

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.^{cxxxiii} 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.

According to Sustrans Cymru, between 30%-40% of Ceredigion residents experienced **transport poverty** in 2016^{cxxxiv}, 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^{xxxxv}. This investment is crucial for the long-term 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. Without access to a car, the long travelling times on public transport can make certain services inaccessible. In some cases, the return journey takes six times longer on a public bus than it would using a private car in Ceredigion. The journey times are significantly longer for those residing in the more rural settlements, such as, Beulah, Troed-Yr-Aur & Llandysul with an average return time of just under 2.5 hours to a sports centre and Rheidol, Ystwyth & Caron with an average return time of over 2 hours to a public library^{xxxxvi} (refer to Figure 7.9 and 7.10). The above figures indicate that the significant percentage of people living in Ceredigion without access to a car (18.4% in 2011), 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 7.9: Average public and private return time to sports facility from Beulah, Troed-Yr-Aur & Llandysul

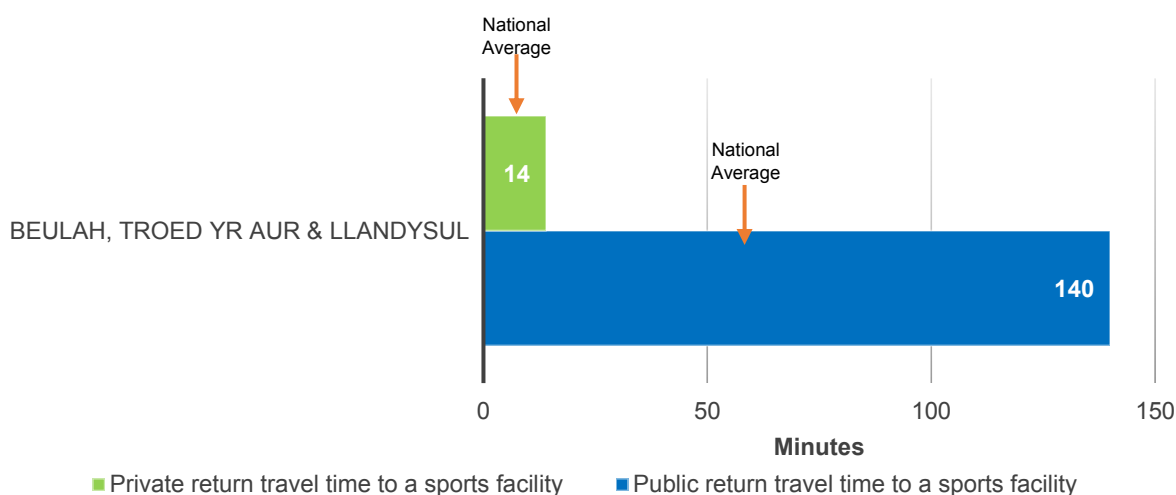
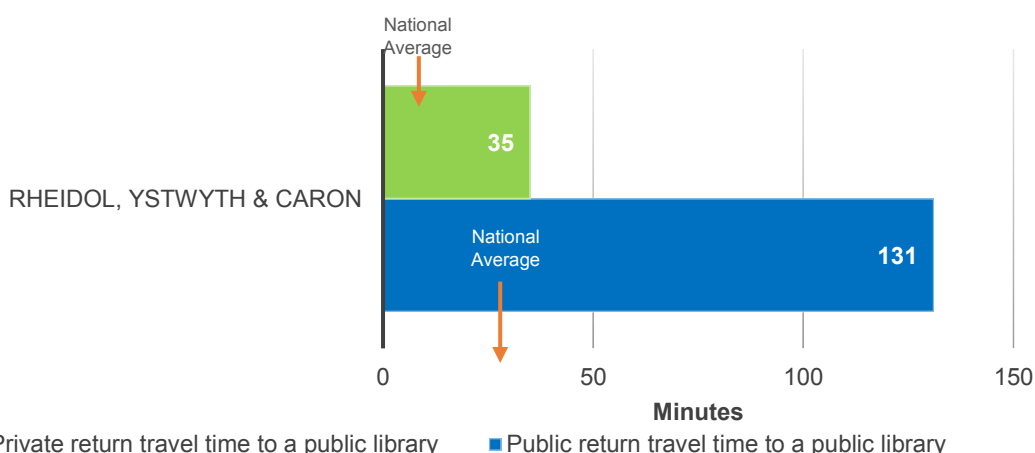


Figure 7.10: Average public and private return travel time to a public library in Ystwyth, Caron & Rheidol

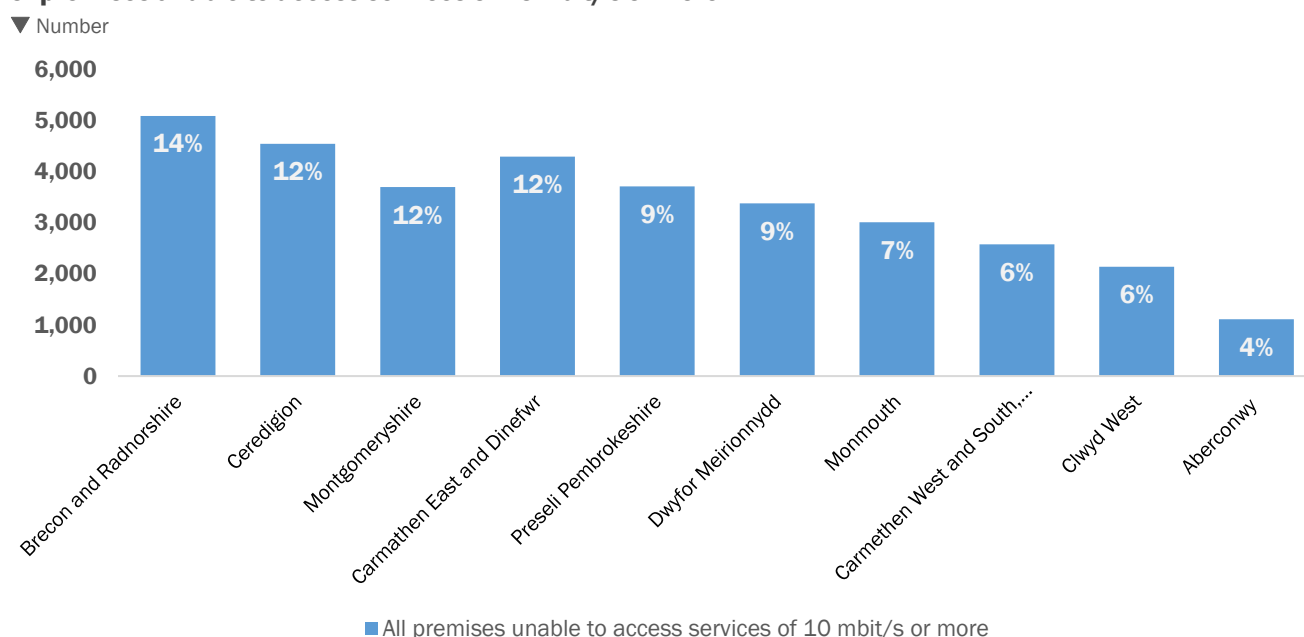


Having **access to the internet** and **mobile phone networks** is becoming more of a necessity. Currently, there is a growing social and economic gap between those who are connected and those who are not, known as the 'digitally

excluded^{cxvii}. Ofcom’s 2019 Connected Nations Wales Report, found a stark contrast between access to different broadband speeds in Ceredigion. Clustered around the main town towns, in particularly 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 7.11)^{cxviii}. 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 COVID-19 and will likely continue to be vital in the future^{cxix}. Figure 7.11 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.

Figure 7.11: 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^{cxli}. Access to broadband and mobile phone network is also impacted by location (refer to Figure 7.12 and 7.13). Figure 7.12 highlights the clustering of Ultrafast (300Mbit/s) and Superfast broadband (30Mbit/s) around the main towns, whilst the more rural communities, such as, large parts of Ystwyth, Caron & Rheidol and south Lampeter & Llanfihangel Ystrad have speeds of up to 10Mbit/s, or no broadband access at all. Within these communities, approximately 1,000 properties are unable to receive a broadband service of any kind^{cxlii}, 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) exist in these remote communities (see Figure 7.13).

Figure 7.12: Availability of Broadband across Ceredigion



Figure 7.13: EE 4G Outside Voice Mobile Coverage across Ceredigion



Ceredigion has been identified as **an area requiring assistance** in receiving better broadband speeds. The Broadband Upgrade Fund is one example of a pilot campaign which provides opportunities for businesses and residents to solve connectivity issues by receiving small grants. Furthermore, the Mobile Network Operators have proposed through the ‘Shared Rural Network Programme’, to collectively increase 4G mobile network coverage throughout the UK to 95% by the end of 2025^{cxliii}.

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.^{cxliiii}

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^{cxliiv}. 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^{cxliv}.

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% ^{cxlii}. 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 7.1 below highlights the difference in Welsh skills by Community Area in Ceredigion.

Table 7.1: 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^{cxlvii}. 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 has increased from 77.2% in 2001, to 78.4% in 2011, an increase of 1.2 percentage points (refer to Table 7.2). 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 7.2: 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 7.3 below). 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.

Table 7.3: 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^{cxlviii}. Table 7.4 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 7.4: Internal migration 2010-2011 (migration between Ceredigion and the rest of the UK) by specific age groups

	Internal Migration (Total)	20-24 yr olds	25-29 yr olds	45 to 64 yr olds	65+
Ceredigion	Inflow	1,590	390	560	240
	Outflow	2,530	710	500	320
	Net	-940	-322	60	-80

Source: Stats Wales, 2011^{cxlix}

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^{cl}. 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.
- 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.

