



DRAFT WELL-BEING ASSESSMENT

Powys Public Service Board

11/0202/2022

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The Public Service Board (PSB) is a statutory strategic partnership established under the **Well-being of Future Generations (Wales) Act 2015**. The Act requires key local organisation in Powys to work together and take a more co-ordinated and long-term approach to the issues that really matter to the people of the county.

The statutory partners that make up the board are:

- Mid and West Wales Fire and Rescue Service - www.mawwfire.gov.uk
- Natural Resources Wales - <https://naturalresources.wales>
- Powys County Council - www.powys.gov.uk
- Powys Teaching Health Board - www.powysthb.wales.nhs.uk

Other invited organisations who play a key role in the PSB include:

- Brecon Beacons National Park Authority - www.beacons-npa.gov.uk
- Powys Association of Voluntary Organisations - www.pavo.org.uk
- Dyfed Powys Police - www.dyfed-powys.police.uk
- Dyfed Powys Police and Crime Commissioner - www.dyfedpowys-pcc.org.uk
- Department for Work and Pensions
- Welsh Government
- Probation Service
- One Voice Wales

Contents

Get in touch	2
Contents	3
Introduction	5
Powys Demographics	14
Social	21
Homelife.....	22
Living Independently.....	34
Health and lifestyle	45
Educating Our Children	63
Social summary	72
Economy	78
Jobs and wages	79
Businesses	93
Tourism	98
Staying connected.....	98
Poverty and Deprivation	102
Economy summary	104
Culture and Community	110
Welsh language.....	111
Communities coming together	114
Participation in cultural life.....	118
Anti-social.....	123
Culture and Community Summary	132
Environment	136
Improving Biodiversity	138
Sustainable Land, Water and Air	140
Reconnecting People and Places	149
Forestry Resources.....	155
Climate Change	159
Environment Summary	169

Methodology..... 174
Data Gaps..... 177
Table of Figures 182
References 183



Introduction

Welcome to our Well-being Assessment 2022. The unprecedented challenges facing public organisations currently cannot be underestimated and the impact the coronavirus pandemic has had on all our lives has been extraordinary, and we are still seeing and feeling the effects of lockdown and social distancing today.

The PSB is a partnership of the county's public sector organisations who have worked together and builds upon the success of the last assessment and our plan to produce a positive outlook for our future generations.

We are required by the Well-being of Future Generations (Wales) Act 2015 to prepare a local Well-being Plan setting out how we will improve the well-being of its communities, against seven national goals. Before we can set out a plan, we must understand the pressures that our communities are facing. To understand this, we have assessed well-being across communities in Powys. This assessment includes a range of data, evidence, and research, providing a comprehensive picture of the well-being of local people and communities now and how well-being could be influenced in the future.

It looks at economic, social, environmental, and cultural factors that impact on people's daily lives, issues such as health, access to employment, condition of housing and access to services. We have engaged with residents, both young and old, businesses and stakeholders through a variety of methods, over the past year to get as much insight as possible.

Background

The Well-being of Future Generations (Wales) Act came into force in 2015, it requires public bodies in Wales to think about the long-term impact of their decisions and to conduct a well-being assessment during each electoral cycle. This provides insight into the well-being of our residents and helps to understand what we need to do to improve well-being for all our residents and service users. The Well-being Assessment focuses on the general needs of the population under four key themes:

- Social
- Economy
- Environment
- Culture

As well as the Well-being Assessment, we must also publish a Population Needs Assessment, focused on care and support needs in our area (requirement of the Social Services and Well-being (Wales) Act 2014).

This Well-being Assessment follows what has been an extraordinary time, the coronavirus pandemic has had a global impact and made us live and work very differently. However, the successful vaccination programme has helped to reduce the risk of serious disease and death and helped to ease transmission. This Well-being Assessment does not focus wholly on COVID-19, instead it evidences areas that we as public organisations need to focus our energies, it provides an overview of what is happening at an overall Powys level, whilst also identifying differences across the county wherever possible.

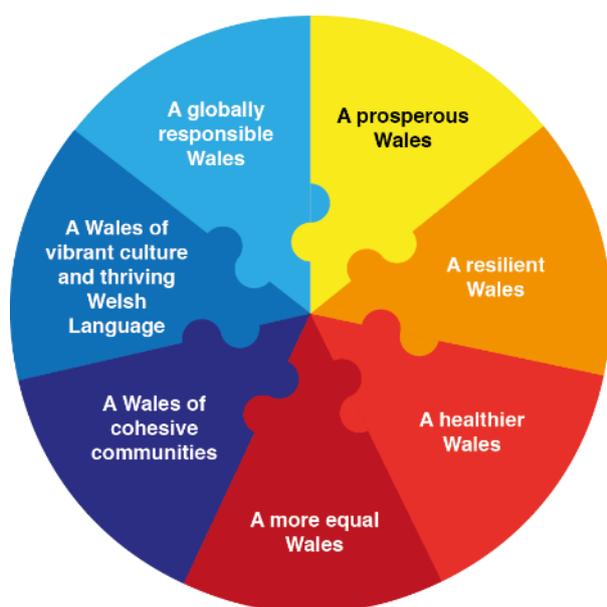
The assessment provides an honest account of what we know and what we don't know. We are aware that there are some data gaps that we need to plug, and this will be a focus over the coming years.

Next Steps

This assessment will inform our plans going forward. Our findings will be used to set well-being objectives, and these will provide the framework for our next well-being plan. **The plan will be published in May 2023.**

It is important to note that the data insight and intelligence we have access to is used daily to help shape service delivery and continuous improvement.

The Seven Well-being goals



The Welsh Government is interested in the well-being of Wales as a whole and has defined this through seven Well-being Goals. This local assessment focusses on the well-being of Powys and its people, but we also note how local well-being aligns with these national goals.

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

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

The following table maps the local areas of focus identified in the assessment, to the seven National Well-being Goals for Wales. This provides a starting point for understanding which areas contribute and impact on the wider well-being of Wales. As we begin to develop our next well-being plan, we will look to understand whether the areas of focus are having a negative or positive impact on the goals, and this will help to prioritise areas for action.

Well-being Theme	Local Well-being: Areas of focus	A prosperous Wales	A resilient Wales	A healthier Wales	A more equal Wales	A Wales of cohesive communities	A Wales of vibrant culture and thriving Welsh language	A globally responsible Wales
Social	Homelife	Yes	Yes	Yes	Yes	Yes	No	Yes
	Living Independently	Yes	No	Yes	Yes	Yes	No	No
	Health and Lifestyle	No	No	Yes	Yes	No	Yes	No
	Educating our children	Yes	No	No	Yes	No	No	No
Economy	Jobs and wages	Yes	No	Yes	Yes	No	No	No
	Businesses	Yes	Yes	Yes	Yes	Yes	No	No
	Tourism	Yes	No	No	No	Yes	Yes	No
	Staying connected	Yes	No	No	Yes	Yes	No	No
	Poverty and deprivation	Yes	No	Yes	Yes	No	No	No
Culture and Community	Welsh Language	No	No	No	Yes	Yes	Yes	No
	Communities coming together	No	No	Yes	Yes	Yes	No	No
	Participation in cultural life	Yes	No	No	No	Yes	Yes	No
	Anti-social	No	Yes	Yes	No	Yes	No	Yes

Well-being Theme	Local Well-being: Areas of focus	A prosperous Wales	A resilient Wales	A healthier Wales	A more equal Wales	A Wales of cohesive communities	A Wales of vibrant culture and thriving Welsh language	A globally responsible Wales
Environment	Improving Biodiversity	Yes	Yes	No	No	No	No	Yes
	Sustainable Land, Water and Air	Yes	Yes	Yes	No	No	Yes	Yes
	Reconnecting People and places	Yes	Yes	Yes	Yes	Yes	Yes	No
	Forestry Resources	Yes	Yes	Yes	No	No	No	Yes
	Climate Change	Yes	Yes	Yes	Yes	No	No	Yes

The Five Ways of Working

Throughout this assessment we have followed the five ways of working, we will take these forward as we move to the next stages of responding to the findings and developing our area plans.



Figure 1 Icons for the five ways of working

- **Long-term** – Balancing short-term needs with the need to safeguard the ability to also meet long-term needs
- **Prevention** – Putting resources into preventing problems occurring or getting worse
- **Integration** – Considering how our priorities may impact upon one another, on the well-being goals and on the priorities of other public bodies
- **Collaboration** – Working together with other partners to deliver our priorities
- **Involvement** - Involving those with an interest in achieving the well-being goals, and ensuring that those people reflect the diversity of the area

What do we know about well-being in Powys?

Our assessment has told us a great deal about the social, economic, environmental, and cultural well-being of people in our localities in Powys:

Social

- **12% (16,154) of the population are unpaid carers.** This is projected to have increased. We have more unpaid carers in south Powys, particularly the Ystradgynlais locality. (ONS, 2011)
- There has been a **16% increase in homelessness** between 2019 and 2020 (from 527 to 621). Mostly single homeless presentations. We anticipate more families with dependent children to present due to the end of the furlough scheme. (Powys Well-being Infobank, 2021)
- **20% of people contacting** Powys Association of Voluntary Organisations **state loneliness and isolation as a reason for contact.** 62% of these were female, increase in demand is seen during the winter months. (PAVO, 2021)
- There are **8,871 housing association properties in Powys.** (Housing PCC, 2021)
- **3,500 people are on the housing demand register,** many require smaller accommodation (often 1 or 2 bedrooms), whilst others need larger homes. 22% of

homes are in the Newtown locality. 48% have a poor energy EPC rating. (Housing PCC, 2021)

- **4,088 families live in absolute poverty**, 31% (1,248) of these were lone parent households (Department for Work and Pension, 2019-20).
- **The coronavirus pandemic has increased existing health inequalities.** Deprived groups have been more vulnerable during lockdowns and declining income.
- There has been a **48% increase in children** (1,601 to 2,371 children) **eligible for Free School Meals** over the past two years (compared with the rest of Wales). (Welsh Gov, 2021)

Economy

- **79.2% of people are economically active and 17.8% are self-employed.** (ONS, Dec 2021)
- **5% of working-age people are unemployed (16-64 age group, Dec 2020).** Llanidloes was the hardest hit locality, however all localities saw unemployment grow. (ONS, Dec 2021)
- Median weekly **full-time earnings in Powys are £519** (Wales: £542, UK £586). (ONS, 2021). Powys has the lowest gross value added per hour worked in the UK (since 2008). (ONS, 2021) Powys has the lowest gross value added per hour worked in the UK (since 2008). (ONS, 2021)
- The **average household income in Powys is £33,458** (Wales: £34,700, UK: £40,257). 55% of households in Powys earn *below* the Powys average (£33,458). (CACI, 2021)
- **93% (8,030) of businesses are micro-businesses (employing between 0-9 employees).** 6% (550) small, 1% (65) medium-sized and 10 large businesses. (ONS, 2021)
- **12% of properties are unable to receive 10mb/s broadband.** Highest amongst all Welsh local authorities (2020 Ofcom report). (OFCOM, 2020)

Environment

- **Water Quality:** many rivers in Powys are **not achieving good ecological status.** The river Wye in particular, is suffering from an increase in nutrient pollution. There are two water pollution incidents per week.
- **Air quality:** urgent measures are required to address **ammonia pollution** from intensive agricultural units.
- All of Powys is within a 300m buffer area of **greenspace**, however not all sites have full legal access. Half of our population lives within 10km of an accessible greenspace site in Powys.
- **Impact of Climate change on the natural environment** (e.g., more frequent flooding and high temperatures and winds).
- **Energy efficiency:** Powys has **old and inefficient housing**, reliance on solid fuels and **often households run two cars** due to rural nature and limited public transport.

Culture and Community

- **19% of residents can speak the Welsh language**, ranging from 54% in Machynlleth locality to 8.6% in Knighton and Presteigne. Most Welsh speakers are aged 5-15 years old. (ONS, 2011)
- Between April 2020 and March 2021, the number of 3-day emergency food aid parcels given to families with children in Powys increased by 197% (971 parcels) (Wales: 7%) when compared to 2019/20 (Child Poverty Action Group, 2021). In total, 6,754 parcels were given in 2020/21 (84% increase since the previous year). (Child Poverty Action Group, 2021)
- Most of Powys is poor for access to services (just under **half of Powys areas¹ are in the worst 20% in Wales in terms of access to services**). (Welsh Gov, 2019)
- **6 areas¹ in Powys are in the worst 20% in Wales for community safety** (Llandrindod East/West, Newtown East, Newtown South, St Mary 1 (Brecon), Welshpool Castle and Welshpool Gungrog 1). (Welsh Gov, 2019)
- **Newtown East ranks 31st most deprived area¹ in Wales (of 1,909 areas¹ in Wales)** (Welsh Gov, 2019)

¹ area = Lower Super Output Area (LSOA), a classified output area boundary as defined by Office National Statistics.

Our 13-locality approach



Figure 2 Powys 13 Localities (PCC, 2022)

Powys covers one quarter of Wales's landmass, so to gain a better understanding of our residents' needs we use geo-spatial analysis.

Geo-spatial analysis is the gathering of data and use of maps to visualise the data.

We have split the county into 13 localities, centred around Powys' largest towns and their surrounding areas using boundaries set by the [Office for National Statistics \(ONS\)](#).

This enables us to understand and compare areas of the county with each other and target support. Where possible, we will look at data using this 13-locality approach. It is important to note that some data is not available at a level below that of the whole of Powys.

Our 13 localities are

- Brecon Locality
- Builth and Llanwrtyd Locality
- Crickhowell Locality
- Hay and Talgarth Locality
- Knighton and Presteigne Locality
- Llandrindod and Rhayader Locality
- Llanfair Caereinion Locality
- Llanfyllin Locality
- Llanidloes Locality
- Machynlleth Locality
- Newtown Locality
- Welshpool and Montgomery Locality
- Ystradgynlais Locality

Powys Demographics

Who are the people of Powys?

Powys is made up of 133,030 people (ONS, 2020).

The highest population concentrations within Powys are in the Welshpool and Montgomery locality (14% of Powys residents live in this area) followed by Newtown (13%) and Brecon (11%) localities.

Llanfair Caereinion, Machynlleth, Llanidloes, Builth and Llanwrtyd and Crickhowell localities all have small populations (each one accounts for 5% of the total population).

Follow this link [to explore Powys' population via our interactive report.](#)



Powys covers a quarter of Wales landmass and with a small population and large geographical cover, the average population density is only 26 people per square kilometre (Welsh average 153 KM²). To put this in perspective, Cardiff's population density is 2,620 people per KM², and London has a population density of 5,727 people per KM². Powys is the most sparsely populated local authority in all Wales and England.

The population density differs across our 13 localities, with the highest density in the Newtown locality with 78 people per KM², Welshpool and Montgomery locality are second highest with a density of 64 and Ystradgynlais are 3rd highest with 61 people per KM².

