

# CEREDIGION SINGLE INTEGRATED PLAN

## SINGLE NEEDS ASSESSMENT: POPULATION ISSUES, OUTCOMES & PRIORITIES

### INITIAL REPORT TO LSB EXECUTIVE GROUP (SEPT 2012)

#### INTRODUCTION: PURPOSE AND SCOPE

This is the initial report to the Ceredigion Local Service Board Executive Group on the Single Needs Assessment (SNA) of population issues and outcomes. The paper is presented to the Executive Group in order to support the first phase of the preparation of the Single Integrated Plan, the identification of priority issues. The paper summarizes the approach sought by Welsh Government (WG) as laid out in *Shared Purpose, Shared Delivery*, outlines the population issues which emerged from the initial phase of the Single Needs Assessment work, and provides a preliminary analysis of those issues for the LSB to prioritize.

An initial purpose for this analysis is to provide the basis for stakeholder and partnership groups to consider the priorities of the Single Integrated Plan.

The paper does not set out the findings of the initial population issues assessment in detail; this detailed assessment will be developed alongside the Single Integrated Plan and will be presented in full as a Technical Report to the LSB.

This paper focuses upon identifying the strategic population issues to be addressed by the Single Integrated Plan and how they might fit with a set of high level population outcomes. It does not identify a set of measures for population outcomes; these will require further study and analysis to decide on measures which are suited to the outcome and which provide an effective means of monitoring the progress of the Single Integrated Plan.

The analysis of service outcomes and issues will be developed later. This service-based study will refer to the population issues and outcomes following further exploration of the links between service outcomes and population outcomes.

The Single Needs Assessment, therefore, should be seen as an iterative process that, in general, moves from an initial outline of issues affecting the population of Ceredigion towards a more detailed examination of those issues, and then develops these analyses to inform the process of investigating services issues and identifying service outcomes which contribute most effectively to the population outcomes.

## STRUCTURE OF THE PAPER

The paper has the following broad structure:

- Introduction: scope and structure
- The Single Needs Assessment in the context of the Single Integrated Plan and its accompanying Information Strategy
- Methodology used to produce this initial assessment
- The approach to identifying population issues
- General themes and drivers
- Challenges for Ceredigion in the SNA approach
- The approach to identifying strategic priorities
- An analysis of the main population issues
- An analysis towards setting LSB strategic priorities

## THE SINGLE NEEDS ASSESSMENT, INFORMATION STRATEGY AND THE SINGLE INTEGRATED PLAN

The Welsh Government's ambitions for public sector working and the central role of Single Integrated Plans in LSB work are contained in the document *Shared Purpose, Shared Delivery* published in final form in June 2012. The guidance lays out in very broad terms the process for producing the Single Integrated Plan (SIP) and the role of research and evidence in providing the basis upon which LSBs should decide priorities and plan their approach to tackling those priority issues.

LSBs should produce an information strategy which outlines in broad terms the approach that they will take in assembling the evidence to support the preparation of the SIP and its development from a broad strategic view to more detailed service plans and measures. The information strategy should not be a comprehensive definitive list of data sources, nor is it expected that it should set out in detail the research approaches to particular issues since these will evolve as the SIP evolves. WG emphasises that the information strategy, like the SIP, is a process rather than a fixed stage marked by a definitive document.

The information strategy will use a broad definition of the terms and will cover all types of research and assessment, including more qualitative approaches and techniques such as community engagement, practitioner research, service user 'journeys', etc. An important point is that these will be linked back to the development of the more quantitative evidence to ensure that the various forms of research and measurement complement each other so that, even when the focus of the research moves to service-based issues, the population outcomes are still at the forefront.

The table below sets out in broad terms the research or information approaches required in the various phases of the SIP preparation and development, including the role of this paper and the full SNA.

<b>SIP Development</b>	<b>Research and Information Development</b>
Initial identification of population issues and priorities for the Ceredigion SIP	Preparation of initial SNA issues paper and response to specific questions
Stakeholder engagement on the LSB priorities	Preparation of summary information and graphics for stakeholder workshops; response to specific questions from stakeholder engagement workshops
Preparation of SIP	Response to specific additional questions; development of the Single Needs Assessment and the full SNA Technical Paper; preparation of the Single Integrated Plan Information Strategy
Development of Results Based Accountability or similar approach for population outcomes	Research and analyse significance of measures; develop 'report cards' or similar information summaries for identified priorities
Public consultation on the SIP	Preparation of consultation material; response to specific queries
Develop SIP strategy into more detailed population outcomes and service plans	Develop research analyses to support service plans; develop service plans with a clear understanding of the relationship between population outcomes and measures and the service outcomes and indicators.
Development of integrated services around client-centred approaches	Development of more innovative research methods including client journeys, practitioner surveys, etc.

The deadline set out in *Shared Purpose, Shared Delivery* foresees the initial Single Integrated Plans in place by April 2013. Given this timetable it was apparent that the preliminary information on population issues necessary to determine the priorities of the SIP would have to be available by September 2012.

The deadline precluded the production of a full SNA *tabula rasa* at this point. However it was clear that it was not necessary to have available a full analysis of all issues, or a detailed examination of all data and measures, in order to discuss the possible priorities for the SIP. All that was required was a setting out of the main issues with some summary analysis of any local perspectives.

This initial SNA process, therefore, was designed as a rapid assessment of evidence in order to produce a set of strategic population issues that could be considered as the basis for proceeding with the Single Integrated Plan. A full set of analyses and detailed examination of the issues would be developed in parallel with the development of the SIP.

The methodology adopted followed a number of stages:

- An initial analysis was made of existing Ceredigion assessments and plans and those single needs assessments and plans already produced by other Welsh authorities, as well as the 'joint needs assessments' of health and wider determinants of health in some areas of England. This initial analysis gave some idea of the scope of a single needs assessment, its structure, the data sources used and the level of analysis undertaken, and how the needs assessments might identify strategic issues and lead to the setting of strategic objectives and priorities.
- Ceredigion joined with Pembrokeshire and Carmarthenshire to determine a common approach and framework for their respective SNAs. The group also identified where they might benefit from a collaborative approach, for example in reducing duplication in the collection and analysis of data from Hywel Dda Health Board, Dyfed-Powys Police, or other bodies that cover the area of the three counties. The three counties agreed to take the framework of population issues in the Welsh Government's 'Programme for Government' as the structure for their initial SNA work.
- An analysis of existing Ceredigion needs assessments and strategic plans was carried out to identify strategic population issues and outcomes and the evidence base which were placed into the SNA framework. Welsh Government strategic issues were similarly assessed for local relevance and added to the developing assessment of strategic issues, as were newly-arising issues or themes relevant to the SNA that had been identified from more recent research work and which may not have been given due emphasis in the separate assessments and plans.
- Detailed data collation and analysis work was divided among the research team broadly along the lines of the major headings or themes of the SNA framework with the issues in each broad area being initially studied in isolation but with connections to other issues being identified as work progressed.
- The study consisted of: a rapid review of literature, especially summaries of recent reviews (e.g. Institute of Rural Health review), or compilations of data relevant to the local area (e.g. Public Health Observatory Wales compilations of health determinants and outcomes data); a review of the more easily available data (e.g. on-line statistics) many of which had been used in existing assessments and could be updated with more recent data; an investigation of

data sources that had not been used in existing assessments, particularly those which were relevant to the new emerging themes and issues. The study was critical in approach, testing the assumptions embodied in the existing assessments of strategic issues for their validity and topical relevance.

- The data compilation and analysis process was reviewed at the halfway point and work reassigned according to work load and where it had become clear that important connections existed between particular themes and issues.
- At the same time as the work of data analysis was proceeding, a request was made to policy officers to consider the initial list of strategic issues and to identify any additional existing or emerging issues that they thought should be included. Policy officers were also asked to contribute any more qualitative or anecdotal evidence to illustrate the strategic issues. Discussions were held with lead officers on strategic plans to clarify any points of detail and to ensure that the SNA would properly cover the main issues identified in existing strategies and the connections already identified between the various strategies.
- The issues identified by this consultation and analysis work were compiled into the summary format presented in this paper. Any additional information relevant to the identification of strategic issues and to setting strategic priorities was added to the issues summary.

A number of questions of definitions and approach needed to be clarified in order to identify issues, outcomes and priorities.

First is the question of terminology and labels. It is clear that the various assessments and strategies studied employed a variety of terms to cover the matters of interest or the framework in which those matters are discussed. The terms 'issues' and 'outcomes' are used most frequently, but reference may be made to 'drivers' and other terms.

Even the same terms may be given different meanings so that 'outcomes' may refer generally to the end result (e.g. a health outcome), to a rather broad vision ('a healthy population'), or to very specific outcomes formalised through a results-based accountability process and given indicator measures. Similarly, 'strategic' may relate to a matter of some broad range as opposed to a local or operational matter, or may denote something formally designated in a strategy.

This leads to the second problem in identifying issues, outcomes and priorities, which is the question of scale: what is the most useful and appropriate scale or level at which to focus the analysis and discussion? In these terms scale can be viewed as spatial or temporal, or as the size of the population affected. At one extreme, 'outcomes', for example, may be set at such a high level that they are no more than bland and obvious 'mission statements'; on the other hand they can be set at such a detailed level that they refer only to a very specific and restricted area of action. All scales in between are possible and there can be no fixed view on the appropriate scale for a 'strategic' outcome or issue, which may vary with the subject matter and which will also depend on the organisational context in which the issues are being discussed.

For the purposes of the Ceredigion SNA an 'issue' is taken to refer to something stated as a question related to the population. This may take the form of a particular known problem, identified and defined on the basis of study. It may also refer to a supposed problem, an assumption or belief that has not yet been fully studied or tested. An issue may also arise from a consideration of emerging trends and their potential effects, such as the effects of an ageing population in the future.

The view taken in this assessment is that 'strategic issue' refers to individual and unitary issues which are sufficiently broad to cover a substantial area of analysis or action. At this level, although the issues have a unity of subject matter, they may also be strongly connected to other population issues. Also, although they are initially organised under the headings provided by the *WG Programme for Government*, they may be re-arranged under and approached from other higher level headings or outcomes.

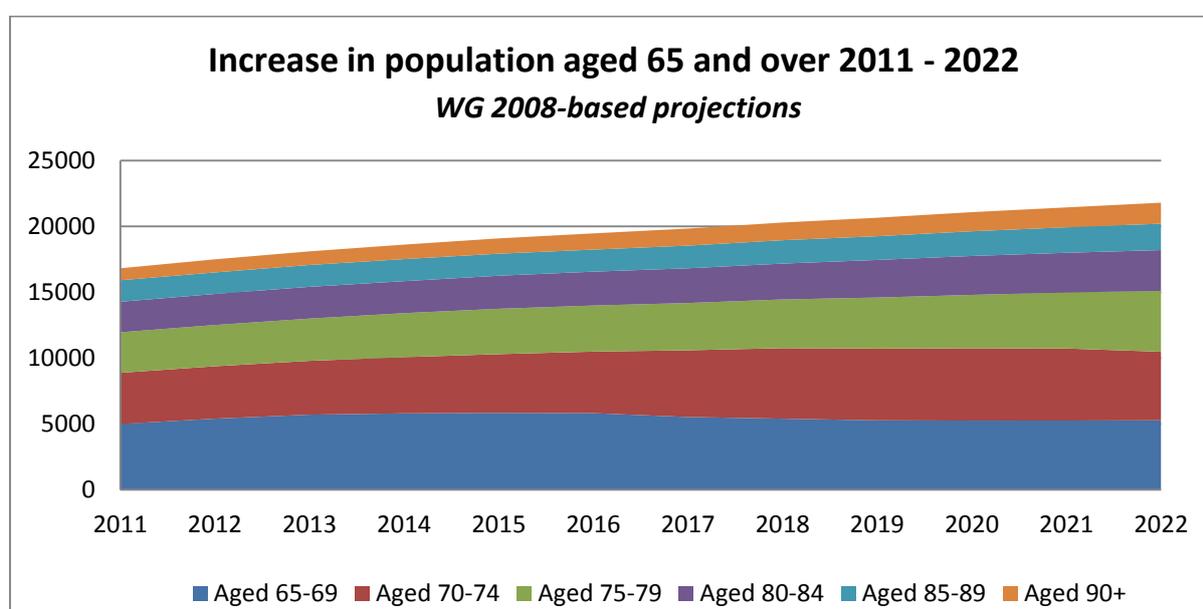
'Outcome' may be defined as the inverse of an issue, i.e. it is the intended result of action to address the problem or issue, or a broader more general statement of an objective. The former type of outcome may be derived from the strategic issues; the formulation of the latter lies more in the realm of strategic policy and so broad outcomes are not identified here except in reference to where they have been stated in existing policy. Similarly, although we have identified population issues here on the basis of statistical evidence, these will not necessarily become the specific measures of population outcomes required under a Results-Based Accountability approach. These measures of outcomes will be developed in parallel with the SIP.