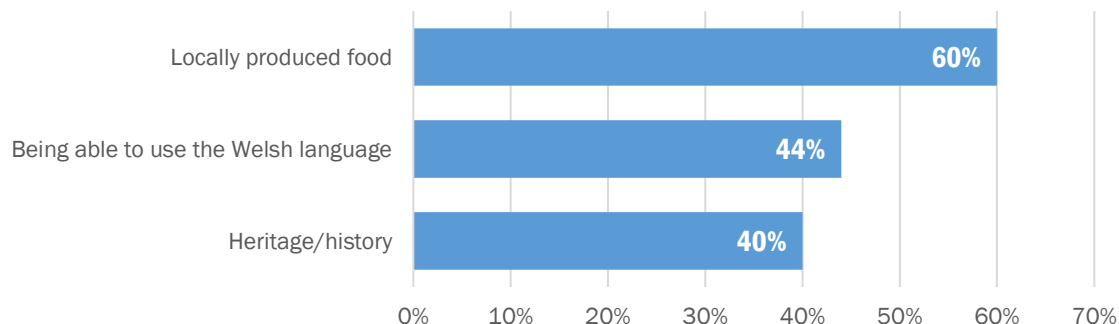
”

- 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 Fig 7.14). 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 7.14: Top three responses to - which three things do you value the most in relation to your county's vibrant community and thriving Welsh language?



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^{cli}. 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. People who don't live in, or near, the main towns in Ceredigion are often surrounded by private farmland, few cycle paths or

pavements as well as poor public transport services. 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^{clii}.

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%)^{cliii}, 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. 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.

Figure: 7.15 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?



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^{cliv}. Ceredigion recorded the lowest number of fly tipping incidents in Wales during 2019-20 (159), reducing by 59% since 2015-16^{cliv}. 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 general public^{clvi}. However, our 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 about their local environment. 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.^{clvii}

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.^{clviii} 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 in Wales it is predicted that the summer **average temperatures will increase by 1.34°C**. Warming above this level will result in further sea level rise, extreme weather events, and 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. To meet the well-being goal of '**A Globally Responsible Wales**', '**A Healthier Wales**', '**An Equal Wales**' and '**A Resilient Wales**', immediate, effective 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 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 7.16 below^{clix}). This change driven by global warming is reflected in the 2021 Future Trends Report, whereby sea level rise in Aberystwyth is 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 7.16: Land projected to be below annual flood level in 2030 – North Ceredigion



Source: Climate Central

However, a significant amount of work is being undertaken 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. The fight against coastal erosion in areas like Borth will be on-going for future generations.

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.

The aim is to bring together a wide range of knowledge, experience and ideas from across Borth to help propose a medium to long-term strategic direction and vision for the village.

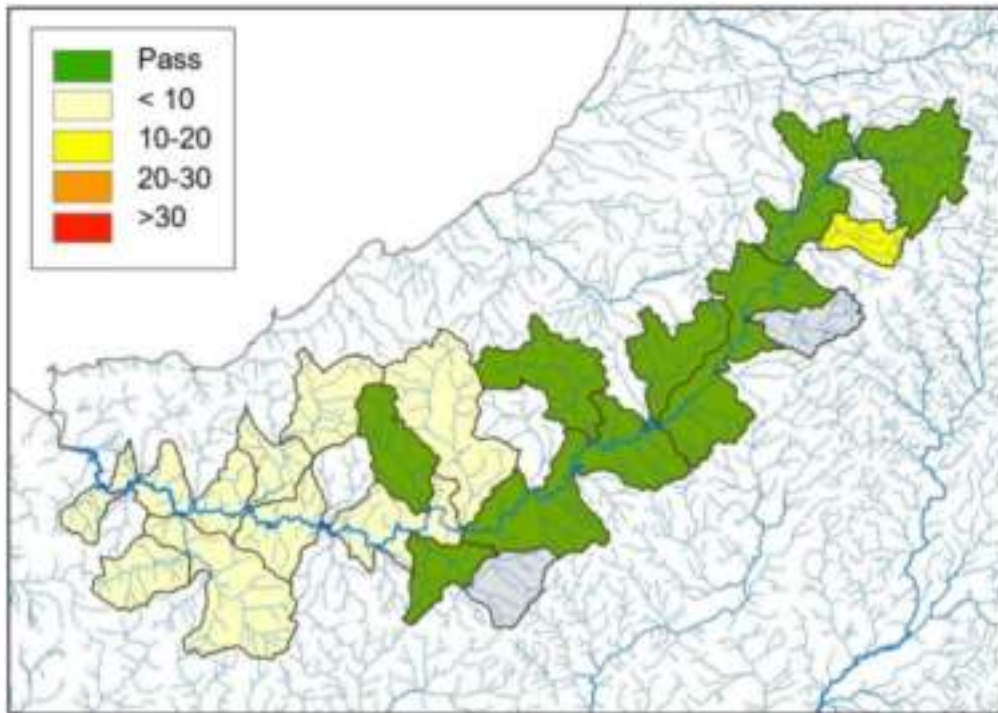
Wales is one of the worst affected nations in the world for **biodiversity loss**. Research by the State of Nature Partnership highlights that one in six species in Wales is threatened with extinction^{clx}. Ceredigion's rich variety of species and habitats are under threat due to the unsustainable management of agricultural land and woodland, climate change, invasive non-species and pollution of freshwater habitats^{clxi}. 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 appearing 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.

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^{clxii}. 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^{clxiii}. 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 7.17 below), which includes the towns of Lampeter, Newcastle Emlyn and Cardigan, where farming is more intensive.

Figure 7.17: 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)^{clxiv}

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. 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.

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^{clxv}. 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)^{clxvi}. (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^{clxvii}. 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)^{clxviii}. 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.

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). 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 and have called 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.

7.4 Home and Family

Starting a Family

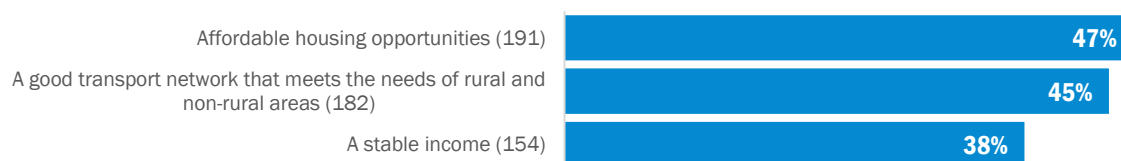
Finding a partner is an important life event. Relationships play a central role in shaping an individual’s well-being. Research by the ONS has found that people who are married or in a civil partnership in the UK are more likely to report higher personal well-being (measured by life satisfaction, feeling 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^{clxxx}. 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^{clxxx}.

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 7.18 below). 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)^{clxxi} 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 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 7.18: Q18. Which three things do you value most in a prosperous community?



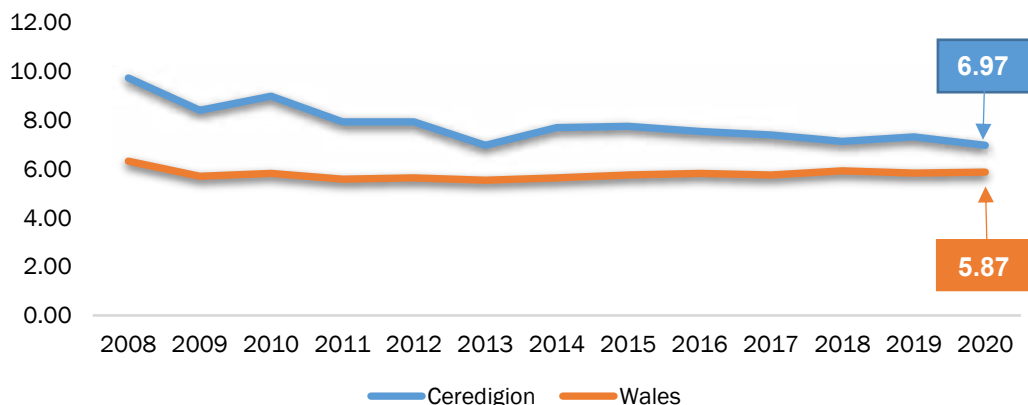
The **economic impact of the COVID-19 pandemic** is likely to lead to reduced household incomes in Ceredigion and increase absolute poverty in the coming years. The restrictions put in place to limit the spread of the virus resulted in certain types of work and households being hit the hardest (e.g. leisure and hospitality jobs, self-employed workers, travel and transportation jobs etc.). Some workers in these sectors will have been supported by the Coronavirus Job Retention Scheme (CJRS) and the Self-Employment Income Support Scheme (SEISS). However, it is reasonable to expect reductions in income for workers in shut-down sectors, due to earning cuts or redundancies. Furthermore, the ending of the £20 Universal Credit uplift at the end of October 2021 has the potential to widen health inequalities and leave the 4,600 individuals on Universal Credit in Ceredigion^{clxxii} 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 (1,425 claimants) through 2020 and well into 2021 (which peaked at 2,030 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^{clxxiii}. The combination of local house prices above the national average (£183,750 compared to £175,000^{clxxiv}) and local earnings below the national average (£26,400 compared to £28,300^{clxxv}) 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 (refer to Figure 7.19).

Figure 7.19: Ratio of house prices to work-placed earnings in Ceredigion and Wales, 2020

▼ Affordability ratio



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 (see Figure 7.20), and was consistently mentioned as one of the biggest challenge in the future in the written comments and at stakeholder events.

Figure 7.20: Q19. Looking ahead, what concerns you the most about prosperity in the county?