Builth and Llanwrtyd are the most sparsely populated of our 13 localities with 11 people per KM². Second lowest is Machynlleth with a population density of 12 and 3rd lowest is Llanfyllin with 17 people per KM². (ONS, 2020)

Follow the link for more [information about the Powys population density via our interactive report.](#)

Age groups in Powys

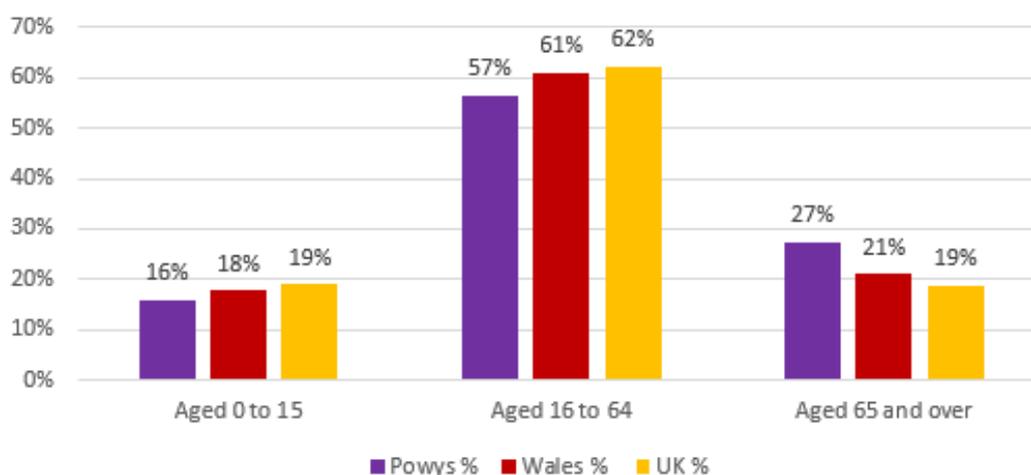


Figure 3 Percentage breakdown of Mid-Year Estimates (ONS, 2020) by age bands

Compared to the Wales and UK averages, Powys has a lower percentage of residents in the age groups 0 to 15 and 16 to 64 and has a higher percentage of residents who are aged 65 and over. **The average age of the Powys population is higher than Wales and UK averages.**

16% of Powys residents are aged 0-15, the Welsh average is 18% and the UK average is 19%.

The distribution of those aged 0-15 fluctuates across the Powys 13 localities with Newtown locality having the highest number of 0–15-year-old residents and Machynlleth having the lowest number.

57% of Powys residents are aged 16-64, meaning that, as with 0–15-year-olds, this segment of the population makes up a smaller percentage of the Powys population than we would see if we looked at the Welsh average of 61% or the UK average of 62%.

The Welshpool and Montgomery locality has the most residents aged 16-64 and Llanfair Caereinion has the fewest.

27% of Powys residents are aged 65 and over and represent a significantly higher percentage of the population in Powys than that of the Welsh average of 21% or the UK average of 19%.

Welshpool and Montgomery have the highest number of residents aged 65 and over and Machynlleth has the lowest. (ONS, 2020).

Follow this link for more [demography insights and to see how our 13 localities compare to each other, via our interactive report](#)

Ethnicity and place of birth

According to the Census (ONS, 2011), **94% of Powys residents were born in the UK.**

Of those not born in the UK:

- 0.3% (418) were born in Ireland
- 3.4% (4,638) were born in EU countries
- 2.1% (2,855) in other (non-EU) countries.

Ethnicity in Powys shows that:

- 98% (130,827) are White
- 0.86% (1,142) are Asian/Asian British
- 0.57% (760) are Mixed/ multiple ethnic groups
- 0.1% (132) are Black/African/Caribbean/Black British
- 0.09% (115) other ethnic groups

There is little known about the change in the ethnicity and place of birth information of our residents over the last 10 years. As this data is captured in the 2011 census, we will be able to understand how this has changed and update the information when the new 2022 census data is released during 2022/23.

Follow this link to view [more information about Powys population Ethnicity and Place of birth and to understand the differences by locality in our interactive report.](#)

Powys' population past and future

Past population (all ages)

In the last 20 years the number of people who live in Powys has increased by 5%, from 126,134 people in 2000 to 133,030 in 2020. This is lower than the 9% population increase experienced across Wales as a whole.

This increase largely took place in the first 10 years of the period, with the last 10 years showing an increase of just 0.1% (the Welsh average over this same period was 4%). (ONS, 2020).

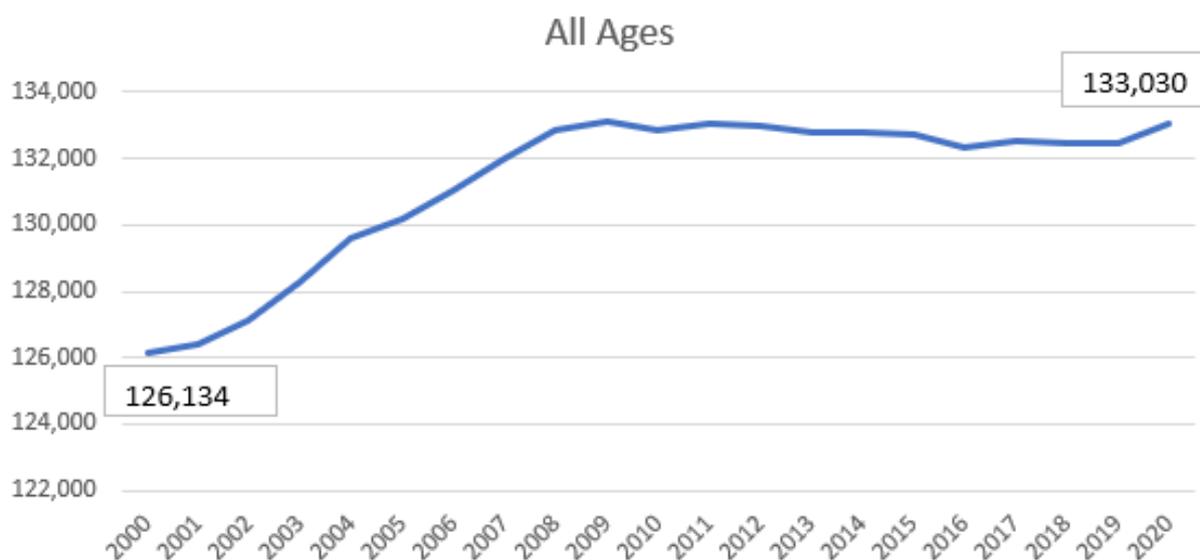


Figure 4 population trend over 20 years (ONS, Mid-Year Estimates 2020)

Changes in population growth have not been equally spread across all age groups.

Age 15 and under

The age 15 and under group saw a -7% decrease (Wales -6%) in population between 2000-2010, and in the last 10 years has seen an additional -8% decrease (Wales 1% increase).

The 15 and under group has seen a reduction in Powys over the last 20 years of -14% in total, from 24,528 in 2000 to 21,069 in 2020 (Wales -5% reduction).

Age 16 to 64 group

The 16-64 age group has seen both an increase and decrease in Powys across the last 20 years, with an increase of 4% from 2000-2010 (Wales 7%), but between 2010-2020 has seen a -6% decrease overall (Wales 0%).

The 16-64 age group has seen a reduction in Powys over the last 20 years of -2%, from 76,607 in 2000 to 75,160 in 2020. Wales in the same period has experienced a 7% increase.

Age 65 and over

The 65 and over age group has seen dramatic increase across Powys, during 2000-2010 there was an increase of 20% (Wales 11%) in this population age band, from 2010-2020 saw an increase of 23% (Wales 20%).

The 65 and over age group has seen a large increase in Powys over the last 20 years of 47%, from 24,999 in 2000 to 36,801 in 2021. (Wales 33% increase).

Age 80 and over

The age 80 and over population group has the largest increase of all age groups, between 2000-2010 there was a 29% increase in this age group (Wales 20%) and in the last 10 years the increase has been a further 19% (Wales 15%).

The aged 80 and over age group has seen the largest increase in Powys over the last 20 years with a 53% increase, from 6,361 in 2000 to 9,737 in 2020 (Wales 39% increase).

(ONS, 2020)

Follow this link to view more [information about Powys historical population and to understand the differences by locality and single year of age in our interactive report.](#)

Population projections

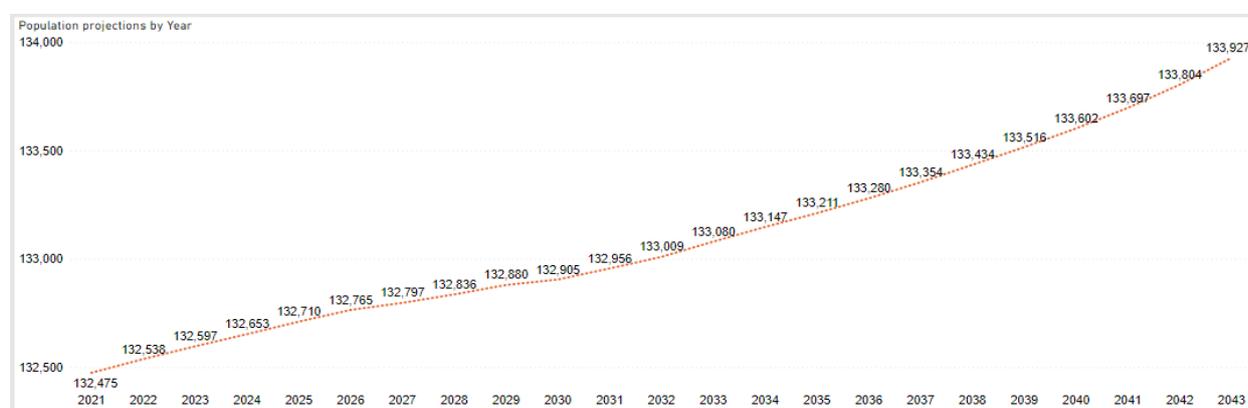


Figure 5 Population projections by year (Welsh Gov, 2018 based household projections for Wales)

Between 2021 and 2043 is it projected that Powys population will increase by 1%, from 132,475 to 133,927. This is lower than the 4.6% population increase projected across Wales as a whole.

Population projections are not equally spread across all age groups.

Age 15 and under group

The age 15 and under group has seen a reduction in Powys over the last 20 years, and this trend is set to continue with a **further reduction of -6.5% (-1,382 persons) projected by 2043 (Wales -3.8%).**

The year 2037 shows the lowest figure for the under 15 age group of 19,589 before slowly **increasing to 20,473 by 2043.**

Age 16 to 64 group

The 16-64 age group is projected to have a steady decline in Powys between 2021 and 2043. **This equates to a reduction of -8.8% (-6,512) persons of working age (Wales -0.5%)**

Age 65 and over

The 65 and over age group is projected a large increase in Powys of 25.2% (+9,346 persons), during the same period Wales 65+ age group will see a similar increase of 26.5%.

Age 80 and over

The 80+ age group is projected a large increase in Powys of 63.7% (+6,318 persons), during the same period Wales 85+ age group will see a similar increase of 61%.

The increase in the number of elderly people in Powys will occur as the number of people of working age decreases.

By 2043, the number of elderly persons (age 65 and over) is projected to rise by 25.2% (+9,346), whilst at the same time the working age population is projected to fall -8.8% (-6,152).

The population change will create a gap between those who will need help and support in their later years, and those working aged people who will be providing it.

(Welsh Gov, 2018)

Follow this link to view more [information about Powys population projections by fixed age bands in our interactive report.](#)

Follow this link to view more [information about Powys population projections by single year of age \(or create your own age bands\) in our interactive report.](#)

Demography summary

Understanding the demography of the Powys residents is a key cross cutting theme that effects all aspects of well-being in Powys. We know that due to Powys' large, rural countryside the well-being of the population will differ from one locality to the next.

Powys currently has a **population of 133,030** people, there are variances in the distribution of the residents across our 13 localities with our highest population numbers seen in the Welshpool and Montgomery locality (ONS, 2020).

Due to the large geographical coverage of Powys and small population, we have a low population density of 26 people per km², this makes Powys one of the **most sparsely populated places in the UK**. The population density does range across our 13 localities with Newtown (78 people per km²) being the most densely populated locality and Builth and Llanwrtyd locality, the most sparsely populated (11 people per km²) (ONS, 2020).

The average age of Powys residents is higher than the Wales and UK averages. Powys has a lower percentage of residents aged 0 to 15, as well as a lower percentage of residents aged 16 to 64, however it has a higher percentage of residents who are aged 65 and over. The Newtown locality has on average a lower age population than the rest of Powys with the most residents aged 0 to 15, whilst Welshpool and Montgomery locality has on average a higher age population with the most residents aged 65 and over (ONS, 2020).

Powys is not very ethnically diverse, **94% of residents who live here are born in the UK and 98% are white.** However, this data is from the 2011 census and will be reviewed when the 2022 census data is released. Once this is available, we will be able to understand how ethnicity numbers may have changed during the last 10 years in Powys (ONS, 2011).

The **Powys population has maintained a steady level over the last 10 years** with an increase of 0.1%, which is lower than the Welsh average (4%). However, this steady level of population numbers is not equally distributed across age bands. **Powys has seen decreasing numbers of children (-14%) and working aged persons (-6%)** over the last 10 years and increasing levels of older people (23%) over 10 years (ONS, 2011).

This trend is set to continue as we look at population projections. **In the next 20 years** Powys is projected a population growth of 1%, however, during the same period its projected that Powys will see a **reduction in children of -6.5%, a reduction in working age population of -8.8% whilst the older population will increase by 25.2%** (Welsh Gov, 2018).

Over the next 20 years the demography of Powys will be very different, there will be a gap between those who will need help and support in their later years and a lack of working aged people to provide it. The reduced labour force will also see gaps in other sectors, as the number of working aged persons available to fill them will reduce. Population changes and workforce need to be a key focus, **if we do nothing the Powys economy will worsen and there will be a care crisis.**

Social

Social	21
Homelife	22
Housing.....	22
Cost of living.....	26
Homelessness.....	28
Loneliness and isolation	30
Living Independently	34
Care Homes	35
Extra Care Units.....	36
Sheltered housing	36
Support at home	37
Accessing Services and Getting around	40
Carers	41
Health and lifestyle	45
Health and health inequalities	45
Mental health.....	48
Staying healthy.....	55
Substance Misuse.....	57
Obesity	59
Educating Our Children	63
Our schools.....	63
Support to pupils during the COVID pandemic.....	64
Educational attainment.....	65
Free school meals and educational attainment.....	66
Exclusions	68
Childcare Sufficiency	68
Child Play Sufficiency.....	69
Sufficiency of Nursery Education	71
Social summary	72

Homelife

Housing

Houses are more than physical structures providing shelter. They are homes – where we bring up our families, socialise with friends, provide space where we can unwind and take refuge from the rest of the world. They are where we spend most of our time and have an influence on our health.