In addition, under the heading 'Key Drivers', the Ceredigion SNA identifies a series of emerging trends or overarching themes that it is believed will affect Ceredigion during the period of the Single Integrated Plan. Some of these trends, such as an ageing population, may be stated with some certainty, even if all their effects may not be exactly known. Other trends, such as the timing and extent of increasing fuel costs may be less certain.

This section summarises some of the longer-term and broader drivers of change apparent in Ceredigion.

### Ageing Population

Population projections at national and local level clearly show that an ageing population, that is a rise in both the numbers of the elderly and very elderly and a rise in proportion of the population in those age groups, is the major demographic change in the medium-term. This rise can be attributed to two main factors. Firstly, there is a continuing rise in life expectancy which means a higher proportion living into the very elderly groups in particular, accompanied by a levelling of the difference in life expectancy between men and women. Secondly, the 'baby boomer' generation born in the years following WWII are now entering their sixties and seventies and will contribute to the rise of the 75+ population in the next five to ten years and the 85+ population over the next fifteen to twenty years.



### Economic Downturn

The financial crisis that started in 2008 has developed into a wider economic crisis and spread beyond the Western financial sector, with wider global effects on trade. In the UK the initial prolonged period of recession has been followed by years of low or negligible quarterly GDP growth and by a second period of GDP contraction or recession.

The effects of this continued economic down turn are uneven and can appear contradictory. While some official data, for example, show a depressed UK economy that returned to recession in 2012, employment data show increasing employment. However, the uncertainty of a downturn coupled with the new caution of financial institutions, from the very largest to the high street retail banks, have dented business and consumer confidence and reduced demand in the economy, and these factors have an impact upon business throughout the UK.

Actions to support the private and international financial sectors have not only effectively worked to transfer private debt into sovereign debt but have also increased pressure on national and pan-national fiscal regimes. The UK Government has placed the reduction of the national debt at the centre of their economic policy. With limited opportunity for increasing revenues from tax receipts, attention has therefore concentrated on reducing the Government budget deficit. These fiscal objectives appear to support, and perhaps to have accelerated, political objectives such as reviewing the benefits system and limiting welfare support, in addition to pressure for an overall reduction of spending on the public sector.

### **Changes in the Public Sector**

A smaller or curtailed public sector is seen as a major contribution to the UK Government's objective of debt and deficit reduction, together with a more prominent role for the private sector in the UK economy.

Although most of the public sector institutions in Ceredigion (Welsh Government offices and agencies, local government, health and universities) are largely funded directly from devolved functions at the discretion of Welsh Government, the UK budget objectives will set the overall parameters of the Welsh public sector.

To date, due largely to the priorities and direction of Welsh Government, there has been relatively little direct impact on local public sector employment, although there has clearly been a curtailment of any growth in public sector employment.

Not all changes are directly attributable to the effects of the economic downturn: the basis for both higher education and health funding has been under discussion for some time. In the former case, discussions have been driven by the need to provide a financially sustainable model of HE in Wales that can compete in an increasingly international market for HE education. Changes in the health service have been driven by a similar need to maintain high quality and expensive specialist services against the challenge of changing lifestyles and demographics, such as an ageing population.

### **Population Change through Migration**

A key feature of the recent history of Ceredigion has been the changing nature of the population resulting from inward and outward migration. Out-migration has been a long-standing feature of local population change, with the population declining from its late 19<sup>th</sup> C peak to a new low in the decade 1950 to 1960 through a prolonged period of net out-migration. Since then the population has risen steadily through net in-migration.

However, although there has been a net increase in population, out-migration from the county has continued. Leaving aside migration around HE student moves, the main feature has been net out-migration in the years immediately following school and further education. The data is confused by HE moves but seem to indicate that a 'local' cohort at age 17/18 may be reduced by 50% or more by age 24, and that young women appear to migrate sooner than young men. The out-migration may primarily be for higher or further education, but appears to be followed by other moves connected to career and life opportunities.

Although there is some non-student in-migration in these young adult ages, it is not until the mid- to late-thirties that a substantial in-migrant stream is seen, with net in-migration in middle age, between 45 and the late 60s.

It seems unlikely that this pattern will alter greatly in the medium term as the appetite amongst the young for opportunities outside Ceredigion would appear set to continue. Some small-scale changes may be prompted by the economic downturn and other developments, such as a higher proportion

of Ceredigion school-leavers attending the local universities. There may be some anecdotal evidence for the return of 'local' out-migrants at a later stage in their life or career, but these may be very opportunistic and limited.

### **Changing Nature of Rural Ceredigion**

It is evident that recent decades have seen a slow but profound change in the nature of rural Ceredigion.

The main features of this change have been:

- A sustained period of in-migration from outside rural Wales to the traditionally 'deep rural' areas
- Sustained increase in dependence upon urban centres for employment with concentric development of commuter areas moving further out from commuter villages around towns into the deeper rural area.
- Linked with commuter patterns, an increased use of main towns for a range of everyday services including food retail with economies from multi-purpose trips linked to commuting. This coincides with a contraction of services in rural areas.
- Although less marked than other rural areas because of the strong sense of community sustained in agricultural communities, there has been a gradual move further along the change from a producing to a consuming countryside.
- A weakening of the traditional cultural and social links of rural communities, with greater individualism and fewer residents of rural areas participating in these networks

Unless there is a radical change in social and economic circumstances at national level, it seems likely that the drivers of these changes will continue to operate in the future. Although some elements of these changes have been evident over a number of decades the evolution of change has been relatively slow and difficult to perceive and, as a result, there has been little serious debate until recently about how rural communities may respond to and accommodate these changes.

### **Rural Isolation and Access to Services**

The decline of service provision in rural areas has been one of the major concerns of policy makers and rural communities, although Ceredigion may be seen as remarkable in that local decline has lagged behind the change in other rural areas of the UK.

In combination with the other social and cultural changes in rural areas described above, the issue of poor local provision of services creates a potential for an increased sense of rural isolation, particularly for those sections of the community, such as households in poverty or elderly households, with failing mobility and a lack of independent travel.

The twin issues of poor access to services and isolation will have an impact on social and economic well-being in rural areas and may lead to increased need or demand for formal support from local agencies. These factors will also have an impact on the delivery of services in rural areas affecting the supply of support staff and the cost of bringing services to people in need.

## **Peripherality**

Ceredigion's location on the western side of the UK places it at the periphery of economic systems in the EU, the UK and in Wales. It is peripheral even to the major EU routes in to the Irish Republic which cross Wales to ports to the north and south.

Its location has been a major factor in the relative lack of economic development in the county with only weak links to the nearest industrial centres of south Wales and the west Midlands. This locational disadvantage was not addressed by industrial development strategies in rural mid-Wales that followed the 1964 Beacham report which were focussed on areas in Powys with relatively little development in other areas of mid-Wales.

The concept of City Regions as loci for economic growth and regeneration has been gaining strength in recent years. With areas such as Cardiff and Swansea being proposed as the focus for new city region designations it would appear that Ceredigion and other areas of mid-Wales will be again locations on the periphery of the major economic development.

## **Increasing Real Fuel Costs**

Advocates of the 'Peak Oil' view have been warning for some years of a time when the exhaustion of reserves of cheap, easily extracted oil and the reaching of a production peak will result in the inexorable rise of oil commodity prices. However, to date production has continued to rise and new reserves continue to be identified and exploited, and more efficient recovery techniques employed.

There is a long-held view that continuous and disproportionate rises in the cost of oil-based fuel for transport (and heating) have been a particular burden on rural residents and businesses. However, although increases in fuel duty and other taxes have been added to any rises in the commodity price, in general consumer prices have not increased greatly in real terms against other prices over the medium term, although short-term changes may mean retail petrol prices have risen above the general level of price inflation.

However, there is some evidence that the years since 2010 have seen a more sustained period of rises above inflation and that this situation may persist despite falls in commodity prices and mark a longer-term trend. Rises in fuel costs will have a particular impact on rural residents needing car transport for commuting, and will have a disproportionate impact on poorer households who may already find running a car a costly necessity. Fuel costs will also have an effect on the cost of providing services to residents at their home or through a network of scattered settlements and other locations.

In previous studies individuals' travel behaviour in rural areas has proved relatively inelastic against fuel cost rises, given the tendency to make multi-purpose trips around commuting journeys. However, a sustained period of high fuel prices at or above current levels may modify travel decisions. One effect could be greater use of local facilities for more everyday items and services.

## **Welsh Language**

Ceredigion remains one of the strongholds of the Welsh language. According to the 2001 Census, 51% of the population aged 3+ spoke Welsh and 61% had some skill in Welsh. The proportion of Welsh speakers varied from area to area, with the main towns and seaside settlements having relatively low proportions of Welsh speakers and higher proportions in more rural areas such as Tregaron or the lower Teifi valley. However, it was also clear that there were high proportions in areas that had seen new housing development where families were located and school age children were being educated in the language.

The use of the Welsh language by service providers is covered by the Welsh Language Act and the language policies of the individual agencies and these will provide the framework for designing services to ensure the full use of the language by service users.

## CHALLENGES FOR CEREDIGION IN THE SNA APPROACH

Although the general movement towards formulating strategy and policy on a firm evidence base is to be broadly welcomed, the preparation of the Ceredigion SNA has highlighted a number of issues related to the prevalent models of policy evidence. Since elements of national policy, including the selective implementation (and funding) of programmes, is based upon these models, these issues raise serious challenges for Ceredigion in the interpretation of evidence (including by bodies such as WG) as well as in policy formulation and implementation.

### **Deprivation in Rural Areas**

The ecological approach has become the dominant analytical model to link aspects of deprivation to population outcomes. This is best exemplified in the use of the Welsh Index of Multiple Deprivation (WIMD), based on statistical areas, together with, for example, health outcomes for those same areas to demonstrate the correlation between areas of deprivation and areas of poor health. The analysis is enhanced by the use of choropleth areal mapping using similar colour schemes etc. (c.f. maps and scatter graphs in 'Cardiff Matters' Needs Assessments).

Such correlations lie at the heart of the concept of 'multiple deprivation'. However, this is not the only, nor necessarily the most useful, model of either deprivation or the correlation between deprivation and population outcomes. Whereas the model might hold for areas that display the classic characteristics of multiple deprivation, particularly those urban areas that demonstrate a high degree of homogeneity, it is markedly less applicable to more heterogeneous areas such as rural areas.

Several studies have demonstrated the failings of the model in capturing deprivation outside of such homogeneous areas. Commentary in the WIMD itself notes not only that the most deprived individuals or households are not necessarily found in the most deprived areas but also that only a minority of deprived people live in the most-deprived areas. For example, although around 1 in 5 of the people in income-benefits households live in the most-deprived 10% of areas in Wales, which represent a significant concentration of deprivation, 4 out of 5 people in income-benefits households live outside these areas.

The WIMD guidance itself notes that the nature of the WIMD and its particular strengths should be borne in mind when formulating policy. WG policy has concentrated on the area ecological approach, seeking, for obvious reasons, to tackle those areas of concentrated deprivation identified by WIMD. However, the approach, and the use of WIMD as an evidence base, appears to have moved beyond its application to these areas of concentrated deprivation and into policy areas to which the model is less suited. The Local Government Data Unit has seen the need to issue a report reminding policy makers of the limitations of the ecological approach and the requirement for policy makers to understand these limitations and design policies on a more appropriate evidence base where necessary.

## **Perception of area's relative standing in Wales**

One approach which is frequently used to set priorities at a local or national level is to identify those areas which are significantly below or above some national or local average. For example, a ranking of the 22 unitary authorities on some standardized rate, such as life expectancy or prevalence of a particular disease, would reveal those low (or high) ranking areas with the implication that the issue or underlying problem was most acute in these areas and therefore they should either provide a target for national action, or that these issues should be given priority in these areas.

Such an analysis, however, may be only a crude view of the issue. It may be, for example, that although differences between areas exist they are not actually statistically significant for those measures or that when viewed in a wider context all the Welsh areas, even apparent outliers, are closely grouped.

It is clear that on the basis of a crude unitary authority analysis of this type Ceredigion would fail to be identified as an area with particular problems or issues that require national action. In fact on many measures, such as life expectancy, Ceredigion stands clearly amongst the 'better off' local authorities, whilst on others it is near to or slightly above national averages. From the initial Needs Assessment it seems that only on measures associated with factors such as rural accessibility, or the ageing demographic profile, that Ceredigion may be thought of as 'worse off'.

These analyses, therefore, may lead to the view that there is little at issue in Ceredigion requiring action. However, this is an over-simplification which the Needs Assessment can help to correct when looking at individual issues in more detail. As with the 'ecological model' of deprivation, other approaches are required to identify needs at a finer level of analysis.

## **Small Numbers Problem**

Ceredigion is one of the smaller unitary authorities in Wales and that, together with often low rates on many of the main population measures, means that actual numbers per annum of, for example, cases of a particular disease or certain types of crime may be very small. This is certainly a problem in more geographically localised studies, but may also hold for data for the county as a whole.