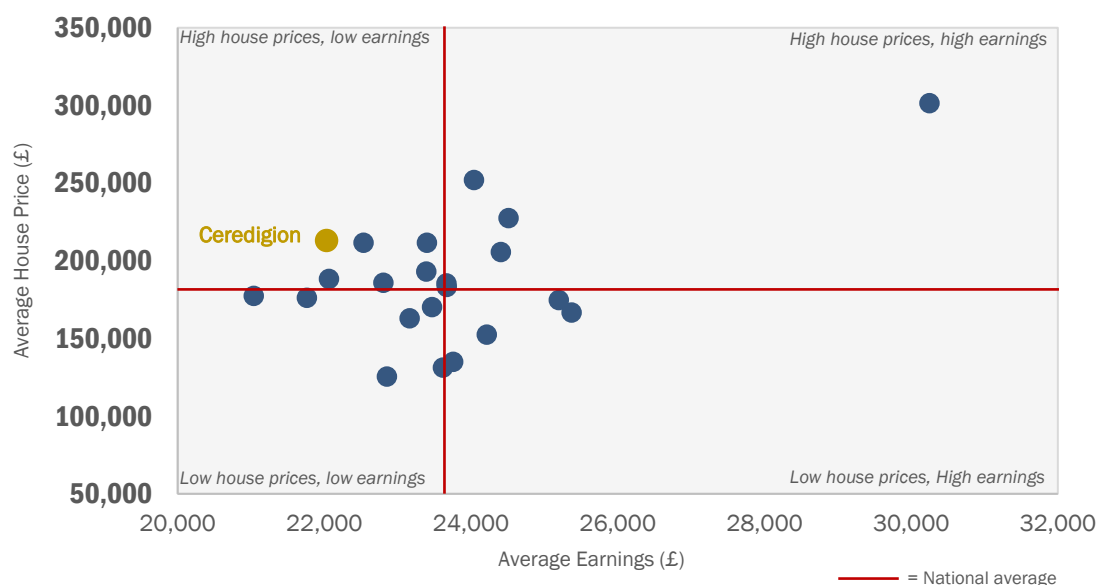


However, for the first time since 2013 the housing affordability ratio dropped below 7 in Ceredigion, as earnings increased by more than house prices. The COVID-19 pandemic however, is very likely to have reversed that trend during 2020, as the West Wales region along with other parts of the nation saw 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 rents in Ceredigion is approximately £730, however rental prices vary across the county and by property type^{clxxvi}. 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 7.21.

Figure 7.21: Average House Prices compared with Average Earnings across Wales



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.^{clxxvii} 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^{clxxviii}. Poor quality and inadequate housing can impact out 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.

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, 1919 violence against the person were reported by Dyfed-Powys Police, this is an increase of 11% (+183 reported offences) since 2018-19^{clxxx}. 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 7.22 below displays the number of reported violent crimes by community area in Ceredigion during 2020-21^{clxxx}. 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 7.22: Number of violent crimes against the person by community area in Ceredigion (2020-21)

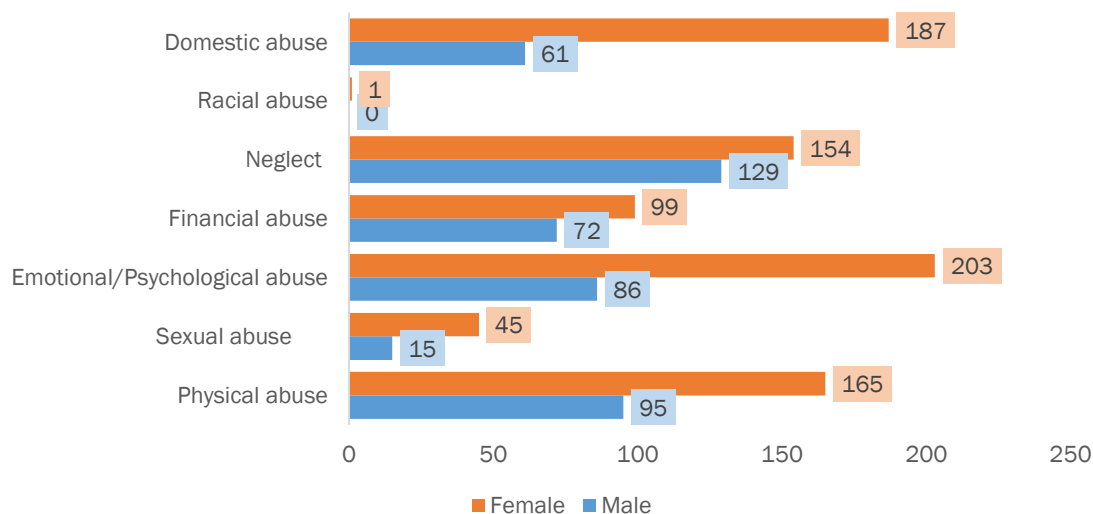


Source: Dyfed Powys Police (2021)

The 2018-19 data is the most up to date data regarding **alleged abuse** in Ceredigion (see Figure 7.23). 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 7.23: Types of alleged abuse in Ceredigion by measure and gender (2018-19)



Source: Stats Wales (2019)^{clxxxii}

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^{clxxxiii}.

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^{clxxxiii}. 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.

The next iteration of the National Strategy for VAWDAS 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 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^{clxxxiv}.

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 7.24.

Figure 7.24: Activities identified by Ceredigion residents as being important to supporting their well-being now and in the future



Source: The 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)^{clxxxv}. Furthermore, the proportion of full-time workers in Ceredigion (72.4%) is higher than the national average (71.0%)^{clxxxvi}. 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 balance following the nationwide lockdowns 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.

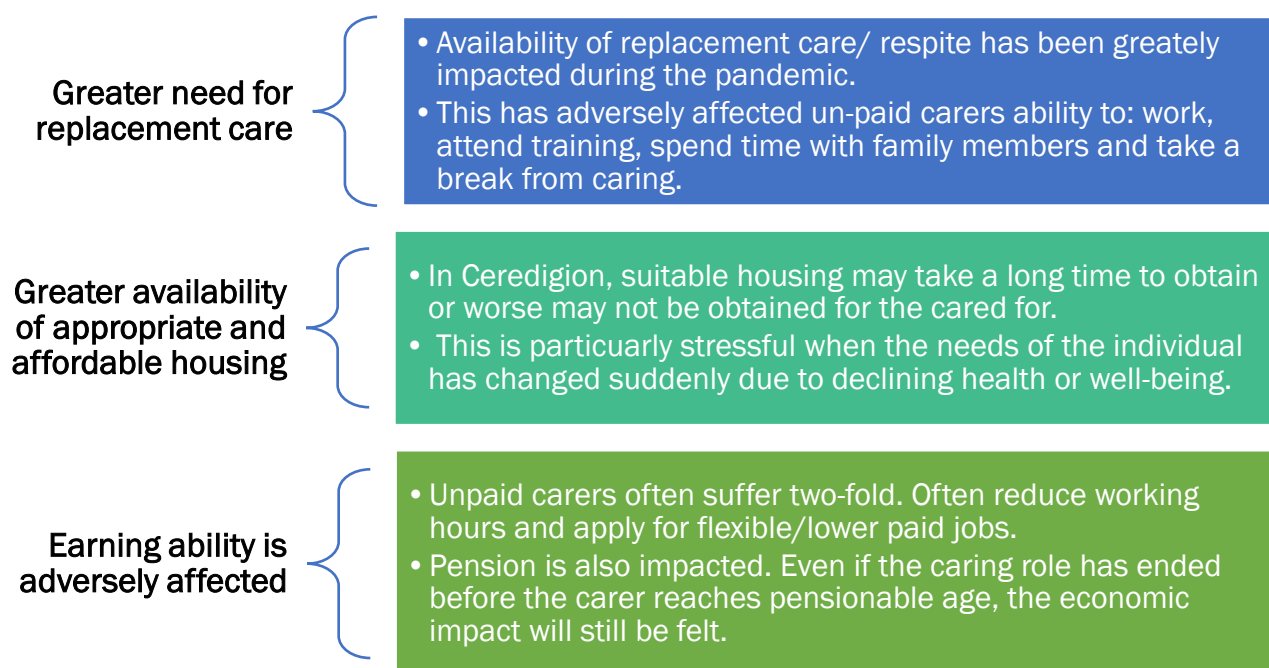
Caring for another person can bring fulfilment and strengthen relationships, however, it can also negatively impact an individual’s personal life particularly when work and other demands are combined. Unpaid carers that work might find it difficult to juggle a job and their caring responsibilities, which 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^{clxxxvii}. 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^{clxxxviii}. This is a slight increase from the 2001 Census (+1,000), whereby 10.7% (or 7,700) of Ceredigion’s population were unpaid carers^{clxxxix}.

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^{cx}. 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^{cxci}.

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 7.25 below.

Figure 7.25: 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^{cxcii}. 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^{cxci}. 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.

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^{CXCIV}. **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 less likely to smoke or take drugs.^{CXCV}

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 7.26 summarises the main actions respondents would take or the support they would need to improve their physical and/or mental well-being.

Figure 7.26: Actions identified by respondents to improve their own physical and/or mental well-being



Source: Ceredigion PSB, The 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...".

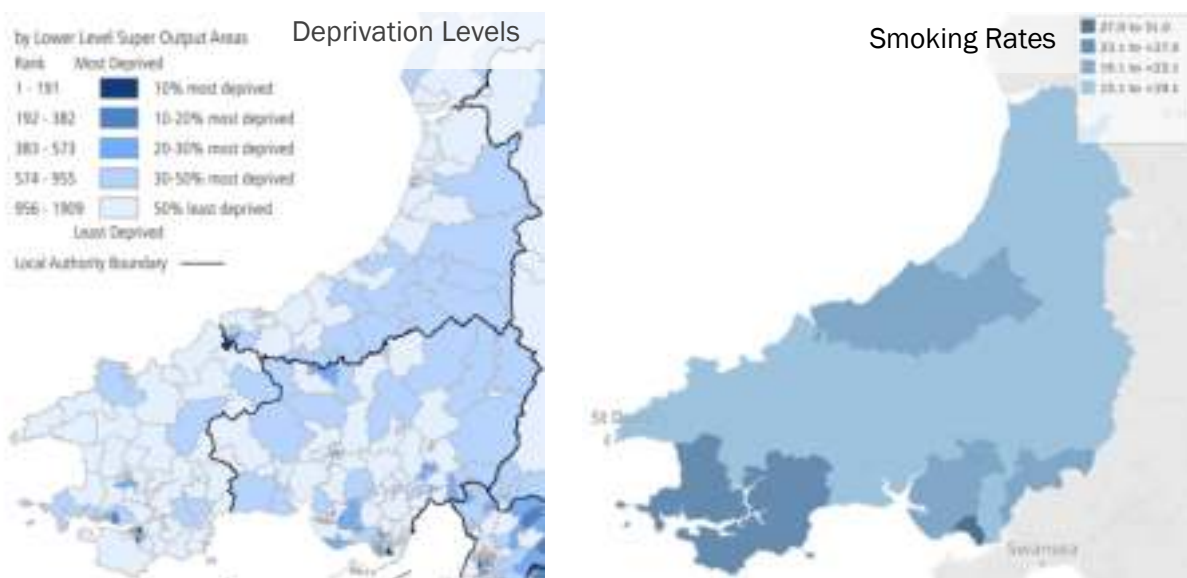
We know that Health Boards across Wales have experienced an increase in demand over the last 18 months, with NHS Wales reporting the longest waiting times on record in August 2021. Hywel Dda University Health Board (HDdUHB) resources are also stretched. The latest figures (August 2021) indicates that 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 a 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 exercises 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.