According to the report ‘How does housing influence our health?’, **“A healthy home needs to be affordable, provide for all household needs, somewhere we feel safe and connected to our community.”** (The Health Foundation, 2017)

Total Number of Households by Locality

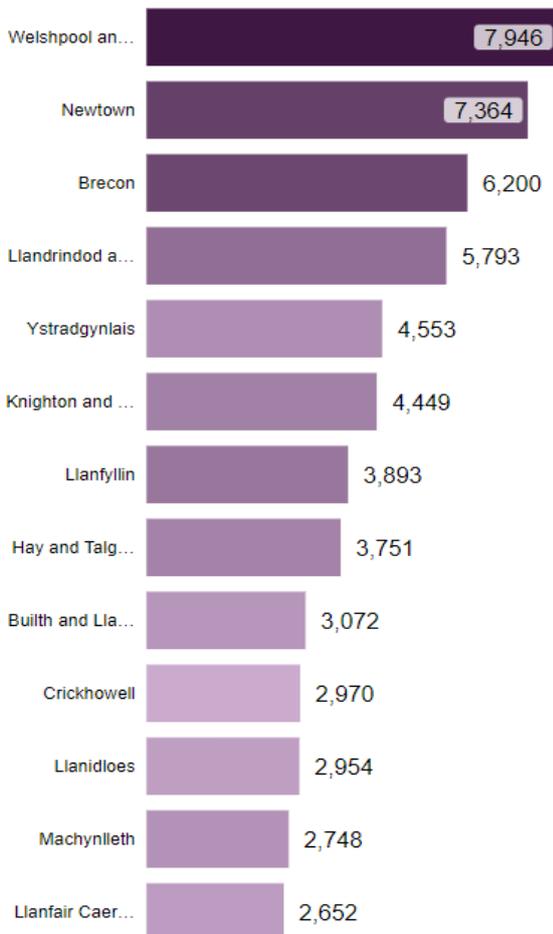


Figure 6 Number of Households by locality (ONS, 2011)

In Powys, there are **58,345 households**, these are distributed across the county (ONS, 2011)

There are differences in the number of households across our 13 localities:

Welshpool and Montgomery (7,946), Newtown (7,364) and Brecon (6,200) localities rank 1st, 2nd and 3rd for the most households per locality in the county.

The locality household data here is from the 2011 census and as such is out of date, we will be able to provide an update on these figures and understand how households in Powys localities have changed in the last 10 years when the 2022 census data is released.

Nationally, the number of households in the UK has continued to rise, whilst the average household size (2.4 people) has remained stable over the past two decades, whereas the proportion of people living alone has increased.

In Powys the **average household size is 2.2 people per household.** (Welsh Gov, 2018)

Follow this link to [view more information about the number of households and household size by our 13 localities from the 2011 census.](#)

In 2021, 36% of households in Powys are 2 person households (no children) (21,584) and **34% are single-person** (1 person) households (UK: 28% of households are single-person). (Welsh Gov, 2018)

According to future trends report (Welsh Gov, 2021), the number of people living in single-person households is likely to increase in the future.

Housing projections show that there are 20,085 single-person households in Powys in 2021, **in the next 10 years single-person households in Powys will increase by 4.2%** to 20,940. (Welsh Gov, 2018)

Powys already has a higher than national average level of single person households, with this trend set to increase, and if we do not build more homes, this may put **more pressure on already limited single housing stock in Powys for future generations.**

Follow this link to [view more information about future trend on projected household and household type and historical household numbers in Powys.](#)

The make-up of housing by tenure in Powys is:

- **70%** of homes are owner-occupied
- **17%** are privately rented
- **8%** are rented from the local authority (social housing)
- **5%** are rented via registered social landlords

There is a need for more affordable, energy efficient housing. In Powys, **3,500 people are listed on the Council's housing demand register.** A quarter of those are already social housing tenants. Many require smaller accommodation, often one or two bedrooms, whilst others need larger homes to cater for their growing families. (Housing PCC, 2021)

For the first time, we have gathered registered social landlord data² and provided a snapshot of social housing across the county.

Social housing in Powys

There are nearly **9,000 registered social landlord homes** and Powys County Council owns 61% of these. Along with the council there are nine housing associations offering social housing in Powys. The number of homes in each locality varies, 22% of all social housing provided are within the Newtown locality, whilst other localities have lower numbers. (Housing PCC, 2021)

² The snapshot includes information from eight of the nine providers in Powys, September 2021.

Most houses offer two and three bedrooms, we have **1,890 one-bedroom properties**, our housing demand list shows that we have 2,065 people waiting for a one-bedroom property.

The future trends report (Welsh Gov, 2021), additional housing units will be needed in the future to meet increasing demand for future generations. This can be seen in housing projections where there is a predicted rise in households in Powys to 60,034 households in 2026. (Welsh Gov, 2018)

48% of social landlord properties have a low energy EPC (Energy Performance Certificate) rating (D-G), this is something we need to focus on to tackle climate change.

The average rent differs depending on the size of the property. There are slight differences in the weekly rent price across our 13 localities, however they are not statistically significant.

We have insight into where those on the housing demand register would like to live, and the data shows there is an unmet demand for affordable housing in the communities where people come from. Research shows that people in need of social housing could rise rapidly because of COVID-19, with low-income earners twice as likely to lose their jobs (National Housing Federation, 2020).

Follow this link to [view more information about social housing in Powys.](#)

There is a recognition that **those who are homeless or in unstable housing are a particularly vulnerable group** who have complex needs. This combined with homelessness being an extreme form of social exclusion will have an impact on well-being.

What have people said?

In the Living in Powys survey, when asked “**what priorities respondents would include on their well-being plan**”, answers included:

- “Affordable Housing in a rural area.”
- “Quality, affordable, carbon neutral housing.”
- “Support for making aging housing stock more sustainable.”
- “Security of tenure and quality of housing.”

When asked **if they had ever experienced any discrimination based on their background or identity (e.g., gender, age, ethnicity, sexual orientation) while looking for housing or accommodation**

- **91%** of respondents answered ‘no’
- **5%** of respondents answered ‘yes’
- **4%** of respondents answered ‘I don’t know’

When asked if they are satisfied with their local area as a place to live

- **84%** of respondents stated they are very satisfied or fairly satisfied
- **8%** answered neither satisfied nor dissatisfied
- **8%** answered they were dissatisfied or very dissatisfied

“Good quality housing and sense of belonging is fundamental to good health and well-being. Having a home is a basic need and a stabilising factor that brings benefits to health from access to employment and education and reduces health inequalities – a key public health priority. Inadequate housing, including homelessness, is known to directly and indirectly affect physical, social and mental health” (Public Health Wales, 2019).

Cost of living

Inflation in the UK has risen, and increasing fuel, food and transport costs are worrying for many across the country. Powys is no exception, the cost of living in such a rural area has always been more expensive. Most households run at least one car, and fuel bills are higher due to limited public transport; and there is often older, inefficient housing and a reliance on fossil fuels to heat homes. Recently, there have been energy hikes with more planned for Spring 2022, increasing living costs coupled with static wages will put pressure on many families across Powys.

- 20% of working aged people (aged 16-64 years) in Powys are economically inactive (December 2020), Wales 24%. (ONS, Dec 2021)
- Powys has the third lowest rate of economically inactive residents across Wales. (ONS, Dec 2021)
- 4% (3,020) of people aged 16-64 are claiming unemployment benefits living in Powys This is the second lowest rate across Wales. (ONS, 2021)
- **4,088 families with children are living in absolute poverty in Powys** (income is below 60 per cent of median income) and 31% (1,248) of those are lone parent households. (Department for Work and Pension, 2019-20).
- Median gross **weekly earnings were £537** in 2021. This was lower than the Welsh average of £571 (ONS, 2021)
- **Average household income in Powys is £33,458** (Wales: £34,700, UK: £40,257). **55%** (33,149) of **households** in Powys earn **below** the Welsh average and 37% (22,162) of households earn above the average. (CACI, 2021)
- **Powys is the 12th most expensive county in England and Wales and 3rd in Wales** in terms of median estimated energy costs. The annual median energy cost for existing homes was estimated at £1,106, and this will have increased over the past few years with the rise in energy costs (ONS, 2019).
- Whilst we do not have figures for Powys, **fuel poverty estimates for Wales indicate that 12% of households are in fuel poverty** (155,000 households). Households were more likely to be in fuel poverty if they lived in older inefficient homes, privately rented, lived alone without children (Welsh Gov, 2018)

Follow this link to [view more information about household income in Powys and how this differs across our 13 localities.](#)

The cost essential outgoings (as defined by CACI) show that in Powys, residents spend their income on the following things (taken from mean PayCheck income): -

- 35% income tax and National Insurance
- 29% food and clothing
- 16% council tax, utilities, and insurance
- 8% mortgage and rent
- 8% childcare and student loans

(CACI, 2021)

What have people said?

In the Living in Powys survey, when asked **“How well would you say you yourself are managing financially these days?”**

- 25% of respondents said they were living comfortably
- 46% were doing alright
- 22% just about getting by
- 6% finding it quite difficult
- 1% very difficult

Respondents were also asked **“In the last twelve months which of the following have you done for family members (not living with you) or friends?”**, the answers were as follows:

- 27% have given or lent money
- 17% have given or lent food
- 28% have given or lent other things
- 11% have taken them out for an evening
- 17% had either babysat in the evening or looked after children in the daytime

And **“In the last twelve months which of the following have members of their family (not living with them) or friends done for them”**, the responses were as follows:

- 21% had given or lent you money
- 16% had given or lent you food
- 28% had given or lent you other things
- 15% had taken you out for an evening
- 20% had either babysat in the evening or looked after your children in the daytime

A child poverty survey conducted in August 2021, on behalf of Powys County Council's Economy, Residents and Communities Scrutiny Committee, asked residents and organisations **“What changes do you think the Council should make to tackle child poverty in Powys?”**, responses included:

- “It should look to provide opportunities and encourage adequately paid jobs.”
- “Additional funding needed for youth services and youth groups. Additional funding needed for schools, particularly for children with learning difficulties.”
- “The council should and could do more to tackle food poverty. Many low-income households do not have affordable access to nutritional food. The councillors should be telling the British government not to cut universal credit in September. The council needs to think about how it can use digital solutions to tackle poverty. The council should invest in youth services and youth centres.”

- “Many parents are doing multiple jobs just to exist and pay their bills. These people get little support. Parents on universal credit seem to get far more support. It saddens me that responsible hard-working parents are neglected.”
- “More skills given to older children in financial responsibility, cooking using fresh ingredients and life skills.”
- “The link between good affordable housing and child poverty is undeniable, however we are a low wage area, with childcare options both inaccessible and expensive- and whilst help is available for fees there is no allowances made for excessive travel. In a rural community with lacking public transport, running a car to access childcare is essential. This marginalises a lot of parents who are unable to access well paid jobs due to childcare issues.”

Respondents were given the opportunity to comment on **how poverty affects children and young people in Powys**, responses included:

- “Poverty has a huge mental impact on children. Not being able to afford to go on school trips, have decent clothes and being hungry has a terrible effect on the whole community let alone the children. The UK is one of the richest nations in the world and we should not still be having children going to school hungry and, in the winter, without a decent warm coat and shoes.”
- “Children and young adults can't help but make comparisons between those that have and those that don't. This obviously has a big impact on a child's confidence and affects their ability to succeed as they can feel inferior to children from financially secure households. A well-maintained home and a real living wage should be the council's priority for every family even if it means that wealthier households face much higher council tax bills.”
- “Remember that parents and children are genuinely afraid to ask for help because they think kids will be taken away and put in care. When you are so stressed and humiliated that's how your thinking goes. Assurance that this isn't going to happen needs to be upfront and clear if you want children and /or parents/ relatives/neighbours to admit there is a problem and accept or seek help. Children need volunteer opportunities to get them out of the house and into safe, warm situations where they feel they have something to offer. Free, multigenerational evening classes were a godsend to me when I was a child in poverty. I met kind, helpful adults who treated me with respect. It was fun, very educational, and non-judgemental.”

Homelessness

Between 2019-2020, Powys experienced a 16% increase in homelessness presentations.

(Powys Well-being Infobank, 2021)

Recorded homelessness presentations rose from 527 in 2019 to 621 in 2020. The most common reason given for homelessness in 2019 was the non-violent breakdown of a relationship (94 cases), by 2020 this had been overtaken by cases where parents were no longer willing or able to accommodate the individual (accounting for 108 cases). In 2020, **46% of overall cases were single young males.**

The situation surrounding COVID-19 and the subsequent lockdowns intensified the homelessness presentations and at the height of the first lockdown (March 2020), the Powys County Council Homelessness team reported that they were handling 260 homeless instances. Homeless enquiries and applications increased by 300% than at the same point in the previous year. The sharp **increase** was driven by **several factors**, primarily:

- a reduction in opportunities for individuals who were previously staying temporarily with friends or family members
- an increased rate of relationship breakdowns; and
- the early release of prisoners into the community at the beginning of the pandemic

Many applications and enquiries for help came from households who had received notice to leave their rented accommodation.

We know that many young adults leaving care have an increased likelihood of becoming homeless, **13% of all care leavers experienced homelessness during 2020/21.**

During the period covering 2020/21, there has been a **63% prevention rate of homelessness in Powys.**

In 2021, up to October, there were 341 recorded cases of homelessness in Powys. 24% (83) of these cases were in the Newtown and Llanidloes Local Housing Market Area (LMHA), the lowest number of cases was in Crickhowell and Llangattock LMHA with four cases (1%).

Follow this link to [view more information about homelessness presentations and reasons over time in Powys.](#)

The mean age at death for someone who is homeless in England and Wales is **44 years for men and 42 for women** compared to average life expectancy for the general population of England and Wales which is **76 and 81 respectively (2017)**

- An average reduction of life in men of 32 years and,
- An average reduction of life in women of 39 years. (Centrepint, 2014)

Even those people who sleep rough for only a few months are likely to die younger than they would have done if they had never slept rough (The Lancet (Science Direct), 2018)

According to 'Toxic Mix: The health needs of homeless young people', (Centrepint, 2014) homeless young people are amongst the most socially disadvantaged in society. Previous

research has shown that many have complex problems including substance misuse, mental and physical health problems, and have suffered abuse or experienced traumatic events.

- 42% of homeless young people have a diagnosed mental health problem or report symptoms of poor mental health
- 18% have attempted suicide
- 31% have a physical health problem (such as problems with their breathing, joints and muscles, or frequent headaches)
- 21% have a history of self-harm
- 52% report problems with their sleep
- 55% smoke and 50% use illegal substances

(Centrepoint, 2014)

Mortgage and landlord possession rates have reduced significantly, largely impacted by the passing of the COVID-19 Act in March 2020, which made it illegal for those renting or with a mortgage to be evicted. Levels of possession rates remain well below pre-COVID-19 levels (April – June 2021). However, government statisticians expect an increase in volume across possession and enforcement as courts continue to manage the backlog of cases, while also dealing with new cases.