This factor introduces its own problems in a study of local population needs. Some of the usual measures of prevalence or trend may be subject to the volatility expected in the case of small numbers. This volatility may be due to the random nature of events such as the occurrence of a relatively rare disease, or to the actual cause such as the impact a single individual or household may have on local crime figures.

The effect of the small numbers problem may be to erroneously identify 'hot spots' which, in fact, are explicable through random or local effects, or to show time series trends which in fact have little significance.

## **Rural Proofing**

The term has been used in a number of policy and operation plans to refer to a way of taking rural issues into consideration in a process which may be primarily designing around policy or service delivery models that are more appropriate to an urban context.

The term can also apply to the process of identifying needs within an area in order to overcome some of the problems of measurement and analysis noted here. As with policy planning it may help to subject the Needs Assessment and subsequent work on measures of population and service outcomes to a more formal assessment as to whether rural issues are properly recognised and taken into account.

## STRATEGIC POPULATION ISSUES ASSESSMENT

As noted above, the focus of this initial Ceredigion Population Single Needs Assessment is a series of 'strategic issues'. How these are defined and how they have been identified is outlined above.

Appendix 1 presents a full list of strategic issues under the broad headings of the Single Needs Assessments. For each identified strategic issue the paper notes the nature of the issue and an initial assessment of the relative importance of that issue in Ceredigion. This assessment is based firstly on whether there is evidence that data for Ceredigion indicates a particularly high or low prevalence or rate of the main measures in relation to Welsh UAs, Wales or the UK, but it also indicates whether there are other measures and aspects of particular significance to Ceredigion.

This initial analysis proceeds to a consideration of trends in that issue at a local and wider scale and any implications that are particularly notable for the Single Integrated Plan. Finally a brief initial analysis is made of the role of that issue in setting priorities for the LSB. This analysis is expanded upon in Appendix 2.

## IDENTIFYING PRIORITIES FOR THE CEREDIGION SIP

The process of identifying or setting priorities for the LSB and the Single Integrated Plan depends to a great extent on the question of the level of outcome selected. As seen above, outcomes can be stated in detailed operational terms, as broader strategic issues that are still defined in terms of single identified issues, or as broader (and to some extent less useful) generalised outcomes.

In the *Shared Purpose* WG strongly hints that local LSB priorities should be drawn from a list of broad outcomes that WG believes are of particular significance for local multi-agency delivery:

- Improving early years' experiences.
- Improving health and educational outcomes of children, young people and families living in poverty.
- Preventing poor health and reducing health inequalities.
- More inclusive and cohesive communities.
- Improving the skills of young people and families.
- Ensuring people receive the help they need to live fulfilled lives.
- Creating sustainable places for people.

According to WG, it is the role of the LSB to use its local needs analysis to determine which will be the highest priorities for local action. At first sight, however, it would appear that all or any of the strategic population issues noted in Appendix 1 (and many others) could be easily accommodated under these broader outcomes. No detailed guidelines are offered by WG as to how the SNA might identify which outcomes should be the priority for the LSB, although WG have indicated that this process should not require detailed or comprehensive data.

At this level of broad outcomes, all of which are important, and any of which may be a local issue to a greater or lesser extent, it is highly unlikely that priorities can be identified on the basis of evidence alone; matters of existing policy priorities, stakeholder views, political direction, etc. are likely to be just as useful as a collation of research analysis. However, it is possible that at a more detailed level,

such as that laid out in the SNA, issues may be more clearly seen as presenting a particular problem locally. An evidence-based approach to setting priorities, therefore, may be to select as high level priority outcomes those which have a number of lower level issues of local importance.

Alternatively, whilst recognising how each of the issues may contribute to broader outcomes like those listed by WG, the LSB may wish to base its priorities for action on the lower level issues, areas in which it can make a more focussed selection based on evidence.

As an initial step as to how the evidence collated to date might be used to determine priorities, Appendix 2 presents an analysis of the list of WG outcomes against the information collated from the initial needs assessment analyses. This places the population issue under the headings of the WG list (with some duplications) and analyses the list on the basis of other local or wider criteria.

The criteria on which each issue is analysed are:

- Evidence that the issue is particularly relevant to Ceredigion e.g. a particularly high rate or prevalence, something of particular relevance given the circumstances of Ceredigion
- Identified as a priority in an existing Ceredigion plan or strategy
- Identified as a new or emerging priority by local stakeholders
- Scale of the issue (geographical, temporal, size of population etc.)
- The resolution of the issue is particularly amenable to the Ceredigion LSB approach
- Contribution to the broad population outcome

## APPENDIX 1 SUMMARY OF POPULATION ISSUES ANALYSIS

### HEALTH

#### IMPROVING HEALTH OUTCOMES

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>General health as measured by life expectancy</p> <p>What is the prevalence of the main diseases and conditions?</p> <ul style="list-style-type: none"> <li>• chronic conditions</li> <li>• circulatory diseases</li> <li>• cancers</li> </ul> <p>Localized high prevalence rates</p> <p>Prevalence of mental health</p>	<p>Life expectancy has been consistently among the highest in Wales UAs e.g. 2008/10 M = 80.8 (highest UA, Wales = 77.62); F = 83.9 (highest UA, Wales = 81.82)</p> <p>In addition to indigenous reasons for relatively good health (e.g. traditional rural society attitudes; lack of local heavy industry occupation, good environment etc.) can also include element of recent population change with net in-migration by self-selecting group of relatively well-off and healthy</p> <p>There is no evidence that rates for any of the major diseases and conditions in Ceredigion are significantly higher than general rates in Wales or other comparable areas; for most prevalence in Ceredigion is below or around Wales averages.</p> <p>There is some evidence of higher than average</p>	<p>No reason to see any short- to medium-term change in the current situation; Ceredigion will continue to have one of highest life expectancy rates in Wales; possibility that long-term population changes may impact e.g. through disappearance of more conservative rural attitudes to certain risks, or through the playing out of period of social change and lifestyles</p>	<p>Multi-agency work especially involving Health Board, Public Health and local authority and 3<sup>rd</sup> Sector can have effect on long term individual health by promotion of healthy lifestyles</p>

problems	rates of strokes in the Tregaron area, however actual numbers are small and it may be a statistical small number effect rather than an indicator of an underlying spatially related issue		
Obesity related disease and conditions	The forecast rise in the numbers of Ceredigion elderly and very elderly population point to a related increase in the general prevalence of age related diseases and conditions such as dementia and diabetes (see DAFFODIL model)		
Are there any locally high incidences of disease or conditions?	Some evidence of locally high incidence of campylobacter in Ceredigion although numbers are quite small		
Age-related disease and conditions and forecasts for change			

PREVENTING POOR HEALTH

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
What is the overall incidence of some of the factors underlying poor health? Are there any particularly high incidences of these factors?	There is no evidence that rates for most of the listed poor health factors in Ceredigion are significantly higher than general rates in Wales or other comparable areas; for most prevalence in Ceredigion is below or around Wales averages.  Past studies have suggested some possibility of	National trends on the factors behind poor health such as smoking or alcohol use are complex; different studies have identified different trends differentiated by age groups or by life stages or social class; some behaviours rates have shown steady fall (e.g. smoking) but may also steady around a lower rate; more recently concern has moved to examination of	Multi-agency work especially involving Health Board, Public Health and local authority and 3 <sup>rd</sup> Sector can have effect on long term individual health by promotion of healthy lifestyles

<ul style="list-style-type: none"> <li>• Low birth weight babies (&lt;2.5kg)</li> <li>• Dental health</li> <li>• Obesity rates</li> <li>• Smoking</li> <li>• Alcohol abuse and disease</li> <li>• Prevalence of MMR and other diseases preventable by immunisation</li> <li>• Incidences of food poisoning and other hygiene related disease</li> </ul>	<p>higher prevalence of low weight births in Aberystwyth and Cardigan areas although numbers are quite small</p>	<p>obesity trends with general higher consumption of food calories and reduction in general physical effort in home in home and work life; recent reports have characterised this as an obesity epidemic with increasing prevalence of conditions associated with overweight</p>	<p>More direct intervention may be possible in some individual cases of extreme alcohol or other substance misuse</p> <p>Multi-agency Intervention at the level of individuals or households will be particularly necessary in outcomes for vulnerable groups such as looked-after children</p>
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## MEASURES OF GOOD HEALTH

Issues	Local Profile and Context	Trends and Implications	Outcomes Priorities Notes
What is the overall incidence of factors and behaviour underlying good health?	<p>Ceredigion has fairly high rates for physical activity participation</p> <p>No reliable comparator data available for mental well-being at present</p>	No reliable information on the complete range of medium- or long-term trends in the factors underlying good health; data from service providers generally show an increase in participation for all types of physical activity such as sports	Multi-agency work especially involving Health Board, Public Health and local authority and 3 <sup>rd</sup> Sector can have effect on long term individual health by promotion of healthy lifestyles

## RURAL HEALTH ISSUES

Issues	Local Profile and Context	Trends and Implications	Outcomes Priorities Notes
<p>Are there any conditions, diseases or other health incidents intrinsically related to rural areas?</p> <p>Are there any specifically rural factors and behaviour</p>	<p>There are few consistent sets of comparator data at a low geographical level to identify particular health issues in rural Ceredigion. For the purposes of health analysis (cf. Institute of Rural Health) all of Ceredigion except Aberystwyth considered as rural; general comments on rural health apply.</p> <p>Some specific rural problems can be identified such as agricultural accidents. Issues such as suicide and depression have been highlighted not because of high overall rates but because of</p>	<p>Forecasts of population change show elderly and especially very elderly increasing in numbers and as proportion of the local population with consequent rise in prevalence of age related conditions; this will particularly affect rural areas with an already higher proportion of elderly in population and where care and provision of services will be exacerbated by problems of rurality.</p> <p>Changes to public sector including health</p>	An area where LSB approach can help mitigate the effects of rural accessibility, the forecast for an ageing population and care problems in rural areas, and the potential effects of changes to existing service provision

<p>underlying good health?</p> <p>Are there any specifically rural factors and behaviour underlying poor health?</p> <p>Are there any specifically rural barriers to health care?</p>	<p>hidden nature and stigma in rural communities make intervention difficult</p> <p>Ceredigion is good example of prevalent problem that rural areas tend to have high proportion of more elderly population with consequently higher levels of conditions related to ageing.</p> <p>Response to accidents and acute incidents in rural areas may be significantly lower than in urban areas; although some contradictory data on whether this has a significant effect on outcome <i>prima facie</i> it would seem residents in rural areas less likely to receive early intervention response necessary to reduce e.g. effect of strokes</p> <p>Some evidence that issues such as housing quality and fuel poverty may have a specific rural dimension (off-gas areas or older housing stock)</p> <p>The major issue related to all health issues in rural areas is access to health services. This ranges for all levels from GP provision to major hospital procedures. However some concern especially about a range of routine health provision e.g. health checks some requiring specialist clinics that may be above range offered by local GPs. Some evidence of distance decay factors in take up of these; access to services may also be conditioned by more stoical attitudes to health intervention in</p>	<p>services will have impact upon rural areas; pressures towards centralization and concentration in fewer centres with greater range of improved services; however potential for increasing accessibility problems for individuals (especially less mobile) and for general health to be affected by distance decay factors</p>	
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	rural areas		
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REDUCE HEALTH INEQUALITIES

Issues	Local Profile and Context	Trends and Implications	Outcomes Priorities Notes
What is the evidence for health inequalities due to deprivation or other social factors at the local level?	Although recognised that inequalities in the wider determinants of health such as deprivation, incomes, employment education etc. lead to inequalities in health, this relationship may be difficult to demonstrate at the local level. Much of the approach is based on a comparison of determinants of health and health outcomes on a small area geographical basis. This is the classical deprived area approach which is seen in WIMD analysis of LSOA data and in PHOW's series of atlas reports on wider health determinants at MSOA level.	<p>It is apparent that ecological approach to correlating poverty and health outcomes is not wholly satisfactory in the case of Ceredigion where poverty and deprivation are more dispersed than in the classic areas. More nuanced or detailed approaches would be needed to demonstrate the link in areas such as Ceredigion e.g. longitudinal studies, case studies.</p> <p>Even without specific evidence at the local level need to keep the keep in mind the link between poor health and poverty/deprivation in local policy making and when scrutinising national initiatives</p>	The link between deprivation and poor health or health inequalities link is a classic area for multi-agency approach; LSB can take into account local factors such as the dispersed nature of deprivation in households and individuals in formulating policy response which may be very different from response to a more concentrated spatial pattern