Adulthood is the time to establish **healthy behaviours** to protect our health now and in the future. According to Public Health Wales, during 2018-19 Ceredigion had the **third lowest proportion of smokers in Wales** (16.6%), which is below the all-Wales average of 18.4%. 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 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^{cxvii}.

In Ceredigion, smoking rates are higher in south Ceredigion compared to north Ceredigion, and research shows that smoking rates are higher in more deprived areas^{cxviii}. The maps in Figure 7.27 compare deprivation across Wales to smoking rates in the Hywel Dda University Health Board region. There is some correlation between the two in 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. Not only do these figures impact 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 7.27: Map of Hywel Dda University Health Board region by deprivation levels compared to smoking rates in Hywel Dda (2019)



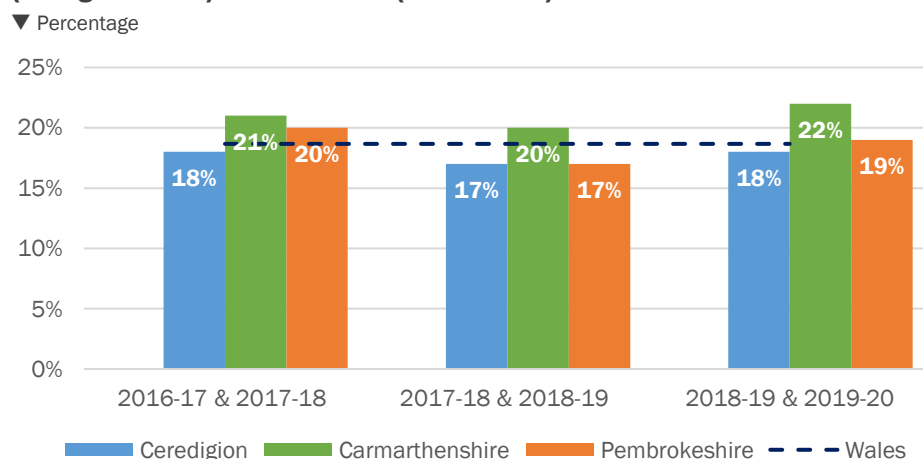
Source: Hywel Dda University Health Board (2019) and WIMD (2019)

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, such as that by Cancer Research UK, identified significant increases in smoking during the first nationwide lockdown^{cxviii}. This could be linked to the pandemic influencing unhealthy coping mechanisms.

During 2018-9 & 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. 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 7.28). Recent data from HDdUHB shows that the county has seen an increase in admission rates for alcohol-specific conditions by 13% since 2015-16. This may be as a result of the introduction of the Alcohol Liaison Nurses within the hospitals in Ceredigion who are increasing the identification of those with alcohol issues.

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^{cxix}. Alcohol consumption in Ceredigion will need to be carefully monitored to ensure that consumption rates do not follow the national trend.

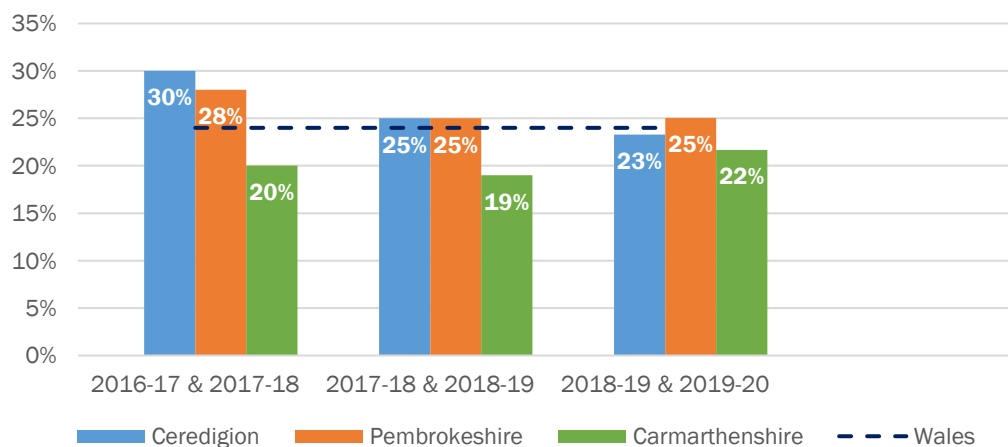
Figure 7.28: Percentage of adults consuming above 14 units (over guidelines) in West Wales (2016-2020)



Source: Stats Wales, National Survey for Wales (2021)^{cc}

According to the latest data, Ceredigion residents are also **eating less healthy** 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 % points. This is inconsistent with national trend, which has remained stable (refer to Figure 7.29).

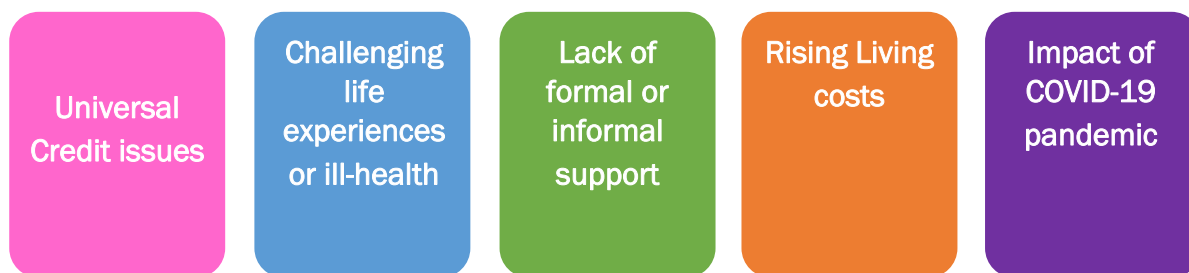
Figure 7.29: Percentage of adults who reported eating five or more portions of fruit and vegetables the previous day (2016-2020)



Source: Stats Wales, National Survey for Wales (2021)^{cci}

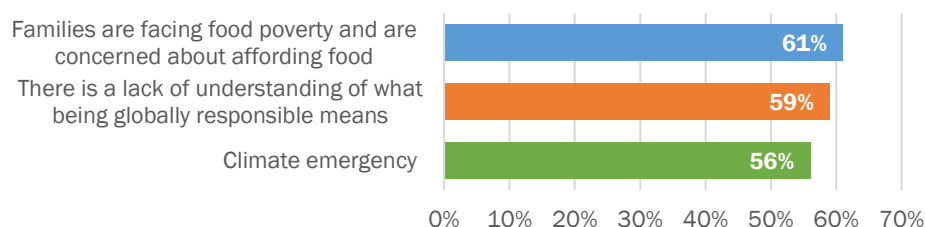
The increase in **food poverty** within the county could partly explain this increase. The number of emergency food parcels given to people in crisis by food banks is on the rise in Ceredigion, a trend also seen nationally. During 2019-20, Trussell Trust Food Banks distributed 1,962 food parcels to Ceredigion residents (this equates to 2.7% of the population), this increased to 2,165 in 2020-21, a 10% rise from the previous year^{ccii}. 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^{cciii}. This is in addition to the already established increases in living costs and poverty in the county.

Figure 7.30: Drivers of Food Poverty in Ceredigion



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 7.31).

Figure 7.31: Top 3 future concerns on the county’s global responsibility



Source: Ceredigion PSB, The 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**.

The cost of **physical inactivity** is estimated to cost the NHS approximately £1 billion a year. 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^{cciv}. Physical activity guidelines recommend that adults should aim to do at least 150 minutes of moderate activity (e.g. brisk walking, riding a bike, dancing etc.) per week.

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 lockdown^{ccv}.

Having access to leisure centres and gyms can enable and encourage us to take part in more sporting activities. Not only can exercise boost our physical health it is also extremely important for our mental health and well-being.^{ccvi} In The Well-being Survey, 37% of respondents noted that not being able to take regular exercise was something that concerned them the most about being able to stay physically and/or mentally well in future.

There are 6 Leisure Centres in Ceredigion which offer a variety of activities and facilities for people of all ages. Table 7.5 below includes all 6 Leisure Centres in Ceredigion and whether they are run fully by Ceredigion County Council, or support by Ceredigion County Council.

Leisure Centre	Provider
Aberaeron Leisure Centre	Run by Ceredigion County Council
Cardigan Leisure Centre	Run by Ceredigion County Council
Lampeter Leisure Centre	Run by Ceredigion County Council
Aberystwyth – Plascrug Leisure Centre	Run by Ceredigion County Council
Calon Tysul Leisure Centre	Supported by Ceredigion County Council
Caron Leisure Centre	Supported by Ceredigion County Council

In 2018-19 there were approximately 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.^{ccvii} These trends indicated that the number of those 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, many of the centres were recommissioned by the Health Board to be used as field hospitals or vaccination centres. Although by now, a majority of leisure centres have reopened in Ceredigion, some still remain closed. This said, Ceredigion Actif made sure that people of all ages were still able to stay active during this time and during lockdowns by providing a variety of online sport sessions. Additionally, Aberystwyth University was able to offer swimming facilities whilst the Plascrug Leisure Centre remained closed.^{ccviii}

In The Well-being Survey, around 37% of respondents noted that “exercising more” or similar comments around taking exercise, staying active or keeping fit was something that they would want to do to improve their physical and/or mental well-being. Corresponding to this 13% of respondents noted that a greater availability of or access to leisure and exercise classes that are appropriate, affordable or free was needed in Ceredigion.

Mental illness is something that one in four adults will experience in their lifetime^{ccix}. Looking after our **mental health** is just as important as looking after our physical health.