The furlough scheme ended at the end of September 2021, this was a lifeline to many who found themselves unable to work during the coronavirus pandemic, it is predicted that we will see a rise in homeless presentations from two person households and those with dependent children, unable to keep up with private rent or mortgage payments.

What have people said?

“It's recognised by the Housing Network³ that the end of furlough arrangements, a deterioration in mental health during lockdown, increased money worries and rises in repossession orders will result in an increase in homelessness” (Powys County Council Staff Member).

Loneliness and isolation

Over half of the Powys population live in villages, hamlets, or dispersed settlements (Powys: 58.7%, Wales: 17.1%) (ONS, 2011) and must travel a long way to access services or meet up with others. More than a quarter (**28%**) of households in Powys are **unable to receive high speed broadband (30 Mbit/s)**, and nearly one in five (17%) are unable to receive 10 Mbit/s.

³ The Housing Network consists of local authorities across Wales who meet quarterly to discuss topics related to housing and homelessness.

17% of people in Powys report feeling lonely in the most recently available data. Applied to the current population, there could be potentially 22,600 residents across Powys who are feeling lonely.

This is higher than the Welsh average of **15.5%** (though this difference is not statistically significant).

People feeling lonely, age-standardised percentage, persons aged 16+, local authorities, 2019-20
Produced by Public Health Wales Observatory, using NSW (WG)

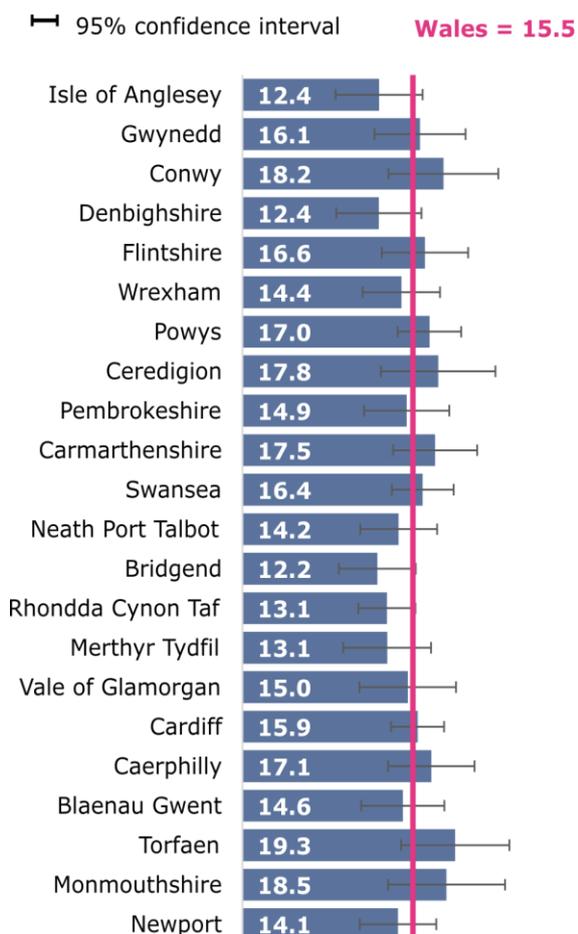


Figure 7 People feeling lonely by Local Authority 2019-20 (Public Health Wales, 2021)

Using data provided by Powys Association of Voluntary Organisations, between 2018 and 2021 PAVO Community Connectors received 12,525 referrals, of which 15% (1,953) were for isolation and loneliness. (PAVO, 2021)

There was a 60% increase in referrals for social isolation during 2018 and 2021, 61% of all referrals are female. There is no correlation on which month is more popular for the referrals, although, the winter months are predominantly higher.

However, during 2020-21 we believe that the true figures of this may be masked due to how the referral types changed during the coronavirus pandemic in 2020 and that the number of those feeling lonely are a lot higher.

Builth Wells and Llanwrtyd locality rank as one of the top three localities each year since 2018 and have a higher rate of loneliness than the average for Powys with 60 persons per 10,000 for the year 2020. Llanidloes is the lowest locality every year since 2018 with 26 persons per 10,000 for 2020.

Research shows that loneliness is associated with poorer physical and mental health and lower well-being amongst older people. Loneliness amongst older people is associated with experiencing depression, and older people with a high degree of loneliness are twice as likely to develop Alzheimer's disease as those with a low degree of loneliness (Age UK, 2021)

We know that loneliness and isolation can have an adverse effect on health, including:

- Increased blood pressure, abnormal stress response, heart disease, and poor sleep with its associated health problems.
- A strong association with depression.
- In older people who are lonely or isolated, a substantially increased chances of developing dementia and, specifically, Alzheimer's disease, when compared to individuals with better social connection.
- A significantly greater risk of mortality in older people who have unsatisfactory or limited social relationships, than for those with stronger social networks.

Social isolation has been linked to an increased risk of death from any cause (Welsh Gov, 2017)

Recent research on loneliness has identified three main findings:

- People who felt most lonely prior to COVID-19 in the UK now have even higher levels of loneliness. This increase began as physical distancing, shielding and lockdown measures were introduced in the UK, in March 2020.
- Adults most at risk of being lonely, and increasingly so over this period, have one or more of the following characteristics: they are young, living alone, on low incomes, out of work and, or with a mental health condition.
- The impact on well-being from people at risk of loneliness is likely to be compounded by other economic and social impacts experienced by the same people, such as those experiencing job losses and health anxieties.

Research also found that risk factors for loneliness were near identical before and during the pandemic. Young adults, women, people with lower education or income, the economically inactive, people living alone, and urban residents had a higher risk of being lonely. Some people who were already at risk for being lonely (e.g., young adults aged 18-30, people with low household income, and adults living alone) experienced a heightened risk during the COVID-19 pandemic compared to before COVID-19. Further, being a student emerged as a higher risk factor during lockdown than usual.

Further Reading:

The Local Government Association (LGA) and Association of Directors of Public Health (ADPH) have jointly produced a paper on practical advice for Directors of Public Health and others leading the local response to the loneliness and social isolation issues arising from the COVID-19 outbreak. (LGA, 2021)

What have people said?

In the 'Living in Powys' well-being survey, **8% stated they often feel lonely** and 62% feel lonely some of the time. When asked **if this has changed due to covid**, 41% answered 'yes-increased'.

When asked **"how often do you feel you have no one to talk to?"**

- 6% answered 'often'
- 50% 'some of the time'

Again, **when asked if this had changed due to covid**,

- 28% answered 'yes- increased'
- with 44% saying it had 'stayed the same' (based on responses from 461 respondents)

In the same survey, when asked **"what would be your top priorities to put into a well-being plan?"** responses included:

- "I feel that there needs to be initiatives to support the isolation due to the very rural area we live in - to promote community and ensure we have the services towns and villages have. Isolation is very real here and therefore loneliness."
- "I do think Covid has thrown up how isolated we are and that not enough is done to facilitate interest groups, where people can make friends in their local halls - not everything being in Llandrindod or Builth - we need well-being being brought to us locally. There is a lot of isolation in the farming community here, and now, having lived as they do, by working from home, it becomes concerning the effects of fearfulness about going into Builth or Llandrindod affects you. That surprised me."
- "I am privileged to live in a beautiful house and location - however this means I am frightened as I age due to the ruralness and lack of contact with people."
- **"Army veterans** are one group of the Powys population, and they are at a disadvantage in terms of accessing levels of support within the military charities, compared with other parts of the country. Isolation has worsened during COVID-19 and is more of a problem in Powys compared to more populated areas" (Armed Forces Liaison Officer, Powys County Council)

Living Independently

We want to support older people to live independent lives. This includes supporting people to live at home or providing suitable accommodation options. As the elderly population increases (including the number of people with dementia), it will create increased demand on the services that we provide. Some elderly residents currently live-in social housing and many of these may wish to stay in their own home for as long as possible.

Older people in Powys are entitled to be supported in several accommodation settings, ranging between sheltered housing, extra care, or care homes.

As the elderly population increases (including the number of people with dementia), there will be more demand on the services that we provide to support older people.

By 2030, the number of **elderly persons is projected to rise by 15%, whilst at the same time the working age population is projected to fall 3,200 (4%)**. The population change in the next 10 years will create a gap between those who will need help and support in their later years, and those of working age people who will be providing it. (Welsh Gov, 2018)

The National Population Survey (Welsh Gov) estimates for each year will vary, but around **7,000 persons are employed in the care sector in Powys**. A 4% fall in the working age population implies a fall of 280 employees from the Care Sector in Powys. A 15% rise in the elderly population implies a need for an additional 1,050 persons that may need Adult Social Care support. **A total gap of 1,330 persons by 2030.**

This section assesses the older population in Powys, with particular reference to people aged 65 and over.

By 2043, the aged 65 and over [population](#) (currently 37,093) is [projected](#) to **increase by 25.2%** to 46,439 (+9,346). Over the same period, the aged 80 and over population is expected to **increase by 63.7%** (+6,318). (Welsh Gov, 2018)

According to the Future trends report (Welsh Gov, 2021), **these projections indicate a substantial rise in demand in the health and social care sector.**

Future trends report also says, the old age dependency ratio will increase over time as the number of pensioners grows faster than the number of working-age people. The old age dependency ratio in Wales has historically been higher than the UK average. As Powys has a higher than the Welsh average of older people this dependency ratio will cause increasing pressure on future generations in Powys.

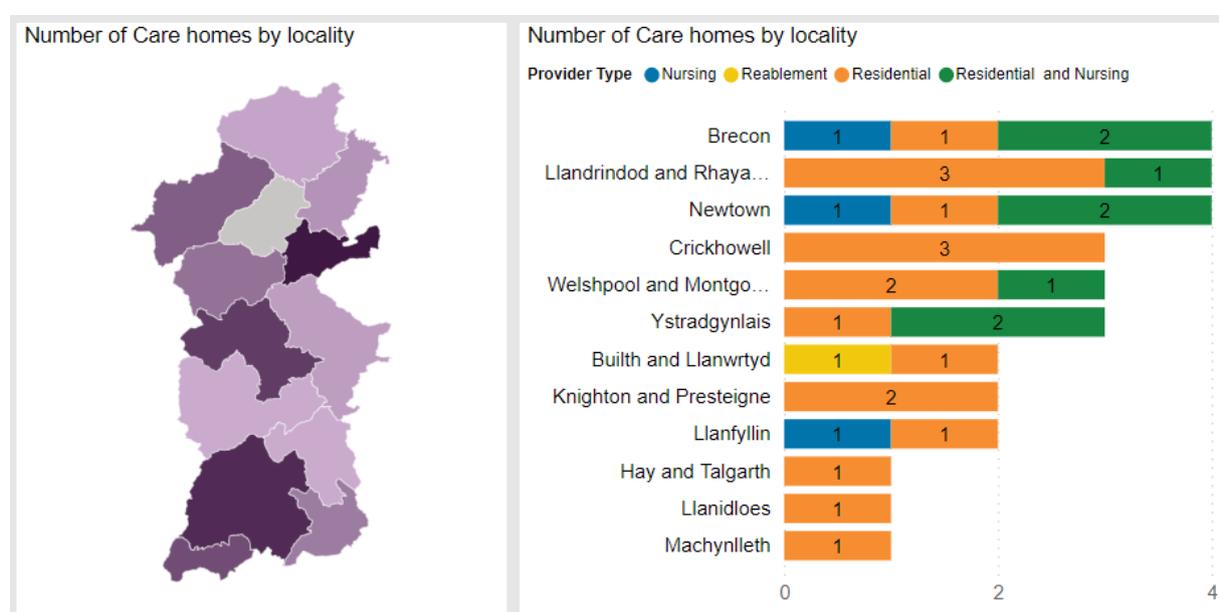
Due to the rurality of Powys, it is sometimes very difficult to place people in a care home within or near their community. There are challenges for independent living, especially isolation and loneliness which can increase as people get older.

Care Homes

In Powys, we currently have three main supported accommodation types: sheltered housing, care homes (residential or nursing) and Extra Care Units.

There are **29 care homes** in Powys registered with **Care Inspectorate Wales (CIW)**, 12 of which are council owned homes run by Shaw Homes, 17 privately run homes, and 1 reablement unit run by Shaw Homes.

- Three homes provide nursing care only
- 18 homes provide residential care only
- Eight homes provide both residential and nursing care
- One reablement provider



Brecon, Llandrindod and Rhayader and Newtown localities have four care homes each. The care homes in these three localities are a mix of Nursing Care homes, Residential Care homes and Dual Care homes (both Nursing and Residential).

Note – the Reablement unit in Builth Wells is not a Care home, this is a specific unit connected to Brynhyfryd Care home and provides 12 reablement beds (six funded by Powys County Council and six funded by Powys Teaching Health Board).

Hay and Talgarth, Llanidloes and Machynlleth localities each have one care home and all three of these are Residential Care home providers.

Llanfair Caereinion is the only locality without a care home.

In Powys there are:

- 571 Residential care beds registered with Care Inspectorate Wales
- 12 Reablement beds

- 118 are Residential dementia care beds
- 280 Nursing care beds and
- 139 Dementia nursing care beds.

Newtown locality has the highest number of registered beds with 202, 2nd highest is Ystradgynlais with 183 beds and Welshpool and Montgomery locality is 3rd highest with 164 beds.

As stated above, 12 of these care homes are owned by Powys County Council, however, Powys commissions some beds within private care homes too.

Powys County Council funds 49% (553) of the care home beds within the county, Powys Teaching health board funds 7% (80) with CHC funding (CHC stands for **NHS continuing healthcare**, with continuing meaning long-term life care) and the rest are either out of county placements (residents from outside the county placed within a Powys Care home) or are privately funded care home residents. (November 2021).

Additionally, both Powys County Council and Powys Teaching Health Board also fund several placements for Powys residents in out of county care homes.

Extra Care Units

There are **58 extra care units**, currently one 10-unit Extra Care Housing facility attached to a Sheltered Housing scheme (Bodlondeb) in Llanidloes (Llanidloes locality) and a 48-unit Extra Care Housing scheme at Llys Glan yr Afon in Newtown (Newtown locality). These schemes are currently only available to rent.

There are two more extra care units due to open in mid-2023. Neuadd Maldwyn, in Welshpool (Welshpool and Montgomery locality), which will consist of 66 extra care units and Pont Aur, Ystradgynlais (Ystradgynlais locality) which will have 41 units, 10 of which are new extra care apartments.

Sheltered housing

Sheltered Housing is accommodation for elderly or disabled people consisting of private independent units with some shared facilities and a warden. A great option for people who want to live independently but need a bit more support, or just need to live in a smaller and easier-to-manage home.

In Powys there are 2,170 sheltered housing homes.

To show it equally across the county we have converted this into a rate per 1,000 population of 75+ Powys residents.

Powys has a rate of 94 sheltered housing per 1,000 of 75+ population. 1st and 2nd highest localities are Knighton and Presteigne locality (213) and Llanfair Caereinion locality (209) which have more than double the Powys average.