## SOCIAL CARE AND SUPPORT

### CARERS

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>Extent of current demand for care</p> <p>Burden on carers in the family and friends</p>	<p>From 2001 Census, Ceredigion ranked 20 of 22 UAs in Wales with 10.7% of population caring BUT high HE population masks true picture</p> <p>58% of carers in 2001 aged over 50, 19% over 65</p> <p>2.5% of 7749 carers providing over 50 hours/week</p> <p>Less than 1% of carers giving 50+ hours of care currently provided with LA service</p> <p>StatsWales latest data on provision of services shows downturn but is misleading because of redefinition of criteria</p> <p>2001 Census identifies only 152 carers aged under 16 but local initiative indicates this is a significant underestimate</p>	<p>Ageing population would indicate higher levels of care provision needed in future. Current initiative to provide better support for carers through the "Information and Consultation Strategy for Carers". Carers' own health may suffer from caring burden</p> <p>Focus on young carers via schools</p>	<p>Potential priority area for LSB action given the high likelihood for the situation to worsen, the scale of the issue and the need for a co-ordinated response across agencies</p>

SUPPORTING THE ELDERLY

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>Current and projected elderly population</p> <p>Current and projected prevalence of age-related conditions and diseases</p> <p>Minor falls and accidents as problem issue in elderly health</p> <p>Excess winter deaths among elderly</p> <p>Mobility of the elderly and social isolation of in rural areas</p> <p>Potential for malnutrition in elderly</p>	<p>Population 85+ will more than double by 2030</p> <p>Life expectancy at birth 2008-10 male 80.8 and female 83.9, the highest in Wales</p> <p>Numbers aged 65+ with dementia projected to rise by 79% by 2030; c25% increase in diabetics; 65% increase in number of people with mobility problems; 75% increase in hospital admissions because of falls</p> <p>10% total increase in mental health problems, predominantly in 65+, by 2030</p> <p>No major problem in Ceredigion for EWD when deaths are aggregated over a sufficiently long period, but excess cold identified as housing issue and fuel poverty is an issue</p> <p>Not quantified; some qualitative evidence available from WISERD</p> <p>No local evidence for malnutrition in elderly but likely to be a problem because of less efficient absorption of food, decreased motor skills, etc.</p>	<p>Increase in demand for homecare, residential care, nursing homes, etc.</p> <p>Challenge is to increase healthy life expectancy</p> <p>Minimise falls hazards in housing; provide 'lifetime homes'</p> <p>Improve insulation and heating in homes, but EWD is related to more than just temperature, e.g. influenza prevalence</p> <p>Access to services more difficult for elderly with restricted mobility, compounded by rurality</p> <p>Increased burden on social and health services</p>	<p>Potential priority area for LSB action given the high likelihood, the scale of the issue and the need for a co-ordinated response across agencies</p>

SUPPORTING THE GENERAL POPULATION

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>What is the state of the general health of the population?</p> <p>Are there specific health conditions that could use low-level support in the community?</p> <p>Are there localized high incidences of LLTI?</p>	<p>WHS shows no major problems, other than depression (possibly – conflicting reports). Smoking, obesity, alcohol consumption, exercise all better than Wales average</p> <p>Nothing major – usual lifestyle issues</p> <p>Highest LLTI 2001 in Cardigan Rhydyfowch at 32% (21% overall; Wales) Disabled Facilities Grants show no particular clusters</p>	<p>No major issues specific to Ceredigion</p>	<p>Scope for further multi-agency work under LSB</p>

SUPPORTING THE YOUNG

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
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What kinds of problems do vulnerable young people face?	c.10,000 males and c. 4,500 females under 29 referred because of substance abuse - mostly alcohol, then cannabis.	Targeted interventions already in place, particularly in relation to alcohol abuse	Scope for further multi-agency work under LSB
What is the level of vulnerable young people in the local community?	Not known. Evidence from voluntary sector?		

#### SUPPORT IN RURAL AREAS

<b>Issues</b>	<b>Local Profile and Context</b>	<b>Trends and Implications</b>	<b>Priority Outcome Notes</b>
How are vulnerable people distributed in rural areas?  What issues do vulnerable people face in rural areas?	Distribution is not known but rural areas are increasingly elderly, c.f. average age of farmers. Concomitant risks of loneliness, access to services including timely health interventions, increased demand for care. Suicide level doesn't seem particularly high but numbers are volatile – 2010 four, 2002 twelve.	Access to services, (including getting to place of work/training) is an issue for rural areas; access to health services is increasingly a problem for all residents as Hywel Dda centralises its provision out of the county  c.f. remarks on problems of adaption of older rural housing stock to accommodate 'virtual ward' approaches	Scope for further multi-agency work under LSB to mitigate the effects of ageing population and difficulty of access to care services

## POVERTY

### OVERALL LEVELS OF POVERTY IN CEREDIGION

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
What is the overall level and pattern of poverty in Ceredigion?	According to CACI Paycheck data on household incomes 34.5% of Ceredigion households have a household income less than 60% of the GB median. Ceredigion is ranked as 9 <sup>th</sup> highest of UAs on this measure (Wales = 32.4%; GB = 27.2%).	Although data on employment earnings and household incomes indicate that a relatively high proportion of Ceredigion households may be defined as being in poverty, other data such as the number of benefit claimants would indicate a less severe situation although not an affluent area.	Potential for LSB to take a different approach from prevailing national focus on geographic concentrations of deprivation or poverty and to recognise the different nature of poverty on Ceredigion.
What is the overall level and pattern of deprivation in Ceredigion?	6 Ceredigion ward areas appear in the highest 20% of Welsh wards on this measure (Cardigan Teifi, Mwldan, and Rhydyfowch; New Quay; Aberystwyth Rheidol and Canol. Aberystwyth Canol is the only Ceredigion ward to appear in the highest 10% on this measure.	Some of this is due to the presence of HE student households which may distort any surveys or modelled measures. It is also apparent that some groups in Ceredigion may be relatively affluent compared with other areas (e.g. relatively affluent retirees)	Identification of poverty and its effect on population outcomes in e.g. health and education as well as its effects on crime and community safety are potential areas for the LSB multi-agency approach
What is the nature of rural poverty and effect of poor access to services	Welsh Index of Multiple Deprivation models deprivation on a geographical 'ecological' basis. On the overall WIMD Index there are no Ceredigion LSOA areas in the most deprived 10% and only 2, Cardigan Teifi and Rhydyfowch in the 20% most deprived of Welsh LSOAs. There are no additional LSOAs added by extending the analysis to the 30% most deprived, and only 32% (15 LSOAs) are in the 50% more deprived rankings.	It is apparent that the ecological approach to identifying concentrations of poverty is not wholly satisfactory in the case of Ceredigion where poverty and deprivation are more dispersed than in the classic areas. More nuanced or detailed approaches would be needed to demonstrate the link in areas such as Ceredigion e.g. longitudinal studies, case studies.	

	<p>On an analysis of the individual domains it is apparent that it is only in two areas (housing and access to services) that Ceredigion LSOAs appear in the most deprived rankings in any significant numbers.</p> <p>However, although it can be difficult to assess the significance of benefits data due to the changes to the systems and eligibility, it would seem that Ceredigion has a low proportion of benefits claimants (e.g. Pension Credit, Working Tax Credit etc.) compared to national averages or to other local authority areas.</p>		
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CHILD POVERTY & DEPRIVATION

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>Overall level of child poverty in Ceredigion</p>	<p>Overall the evidence is that Ceredigion has a relatively low rate of child poverty compared with national or other local area data.</p> <p>HMRC data in 2009 snapshot showed that an estimated 2,245 or 17.5% of children in Ceredigion were in poverty. This was the fourth lowest proportion in Wales (Wales average = 22.7%; lowest Monmouth 13.2%; highest Blaenau Gwent 30.2%).</p> <p>At local level there was a wide range from 2.1% (Aberystwyth Bronglais) to 42.6% (Cardigan Teifi) with a median value at 15.5%</p> <p>According to HMRC data for 2010/11 of the total of 6,100 families claiming tax credit in Ceredigion, around 4,600 had dependent children with 2,300 families claiming WTC and CTC, and 2,300 claiming CTC only.</p> <p>HMRC data for 2010/1 also records that 1,000 of the 4,600 families with children claiming Tax Credit were lone parent families.</p> <p>There are no Ceredigion areas in the most</p>	<p>Although local rates appear low there are still a substantial number of children and families with children affected by poverty and associated issues. This number may increase with prolonged impacts of the economic downturn and austerity measures including changes to the benefits system. School meals data show an increase in the rate of take up since 2009/10</p>	<p>Identification of poverty and its effect on child population outcomes in e.g. health and education as well as its effects on crime and community safety are potential areas for the LSB multi-agency approach.</p>

	<p>deprived 10% of Welsh LSOAs on the WIMD Child Index, and only 1, Cardigan Teifi, in the most deprived 20%.</p> <p>According to WG 2012 Local Area Summary Statistics in 2010 Ceredigion had the third lowest rate of children living in workless households (10%) amongst the Welsh local authorities. The rate fell since 2009 and fell since 2004. The gap between the Wales average has widened from being 6.3 percentage points below the Wales average in 2004 to being 8.7 percentage points below the Wales average in 2010.</p> <p>These data are broadly compatible with local measures such as the percentage of children taking up free school meals</p>		
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WORKLESSNESS AND BARRIERS TO WORK IN CEREDIGION

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
What is the extent and pattern of worklessness in Ceredigion?	Once the ca 9,500 full-time HE students are excluded from the analysis economic inactivity rates in Ceredigion are close to or below Wales averages. In 2001 the inactivity rate excluding	The numbers and proportions of workless individuals or households are generally greatly distorted by the high proportion of HE students of working age. A relatively high proportion of early	

	<p>students was 21.8% (Wales = 26.4%) and Ceredigion was ranked 20<sup>th</sup> lowest of the 22 UAs with only Monmouth and Powys having a lower rate.</p> <p>It is apparent that, given the small local sample size, there is great volatility in the more recent the Annual Population Survey series of survey data which has seen the inactivity rate vary between 21.4% (2011) and 26.4% (2012), and the rank to similarly vary between years</p> <p>Similarly although a comparison with Wales UAs, Wales and UK APS unemployment rates generally places Ceredigion well below the national averages and below many of the Wales UAs (e.g. 2012 Wales= 8.6% UK =8.2%; Ceredigion =6.3% rank = 17<sup>th</sup> highest), the data show the same volatility as other APS figures with the relative position in some years being as high as rank 7<sup>th</sup>.</p> <p>On the basis of the APS data therefore it is reasonable to take Ceredigion has having a lower than national average rate of unemployment and for it to be ranked among the lower end of the Wales UAs.</p> <p>In 2012 20.6% of Ceredigion households with HH reference person aged 16-64 were workless. This compares to a Wales average of 22.9% and gives it a rank of 6<sup>th</sup> lowest proportion. (All Wales UAs</p>	<p>retirees also raise the workless measures although many of these appear to be voluntary and perhaps relatively wealthy early retirees.</p> <p>There is little evidence however that Ceredigion has an especially high rate of worklessness and many employment and economic activity rates show Ceredigion ranked among the better UAs in Wales.</p> <p>It is possible that factors related to the nature of the local economy such as a relatively high proportion of self-employment in agriculture or tourism may mean a higher level of hidden unemployment or under-employment, but these are difficult to quantify and compare.</p>	
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<p>What is the extent of young persons' worklessness (NEETS)</p>	<p>except Flintshire, Monmouthshire and Wrexham are above the UK average of 18.7%).</p> <p>The latest WG bulletin cites an estimates 9% NEETS rate for the Mid-Wales sub-region (Powys and Ceredigion) lower than the other Wales sub-regions although the Mid-Wales data is flagged as being of poor quality.</p> <p>At local authority level the school leaver survey-based estimates indicate that 26 persons, 3.3% of the 688 Ceredigion yr. 11 (16 year olds), were NEET in 2011. This is the 6<sup>th</sup> lowest proportion in Wales. On the other hand at age 18 (Year 13 leavers) the proportion has risen to 7.6% (6<sup>th</sup> highest in Wales UAs).</p> <p>However, although WG data (based on pupil destination survey) indicate a very low number and low rate of NEETs in Ceredigion, data from the CYPP indicate a far higher level from their own client data (2011 = 258; 2012 = 135). It is difficult to reconcile these two data sources; the difference is too large to be ascribed to survey error alone.</p>		
<p>What are the barriers to access to employment</p>	<p>Several reports have highlighted the particular problems faced by the employed and job seekers resident in rural areas.</p>		



	<p>Information in the earlier 2003 National Survey of Basic adult Skills indicated that Wales had lower levels of literacy and numeracy than the regions of England. However it is to be expected that the average level of both these skills is relatively high in Ceredigion given the presence of HE students which has the effect of raising all comparisons between the working age populations of the various unitary authorities and Wales averages on any qualification measure.</p>		
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POVERTY AND POOR HEALTH OUTCOMES