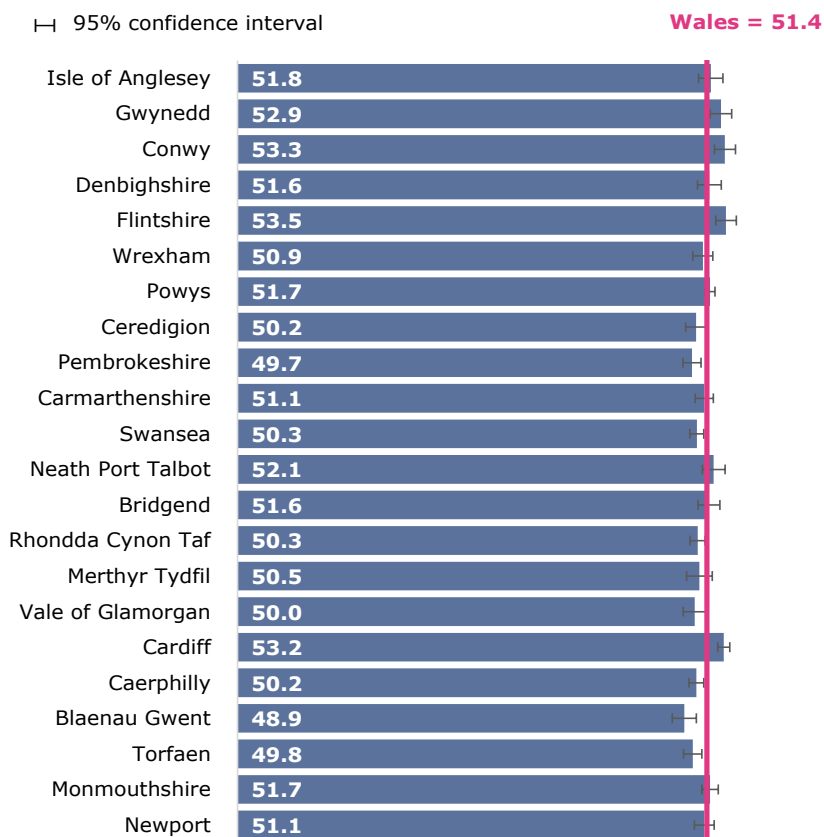
The number of **admissions to mental health facilities** in the HDdUHB has fluctuated between 750-900 admissions annually. During 2019-20, the number of admissions to HDdUHB health facilities dropped to 717, which is the lowest number of admissions since recording began in 2010, a decrease of 20.5% (or 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.

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 7.32 below 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.

Figure 7.32: 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)

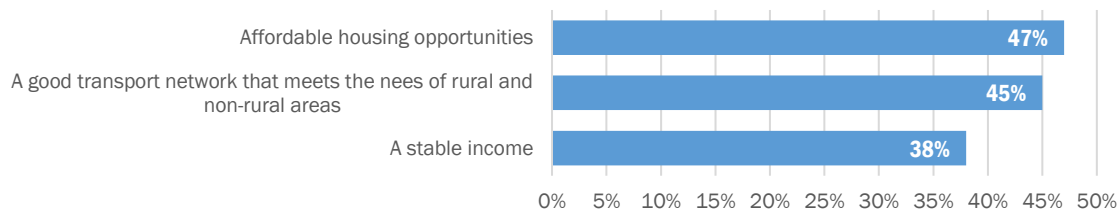
The COVID-19 pandemic is likely to have affected the well-being and mental health of residents in Ceredigion. Research by Cardiff University has found that there has been a decrease in psychological well-being in Wales since the first lockdown^{cx}. In addition, mental health problems are more severe 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. However, updated data is required for Ceredigion to confirm whether this will unfold. This could have damaging impacts on achieving a society in which people’s physical and mental well-being is maximised (**A Healthier Wales**).

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 activity 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 7.33).

Figure 7.33: Which three things do you value the most in a prosperous community?



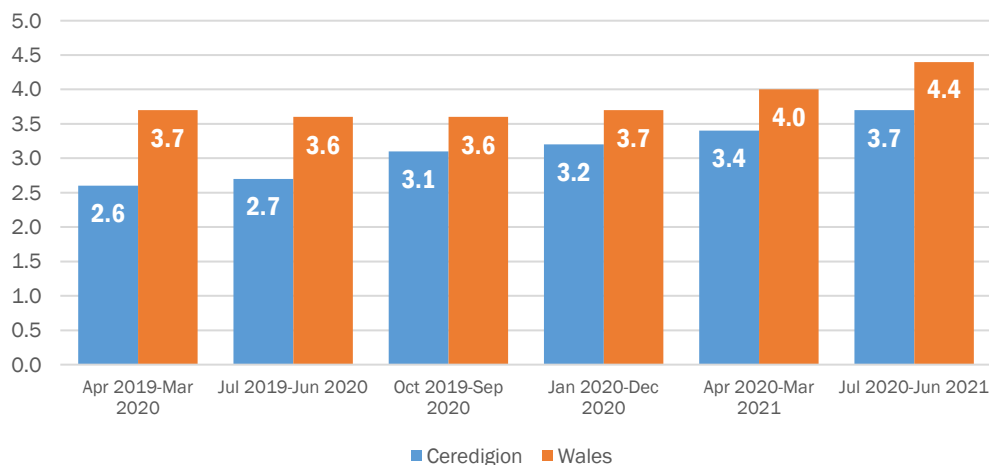
We also know from the chapter on *Youth* that job opportunities, particularly higher paid jobs, are a primary factor in young people’s decisions to remain in Ceredigion or search for employment opportunities outside of the County.

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.^{ccxi}

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. (Figure 7.34). 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).^{ccxii} 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 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 7.34: Unemployment in Ceredigion

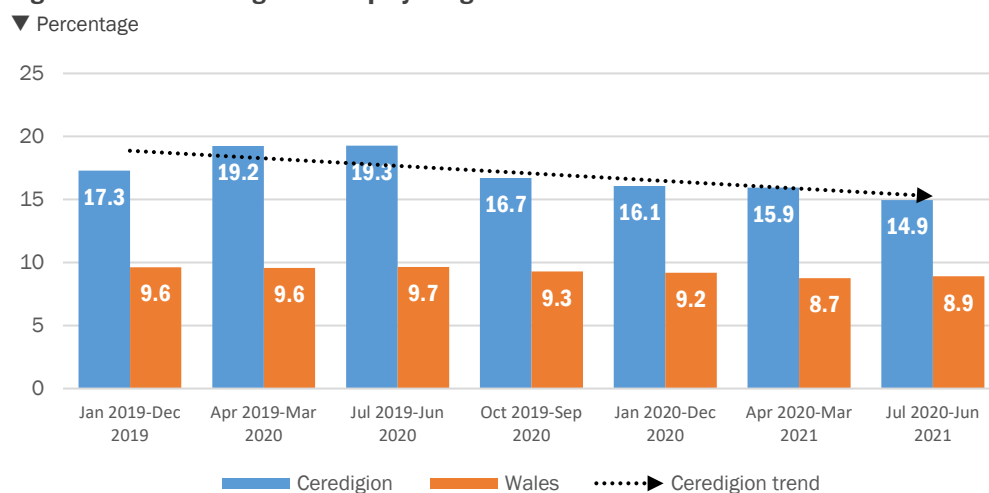
▼ Percentage



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 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 7.35). 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 7.35: Percentage self-employed aged 16-64



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 7.6). 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 7.6: 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.

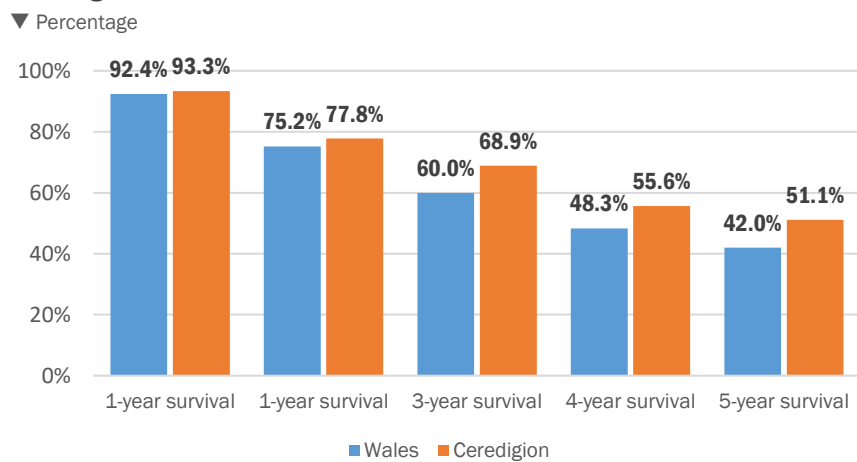
The demographics of Ceredigion are also changing. This Assessment has shown how the overall population of the county, and in particular the working age population (16-64), has been decreasing and is projected to continue to decrease over the longer term, bringing with it the challenges of meeting the 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 7.36), 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.^{ccxiii} Increasing the business birth rate will be a key focus in the coming years as drives 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.^{ccxiv}

Figure 7.36: Survival of newly born enterprises in Ceredigion 2019



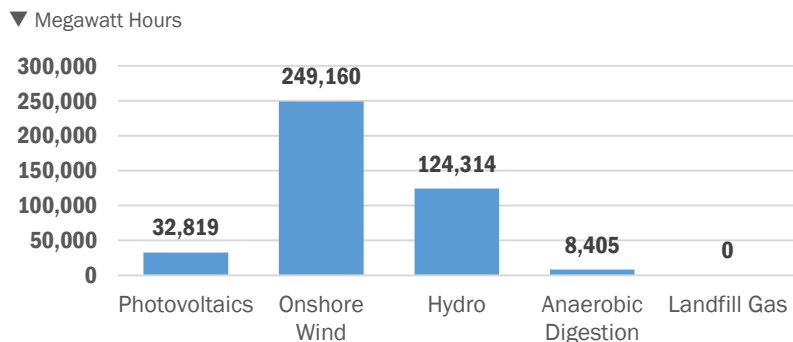
The feedback from our engagement events shows growing support for **developing the green economy** that places carbon reduction, resource efficiency and being socially inclusive at its core. This is understandable given the way in which Ceredigion residents strongly value their local environment – 68% 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 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.^{ccxv} **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 7.37).^{ccxvi}

Figure 7.37: Renewable Electricity Generated (MWh) in 2020 in Ceredigion



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 7.38). 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 7.39). 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)*.

Figure 7.38: What would you consider doing to improve your own or your community's economic circumstances?