Newtown Locality has the lowest rate with only 30 sheltered housing per 1,000 of 75+ population.

There are 6 localities above the Powys Average (94 sheltered housing) which are:

1. Knighton and Presteigne Locality (213)
2. Llanfair Caereinion Locality (209)
3. Builth and Llanwrtyd Locality (177)
4. Llanidloes Locality (156)
5. Llanfyllin Locality (123)
6. Crickhowell Locality (114)

Support at home

In Powys, we are supporting older people to remain in their own homes as much as possible. This is initially via preventative support using tools, such as Technologically Enabled Care (TEC) and Occupational Therapy aids and adaptations.

Alongside these, there are a range of services available to support, including:

- Domiciliary care
- Reablement
- Direct Payments
- Technology enabled care (TEC)

As of September 2021, approximately two-thirds of older people with a package of care are being supported in their own homes.

We support people to live at home through services that include domiciliary care and assistive technology.

Domiciliary care is the range of services put in place to support an individual in their own home. Services may involve routine household tasks within or outside the home, personal care of the person and other associated domestic services necessary to maintain an acceptable level of health, hygiene, dignity, safety, and ease in their home.

There are **713 recipients receiving 10,200 hours of Domiciliary care in Powys** (1st October 2021).

The highest recipients of Domicilliary care are residents in Welshpool and Montgomery locality with 105 clients, followed by Newtown locality with 102 clients.

Llanidloes locality has the lowest clients of Domiciliary care with 25 clients, followed by Llanfair Caereinion with 27 Domiciliary care clients.

Between October 2019 and October 2021 there has been a **5% increase** (34) in clients but a **6.5% (669 hours) decrease** in hours.

[Follow this link to view more information about Domiciliary Care in Powys.](#)

Reablement is the official title given to **short-term care at home**, to aid recovery after discharge from hospital. While post-operative care and post-discharge care are more general terms, referring to care offered for however long it takes for the individual to get back on their feet, reablement is more specific. The benefits of reablement are: -

- leads to improved health and well-being
- uses a strengths-based, person-centred approach
- supports timely discharge from hospital or enable an individual to remain living at home if, due to illness or disability, they have increasing difficulty with daily life activities
- is time limited, where short-term support is provided, usually for up to six weeks, but possibly for a shorter period depending on progress
- focus should be on achieving outcomes rather than completing care tasks

Between April 2019 and September 2021, **there have been over 600 periods of reablement completed, with 82% of these individuals aged 65.**

The locality with the highest number of reablement discharges is Welshpool and Montgomery locality with 93 discharges, Llandrindod and Rhayader locality is the 2nd highest with 90 discharges.

The lowest locality is Machynlleth locality with 24 reablement discharges followed closely by Llanidloes locality with 28.

Out of the 656 total reablement discharges since April 2019,

- 290 clients had all of their identified goals achieved
- 226 partially achieved their goals
- 115 did not achieve their goal
- 33 were unknown

There were 115 clients whose identified goals were not achieved through reablement alone.

Over half of the reablement clients between April 2019 and September 2021 were female (67%) and 33% of the reablement clients were male.

Direct payments allow individuals to receive payments from the local authority instead of traditional packages of care. This provides much more flexibility and greater control, and allows the individual to act as the employer, using the payment as they see fit to meet their

needs. In November 2021 there were **481 recipients of Direct Payments** in Powys receiving **over 11,000 hours weekly**.

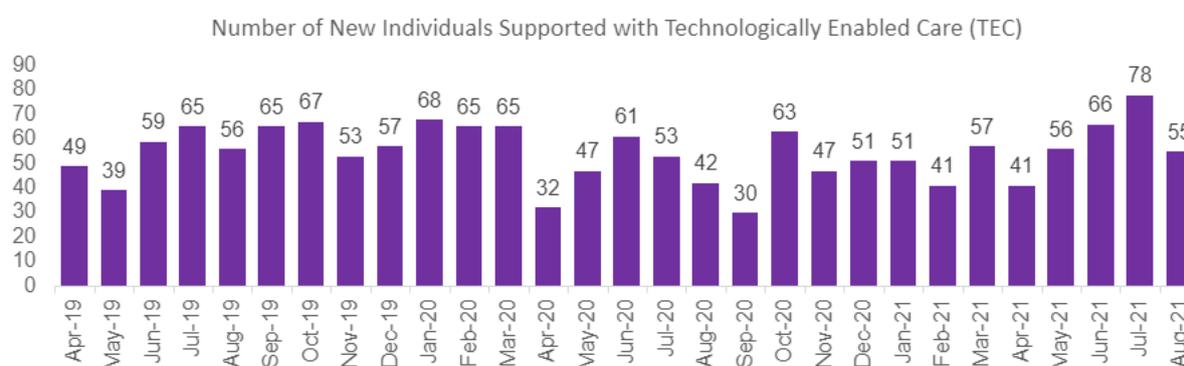
Between November 2019 and November 2021 there has been a **25% increase (124 clients) in clients** and a **15% increase in hours (1720hrs)**. There has been a minimal decrease in the last year (November 2020 to November 2021) of 17 clients and 229 hours.

Welshpool and Montgomery locality has the highest uptake of direct payments (96 clients), followed by Llandrindod and Rhayader locality (68 clients). Brecon locality and Newtown locality are both third highest (65 clients).

The locality with the lowest number of Direct Payments is Machynlleth locality (27 clients), followed closely by Ystradgynlais locality (28 clients).

The increase in direct payments uptake has supported the domiciliary care market, with some individuals setting up micro-enterprises within their own communities to support individuals in meeting their needs. Since November 2020 to September 2021 there has been a **55% increase in domiciliary care micro-enterprises** from 16 to 29 (November 2020 to September 2021).

Technology Enabled Care (TEC) is a newer way of talking about care which incorporates services such as telecare, telehealth, telemonitoring, digital health and devices like alarms, monitors, apps or wearables – any technology-based solution that improves care in our homes and communities.



There has been constant uptake of technology enabled care each month since April 2019.

For the period April 2019 to March 2020 there were a total of 708 new individuals, however for the same period the following year (Apr 20 to March 21) there was a decrease of 133 with 575 new individuals. This is to be expected, once individuals have received the new equipment it is unlikely that they will need more.

Technology is changing the way we interact with and meet demand for health and social care services, Future trends report, Welsh Government.

Accessing Services and Getting around

Powys is a rural county offering plenty of green space, however one disadvantage is that many residents often live a long way from services. Powys is unique in that it does not have a district general hospital and residents must travel out of county, to other parts of Wales or over the border to England, to access certain types of health services.

There are large differences in distances to a District General Hospital throughout Powys for example, Beguildy LSOA (in the Knighton and Presteigne locality) has the furthest to travel to a District General Hospital, it would take approximately 86 minutes to arrive at their nearest District General Hospital (note: Beguildy LSOA is ranked second highest in Wales in terms of limited access to services (Welsh Gov, 2019)).

Whereas residents living in Crickhowell LSOA (in the Crickhowell locality) only have a travel time of nine minutes to the nearest District General Hospital.

Follow the link to view more [information about Transport and travel times for residents in Powys to District General Hospitals](#).

In Powys, 68% (65,000) of working-age people travel to work using their own vehicle, whilst 16% (15,000 persons) walk or bike and 2% (2,000 persons) travel by public transport (ONS, 2011)

WIMD (Welsh Index of Multiple Deprivation) is the Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation. WIMD ranks all small areas in Wales from 1 (most deprived) to 1,909 (least deprived).

Powys has 79 Lower Super Output Areas (LSOAs). These small areas have been ranked by WIMD category **Access to Services** and show overall that 75% (59) of LSOAs in Powys are amongst the top 30% most deprived in all of Wales, with:

- 51% (40) of Powys' LSOAs are in the top 10% most deprived
- 18% (14) LSOAs are in the top 20% most deprived
- 6% (5) LSOAs are in the top 30 % most deprived

Notably we have 9 LSOAs who rank in the top 30 LSOAs in Wales for most deprived for **access to services**, these include:

- Beguildy ranks the 2nd most deprived area in the whole of Wales
- Llanbrynmair and Banwy ranks 8th
- Dissert and Trecoed ranks 9th
- Llansilin ranks 12th
- Llangunllo ranks 17th
- Yscir ranks 19th

- Nantmel ranks 21st
- Llanellwedd ranks 22nd
- Llanrhaeadr-ym-Mochnant ranks 24th

Powys does not contain any LSOAs in the top 10% of least deprived areas in Wales in terms of access to services, however we do have five LSOAs in the top 20%, including Llanidloes 1, Llanidloes 2 and St Marys 1. There are a further two LSOAs in the top 30% least deprived, these are Hay and Ynyscedwyn. (Welsh Gov, 2019)

Follow this link [understand more about WIMD in Powys and how we rank against Wales using our interactive report.](#)

In Powys, according to [Stats Wales](#) data, the percentage of people satisfied with their ability to get to and access facilities and services they need is **85% (2020-21)**, a **17% increase from 2017-18**. This is only slightly behind Wales overall (87%, 2020-21).

Carers

The Welsh Government defines a carer as “anyone of any age, who provides unpaid care and support to a relative, friend or neighbour who is disabled, physically or mentally ill, or affected by substance misuse”.

Carers can be involved in a whole range of tasks; from cooking, housework; lifting, washing, and dressing the person cared for, helping with toileting needs, administering medication, and providing emotional support.

Based on the 2011 Census there were 16,154 people living in Powys providing unpaid care, 12.1% of the Powys population (ONS, 2011)

Carers in Powys provide many hours of care:

- **63%** provided unpaid care for **one to 19 hours** per week
- **13%** provided unpaid care for **20 to 49 hours** per week, and
- **24%** provided unpaid care for **50 or more hours** per week

Most adult carers are retired (39%), 23% are caring full-time and do not have paid employment, and 12% do have part-time paid employment. The demographics of our carers is: -

- 57% are women and 43% are men.
- Age bands
 - 27% (4,304) aged 65 and over
 - 38% (6,096) aged 50 to 64

- 23% (3,736) aged 35 to 49
- 6% (942) aged 25 to 34
- 4% (698) aged 16 to 24
- 2% (378) aged 0 to 15

(ONS 2011)

Number of unpaid carers

There are large differences in the number and rate of unpaid carers across our 13 localities.

Welshpool and Montgomery (2,080), Newtown (1,885) and Brecon (1,745) localities rank first, second and third for the highest number of unpaid carers in the county.

Rate of unpaid carers

Ystradgynlais (150 per 1,000), Crickhowell (134 per 1,000) and Knighton and Presteigne (128 per 1,000), Hay and Talgarth (123 per 1,000) localities have the 1st, 2nd, 3rd and 4th highest rates of carers per 1,000 population.

The rate of unpaid carers for Powys is 122 persons per 1,000. Four of our 13 localities are higher than the Powys average.

It is important to note that some LSOAs (Lower Super Output Areas) within our localities have significantly higher rates of carers than the overall locality. For instance, Ystradgynlais 2 LSOA (in Ystradgynlais locality) has 53 more carers per 1,000 than the Powys average and has the highest rate of carers than all 79 Powys LSOAs with 175 carers per 1,000.

The 2nd highest LSOA is Aber-craf (Ystradgynlais locality) with 171 carers per 1,000 and the 3rd highest LSOA is Yscir (Brecon Locality) with 164 carers per 1,000.

Follow this link to [view more information about unpaid carers in Powys, via our interactive report.](#)

However, it is important to note that these figures are significantly outdated, in the last 10 years the ageing population in Powys has seen a large increase in the number of carers in the county and with added pressures due to COVID-19, the number of carers will have increased even more. During the last assessment it was predicted that the number of carers was set to rise by up to 40%, due to the ageing population in Powys. A report conducted by Carers UK in June 2020 shows that across the UK **there is an estimated 50% increase in carers since the 2011 census.**

In Wales 19% of the adult population said they were already providing care before the COVID-19 outbreak (487,000 people) and a further 8% said they have started caring since the COVID-19 outbreak (196,000 people). This suggests there are currently as many as 683,000 unpaid carers in Wales. (Carers UK, 2020)

Carers UK research shows that there has been a 7% increase in unpaid carers in the last 10 years, from 12% to 19%. Combined with the additional 8% who began caring since the COVID-19, nearly one third (27%) of Wales population are currently providing unpaid care.

- 57% are women and 43% are men.
- Half of unpaid carers are in paid employment (50%)
- 31% are in full-time work
- 19% are in part-time work
- Age bands
 - 17% are aged over 65
 - 28% are 55-64
 - 19% are 44-54
 - 25% are 35- 44
 - 5% are 25-34
 - 6% are 18-24

If we apply the Welsh national average, in terms of the percentage of carers against the Powys population today, we estimate the number of unpaid carers in Powys (before COVID-19) to be **25,275, an increase of 56% (9,121) since 2011.**

With the additional pressures of COVID-19, the average percentage of carers in Wales rose to 27%, in Powys this would mean a rise to **35,918 carers, an additional increase of 10,643 carers since the beginning of the coronavirus pandemic.** However, in 2022 we will have more up to date figures once the 2021 Census data is released.

It's important to note here that the research carried out by Carers UK only includes carers aged 18 or over, and carers under 18 are not included in these estimates.

When we have looked at the carers that are "known" to us (through Powys County Council social services or through [CREDU Cymru](#)) we estimate that potentially only 10% of carers are getting support, **leaving up to 90% of carers in Powys without any official advice or support around their caring responsibilities.**

What have people said?

In the 'Living in Powys' well-being survey, out of 470 responses, 45% identified themselves as being (or had been) a carer for a friend, neighbour or family member.

Of these respondents, **59% had never had contact about their caring responsibilities** with either the Council, the Department of Work and Pensions, carers organisations or their GP practice.

#1

The Welsh public said the top challenge affecting unpaid carers in Wales was:

not being able to take time away from caring



Challenges faced by unpaid carers in Wales (Carers UK, 2020)

When asked what challenges unpaid carers are faced with, respondents stated the following as the main challenges:

- not being able to take time away from caring **(78%)**
- managing the stress and responsibility **(77%)**
- the financial impact of the additional care costs **(72%)**
- the impact it has on other personal relationships (e.g., with family, friends, partners etc.) **(70%)**.

Whereas unpaid carers responded with the following challenges:

- not being able to take time away from caring **(74%)**
- managing the stress and responsibility **(73%)**
- the negative impacts on their physical and mental health **(73%)**
- the impact it has on other personal relationships (e.g., with family, friends, partners etc.) **(65%)**
- the financial impact of the additional care costs **(53%)**
- the negative impact it has on their ability to do paid work **(50%)**
- not having anyone to talk to about the challenges of caring **(46%)**.