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>People in poverty suffer poor health outcomes</p>	<p>Most recently renewed interest in the connection between economic and social factors and health outcomes has been focussed on the local area and the data available on health and deprivation for standard statistical areas which allow a comparison of the geographical pattern of e.g. cancer prevalence and the geographical pattern of deprivation or behaviour such as smoking.</p> <p>This approach is clearly useful when used at an aggregate scale e.g. male life expectancy appears to be significantly lower in the most deprived quintile of Welsh LSOAs (Welsh Assembly Government. <i>Fairer health outcomes for all: reducing inequalities in health strategic action plan</i>. Cardiff 2011), or at a generalised geographic view e.g. geographic pattern of disease prevalence and deprivation for all of Wales.</p> <p>Locally however it may not produce such useful correlations (e.g. comparison of maps of determinants of health and health outcomes)</p> <p>Poverty in Ceredigion is scattered and the nature of the statistical areas in Ceredigion means that they are not sufficiently granular to pick up the</p>	<p>The simple ecological approach to establishing or exploring the link between poverty and health outcomes is unlikely to provide a fruitful course of study. It is more likely that more nuanced approaches such as longitudinal studies or case studies are more appropriate to local circumstances and that these will provide instances of the links shown elsewhere or at national scale. Developed further they may identify specific local dimension of links.</p> <p>Even without specific evidence at the local level need to keep the keep in mind the link between poor health and poverty/deprivation in local policy making and when scrutinising national initiatives</p>	<p>The link between deprivation and poor health or health inequalities link is a classic area for multi-agency approach; LSB can take into account local factors such as the dispersed nature of deprivation in households and individuals in formulating policy response which may be very different from response to a more concentrated spatial pattern. This may concentrate on very specific cases such as vulnerable people in poverty and health; young in poverty and teenage conceptions; looked after children and health outcomes; elderly in fuel</p>

<p>Specific links between poverty and conditions</p>	<p>small pockets of deprivation in rural areas. There are likely therefore to be relatively few areas which correspond well to a simple geographical model of deprived area = unhealthy area.</p> <p>Prevalence of some diseases and other factors in Ceredigion may be relatively small in number and so it may be difficult to show that comparisons between areas or over time are significant</p> <p>There is some basis to suppose some more specific links between the conditions of poverty and specific conditions e.g. the link between poor housing and respiratory disease or mental ill health although there is little evidence to demonstrate these links at the local level</p>		<p>poverty and health, etc.</p>
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POVERTY AND POOR EDUCATIONAL OUTCOMES

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>Evidence for link between poverty and poor educational outcomes</p>	<p>As with establishing the link between poverty and poor health outcomes, the link is largely established by national or wider studies and specific local evidence for Ceredigion is largely lacking. However there is evidence from the CYPP of a significant difference in educational achievement between children taking or not taking free school meals.</p> <p>In 2010 47% of free school meal takers achieved Level 5+ at Key Stage 3 against 73% of those not taking free school meals. This difference can be seen over measures from the previous 5 years and (matters of definition aside) would appear to be a significant difference and one above the Wales average difference</p>	<p>Poverty seems to impact on educational outcomes from an early point in a child’s life. Some studies show that poorly achieving children in poverty are less likely to be able to make up poor educational achievement than children not on poverty.</p>	<p>The link between deprivation and poor educational outcomes is a classic area for multi-agency approach; LSB can take into account local factors such as the dispersed nature of deprivation in households and individuals in formulating policy response which may be very different from response to a more concentrated spatial pattern.</p>

EDUCATION AND EARLY YEARS

EARLY YEARS EXPERIENCE

Issues	Local Profile and Context	Trends & Implications	Priority Outcome Notes
Young Children in workless households	The gap between the Wales average has widened from being 6.3% below the Wales average in 2004 to being 8.7% below the Wales average in 2010 however there is a need.	In 2010 Ceredigion had the third lowest rate of children living in workless households amongst the Welsh local authorities. The rate fell since 2009 and fell since 2004.	Multi Agency Approach
Children in Vulnerable Families and Household circumstances (Domestic Abuse & Violence, alcohol and drug abuse)	There has been an increase in both domestic violence and child abuse, however the conviction rate has also gone up as more people are reporting incidents of abuse, and this is something to keep an eye on.	Domestic abuse is on the up, however so is the conviction rates. This is due to more people reporting incidents than usual.	

EDUCATIONAL OUTCOMES

Issues	Local Profile and Context	Trends & Implications	Priority Outcome Notes
Educational Outcomes for looked after children	As a group looked after children perform less than the average for all children at each stage in their education.	The proportion of looked after children and young people who left care aged 16-19 with at least one GCSE qualification has increased since 2002-03 but is still well short of the target set in 2001. Children who are looked after are less likely to achieve the expected level as assessed by teachers at Key Stages 1, 2 and 3. Moreover, the gap increases as the children get older: at Key Stages 1 and 2, the proportion of all children achieving the expected level is almost double that of children of who are looked after but, by Key Stage 3, the ratio is three times as great.	Multi Agency Approach
Educational Outcomes for children in poverty	The acquisition of qualifications reduces the risk of poverty: some GCSEs (but no good ones) cut the unemployment risk to 5 per cent and the low pay risk to 50 per cent. But it is only with 'A' levels or equivalent (which most of those with five good GCSEs now go on to achieve) that these risks fall below average.	Ceredigion has relatively high levels of educational achievement. Nevertheless, there are still a significant number of residents with poor basic skills. It is important to note that on average children who grow up in poverty are at a disadvantage.	Multi Agency Approach

Educational achievement	Consistently higher than the Wales average Key	Long-standing trend of higher than Wales average school achievement	
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Ceredigion school students	<p>Stage achievements</p> <table border="1" data-bbox="450 268 1061 700"> <thead> <tr> <th>Key Stage – 2011 data</th> <th>Wales %</th> <th>Ceredigion %</th> </tr> </thead> <tbody> <tr> <td>1 (level 2+)</td> <td>82.7</td> <td>86.4</td> </tr> <tr> <td>2 (level 4+)</td> <td>80</td> <td>84.8</td> </tr> <tr> <td>3 (level 5+)</td> <td>68</td> <td>76.7</td> </tr> <tr> <td>4 (5 GCSEs A* to C)</td> <td>67.3</td> <td>71.4</td> </tr> </tbody> </table>	Key Stage – 2011 data	Wales %	Ceredigion %	1 (level 2+)	82.7	86.4	2 (level 4+)	80	84.8	3 (level 5+)	68	76.7	4 (5 GCSEs A* to C)	67.3	71.4		
Key Stage – 2011 data	Wales %	Ceredigion %																
1 (level 2+)	82.7	86.4																
2 (level 4+)	80	84.8																
3 (level 5+)	68	76.7																
4 (5 GCSEs A* to C)	67.3	71.4																
Educational achievement of Ceredigion residents	<p>Qualifications of population – highly qualified, above Welsh average. 2010 no qualifications 5% Ceredigion v. 7% Wales. Fewer than 10 aged 15 pupils leave school each year with no qualifications (generally lower than Wales average, but some volatility because of small numbers).</p> <p>For higher qualifications NQF Level (beyond A level) and above excluding those in full time education (i.e. not dependent upon HE student effects)</p> <table border="1" data-bbox="450 1267 846 1348"> <thead> <tr> <th>Year</th> <th>Wales</th> <th>Ceredigion</th> </tr> </thead> <tbody> <tr> <td>2007</td> <td>32.3</td> <td>34.1</td> </tr> </tbody> </table>	Year	Wales	Ceredigion	2007	32.3	34.1	Long-standing trend of highly qualified population even taking into account the HE student effect										
Year	Wales	Ceredigion																
2007	32.3	34.1																

	2008	33.6	37.2			
	2009	35.6	41.0			
	2010	37.2	43.6			

## WELSH MEDIUM EDUCATION

Issues	Local Profile and Context	Trends & Implications	Priority Outcome Notes
Access to and take up of options for Welsh Medium Education	Ceredigion always advertises that Welsh is essential within Welsh-medium primary schools and within category 1, 2a, 2b and 2c schools. According to the county's data 97% of the county's primary teachers are bilingual and the vast majority of these regularly teach through the medium of Welsh. 65% of the county's secondary teachers are able to speak Welsh and able to teach through the medium of Welsh.	The number of take up options for Welsh Medium Education is on the increase however there is a need for continuing support towards teachers and staff to ensure the Welsh Language is used and taught throughout the school years.	Multi Agency Approach

## EQUALITY

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
Pay differences for gender	<p>Women in Ceredigion have a lower median weekly pay than Men, and both are lower than the median pay in Wales and the UK as a whole. However there is still a pay gap between full time men and women, although the gap in Ceredigion is less than in Wales and the UK as a whole.</p>	<p>There is a noticeable gap between pay for full-time employed men and women in Ceredigion.</p>	<p>Little scope for LSB action outside their own organisations but will impact on other areas of equality and poverty</p>
Experience of BME groups in Ceredigion	<p>Non-white ethnic groups from only a small proportion of the Ceredigion population (1.4% in 2001 Census liable to be higher in 2011 Census) and mainly concentrated in Aberystwyth with a high proportion related to HE sector.</p> <p>Anecdotal information and data from NI registrations and other official sources shows growth in non-HE international migrants including from E European EU Accession states. Local education sector etc. has long experience of working with international migrants to HE sector.</p> <p>No evidence of particular problems with racially motivated hate crime in Ceredigion.</p>	<p>Apparent that the non-HE related international migrant population has increased since 2001 and will continue to grow with greater movement especially of EU nationals.</p> <p>UK policies to reduce migration from outside EU may have impact on local non-white ethnic and non-British groups.</p>	

Problems of Isolation in rural communities	No data available at present	Recognise there may special problems for a number of minority groups in rural areas caused by isolation and difficulties of accessing informal and formal support networks	Multi Agency Approach
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# CEREDIGION HOMES

## GENERAL HOUSING DEMAND AND SUPPLY

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>Provision of general housing supply to meet general demand</p> <p>Housing stock by size</p> <p>Housing requirement by household size</p> <p>Number of houses built and ready for occupation</p> <p>Empty private properties as a % of total private stock</p>	<p>Ca 34,500 individual dwellings (houses, &amp; flats) in Ceredigion; housing needs surveys and population and household projections have identifies a dwelling requirement of ca. 500 additional dwellings p.a. The study identified a requirement for housing for smaller households especially single person households</p> <p>Ceredigion traditionally has a high rate of owner occupancy; private rental sector is more important than social sector</p> <p>Supply from new build and conversions in mid-2000s at a slightly lower rate ca 400 p.a. and more recently even lower affected by economic downturn</p> <p>There is no evidence of a medium- or long-term surplus of housing stock; numbers of vacant property remain fairly stable and consistent with normal turn-over. There has been a decrease in house sales since 2008 crisis</p>	<p>The effects of the 2008 crisis on local and national house supply still continue; local developers are small scale and liable to react quickly to changes in market retrenching activity to meet demand</p> <p>State of private development market have implications for all areas of housing given the local predominance of owner occupancy, the large private rental sector, and the policy shift to providing affordable housing through private developer contributions</p>	<p>Overall dwelling requirement and type of housing including affordable housing is contained within the Ceredigion Local Development Plan; the LSB should also be aware of the effect that changes in the open and semi-closed housing markets have an effect on the wider provision of housing including new intermediate types and tenures</p>
Lack of suitable	Evidence of housing quality surveys etc indicate a	Forecasts of population change and prevalence of	Great potential for LSB

housing for the elderly	<p>high proportion of elderly resident in older housing often without the benefit of more efficient heating systems and with inherent design risks for the elderly (e.g. steep and narrow stairways).</p> <p>Although there is an existing supply of sheltered accommodation and wardened developments these appear very small against the total stock occupied by the elderly; new initiatives such as houses for life developments are in train but there is take-up is slow.</p>	<p>age related conditions indicate a continuing rise in the need for care for the elderly; trends in health and care indicate a change to more home-based services including homes for life and a series of gradations in housing adaptations; however difficult to see how a 'virtual wards' approach can be accommodated within the older stock</p> <p>Changes to SHG will reduce further the options for all types of non-profit specialist housing</p>	multi-agency approach involving planning process, housing health and social care services
Specialist housing needs	<p>ORS 2004 study identified housing needs such as existing homes that were unsuitable for residents because of mobility difficulties etc. which could be resolved by <i>in situ</i> solutions and adaptations. Approximately 2,400 (7.5%) of households contained a person with problems moving around the home. A further 211 households had people with other support needs.</p>	<p>Changes to SHG will reduce further the options for all types of non-profit specialist housing</p>	Potential for LSB approach
Lack of suitable housing for the single person/small households	<p>Both the Ceredigion Housing Needs Survey and household projections show a need for a greater proportion of housing to meet the needs of smaller households, especially the growth in one-person households. This growth of one-person households does not necessarily translate directly into a need for more one-bedroom dwellings as one-person household will result from a variety of social change factors including dissolution of</p>	<p>The ORS Housing Needs Survey identifies a net requirement for around 45% of the 2,100 5 year requirement to be one- or two-bedroomed dwellings.</p> <p>Changes to benefits will only allow young adults (up to 35) housing benefits for shared accommodation; liable to increase demand for shared accommodation for HB claimants; HB 'bedroom tax' will penalise over occupancy and</p>	<p>Overall dwelling requirement and type of housing is contained within the Ceredigion Local Development Plan; the LSB should also be aware of the effect that changes in the open and semi-closed housing markets have an effect on the wider</p>

	larger households, the death of partners, etc.	so will increase demand for smaller units.	provision of housing e.g. in providing suitable priced and sized housing for Housing Benefit claimants under new regulations
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Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
Affordability problems in owner occupancy and private rental sector	The long-term evidence shows that Ceredigion housing affordability as measured by ratio of incomes to prices was fairly stable and although slightly higher than Wales was below England; from ca 2003 onwards local house prices rose at faster rate than Wales or England so that by 2007 the lower quartile price was equal to around 6 times the median household income one of the highest ratios in Wales and above the 'ideal' ratio of 3.5; affordability problems particularly noticeable at lower end of market where might be expected to be entry to owner-occupancy; similar problem identified in the private rental sector; Aberystwyth especially identified as a problem area due in part to buy to let landlords with prices supported by continuing rising demand from HE students	<p>Despite 2008 economic downturn has had some effect on local supply prices have not fallen far off 2007 peaks whilst measures of local income have fallen; affordability ratios remain high.</p> <p>These affordability issues have repercussions throughout the local housing sector given the strong link (especially strong locally) between private owner- occupancy market and other parts of the overall housing market</p> <p>Local house prices have maintained high level through continuing demand against weak supply and this might persist in medium-term</p> <p>Effects of affordable housing supply policies on the overall market are difficult to judge as until recently mainly at a low level; overall effect may be counter-productive if policies act to worsen general affordability in open market as developers need to fund affordable housing provisions</p>	Overall affordable housing requirement and policies are contained within the Ceredigion Local Development Plan and the Housing Strategy including work of affordable housing officer and rural housing enabler; the LSB should also be aware of the effect that changes in the open and semi-closed housing markets have an effect on the wider provision of housing including new intermediate types and tenures