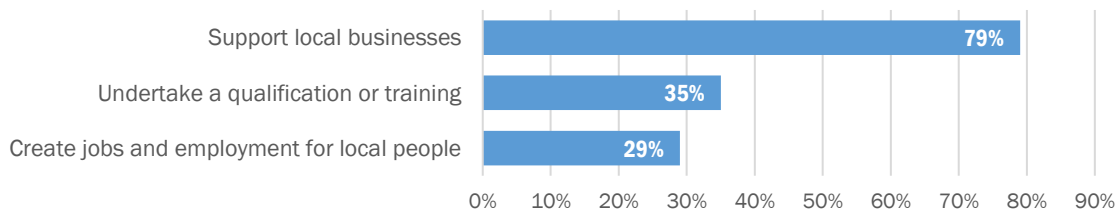
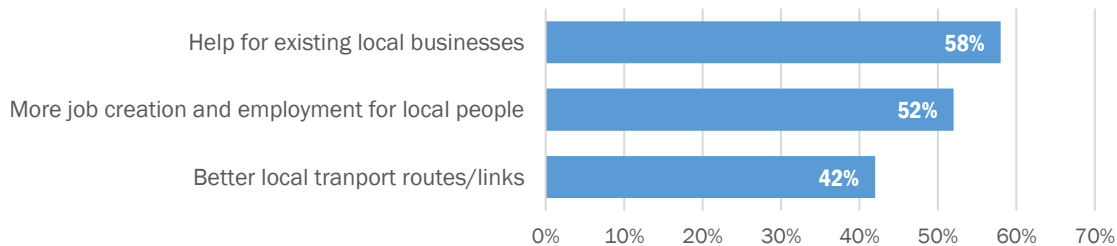


Figure 7.39: What support would need to be in place to do these things?



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.^{ccxvii}

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%.^{ccxviii} (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.^{ccxix} 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.

But 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.^{ccxx} Although this is still much higher than pre-pandemic levels, it is one 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.^{ccxxi}

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 7.33) 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 7.34), strongly points to *in-work poverty* being a particular concern.

Figure 7.33: Economic Activity and Employment Rate at June 2021

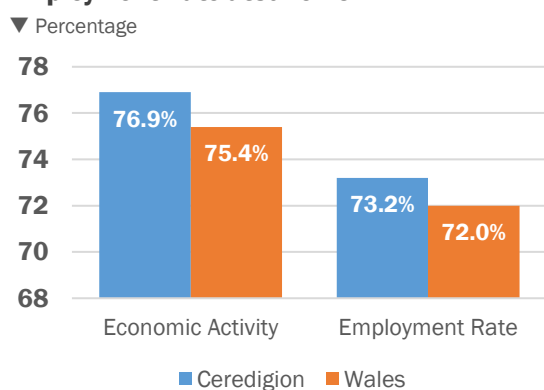
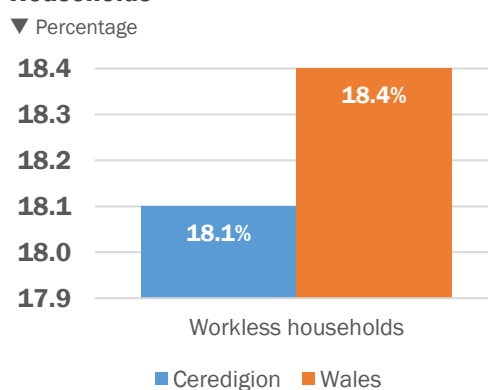


Figure 7.34: Workless Households



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 7.6), 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 surprise

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 7.7 & Figure 7.35).

Table 7.6: Comparison of Average Earnings across the South West Wales Region

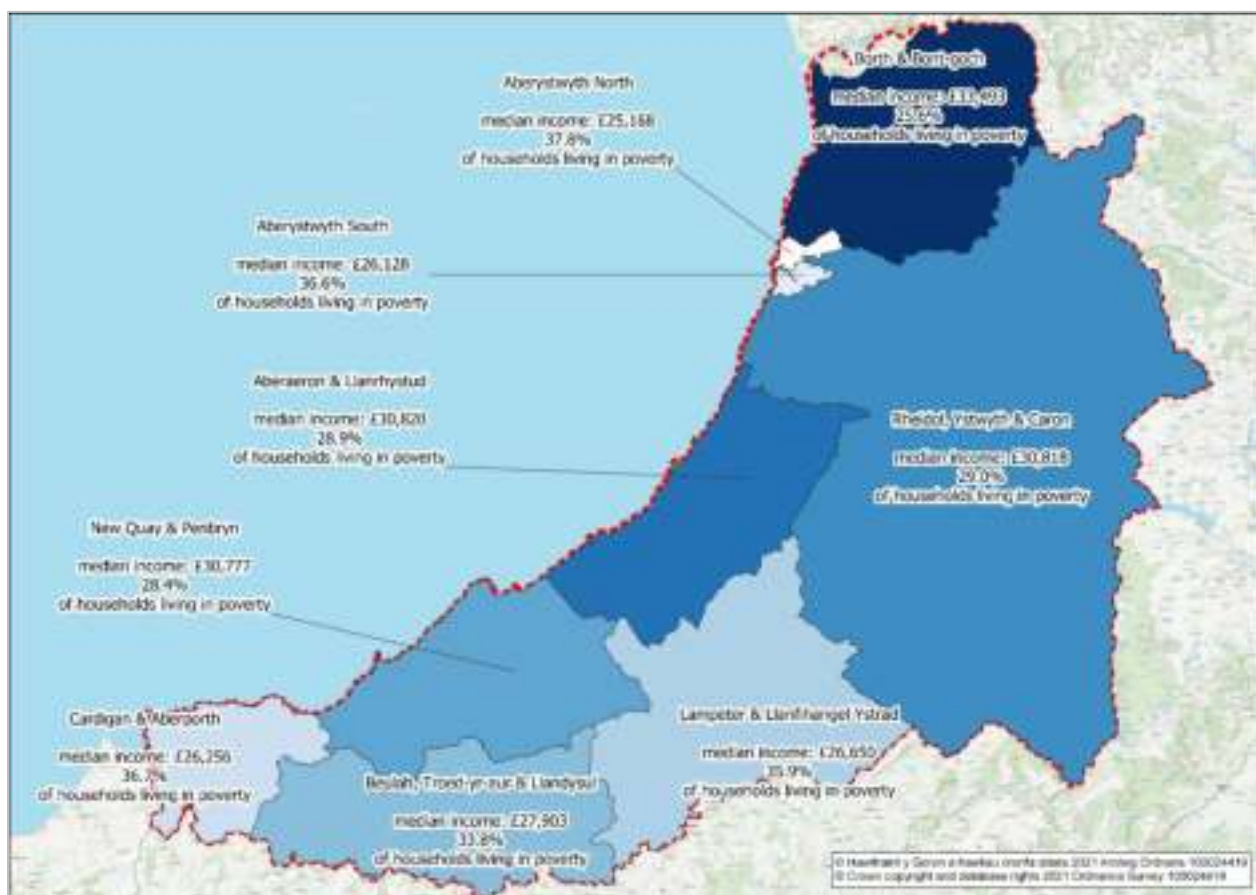
Area	Annual gross pay (Median)	Annual gross pay (Mean)
Ceredigion	£22,028	£24,412
Carmarthenshire	£23,669	£27,250
Pembrokeshire	£22,062	£26,466
Powys	£22,534	£24,244
Swansea	£23,164	£25,227
Wales	£23,665	£26,805
UK	£25,780	£31,590
Ceredigion as % of Earnings in Wales	93%	91%
Difference between Ceredigion 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 7.7: 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%

Figure 7.35: Proportion of Households living in poverty by Community Area



But 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.^{ccxxii} 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. As identified in the Childhood Chapter, there are concerns in Ceredigion and West Wales over the affordability as well as the sufficiency of childcare provision. Housing costs in Ceredigion have continued to climb thanks in large part due to the mini housing boom created by high demand and limited supply in the last eighteen months. Average house prices for example, reached record levels of £218,911 in June 2021^{ccxxiii} and the average first time buyer deposits are estimated to have increased by 25% since 2019.^{ccxxiv} 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.^{ccxxv} 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 7.36 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.

Figure 7.36: Drivers of Poverty in Ceredigion



This can be seen in The Well-being Survey results where all four drivers featured prominently. 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 conversely the biggest concern when looking ahead in relation to a prosperous community where 62% identified this option.

Table 7.8: 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”

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 valance and healthy lifestyle, 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 facilities 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 7.9 below. There is clearly a much greater awareness of employee well-being and from an

organisation perspective, and at the same time a greater acceptance of the benefits that flexible working can bring to an organisation.

Table 7.9: Feedback from engagement events in relation to building resilience in the workforce in the future

Opportunities	Challenges
<p>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.</p>	<p>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.</p>
<p>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.</p>	<p>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.</p>
<p>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.</p>	
<p>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.</p>	

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.^{CCXXVI}

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 resilience workforce and building the future for the county we want.

Summary of themes: **Adulthood**



The number of people attending or participating in **arts, culture or heritage** activities is declining in Ceredigion. Despite the decline in visitor numbers, The Well-being Survey demonstrates that people value the role that arts and culture plays in their lives.

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**.

Hate crime incidents have increased across the Dyfed-Powys region during 2020-21, which may partly explain the decline in perceptions of safety.

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

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.

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.

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.

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** is increasing.

Work-life balance featured prominently in The 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.

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.

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.

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

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 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.

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, 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+.^{ccxxvii} 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.^{ccxxviii}

Table 8.1 below 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 below demonstrates one of the challenges that Ceredigion faces, brought about by a shrinking workforce and an ageing population.