Health and lifestyle

Health and health inequalities

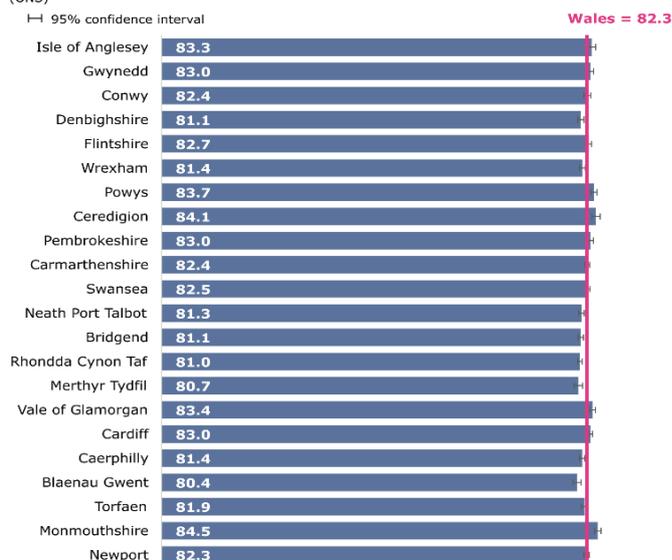
Life expectancy

Life expectancy is an estimate of the average number of years that new-born babies could expect to live, assuming that current mortality rates for the area in which they were born applied throughout their lives. (Public Health Wales NHS Trust, 2020)

The most recently available data (2017-2019) shows that life expectancy in Powys is **83.7 years for women and 80.0 years for men**. For both women and men this is higher than the overall life expectancy for Wales (Wales 82.3 for women; 78.5 for men).

Life expectancy for women and men for different local authorities in Wales is shown in the chart below.

Life expectancy at birth, females, Wales local authorities, 2017-2019
Produced by Public Health Wales Observatory, using Life Expectancy Mid Year Estimates (ONS)



Life expectancy at birth, males, Wales local authorities, 2017-2019
Produced by Public Health Wales Observatory, using Life Expectancy Mid Year Estimates (ONS)

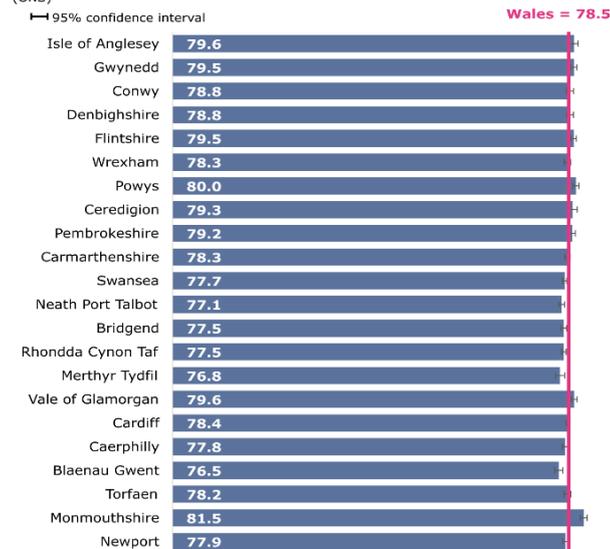


Figure 8 Life expectancy Male and Female 2017-2019 (ONS, 2017-19)

A Public Health Wales report from 2020 indicates that there may be a plateauing in life expectancy improvements in Wales. We also know that it is also occurring in many other developed nations. (Public Health Wales NHS Trust, 2020)

Evidence from 2018 (Public Health Wales NHS Trust, 2018) suggests that a plateau in life expectancy in Wales (which had been improving for many decades) is evident from around 2011 – a phenomenon that has been seen across much of Western Europe – but which occurred earlier in Wales. (Public Health Wales NHS Trust, 2018)

This faltering in improvements in mortality has been mainly driven by deaths in the 85 and over age groups; however, it is also true that mortality in 55 to 84-year-olds is no longer

declining (Public Health Wales NHS Trust, 2018). The same pattern appears to be occurring at a Powys level, where improvements in life expectancy at birth seem to have stalled in recent years, both for men and women.

Life expectancy figures in Powys is greater than for Wales overall, but this needs to be seen as part of a bigger picture: life expectancy at birth in the UK in 2018 to 2020 was 79.0 years for males and 82.9 years for females (ONS, 2018-20) – in line with the figures for Powys – but international comparison indicates that the UK overall lags, particularly for women, behind a number of developed countries on this measure. For example, in 2019 life expectancy at birth in Japan was 81.5 for men and 86.9 for women; for Switzerland it was 81.75 for men and 85.08 for women. (WHO, n.d.)

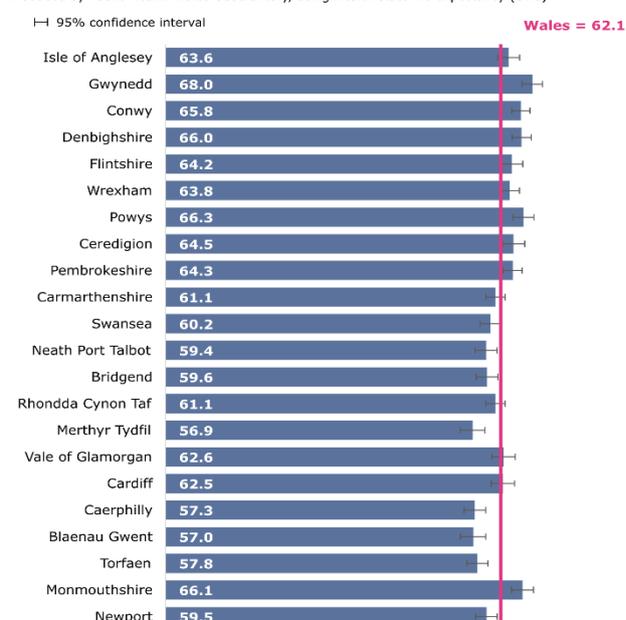
Healthy life expectancy

Healthy life expectancy is the average number of years a person can expect to live in good health, assuming that current mortality rates and levels of good health for the area in which they were born applied throughout their lives. (Public Health Wales NHS Trust, 2020)

For the period 2017 to 2019, **healthy life expectancy (at birth) for Powys was 66.3 years for women and 63.3 years for men.** These figures are also illustrated in the chart below.

People in Powys can expect to live longer in good health than the population of Wales overall, for which healthy life expectancy is 62.1 for women; 61.2 for men.

Healthy life expectancy at birth, females, Wales local authorities, 2017-2019
Produced by Public Health Wales Observatory, using Health state life expectancy (ONS)



Healthy life expectancy at birth, males, Wales local authorities, 2017-2019
Produced by Public Health Wales Observatory, using Health state life expectancy (ONS)

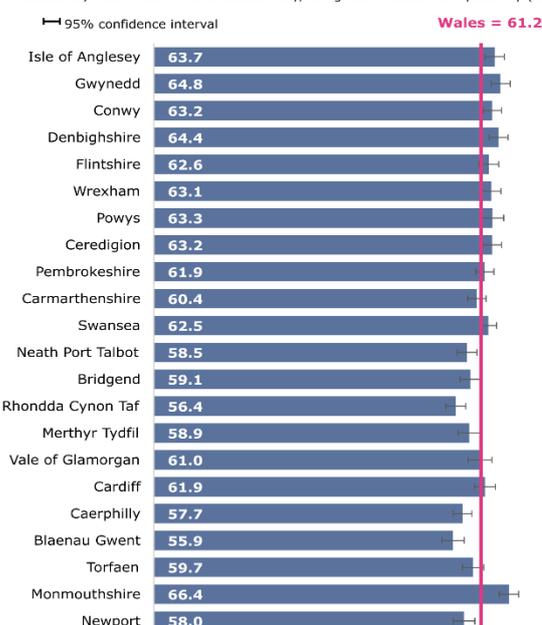


Figure 9 Healthy life expectancy at birth, Male and Female (ONS, 2017-2019)

Healthy life expectancy in Wales is favourable compared to the UK as a whole: for the equivalent period healthy life expectancy at birth for the UK overall was 62.9 for men and 63.3 for women. (ONS, 2018-20)

These overall figures however do not capture inequalities in life expectancy between groups, which are discussed below.

The life expectancy gap

The Welsh Government produces a relative measure of deprivation called the Welsh Index of Multiple Deprivation (WIMD). Measurement across eight domains of deprivation (including for example income, employment and housing) allows comparison of relative deprivation at small area-level in Wales. WIMD ranks 1,909 small areas in Wales, named Lower Super Output Areas (LSOAs), from 1 (the most deprived) to 1,909 (the least deprived). These ranks can be used to understand relative deprivation of small areas in Powys.

Powys has 79 LSOAs: 11% (9) of these are in the top 30% most deprived areas of Wales, including

- Ystradgynlais 1 (in the top 10% most deprived in Wales)
- Llandrindod East/West, Newtown East, Newtown South, and Welshpool Castle all ranked in the most deprived 20% in Wales
- Newtown Central 1, Newtown Central 2, St John 2 (Brecon) and Welshpool Gungrog 1 ranked in the most deprived 30%

Powys does not contain any LSOAs in the top 10% of least deprived areas in Wales, there are 10 LSOAs in the top 20% least deprived areas in Wales, in the top 30% of least deprived areas in Wales, Powys has a further 16 LSOAs (Welsh Gov, 2019).

To understand more about WIMD in Powys and how we rank against Wales, [click here to explore our interactive report.](#)

Having local measures of deprivation like the WIMD is important when thinking about the health of populations, because it allows us to look at relationships between health and deprivation (deprivation is known to have multiple important effects on health). Specifically, we can examine the life-expectancy gap (the difference between life expectancy estimates for different groups) (Public Health Wales NHS Trust, 2020), to allow us to make comparisons between areas with differing levels of deprivation.

Analysis of this kind shows that, while the life expectancy in Powys compares favourably with that in Wales overall, **inequalities persist within Powys itself between the most and least affluent areas:**

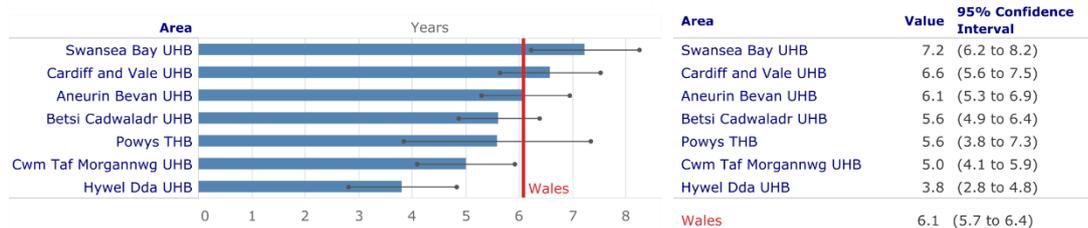
- a girl born in the least affluent parts of Powys **can expect to live 5.6 years less** than if born in the most affluent areas;
- a boy brought up in the least affluent areas **can expect to live 6.5 years less in good health.**

The life expectancy gap for each of the health board areas in Wales is illustrated in the chart below.

Gap in life expectancy at birth between the most and least deprived fifth, 2015 to 2017

Years, females, health boards

--- 95% confidence interval

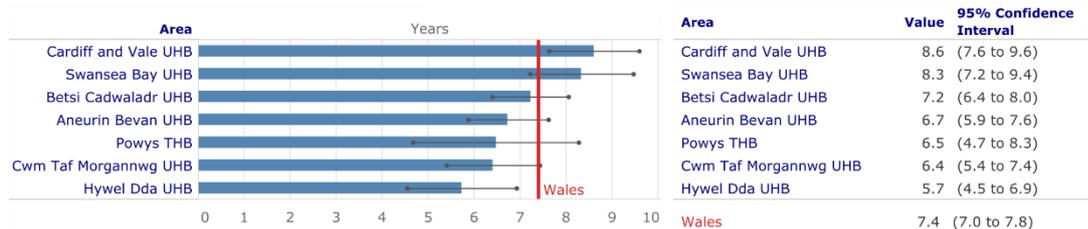


Produced by Public Health Wales Observatory, using WIMD 2014 (WG), PHM and MYE (ONS).

Gap in life expectancy at birth between the most and least deprived fifth, 2015 to 2017

Years, males, health boards

---95% confidence interval



Produced by Public Health Wales Observatory, using WIMD 2014 (WG), PHM and MYE (ONS).

Figure 10 Gap in life expectancy at birth between the most and least deprived, Male and Female, (PHW 2015-17)

Mental health

Positive mental health is a key factor for good health and relevant to the whole population. In 2007 the World Health Organisation stated that there is no health without mental health, which means that public mental health is integral to all public health work. Improving mental health is a critical issue for people of all ages and its impact is cross cutting, affecting life chances, learning, home life, employment, safety, physical health, independence, and life expectancy (Powys Teaching Health Board, 2021).

The coronavirus pandemic has had a significant impact on mental and emotional health and well-being. As of January 2022, mental and emotional health services, including primary, secondary and Third Sector care and support are experiencing unprecedented requests for help across Wales, for mild to moderate depression, anxiety, bereavement and lingering effects of grief, social isolation and loneliness. People accessing crisis services are also increasing, with emerging needs relating to eating disorders, psychosis, and complex needs (including substance misuse and risks of homelessness and debt) all becoming more prevalent.

Depression is the most common mental health problem for older people and prevalence rises with age (Powys Teaching Health Board, 2021).

Women are more often diagnosed with depression than men. **At any one time, around 10-15% of the over 65 aged population nationally will have depression and 25% will show symptoms of depression.** The prevalence of depression among older people in acute hospitals is 29% and among those living in care homes is 40%. **More severe depression is less common, affecting 3-5% of older people.**

Office of National Statistics data taken during 2020 evidences an increase in mental and emotional health issues. **19% of adults were likely to be experiencing some form of depression during the coronavirus pandemic in June 2020;** this had almost doubled from around 1 in 10 before the pandemic (July 2019 to March 2020) (ONS, 2020). 13% of adults developed moderate to severe depressive symptoms during the coronavirus pandemic.

People with mental health needs can seek advice and support from their GP. Access to GP surgeries declined during the pandemic, with many people choosing not to contact their GP, due in part to national lockdown(s) and other pressures relating to NHS services. As of January 2022, numbers of people accessing GP services are consistent (and rising) with pre-pandemic requests for help (Powys Teaching Health Board, 2020-2022).

However, two-thirds of older people with depression never discuss it with their GP, and of the third that do discuss it, only half are diagnosed and treated. **This means of those with depression only 15% or one in seven, are diagnosed and receiving any kind of treatment.** Even when they are diagnosed, older people are less likely to be offered treatment than those aged 16 to 64.

It has been estimated that **between 10-15% of women suffer from post-natal depression.** In Powys there are approximately 1,000 births per year, which would indicate that around 100 women will suffer post-natal depression.

The most common mental health disorders for working age population are anxiety and depression (Social Care Wales, 2017).

According to the pharmaceutical needs assessment (Powys Teaching Health Board, 2021), in the UK;

- 25% of older adults have depression requiring an intervention
- over 40% of those in their 80s are affected by depression
- depression is the leading cause of suicides in England and Wales each year
- Suicide is more common in men
- Substance misuse is more common in men

In Powys there were **250 admissions to a mental health facilities in 2019-20**. The data shows admissions to mental health facilities in Powys have **decreased by 23%** since 2014-15, which correlates with the decrease for the Welsh Average (23.5%).