## HOMELESSNESS

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
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Level of homelessness	Awaiting data on number of applications and accepted homeless in Ceredigion	Major concerns about the impact of benefit changes (HB but also others) on housing status of most deprived Increased pressure on homelessness services due to HB arrears and duty to assist.  Increased pressure on homelessness services and housing options due to the inability to find suitable accommodation post 'bedroom tax' restrictions in an already tight market for shared/one and two bed homes	Although limited room for direct intervention LSB approach may mitigate the effects of benefit changes; long-term approach with Planning etc. to increase supply of suitable sized homes in local markets
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## HOUSING QUALITY

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
General housing quality	<p>Housing quality surveys have tended to show persisting characteristics of local housing stock</p> <ul style="list-style-type: none"> <li>• a high proportion of older housing</li> <li>• a high proportion of properties in rural locations</li> <li>• a high proportion of private rented accommodation</li> <li>• a high proportion of student households</li> </ul> <p>Although 2007 Survey data shows some improvements compared with 1998, overall the results confirm the main failings of the local housing stock when measured against national standards.</p>	<p>Housing quality issues have an impact on a number of related care and health issues such as cold or damp homes and fuel poverty; impact on less mobile elderly population; hazards from falls and other accidents in the home resulting from poor design; environmental design and maintenance impacts on well-being and feeling of safety.</p> <p>The nature of available housing stock will have an impact on the practicality of implementing plans to deliver more longer-term care in the home (e.g. virtual wards); elderly residents may wish care to be developed in their existing home rather than in new purpose built housing</p>	<p>Work progressing by housing associations and local authority housing strategy on improving aspects of housing quality such as energy efficiency; benefit from considering especially issues such as vulnerable people and improvements or in developing home care in existing stock</p>

FUEL POVERTY

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
<p>Households in fuel poverty are defined as those households spending more than 10% of income on heating; and so relates to low income and housing quality</p>	<p>Evidence from modelled data e.g. University of Bristol show the highest proportion of households in fuel poverty are found in those areas of older housing in the centre of Aberystwyth (areas already identified in the WIMD on the basis of 2001 Census) and Cardigan as well as inland rural areas which similarly have a high proportion of older housing stock and poor heating.</p> <p>Problem exacerbated in Ceredigion by large proportion of properties off the gas network</p> <p>Housing condition survey (2007) showed that excess cold is the greatest hazard in the Ceredigion housing stock with 17% of dwellings categorised as Category 1 hazard (i.e. where the authority has general duty to act) and 11,197 (30.6%) categorised as Category 2. The highest proportion of housing in Category 1 excess cold is found in the rural areas and in small towns such as Tregaron, Llandysul, and New Quay and Aberaeron.</p>	<p>Fuel poverty has an impact not only on household budgets and overall spending, but also when it forces households to reduce level of heating leads to poor health outcomes especially for the immobile or vulnerable groups such as elderly sick or young children</p>	<p>Work progressing by housing associations and local authority housing strategy on improving energy efficiency of existing stock; benefit from working with social care organisations to identify vulnerable households</p>

PRIVATE RENTAL SECTOR

Issues	Local Profile and Context	Trends and Implications	Priority Outcomes Notes
Aberystwyth PRS	<p>Identifiable highest concentration of PRS in older parts of Aberystwyth with specific problems related to housing quality (e.g. Aberystwyth Canol is worst area in Wales on WIMD Housing domain) but also to environmental problems of noise and other nuisance</p> <p>Related to growth of HMO and studentification of old town areas where HE student tenants form high proportions of households in many streets (up to 40%)</p>	<p>Environmental nuisance causes problems for students and non-student residents of town and may accelerate individual decisions to leave area</p> <p>Studentification problems apparent due to landlord complacency over standards of housing quality and tenant management stemming from assured supply of transient tenants during university expansion</p> <p>However, nature of students and student expectations is changing and there is the potential for de-studentification of these older town areas as student growth slows and the university seeks to attract students through provision of higher quality managed accommodation.</p>	<p>LSB approach may provide multi-agency support to improve housing quality and landlord management and to improve environmental conditions and to support non-student households in town areas</p>

## SUSTAINABLE GROWTH AND JOBS

### LOCAL LABOUR MARKET

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
High rate of economic inactivity and worklessness	<p>There are a number of different methods of counting or estimating the total workforce in Ceredigion. According to Census the economically active population grew from 23,400 in 1981 to 31,600 (aged up to 74) in 2001.</p> <p>According to Annual Population Survey April 2011 to March 2012 (volatile survey data): Total number aged 16 to 64 = 48,200; economically active 16 to 64 = 31,800 i.e. 65.9% economic activity rate</p> <p>No evidence of particularly high rates of worklessness in Ceredigion once HE students have been accounted for; some growth in most recent years in unemployment (see data under Poverty section)</p>	Some expected rise in unemployment with the continuing economic downturn and its effects on private and public sector	Economic inactivity or worklessness at any level is bad for individuals and for local economy; actions for the LSB may focus on mitigating the effects as much as on the causes of worklessness
High proportion of part-time and casual employment	Although economic activity rates may not be particularly low Ceredigion like many rural areas may see high proportion of part-time work (69.3% of employed; Wales = 73%) and casual working e.g. in tourism or agriculture; however this is not necessarily a feature unique to rural areas and higher rates of casual and	High proportion of employment in tourism related industry but no evidence that proportion in part-time employment is particularly high against other areas in Wales; less easy to see nature of self-employment which may include casual and under employment	

	underemployment may also be seen in urban areas		
Employment vulnerability public sector and local industry structure	<p>On a simple analysis Ceredigion (37% of employee jobs) has a significantly higher proportion of public sector employment that seen in Wales or the UK in general, as well as having the highest proportion of public sector employment among all 22 Unitary Authority areas in Wales.</p> <p>High rate of public sector employment due to universities and other national institutions; local employment in the more general public sector employment is not especially high.</p>	Prevailing political and economic climate indicates pressure on employment in all areas of the public sector making areas with high rate of public sector employment vulnerable to change although the public sector in Wales has been relatively protected to date by the policy approach of Welsh Government; Areas such as HE and health may be especially vulnerable to wider change in the UK	

## INDUSTRY STRUCTURE

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
Skewed distribution with high number of small units and small number of large employers in public sector	<p>Ceredigion has the highest proportion of zero or micro sized enterprises (94.8%) and the lowest proportion of small (2.9%) and medium sized enterprises (0.7%) of the 22 Welsh UAs. The county has one of the lowest proportions of large employers (1.7%).</p> <p>Ceredigion has consistently been noted as an area with a high level of self-employment; in the 2001 Census Powys (25.4% of economically active aged 16 to 74) and Ceredigion (24.8%) were</p>	The industry base in Ceredigion appears to offer little potential for growth without a radical change in direction. The small manufacturing sector means that outside of food manufacture, which has some presence, growth through synergy between existing enterprises is difficult and the manufacturing skills base is very limited. Some potential is offered by providing the environment for start-up enterprises related to innovations from the academic sector e.g. from IBERS developments and from collaborative work	Limited scope for action by the LSB but context for issues related to work, economy and poverty



enterprises, low business formation rates	<p>per annum in Ceredigion, compared to around 10% in England and Wales.</p> <p>Business creation also takes place in enterprises below the financial thresholds for VAT registration, but reliable data is hard to obtain. It is apparent that if this is the case a relatively small proportion of these businesses are growing into enterprises sufficiently large to require registration.</p>		
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## ECONOMIC PRODUCTIVITY

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
Low economic productivity	<p>Ceredigion is included together with Pembrokeshire and Carmarthenshire in the South-west Wales NUTS3 area. The 2009 SW Wales Gross Value Added per head was £11,948 i.e. 59.7% of the UK average.</p> <p>However a per capita GVA estimate for Ceredigion would be more likely to be nearer to the Powys than to the SW Wales estimate. The latest WG Mid-Wales economic profile (June 2012) reports that in 2009 Powys GVA is estimated at £1.6bn, or £12,300 per head. This represents 61.6% of the UK rate and can be compared to the Wales GVA which is around</p>	Difficult to be sure of a true local measure of GVA but the indications are that it is relatively low in UK and liable to remain low	Limited scope for action by the LSB but context for issues related to work, economy and poverty

	73.3% of the UK average.		
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EMPLOYMENT INCOME

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Low employment earnings</p>	<p>No measure of all earnings (i.e. including self-employment) According to ASHE data on employee earnings Ceredigion consistently appears in the lowest ranks in GB on either the mean (e.g. 11<sup>th</sup> lowest from 460 local authorities in 2010) or median (29<sup>th</sup> from lowest) measures of total earnings. This appears to be related in the main to full-time earnings. On measures of part-time earnings Ceredigion appears among the middle ranks of local authorities (e.g. in 2010 median rank = 94<sup>th</sup> highest; mean rank= 250<sup>th</sup>). On measures of full-time earnings, however, the county appears among the very lowest ranks (8<sup>th</sup> from lowest on median and mean measures in 2010).</p> <p>The ASHE series does show some variation in ranking over the years with Ceredigion apparently being ranked a little higher on the overall earnings on past annual surveys (e.g. 2004 all earnings median r = 24<sup>th</sup> lowest; mean = 15<sup>th</sup> lowest).</p>	<p>Ceredigion has historically been seen as a low wage predominantly rural economy, even the development over recent decades of higher education institutions, central government functions and some manufacturing industry have apparently failed to raise average wages in the county from the lowest ranks of local authority areas in the UK.</p> <p>The main reason for a low level of average earnings in Ceredigion is not so much low wages in the existing employment sectors, but rather a lack of significant industry sectors such as manufacturing or financial services where high average wages (including overtime and bonus payments) help maintain high aggregate levels.</p> <p>It appears therefore that recent years have seen full-time earnings in the county fall behind rises to national earnings. This could be a result of a fairly static local labour market with Ceredigion lacking some of the more dynamic sectors which have seen more dramatic growth a national level (e.g. manufacturing or financial services), and a greater reliance on public sector employment which has seen low increases or a freeze on</p>	<p>Limited scope for action by the LSB but context for issues related to work, economy and poverty</p>

		wages. Unlikely to see any change in this circumstance over short- to medium-term Changes in public sector such as HE sector may work to reduce average full-time employment income measures	
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## HOUSEHOLD INCOMES

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Low household incomes</p>	<p>In 2011 the mean household income in Ceredigion was £29,067 and the median income was £23,825. This compared to Wales mean of £31,435 and median of £25,157, and a UK mean of £36,010 and a median of £28,990. In terms of comparison with other Wales UAs Ceredigion was ranked 17<sup>th</sup> and 14<sup>th</sup> respectively on the mean and median ranking.</p> <p>Ceredigion seems to have fallen in its relative position in the ranking of UAs since the household income was first published in 2006. In 2006 Ceredigion was ranked 14<sup>th</sup> on the mean measure (£27,509) and 10<sup>th</sup> on the median measure (£23,772).</p> <p>There is no separate measure for Ceredigion on Gross Disposable Household Income. Data for Powys (2010) shows a GDHI of £14,166 per head. This is equal to 90.1% of the UK level (higher than the Wales indexed figure of 88.7%). The relatively high Powys GDHI figure compared with a relatively low employment earnings and household income measures would indicate that households in Powys may have lower household expenses for example in areas such as housing</p>	<p>The fact that Ceredigion has a relatively higher ranking on household income against the employment earnings ranking indicates that non-employee earnings income in Ceredigion is relatively higher than in some other UAs in Wales. This is assumed to be due to factors such as higher incomes from self-employment or higher pension incomes among retired population.</p> <p>Some of these factors may show a decline over coming years with a fall in retirement and investment incomes.</p>	<p>Limited scope for action by the LSB but context for issues related to work, economy and poverty</p>