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

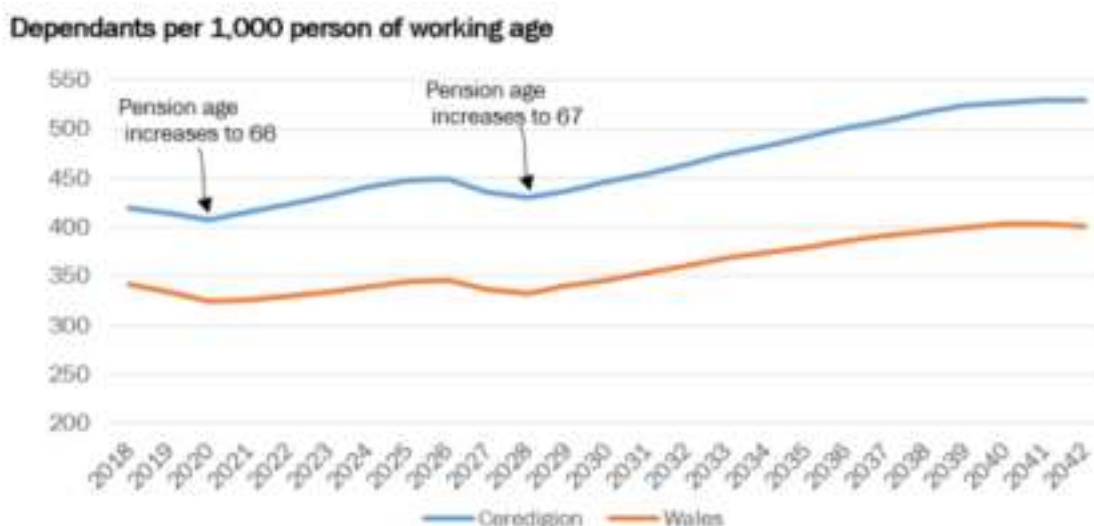


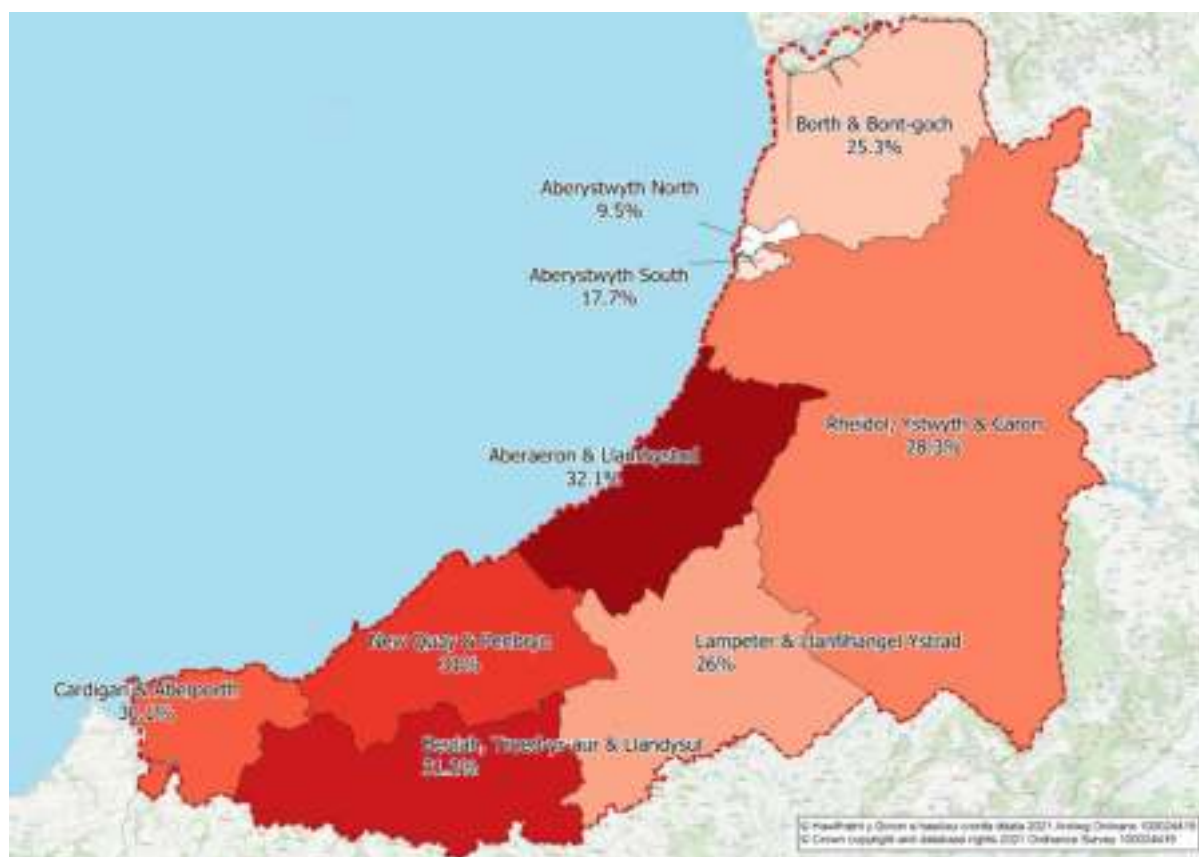
Figure 8.1 highlights the increase in Ceredigion's old age dependency ratio (OADR), that is, the number of state pension age per 1,000 people of working age (16-64). Although this presumes that people under 15 and over 65 years are outside of the labour force and that all working people are in employment, 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 the health and 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.

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



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'.^{ccxxix}

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.^{ccxxx}

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.

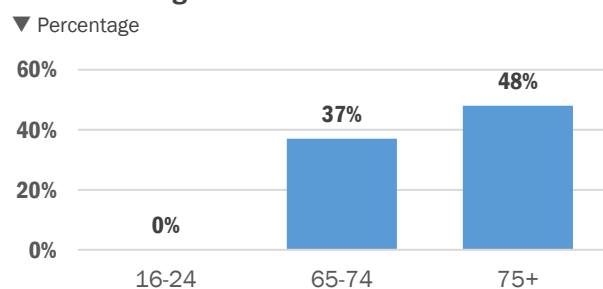
In the year ending June 2019, the economic activity rate within the 65+ population was 15.2. By the year ending June 2020, this had decreased to 10.8, it is likely that the COVID-19 pandemic has affected the economic activity rate within the 65+ population, as this age group was more at risk from becoming seriously ill from the virus. In the year ending June 2021 the economic activity rate within this age group had increased slightly to 11.6.

The state pension age is gradually increasing for both men and women and is currently 66. However, by 2028 it will rise to 67.^{ccxxxi} 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.^{ccxxxii} 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.^{ccxxxiii} 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.^{ccxxxiv}

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



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.^{ccxxxv}

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+ 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.

Case Study ▶

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

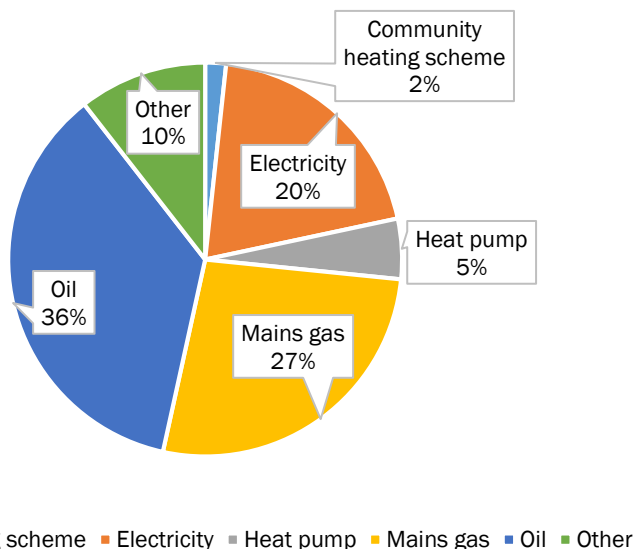
Suitable and affordable homes for older people are important determinants of health and well-being. Well-designed communities reduce health risks for older people, promote independency and well-being, whilst subsequently offering the potential to reduce social and health care costs^{ccxxxvi}. Whilst, 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^{ccxxxvii}. 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)^{ccxxxviii}. 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 8.2 below 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.

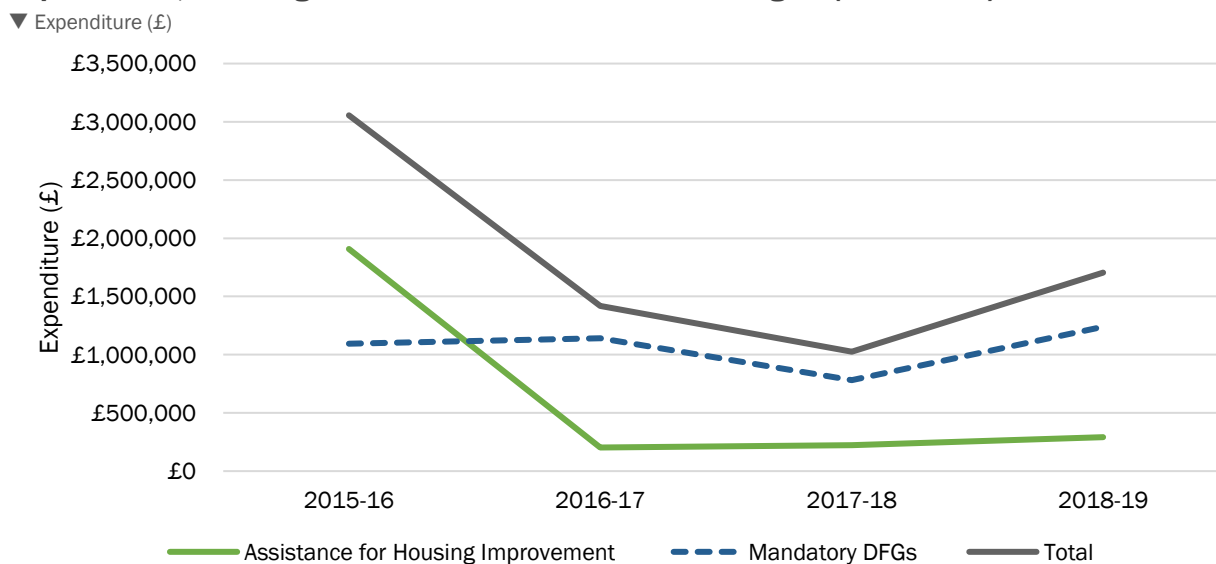
Figure 8.4: Estimated proportion of dwellings by main type of fuel type or method of heating used in central heating in Ceredigion (2019)



Source: ONS (2020)^{ccxxxix}

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 8.3 below 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)^{ccxlccxli}

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.