The figure for Powys is consistently below the Welsh average. Although the numbers seem to be decreasing it is not known if this is because of early prevention or if there are other factors affecting this. (Welsh Gov, 2021)

There were **285 suicides in Wales** in the year 2020. (Office for National Statistics, 2021)

Powys is the **6th highest** Local Authority with **1.05 suicide death rate per 10,000 population in 2020**, which accounts for 4.9% of all suicide deaths in Wales for 2020.

Over the last 10 years the number of suicides in Powys has ranged between 19 and 21 suicide deaths recorded annually. Between 2015 and 2019, 5.6% of all suicides in Powys were persons aged 25 and under.

The number of suicides in Powys

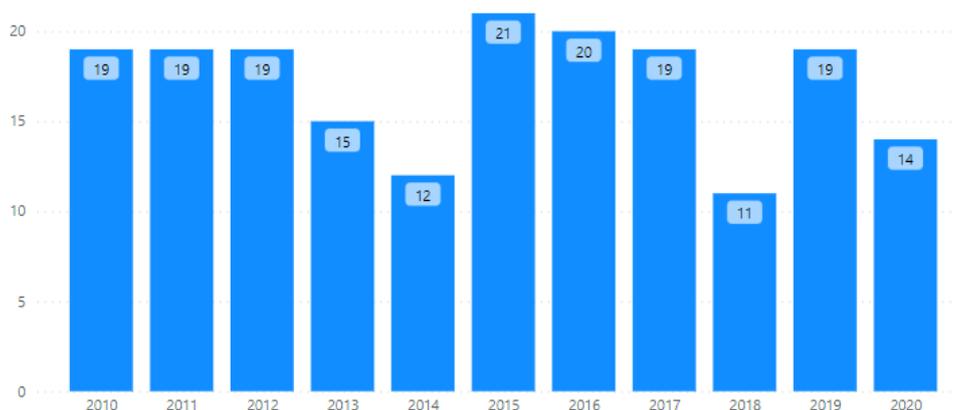


Figure 11 Number of suicides in Powys 2010-2020 (ONS 2021)

Dementia is a major public health issue in Wales.

Approximately **42,000 people in Wales** have dementia, however only 22,686 people have a dementia diagnosis. It is most common among older people - dementia affects one in twenty over the age of 65 and **one in five over the age of 80**.



Source: Wales: General medical services contract: Quality and outcomes framework Sept 2020

As life expectancy increases, there will be more older people and so more people with dementia (NHS Wales, n.d.) (Health Challenge Wales, n.d.)

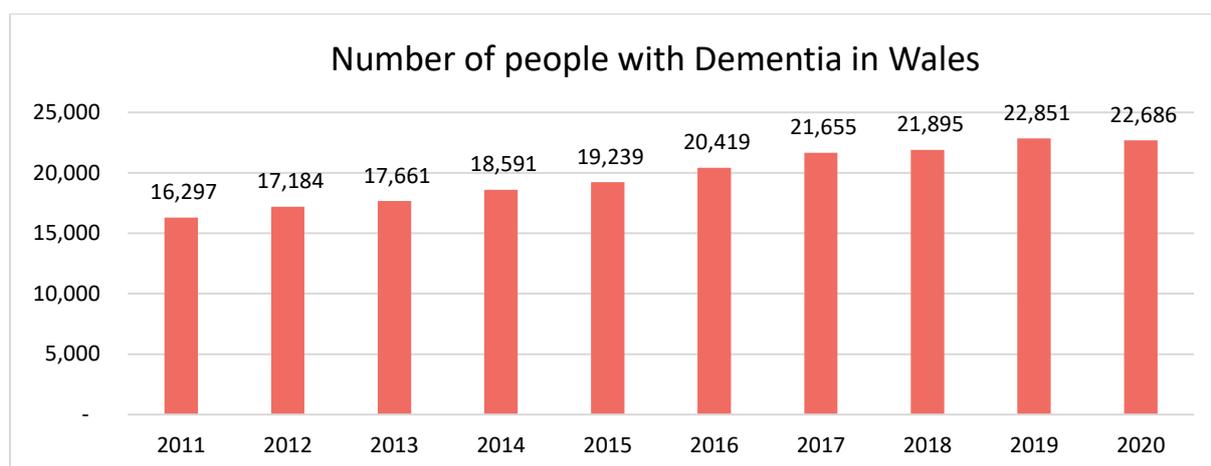


Figure 12 Number of people with Dementia in Wales (Alzheimer's Research UK, 2021)

In **Wales**, between 2015 and 2020, the number of people on the dementia register **increased by 18%**, from 19,239 to 22,686 (Alzheimer's Research UK, 2021).

Between 2010 and 2018, Powys Teaching Health Board had the highest prevalence rate for dementia out of the seven health boards in Wales, this diagnosis rate is calculated by dividing the number of people diagnosed with dementia (as reported in national health statistics) by the total estimated number of people living with dementia. For Powys Teaching Health Board this rate ranged from 59% to 76% between 2010 and 2020.

In 2019 Powys (PTHB) dropped to 2nd behind Betsi Cadwaladr Health Board with 76%, continuing its decline in 2020 where Powys (PTHB) dropped to being the 4th highest with a rate for dementia of 72%.

The diagnostic rates have been impacted by Covid-19 over the past 18 months due to no diagnostic clinics being held. Powys have a current diagnostic rate of 34% but it is predicted to increase when people on the waiting list attend their appointment and receive a potential diagnosis.

The Dementia Care Pathway of Standards were launched in March 2021 following consultation with over 1800 people. There are twenty standards narrowed down from over one hundred potential standards which drill down to the details of what people believe will make a positive difference to dementia care in Wales. Powys has led the way in arranging a workshop to present the Standards to health care staff, local authority and third sector partners.

Following the workshop four workstreams have been developed to progress the Standards in Powys and Memory assessment services feature in ten of the twenty standards, including improving the diagnostic rates. The Dementia Friendly Hospital Charter has a standard to put principles in to practice which reflect the aspirations in the Dementia Action Plan for Wales, covering a number of person centred, and rights based approaches, which will improve dementia care during a hospital admission.

Establishing the Dementia Care Pathway of Standards in Powys will mean there is a clear focus for the development of robust dementia care provision.

What do we know about young people’s mental health? (Social Care Wales, 2017)

- suicide is a major cause of death for people age 15-44
- one in five deaths of men aged 15-24 is a result of suicide
- Regions recognise those at higher risk of suicide, particularly young men. One region identifies higher self-harm levels in the LGBT community and other note the risk factors, such as substance misuse and those more socio-economically deprived

What we do to support it?

In March 2020, all Powys mental health charities stopped their face-to-face services, including drop-in groups and 1:1 counselling session. Some restarted some face-to-face sessions once the first lockdown was relaxed, and they had been able to put procedures and equipment in place to allow social distancing.

Across the county, most community centres for mental health and wellbeing have adhered to Welsh Government guidelines and are open for face-to-face support, by pre-appointment rather than “drop-in”. Where possible, group work is taking place, either outdoors or where facilities enable adherence to social distancing and ventilation guidelines. The Third Sector has also embraced providing remote access to support, by phone, video or through Facebook and/or other social media methods. Restrictions have not prevented organisations from supporting their communities in whatever way possible, and numbers of people seeking support from mental health charities continues to increase. (PAVO, 2021)



“1 in 10 children have a diagnosed mental health disorder, the most common being a conduct disorder” (Social Care Wales, 2017).

As the pandemic progresses a mixed picture is emerging of the effects that lockdown, media coverage and disruption to normal routines are having on the well-being of children and young people.

At a local level it has become more evident that recent events have had a negative impact on the mental health and well-being of some children and young people in Powys resulting in a significant increase in demand for counselling services across the County.

Alongside this, mental health has impacted on demand for children’s social care, with parental mental ill health being a factor for 39% of children receiving care and support,

(national average: 36%). It is important to note that this has risen by over 9% since 2017, a trend which is seen nationally.

17% of children (aged 10 or over) receiving care and support were reported to have a mental health issue, which is higher than the national average of 14%. This is similar to the 2017 figure of 18% (Welsh Government , 2021) (Welsh Government, 2021).

It is also anticipated that there will be an impact on the mental health of young people, with a likely increase in the number of referrals to Child and Adolescent Mental Health Services (CAMHS) to support them in managing their situation. May 2020 saw the lowest number of referrals (24) in the previous 18 months, and this is almost a 50% reduction from May 2019 (46). This does raise concerns that young people may not be accessing the required support at the right time, which may impact their well-being and suggests that there may be an increased demand for the service post COVID-19.

Current provision includes:

- developing a single point of access for CAMHS
- school counselling services
- raising awareness of mental health in schools and to promote youth mental health first aid
- self-harm pathway between health and education and PSE lessons addressing self-harm
- educating those working with young people on dealing with someone who self-harms or is experiencing anxiety and depression
- emotional well-being services

The “staying at home and social distancing rules” had both positive and negative impacts on the Welsh population. There is evidence that the first lockdown negatively impacted the mental well-being of the “...whole population.” However, the impact may have been particularly marked for children and young people, older people, key workers, people on low incomes and at risk of unemployment, people with existing poor mental health and those who were shielding (Powys Teaching Health Board, 2021) .

We know that of those who deliberately self-harm (DSH) and access Child and Adolescent Mental Health Services (CAMHS) (Powys Teaching Health Board, 2021):

- Only 50% who self-harm seek help – mainly girls
- 36% of 16–25-year-olds have self-harmed at some point
- Average age of young person using the service is 15 years (UK: 13 years)
- Waiting times – 85% of those referred and accepted are seen within 7 days (7 follow up), the other 15% are seen within 10 working days

(Referrals from January 2020 – August 28th, 2021 – 247)

As a result of successive lockdown periods, there has been a significant increase in recorded instances of children and young people within the county experiencing anxiety and a range of other mental health issues. An increase in demand for counselling led to a 64% increase in new referrals (September 2021 compared with September 2021).

Xenzone, our commissioned counselling service currently have 245 active cases. Working in close collaboration with key partners, Schools Service is making effective use of additional funds received from Welsh Government to reduce the number of children and young on the counselling waiting list and increase the numbers sessions available. (Schools Service (PCC), 2020)

What have people said?

In the Living in Powys well-being survey respondents were asked if they *considered themselves to be disabled*, of the which 13% answered yes. Of those

- 23% highlighted that they had mental health issues
- 9% had a learning disability or difficulty
- 39% had physical/mobility impairment
- 13% have hearing impairment
- 1% have visual impairment
- 2% speech impairment

In the same survey, respondents were asked how satisfied with their life they are nowadays:

- 61% were very happy or happy
- 26% neutral
- 13% unhappy or very unhappy

And *how happy they felt yesterday*,

- 61% were very happy or happy
- 25% neutral
- 14% unhappy or very unhappy

When asked what priorities they would put into a well-being plan, answers included:

- “Improve mental health for residents through a range of people led interventions.”
- “Make health care more accessible-easier access to GP and shorter wait times for assessments for Mental Health/Autism.”
- “Better mental health care and provision - currently very poor.”
- “Access to quicker assessments for mental health (waiting time over 14 months).”
- “To be able to afford a nice home with a garden (not a shoebox overlooked by lots of others, people living like this will struggle to have good mental health. The current

new builds like Newydd Housing are a prime example of housing that will be bad for mental and emotional health).”

Staying healthy

How can we explain the differences in life expectancy and healthy life expectancy, both between Powys and other areas and within Powys? The chart below is from a Public Health Wales report from 2020. (Public Health Wales NHS Trust, 2019) It illustrates the extent to which risk factors contribute most to the burden of disease in the population of Wales.

Most of these risk factors relate to lifestyle (smoking, diet, alcohol, and drug use) or are themselves directly influenced by lifestyle (obesity and overweight, high fasting plasma glucose, high systolic blood pressure, high LDL cholesterol). A key message here is the important effect that risk factors to do with lifestyle play in influencing health.

Top 10 Global Burden of Disease identified risk factors for disability-adjusted life years (DALYs), count, Wales, 2017

Produced by Public Health Wales Observatory, using Global Health Data Exchange (IHME)

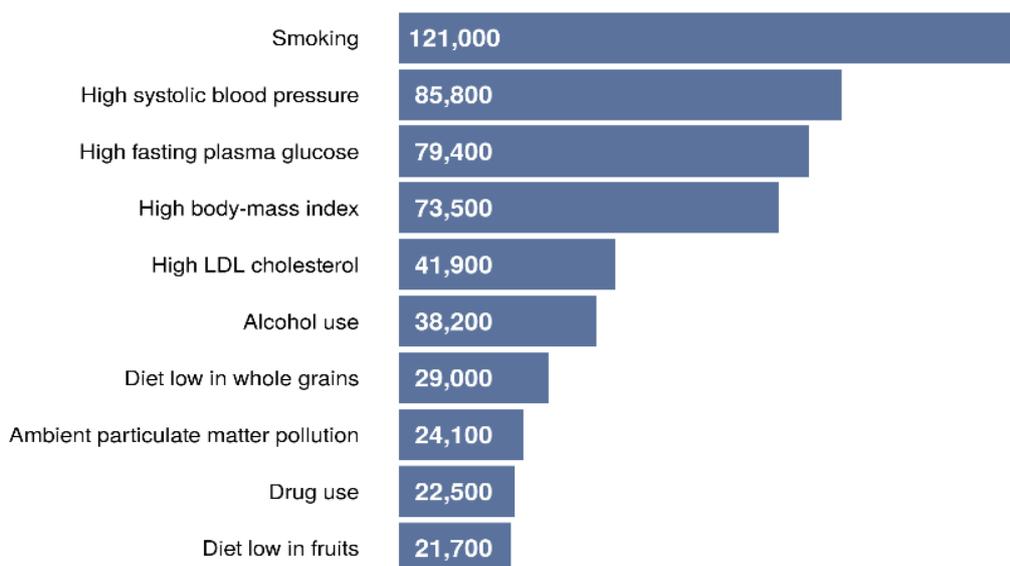


Figure 13 Top 10 Global burden of disease identified risk factors for disability (PHW 2017)

Lifestyles and the environment around us are key drivers of the health of our population. They have a much larger role in determining population health than do other influences such as provision of health and social care services. Understanding how the Powys population is doing on these risk factors is important if we want to systematically improve the health of our population.

When compared with the rest of Wales, Powys adults tend to have healthier lifestyle behaviours (though this is not true for all risk factors). Using National Survey for Wales data (2020) we can understand how Powys compares to the other 22 Local Authorities and against the Welsh average for a number of these risk factors. (Welsh Gov, 2017)

Smoking

Smoking is a key determinant of population health, being the **single greatest cause of preventable death**. Smoking causes a range of cancers, cardiovascular diseases and a range of respiratory conditions (for example COPD and emphysema).