<p>Low gross disposable household income</p>	<p>costs. This turn may be related to the higher proportion of elderly households, especially more the more wealthy households who are outright home-owners. The same factors may apply to some degree in Ceredigion.</p> <p>The WG Local Area Summary Statistics include a per capita estimate of £13,619. As with GVA this estimate of GDHI is merely the “per household” estimate for the South-West Wales NUTS 3 Area. It may debatable how alike or unlike Ceredigion and the other two UAs area in economy and productivity.</p>		
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## RURAL COMMUNITIES

### ACCESS TO SERVICES IN RURAL AREAS

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Measures of sparsity and settlement pattern</p> <p>What is the nature of access problems in rural areas of Ceredigion</p>	<p>On the measure of the 2010 population estimates Ceredigion is the 10<sup>th</sup> (Powys only one higher in Wales) most sparsely populated local authority areas in Wales and England with 43 persons per sq. km (Wales = 145 /sq km).</p> <p>This general sparsity is exacerbated by the settlement pattern of Ceredigion. There is a notable concentration of population in Aberystwyth (ca 18,000) but the other towns Cardigan, Lampeter, Aberaeron, Tregaron, Llandysul, are small in comparison with other rural areas of the UK.</p> <p>Overall a high proportion of the population, around 55%, lives in rural areas outside the towns.</p> <p>WIMD Access to Services domain provides an easily comparable measure of access problems in</p>	<p>Low population densities, sparsity, and poor access to services are the major issues that define rurality.</p> <p>Ceredigion is not just a 'rural authority' in terms of overall classification; it is also overwhelmingly rural in nature with only Aberystwyth town being classified as an urban area. Settlements in the area including towns outside of Aberystwyth are very small. The county also contains areas that can be defined as deep rural areas.</p> <p>The ability to deliver services using current models will be severely limited in an area with a sparse scattered population and relatively few centres with sufficient population to support a range of basic services.</p>	<p>Many of LSB objectives for delivery of services will be affected by challenges of service delivery for residents of rural areas</p>

	<p>Ceredigion compared to the rest of Wales. All but 10 LSOAs (all in Aberystwyth, Cardigan, Lampeter and Aberaeron) are in the most deprived 50% of Welsh LSOAs. 21 LSOAs are in the most deprived 10% of LSOAs with a further 9 in the most deprived 20%. On the local authority analysis Ceredigion is second only to Powys with 44.7% of the LSOAs in the most deprived 10% in Wales.</p> <p>When accessibility by public transport is considered it is apparent that a high proportion of the population of rural areas are remote from regular transport services and would be unable to access services in a reasonable time using a combination of walking and public transport.</p>		
<p>State of local services in rural settlements</p>	<p>There has been a clear lag between Ceredigion and other rural areas in changes to rural services (Many other rural areas saw major declines as far back as the 1950s or earlier).</p> <p>Despite the maintenance of a local services in rural Ceredigion, this was not a strong base, and services struggled to meet increased commercial and political pressures from the 1980s onwards e.g. individuals' higher expectation of financial rewards, move to greater commuting to towns for more varied employment, more commercially aggressive attitude to local services by public sector providers, higher burden from regulatory</p>	<p>Speed of decline appears to have reached a height in 1990s and early 2000s. Since then there is some evidence of a slowing of the process with only a small year on year net loss of facilities. Noticeable that new models of public and commercial service provision are being adopted more rapidly in the local area. In this local services appear to be benefitting from the closing gap between urban and rural areas and the decreasing isolation of the latter in commercial and economic terms.</p> <ul style="list-style-type: none"> <li>• Widespread adoption of the symbol brand franchise model of general store</li> </ul>	<p>Potential role for LSB in maintaining rural services through new models of service delivery e.g. multi-function facilities</p>

	<p>and commercial developments requiring greater investment and higher overheads, greater expectation from new rural residents, etc.</p> <ul style="list-style-type: none"> <li>• Centralisation of key services formerly found in smaller centres in larger facilities offering wider range of functions</li> <li>• Closure of uneconomic rural businesses pubs and shops (e.g. on retirement of individuals) and conversion to more profitable residential use</li> <li>• Start of rationalisation of public facilities e.g. primary schools many of which had very small pupil rolls against a general recognition of large number of surplus places in Ceredigion schools</li> <li>• Active closure of uneconomic and small capacity branches by PO</li> </ul>	<p>e.g. Premier, Londis, Nisa, and Spar in rural areas.</p> <ul style="list-style-type: none"> <li>• Concentration of services on service station sites which provide sufficient passing trade on main routes</li> <li>• Some evidence of diversification specialisation in rural retail and services or differentiation e.g. marketing local goods or home-made food; given the limited market catchment of some centres this is most likely to act as one factor in the success of any business.</li> <li>• Some moves towards community action in support for local services but only limited reach so far in Ceredigion</li> </ul> <p>In the future development may be added:</p> <ul style="list-style-type: none"> <li>• Anticipated there will be further loss of individual businesses and services but not at pace seen in past. These may be related to individual decisions e.g. retirement of small local businesses, or to continuing rationalisation e.g. PO branches</li> </ul>	
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		<ul style="list-style-type: none"><li>• Most vulnerable services are those in smaller villages with only very small local catchment and little opportunity to attract passing trade</li><li>• Continuing rationalisation of primary school provision with more area schools and school amalgamations</li><li>• Potential for more peripatetic or mobile services where personal contact is required (e.g. with elderly groups)</li><li>• Inevitable overall rise in fuel prices will gradually change attitudes to shopping and leisure opportunities with at least some trips (e.g. daily food shopping) being shifted to more local centres rather than larger towns</li><li>• Adoption of Rural Service Centre policy will concentrate residential development in larger villages maintaining a local population within easy distance of village facilities</li></ul>	
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<p>Access to the digital world</p>	<p>Although there have been some improvements in broadband and mobile phone coverage , Ceredigion remains one area where a substantial proportion of households are disadvantaged by lack of full digital access. Although Wales lags UK average take up rates in rural Wales(73%) and in Mid Wales (70%) are higher than in urban Wales (68%) reflecting the importance of access in rural areas despite coverage problems.</p> <p>Welsh Affairs Committee report Sept 2012 specifically mentions Ceredigion as a ‘notspot’ area</p>	<p>Central government initiatives and the Welsh Government's Regional Innovative Broadband Support scheme (c.f. Welsh Affairs Committee report) should increase coverage in all rural areas over the next few years. The WG Next Generation Broadband for Wales initiative promises high speed fibre-based provision to 96% of homes by 2015 but the detailed rollout programme is yet to be decided.</p> <p>There are still lots of holes in mobile phone coverage in the county. The 4G mobile network is now becoming available but only in major cities and 3G penetration is poor in Ceredigion.</p>	<p>Limited actions for LSB but access will condition the contribution of digital modes to service innovation</p>
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**POVERTY IN RURAL AREAS**

<b>Issues</b>	<b>Local Profile and Context</b>	<b>Trends and Implications</b>	<b>Priority Outcome Notes</b>
<p>What is the nature and pattern of poverty and deprivation in rural areas?</p> <p>What are the barriers to education</p>	<p>See notes in Poverty section above on the challenge of measuring rural poverty and deprivation</p> <p>The WIMD employment domain based entirely on employment-related benefits. No truly rural local areas appear in the worse 50% of Welsh LSOAs (Aberporth does appear in the 40% to 50% group).</p>		<p>Scope for LSB approach in developing policies which effectively impact on rural poverty and deprivation</p>

<p>and employment in rural areas</p>	<p>The WIMD Income domain is based upon the HMRC data on the %age in receipt of income benefits and with children in poverty.. No rural areas of Ceredigion are in the worse 50% of Welsh LSOAs except for Tregaron which is in the 40% to 50% group.</p> <p>Other income related benefit data notably Housing Benefit which is available on an individual household basis shows the scattered nature of poverty in rural areas. Usually the only concentrations of households receiving benefits are found in social housing estates in the larger villages.</p> <p>There are proportionally fewer households or individuals in poverty in rural areas than in urban areas</p> <p>Individuals and households that are deprived or in poverty are well scattered across the area</p> <p>Concentrations tend to be very small e.g. social housing estates in larger rural villages and so these do not show well in the geographical area of e.g. WIMD study.</p> <p>The close association between social housing and deprivation and poverty indicators accounts for the 'vaguely visible' nature of rural poverty e.g. different analyses with different parameters</p>		
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	<p>show some areas coming and going on various measures c.f. higher than county average of children in benefit households in area in the lower Teifi valley between Cardigan and Llandysul (which includes those towns and Adpar); and an area across the centre of the county from Llanarth across to Lampeter and N to Tregaron</p> <p>Some issues may have specific rural dimension:</p> <ul style="list-style-type: none"> <li>• Access to services</li> <li>• Housing quality, and fuel poverty in off-gas areas</li> <li>• Costs of travel including need to maintain private transport</li> <li>• Low incomes in rural occupations</li> <li>• Stigma of poverty and low take up of benefits and help</li> </ul>		
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Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
What are population needs for support in rural areas	See section in Supporting people		An area with potential for multi-agency LSB approach

## SAFER COMMUNITIES

### REDUCING THE LEVEL OF CRIME AND FEAR OF CRIME

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>What is level and pattern of crime? What is the level of perception and fear of crime?</p>	<p>In general compared with other areas of Wales or the UK Ceredigion has very low rates of recorded crime in all categories. In many crime categories absolute numbers are very small and therefore may be difficult to see significant trends.</p> <p>On the negotiated Crime Reduction Targets, for example, Ceredigion appears to have seen a declining or stable situation against the 2007/08 baseline. However absolute numbers of some crime categories will be very low.</p> <p>However, taking the latest overall crime data and comparing 2010/11 with 2011/12 there appear to have been significant rises in some categories of recorded crime in Ceredigion:</p> <ul style="list-style-type: none"> <li>• Fraud and forgery (+19; +26%)</li> <li>• General theft (+42; +7%)</li> <li>• Non-domestic burglary (+63; +51%)</li> </ul>	<p>Recorded crime and perception of crime are issues dealt with at length in the strategic needs assessment of the Ceredigion Community Safety Partnership.</p> <p>In summary there are largely low crime rates in Ceredigion. Small numbers in some categories make comparison of rates between areas and across time difficult. Rates and incident numbers may show greater variation because of small number effect. Crime in Ceredigion will be subject to same overall factors as rest of society e.g. unemployment and economic hardship factors; greater use of alcohol, etc.</p>	<p>Recorded crime and perception of crime are issues dealt with at length in the strategic needs assessment of the Ceredigion Community Safety Partnership.</p> <p>The Safety Partnership has a number of strategic priority areas. Although improvement of social conditions will have an effect on overall crime rates the following strategic areas may be particularly suitable for a LSB approach:</p> <ul style="list-style-type: none"> <li>• The night-time economy</li> <li>• Violent crime and</li> </ul>

	<ul style="list-style-type: none"> <li>• Violence against the person (+95; +14%)</li> </ul> <p>Crime in other categories sexual offences, domestic burglary, and vehicle crime have risen over the past year but numbers of additional crimes are very small.</p> <p>NB not easy to reconcile many of the data because of the variety of classifications and sub-classifications used for various purposes.</p> <p>Perception of Crime</p> <p>No data available for Ceredigion separately. BCS data for Dyfed-Powys Police area show public perception of the risk or likelihood of anti-social behaviour, household crime, and drunk and rowdy behaviour, are among the lowest among all Eng &amp; Wales UK police forces. The perception of the risk of personal crime is ranked a little higher than some other force areas.</p> <p>DPP's own public perception surveys tend to show slightly different views reflecting the relative view of local people within the area. i.e. most people recognise the low risk of crime of all types but none the less when asked which they see as a problem will focus on certain issues.</p> <p>The majority of respondents (1077) believed</p>		<p>alcohol related crime</p> <ul style="list-style-type: none"> <li>• Anti-social behaviour and the fear of crime</li> <li>• Road safety</li> <li>• Substance misuse</li> </ul>
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	that Burglary/Theft was a concern for them in their community, closely followed by 1076 respondents who had 'no problems' in their community. The other main concerns respondents had were Fly Tipping (853 responses) and Car Crime (643 responses).		
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REDUCING HARM ASSOCIATED WITH SUBSTANCE MISUSE