According to the Housing Lin report, current provision of **housing for older people** (this includes social sector sheltered and age-exclusive housing and private sector retirement housing) in Ceredigion is significantly below the national average and ranks 22 out of the 22 local authority areas in Wales^{ccxlii}. **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 8.5.

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: The 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 8.1 below indicates the estimates future need (units/beds) in Ceredigion up to 2035.

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 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^{ccxliii}, 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^{ccxliv}. The amount an individual needs to pay for residential or nursing care depends on their financial circumstances.

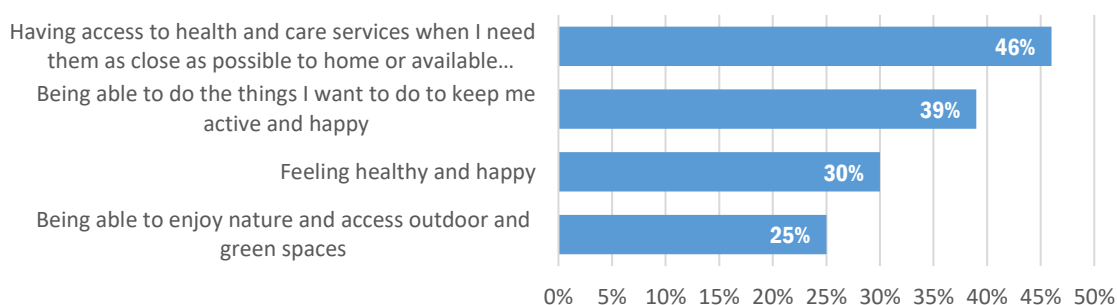
During 2019, the Welsh Government increased the capital threshold from which care home residents have to self-fund from £40,000 to £50,000. There are significant weaknesses in the data, however, it is believed that self-funders make up 30% of the care home population across Wales^{ccxlv} (further data 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.

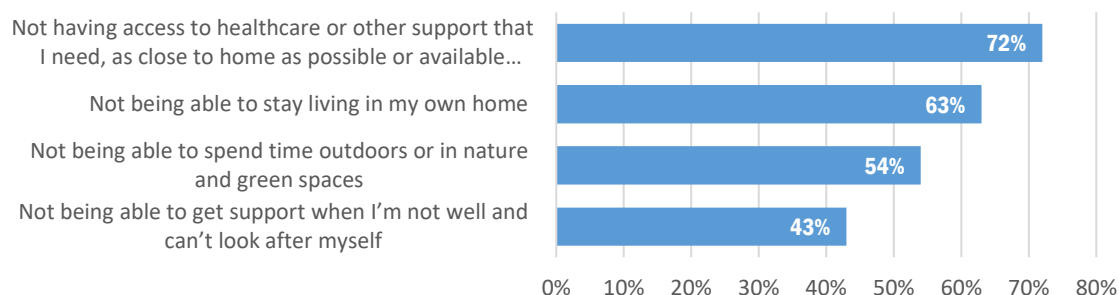
The desire to remain active in order to maintain physical and mental well-being was reflected in the results of The Well-being Survey, where 39% of respondents aged 65 and over said they valued being able to do the things they want to keep them active and happy, which was the second highest response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

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?



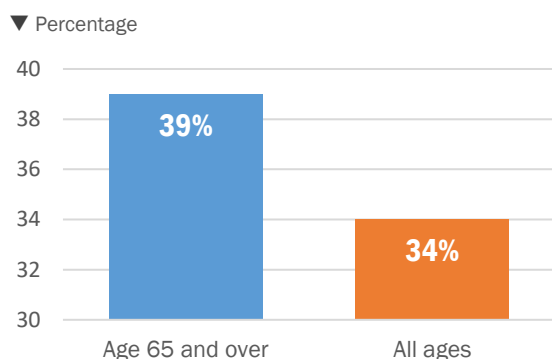
The things that concern Ceredigion’s residents the most with regard to staying physically and mentally healthy over the next ten years are access to healthcare and support nearby, mentioned by almost three quarters of respondents (72%), followed by not being able to live in my own home (63%) and then not being able to spend time outdoors or in nature and green spaces (54%). 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?



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. 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.

Figure 8.9: Percentage of respondents who volunteer



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

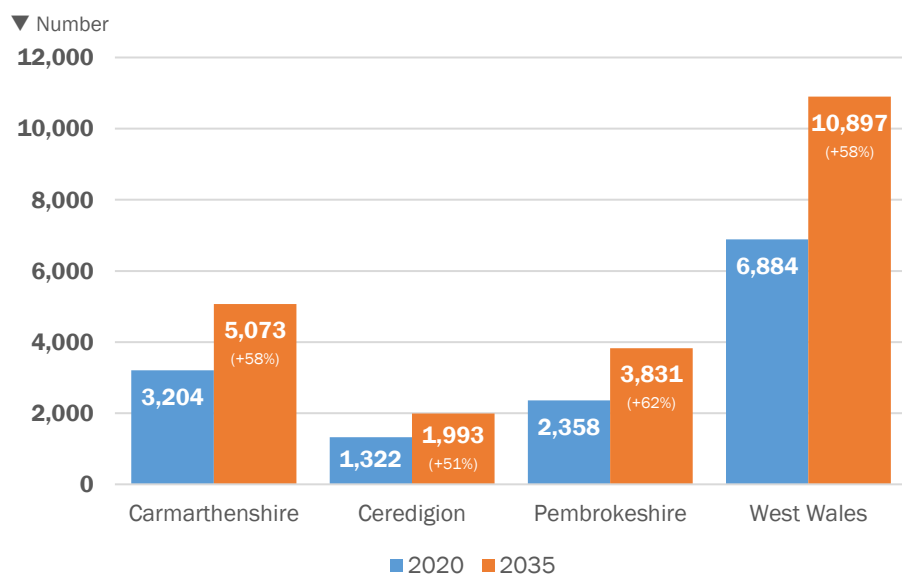
Ceredigion has an ageing population and this trend is set to continue over the next fifteen years. Getting older means being at increased risk of developing a long-term illness, such as dementia, high blood pressure, arthritis and sensory loss,^{ccxlvii} and result in us needing more support from others 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.^{ccxlviii}

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.^{ccxlviii} 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.^{ccxlix} This is a key local and regional issue for West Wales, as similar increases are projected across the region, see Figure 8.9. The total number of people living with dementia is expected to increase by 58% across the three counties by 2035.^{cci}

Figure 8.10: People living with dementia aged 65+ in West Wales



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 pressure 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 8.2.

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%

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.^{ccli} 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.

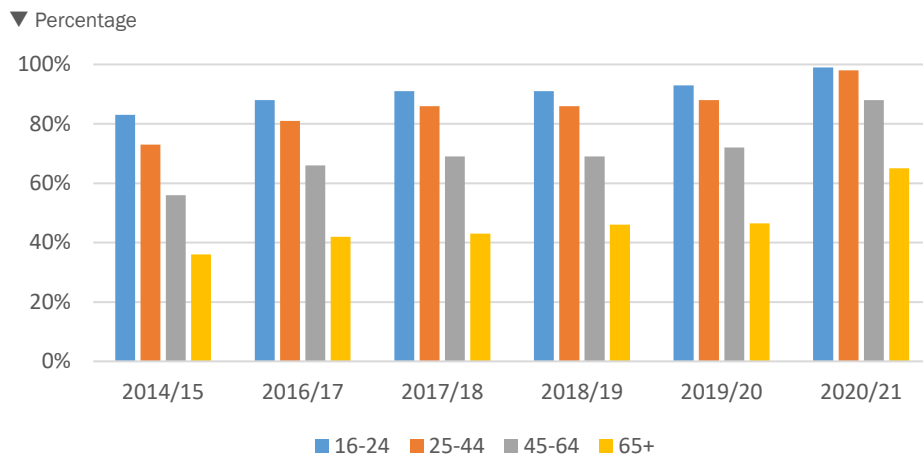
Social connectedness is therefore crucial to ageing well, but given the largely rural nature of Ceredigion, staying connected can be challenging, particularly for older people who may not have access to transport or digital connectivity, or may not be able to leave home due to an underlying health condition.

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 8.10).^{cclii} 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.^{ccliii} 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 8.11: Use of internet 'several times a day' by age cohort and year



Physical Transport can also be a challenge for some of Ceredigion’s residence in staying connected with others. As we get older our health and/or our confidence may prevent us from being able to drive, placing a greater reliance on public transport and which provides limited services from the most rural locations in Ceredigion.

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

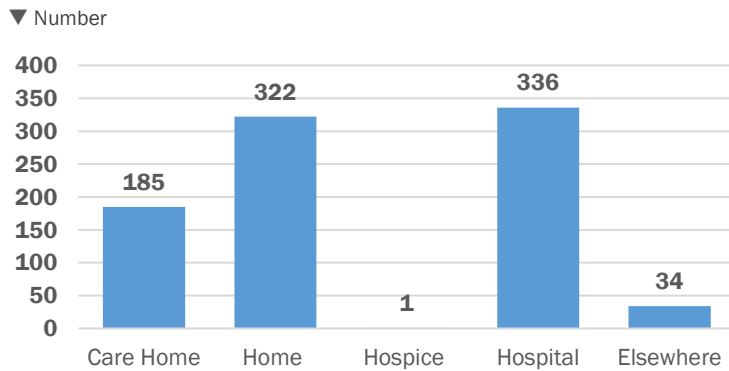
In 2020 there were 877 deaths registered in Ceredigion, and on average there have been around 796 deaths each year between 2013 and 2020. The leading causes of deaths in the county is cancer, with an average of 217 deaths per year, followed by heart diseases and dementia and Alzheimer’s disease. Figure 8.11 shows the average top 3 causes of deaths in Ceredigion.^{ccliv} 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.

Figure 8.12: 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

Figure 8.12 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 are 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.^{ccliv}

Figure 8.12: Death Registrations in Ceredigion in 2020 by location



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 during the day,^{cclvi} which is likely to be prohibitive for many in Ceredigion given that the average household income is just £26,605.^{cclvii}

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.^{cclviii}

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.^{cclix}

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.

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.

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.

Timetable for the next steps

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

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 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.

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 role in future Well-being Assessments and Well-being Plans. Gorwel is now live and will be formally rolled out during the autumn of 2021

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.

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