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>What is level of substance abuse?</p> <p>What is level of crime associated with substance and alcohol abuse?</p>	<p>This theme relates directly to the CCSP's Strategic Priorities:</p> <p>Night-time economy</p> <p>Violent crime and alcohol related crime</p> <p>Anti-social behaviour</p> <p>Substance misuse</p> <p>There are strong links between the first three issues. In general it can be seen that a high proportion of reported violent crime and anti-social behaviour incidents are spatially linked taking place in and around town centres especially Aberystwyth e.g. Central and Rheidol wards but also Cardigan Teifi and other smaller</p>	<p>The presence of the university and social gatherings associated with the relatively large population of young people as well as the general attraction of Aberystwyth town as a social event centre are major factors behind any higher rate of possession or use in the area compared with other rural authority areas.</p>	<p>Potential for LSB multi-agency approach in tackling some of the factors behind substance and alcohol abuse and mitigating the effects</p>

<p>What is level and pattern of anti-social behaviour?</p>	<p>towns); the highest incidents take place at weekends and especially during the evening hours from 6pm to 6am; and are strongly linked to alcohol.</p> <p>The town centres are an obvious concentration of activity at weekends and weekday evenings. This is especially so in the case of Aberystwyth with very large local population of young people including HE students and which also acts as a draw for individuals and groups.</p> <p>Reported noise nuisance is one measure of the temporal dimension with 35% of complaints between 6pm to midnight and 17% of complaints from midnight to 6am. Although higher at weekends in fact it is less marked in Ceredigion and the area shows higher levels of e.g. alcohol-related criminal damage throughout the week than other DPP area authorities, presumably a reflection of the more continuous use of the town as a social centre by various groups including students and tourists.</p> <p>Alcohol continues to be a significant factor behind criminal damage and anti-social behaviour and violent crime. In 2012 ca. 600 crimes of lesser violence against the person were linked to alcohol a rate (7 per 1000 close to that of the other force areas). There were 130</p>		
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	<p>criminal damage crimes linked to alcohol (mainly damage to cars and buildings) a rate lower than that of other DPP force areas.</p> <p>Substance misuse apart from alcohol is less likely to be a factor behind criminal damage and the sort of incidents and crimes associated with excess alcohol consumption. Ceredigion has reported falling drug possession crime but still has a relatively high rate of possession crime in national comparisons which can be attributed to a more active policing policy.</p>		
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DOMESTIC VIOLENCE AND ABUSE, GENDER AND OTHER HATE CRIME

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>What is level and patter of domestic abuse and hate crimes?</p>	<p>There were 264 domestic violence incidents in Ceredigion in 2011/12 of which 14% were repeat incidents (in previous 12 months). There were 134 crimes of domestic violence of which 11% were repeat incidents.</p> <p>The incident figure represents a rise on the 2007/08 figure (217) and subsequent years, but the repeat incident rate is lower than in previous years. This may be due to the success of the intervention methods such as MARAC.</p> <p>Alcohol is strongly linked to incidents of domestic violence and is a significant risk factor for children on the Child Protection Register.</p> <p>Victims of domestic violence are more often female (87%) than male and obviously the pattern includes male to male and female to female as well as male to female and female to male violence.</p> <p>In total there were 35 incidents of hate crime in Ceredigion in 2011/12 and 17 hate crimes, more or less static compared with 2010/11.</p>	<p>Overall rates of domestic violence do not appear high in comparison with other areas. Increases in reporting is more likely to be an indication of better response and interventions than an actual increase in incidents</p>	<p>Scope for the LSB development of the multi-agency approach already in place to tackle domestic violence and vulnerable families</p>

REDUCTION AND PREVENTION OF YOUNG OFFENDING

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
What is nature of young offending?	<p>344 offences committed by youths (11 to 17) main categories assault (20%); shoplifting (19%); criminal damage (12%); public order (11%).</p> <p>Data on first time entrants and custody etc. not yet available</p>	<p>In sufficient data and contextual information has been collated at this point to fully assess the trends and implications of youth offending.</p> <p>It can be assumed that there may be strong links with other forms of behaviour and links to factors such as unemployment.</p>	Scope for LSB approach in reducing the factors behind youth offending in the community in general and at the specific case level of individuals and families

#### IMPROVING SAFETY IN COMMUNITIES

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>What is level and pattern of serious road traffic accidents?</p> <p>What is level and pattern of fire incidents and casualties?</p> <p>Are there any urban landscape design issues in Ceredigion?</p>	<p>What is level and pattern of serious road traffic collisions/accidents</p> <p>Recorded where injury sustained 2010 = 208; 2011 = 209; Injured 2010 = 340; 2011 = 320</p> <p>Fatalities 2010 = 5; 2011 = 4; serious 2010 = 45; 2011 = 56</p> <p>Data on location and type of accident cause not studied in detail although CCSP Strategic report lists main causes of RTCs investigated by Police to be due to :</p>	<p>Overall RTCs have decreased by around 25% from 1990s and early 2000s. Some concern has been raised about potentially high rate in Ceredigion, but this is not borne out by the rate per 100 km measures.</p> <p>2007 Accidents per 100 km of road = 12.1 (r = 4<sup>th</sup> lowest in Wales)</p> <p>2007 Casualties per 100 km of road = 19 (r = 4<sup>th</sup> lowest in Wales)</p> <p>Some issues have been raised over the ambulance response times in rural areas in</p>	Some potential for LSB multi-agency approach

	<p>A bend, view obscured by stationary cars, misjudged speed/positioning, misjudged speed/distance, driving too close</p> <p>Primary fires across the county have decreased from a figure of 135 in 2010/11 to 116 in 2011/12 a reduction of 14%, however Aberystwyth has shown an increase from 59 incidents in 2010/11 to 64 in 2011/12 an increase of 8%.</p>	<p>general and the potential impact on the outcome of RTCs although data is not clear</p> <p>Overall the figures for Primary Fires for the last 5 years are showing a steady reduction but will need monitoring with the objective of reducing the number of primary fires.</p> <p>Although there are strong connections between community safety and design (e.g. robberies and design of housing estates or accidents and lighting schemes) no particular issues have been identified in this initial analysis. However, urban design elements it may be expected to be involved in the resolution of some more specific issues.</p>	
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## ENVIRONMENT AND SUSTAINABILITY

### ENVIRONMENTAL SUSTAINABILITY

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Changes to services in rural areas acts against environmentally sustainable living and sustainable rural societies</p>	<p>Ecological footprint of Ceredigion in 2006 was highest in Wales (4.7 global hectares per capita) Transport, housing and food consumption major contributors</p> <p>Lower than Wales average of commuting by car van and bus – 2001 Census has 55% driving car or van plus 7% passengers (aged 16-74 working); average commute 22 km and almost 20% working at or from home; less than 3% travelled to work by bus</p> <p>Provision of services in rural areas</p> <p>Commuting patterns and other journeys from and within rural areas</p> <p>Barriers to use of alternatives to car in rural areas: bus timetables restricted; Bwcabus scheme in south</p>	<p>Continued commitment to One Planet Wales; code for sustainable homes; car sharing etc Road transport is a significant contributor to footprint</p>	

LIVING WITHIN ENVIRONMENTAL LIMITS

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Can we measure greenhouse emissions from travel, businesses and household use and how do they compare with other areas?</p> <p>Can we measure waste and re-use of materials?</p> <p>Can we measure other aspects of pollution?</p>	<p>Greenhouse gas emissions per capita</p> <p>Major sources of greenhouse gas production (incl agricultural)</p> <p>Insulation standards in housing stock</p> <p>Car journey length per capita</p> <p>Journeys by foot and cycle and barriers to use</p> <p>Recycled and non-recycled waste per capita</p> <p>The local authority with the highest reuse/ recycling/ composting rate in the 12 months to the end of March 2012 was the rural authority of Ceredigion (58 %), whilst the rural authority of Powys had the lowest rate at 40 %</p> <p>Discharges of pollutants into environment</p>	<p>Reducing but still high; transport a major component</p>	

PROTECTING HEALTHY ECO-SYSTEMS

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>What is the current state of eco-systems in Ceredigion?</p> <p>What are the threats to healthy eco-systems in Ceredigion?</p>	<p>%age stable or improving habitats</p> <p>%age stable or improving species (mammal, insect, bird etc surveys)</p> <p>However lack good baseline data</p> <p>Number of lakes, rivers and coastlines achieving good ecological status see Water Framework Directive; lots of contaminate land</p> <p>Landscapes of environmental and other value: open land and un-improved habitat</p> <p>Nature conservation designations land and marine CCW</p> <p>Ancient woodlands as designated by Forestry Commission</p> <p>River water quality: evidence that some is poor – EA reports</p> <p>Sea water quality: beaches?</p>		

SUSTAINABLE PLACES FOR PEOPLE

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Environmental risk</p> <p>Standard of residential dwellings</p> <p>Amenity use of the environment</p> <p>Access to services and employment</p>	<p>Dwellings and facilities at risk from flooding: EA figures; c. 750 properties affected by extreme rainfall event in June 2012</p> <p>Dwellings and facilities protected by flood defences and coast protections</p> <p>Insulation standards and homes benefitting from energy performance measures: Arbed initiatives</p> <p>Accessibility and use of open spaces (formal and informal): only preliminary report</p> <p>Public rights of way use and condition: ROWIP 2002</p> <p>Drinking water quality: doesn't emerge as a major issue but EA maps look alarming re groundwater because of mine workings</p>	<p>June 2012 flooding unprecedented; action needed to alleviate problem particularly given that extreme weather events are predicted to increase as earth warms</p> <p>On-going efforts to improve insulation and reduce fuel poverty and carbon footprint</p>	

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Quality of the urban landscape</p> <p>Environmental standards in urban landscapes (litter, noise)</p> <p>Perceptions of urban spaces</p> <p>Studentification and de-studentification in Aberystwyth</p>	<p>Surveyed and anecdotal perception of urban landscape: cleanliness index fairly high (see maps)</p> <p>Listed buildings and conservation areas</p> <p>Urban renewal area data</p> <p>Student households and changes in HE education rolls: increasing student numbers without concomitant rise in hall places = studentification of Aberystwyth. However, new hall for 1000 students planned and HE numbers potentially volatile or falling</p>	<p>Regeneration Area identified in Aberystwyth</p> <p>Conservation areas in Aberystwyth and Cardigan</p>	

## CULTURE AND HERITAGE

### WELSH LANGUAGE IN CEREDIGION

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
<p>Changes in numbers and proportion of Welsh language speakers</p> <p>Changes in levels of Welsh language skills</p> <p>Changes in use and linguistic contexts</p>	<p>Ceredigion remains one of the strongholds of the language as a community language. According to 2001 Census 51% of the population aged 3+ spoke Welsh and 61% had some skill in Welsh.</p> <p>Changes in Welsh speakers over time: decreasing proportion but increasing numbers 1991 - 2001; 2011 Census will provide new figures shortly</p> <p>Social context of use of Welsh:</p> <p>Educational: proportion of Welsh speakers highest in school age population, but there is no measure of use, just skill level</p> <p>Employment context: bilingual policies not fully enforced in workplace, even in CCC</p>	<p>Implement WG guidance in Wales: a bilingual future</p> <p>Promote use of Welsh as a living language in schools, workplaces</p>	

### ACCESS TO AND USE OF CULTURAL RESOURCES IN CEREDIGION

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
Patterns of use of formal cultural facilities in Ceredigion	<p>Library use: in 2009/10 was around 4,700 per thousand population which was one of the middle ranked local authorities and lower than the Welsh average. However, there are additional library facilities in the university libraries in both Aberystwyth and Lampeter and the National Library of Wales in Aberystwyth</p> <p>Museum visits: 35,000 /year Ceredigion museum (see table from tourism strategy)</p> <p>Other cultural attractions and visitor numbers survey data on the attractions sector (24 responses): 29% of visitors are local residents; 73% get &lt;20,000 visitors; only 56% are open all year</p>	No evidence of a problem in terms of literacy, school exam results	

ACCESS TO SPORT AND FORMAL PHYSICAL RECREATION

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
Patterns of use of formal physical recreation facilities in Ceredigion	<p>Provision of sports facilities: leisure with pools centres in Aberystwyth, Aberaeron, Cardigan, Lampeter, Llandysul, Tregaron; no athletics track in the county</p> <p>Participation rates in sports and formal recreation via facilities or clubs and organisations higher than Wales average</p>	Athletics competitions have to be held out of county, e.g. Ceredigion Schools	

SAFEGUARDING AND IMPROVING BUILT HERITAGE

Issues	Local Profile and Context	Trends and Implications	Priority Outcome Notes
The built heritage in Ceredigion	<p>Listed buildings: c. 2000 in Ceredigion. Buildings At Risk register not updated since 2006.</p> <p>Scheduled Ancient Monuments and locally important ancient monuments: no. 273 designated by CADW</p> <p>Conservation Area designations 13</p> <p>Historic gardens designations: c. 8 in county</p>	Buildings At Risk register is out of date	