- **14.5% of adults in Powys currently smoke** (Wales 17.4%). Powys ranks the 4th lowest amongst the 22 local authorities in Wales for smokers (Welsh Gov, 2017)
- **27.3% of Powys adults are ex-smokers** (Wales 29.3%), ranking Powys as the 6th lowest amongst 22 Local Authorities in Wales (Welsh Gov, 2017)

Alcohol consumption

The proportion of adults over 16 whose **weekly average alcohol consumption** is over guidelines is higher than the percentage for Wales overall.

- **19.7% of adults in Powys** weekly average alcohol consumption **is over guidelines (above 14 units)**. This is above the Welsh average of 18.6%. Powys ranks 8th highest amongst the 22 local authorities in Wales.
- **17.4% of adults in Powys** weekly average alcohol consumption **hazardous (between 14 and 50 units)**. This is above the Welsh average of 16.1%. Powys ranks 9th highest amongst the 22 local authorities in Wales.
- **2.3% of adults in Powys** weekly average alcohol consumption **harmful (over 50 units)**. This is below the Welsh average of 2.5%. Powys ranks 10th highest amongst the 22 local authorities in Wales. (Welsh Gov, 2017)

Diet and physical activity

As well as being important risk factors in themselves, diet and physical activity in the population are key drivers of obesity. In this assessment, we have looked at consumption of fruit and vegetables as a useful indicator of the quality of a person's diet. The percentage of adults **who ate at least 5 portions of fruit of veg** (the previous day) is higher than the Welsh average, and the percentage who ate less than or no fruit or veg (the previous day) is lower than the Welsh average.

- **27.3% of adults in Powys** ate at least 5 portions of fruit of veg (the previous day). This is above the Welsh average of 24.3%. Powys ranks 6th highest amongst the 22 local authorities in Wales.

- **65.9% of adults in Powys** ate some, but less than 5 portions of fruit or veg (the previous day). This is below the Welsh average of 67.8%. Powys ranks the 5th lowest amongst the 22 local authorities in Wales.
- **6.7% of adults in Powys** ate no fruit or veg (the previous day). This is below the Welsh average of 7.9%. Powys ranks the 8th lowest amongst the 22 local authorities in Wales. (Welsh Gov, 2020)

The level of **physical activity** in Powys is also better in Powys than in Wales overall.

- **60.8% of adults in Powys** were active at least 150 minutes (in previous week), meeting the minimum required guidelines for activity. This is above the Welsh average of 53.2%. Powys ranks 4th highest amongst the 22 local authorities in Wales.
- **12.7% of adults in Powys** were active between 30 to 149 minutes (in previous week), below the guideline. This is below the Welsh average of 13.9%. Powys ranks the 10th lowest amongst the 22 local authorities in Wales.
- **26.4% of adults in Powys** were active less than 30 minutes (in the previous week), below guidelines. This is below the Welsh average of 33%. Powys ranks the 2nd lowest amongst the 22 local authorities in Wales (Welsh Gov, 2017)
- An important environmental risk factor for ill health is the quality of the air that we breathe, because poor air quality has effects on respiratory and cardiac disease and can lead to lung cancer and stroke. (Environment pollution, 2008) [10] Nitrogen dioxide (NO₂) is a gaseous pollutant and exposure to outdoor NO₂ is mainly related to road traffic emissions. Average nitrogen dioxide levels are a useful proxy indicator of overall air quality.
- For this indicator Powys ranks 2nd lowest of local authorities in Wales. Average NO₂ is 4.4 in Powys, compared to the Welsh average of 9.2. Predominantly this can be explained by rural nature of the county. The NO₂ pollutant has decreased in Powys over the years, since 2007 this has almost halved from 7.92 to 4.38 in 2019.
- Additional information on air pollution is contained in the 'Environment' section of this assessment.

To look at more lifestyle factors and how Powys ranks against Wales, [click here to explore our interactive report.](#)

Substance Misuse

Use of alcohol or drugs at some stage in life is common; it is estimated that approximately 45% of adult men and 34% of adult women in Wales report drinking above the recommended guidelines, (Public Health Wales, 2022) consume alcohol at levels associated with some risk to their health, and that nearly one in three of the adult population have tried illegal drugs. For a proportion of these individuals their alcohol and drug use may reflect dependency or excessive consumption and may be associated with substantial harmful consequences such as health problems or encounters with the criminal justice system.

Alcohol is one of the leading modifiable life-style related drivers of non-communicable diseases alongside smoking and obesity, and it is estimated to be the behavioural risk factor with the second highest impact on the NHS budget after poor diet (Scarborough P, 2011). Use of alcohol and drugs has also been highlighted as one of the six key drivers of crime due to associations with behavioural disorders and violence: it is estimated that 1 in 100 people each year will be a victim of an alcohol-related violent crime (Institute of Alcohol Studies, n.d.). The impact of alcohol and drug use on wider communities can be far-reaching, and include:

- direct economic costs on health and social care services, the criminal justice system, and the social welfare system.
- indirect costs from low productivity, unemployment, absenteeism and premature mortality or morbidity; and
- intangible costs to the affected individual or their family members from anxiety, pain, financial worries, and reduced quality of life.

Alcohol and drug treatment services have an important and evidence-based role in mitigating the personal and financial costs of problematic substance use and have the potential to provide cost-efficiency savings for a range of public services including health and social care, housing and welfare, and the criminal justice system.

Alcohol and drug use is also common in people with mental health problems and 70% of those in drug services and 86% of those in alcohol services report having experienced mental health problems (Weaver et al, 2003) (Delgadillo et al, 2013). The level of harmful and problematic drug and alcohol use amongst patients of community mental health services is estimated at around 44% (Public Health England, 2016). The relationship between mental illness and substance use is complex, and individuals with co-occurring mental health and substance use problems experience poor health outcomes (Hayes et al, 2011), increased use of health and other statutory services, and an increased chance of being homeless or known to the criminal justice system (Strathdee G et al, 2002). Suicide rates are also significantly higher in this population, with a history of alcohol or drug use being recorded in 54% of all suicides in people experiencing mental health problems (University of Manchester, 2016). Co-occurring conditions are more prevalent among psychiatric inpatients and people in secure services (Strathdee G et al, 2002) and are also common among the prison population (up to 75% of prisoners) (Prison Reform Trust, 2011).

There are several challenges to supporting recovery in this population group; and, despite the high prevalence of co-occurring conditions, detection of the problems remains low; and historically, individuals with such complex needs have experienced difficulties in accessing services which meet all their needs. This often leads to disengagement and poorer patient outcomes.

Mental health and substance use services are commissioned separately which can present organisational and clinical barriers to effective treatment, for example this may lead to disjointed care protocols resulting in services that are unwilling to manage the risk presented by people with co-existing mental health problems and substance misuse.

Research also shows that, despite the shared responsibility that NHS and local authority commissioners have to provide treatment, care and support, people with co-occurring conditions are often excluded from services (Care Quality Commission, 2015) (The Recovery Partnership, 2015).

The current Substance Misuse provision in Powys caters for the maintenance of approximately 500 individuals within treatment presenting with several complex issues.

The caseload is split almost 50/50 between alcohol clients and Class A substance misuse issues.

The incumbent service provider demonstrates within their service model how consideration of the following issues are addressed:

- Recognition of the impact of Adverse Childhood Experiences, how to identify and address this amongst the treatment cohort
- Awareness of the various routes of exploitation such as county lines and other risk factors for those vulnerable within communities
- Consideration of the family around the individual, ensuring provision of wider support and identification and management of safeguarding issues/risks
- Promoting positive community benefits and ensuring wellbeing of communities aligned to the Well-being of Future Generations (Wales Act 2015)
- Service users with co-occurring substance misuse and mental health issues

From a commissioning perspective, Powys is keen to consider innovative and transformative approaches to addressing these challenges, with a focus on a flexible model of delivery, responsive to the changing patterns and demands of drug and alcohol use and an increase in the use of outreach and digital technologies to engage service users before, during and after treatment. This includes maximising opportunities to deliver services from a range of settings and organisations to minimise stigma and increase service access and engagement from harder to reach groups.

Obesity

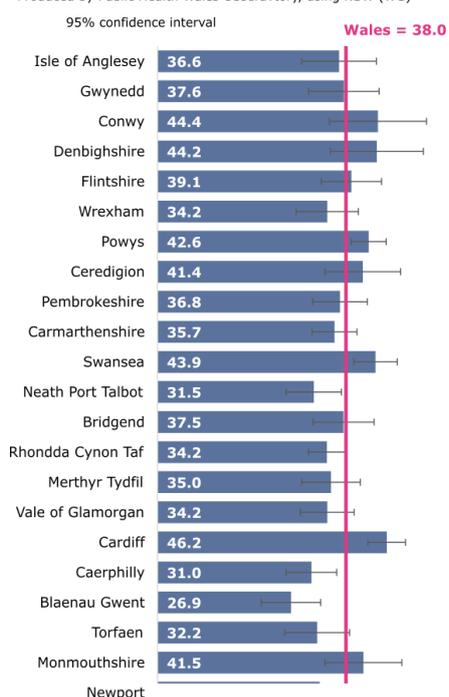
In Powys, nearly 6 in 10 adults are overweight or obese and this is predicted to continue to rise.

Obesity and overweight are associated with several serious conditions, including type 2 diabetes, hypertension, coronary heart disease, stroke, osteoarthritis and cancer. (John B Dixon, 2013) Overweight and obesity are important over the life course of an individual, with childhood patterns of weight often carried over into adulthood. The chart below shows the percentages of people in Powys who were of healthy weight (using most recently available data) for two different groups: working age adults and older adults. Both groups in Powys have a higher proportion of people of a healthy weight than the Wales population overall.

- **42.6% of working age adults (aged 16-64) in Powys are of a healthy weight.** This is higher than the Welsh average of 38%. Powys ranks 7th highest amongst the 22 Local Authorities in Wales.

42.2% of older adults (aged 65+) in Powys are of a healthy weight. This is higher than the Welsh average of 38.1%. Powys ranks 7th highest amongst the 22 Local Authorities in Wales.

Working age adults of a health weight, percentage, persons aged 16 to 64, Wales local authorities, 2017/18 - 2019/20
Produced by Public Health Wales Observatory, using NSW (WG)



Older adults of a healthy weight, percentage, persons aged 65+, Wales local authorities, 2017/18-2019/20
Produced by Public Health Wales Observatory, using NSW (WG)

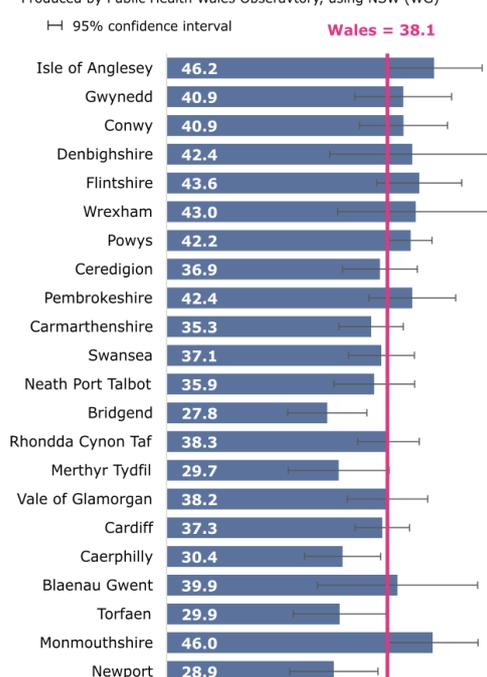


Figure 14 Working age adults of a health weight (PHW 2017-20)

Figures for childhood obesity for different health boards in Wales are shown in the chart below. In Powys in the year 2017/18. (Public Health Wales, 2017/18)

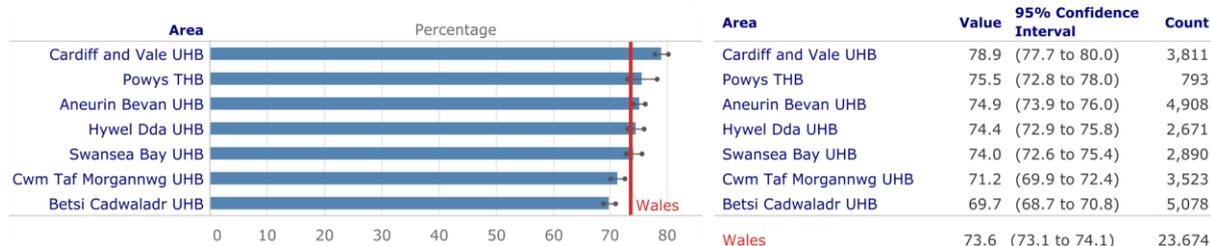
- **75.5% of children age 5 were healthy or underweight.** This is higher than the Welsh average of 73.6%

- **24.5%**⁴ were overweight or obese, which is lower than the Welsh average of 24.5%⁵

Children age 5 of healthy weight or underweight, 2017/18

Percentage, health boards

--- 95% confidence interval



Produced by Public Health Wales Observatory, using CMP (NWIS).

Figure 15 Children age 5 of healthy weight or underweight (PHW, 2017-18)

What have people said?

In the Living in Powys well-being survey, respondents were asked **“how many days per week they do at least 30 minutes physical activity?”** The responses were evenly spread across the options:

- 22% responded everyday
- 23% almost everyday
- 27% 2-3 times a week
- 15% once a week
- 13% rarely or never

In the same survey, when asked **“What would be your top priorities to put into a well-being plan?”** answers included:

- “Provide the infrastructure for people to get out of their homes and exercise without needing to drive, and to incorporate exercise into daily life.”
- “Safe cycling routes so people can move and travel actively and safely.”

And when asked to list **“things that you think positively impact on the health and well-being of you, your family, your business, or employment”** top themes identified included, exercise and eating healthier:

- “Create more outdoor spaces for all to access and enjoy, including pedestrianisation and cycle routes”
- “Support for enhancing walking opportunities in the county. Although on paper responsibility for maintaining public rights of way is the responsibility of Powys and

⁴ percentage implied from the difference in those who were of a healthy weight

landowners, this responsibility is not enforced and too many paths are blocked or unusable. Being able to get out into the countryside for a relaxing, hassle-free walk is fundamental to promoting both physical and mental health. Walking is accessible to all, even the poorest in the community, as it doesn't require an expensive outlay of equipment or membership.”

Educating Our Children

Our schools

At the time of writing there are **17,148 children in Powys schools**,

- 9,709 are attending a primary school
- 7,158 are attending a secondary school
- 281 are attending Special Schools.



In Powys, there are 77 primary schools, broken down into 13 catchment areas.

The Powys school catchment areas are:

- Llanfyllin
- Welshpool
- Llanfair Caereinion
- Machynlleth
- Llanidloes
- Newtown
- Llandrindod Wells
- Presteigne
- Builth Wells
- Brecon
- Hay and Talgarth
- Crickhowell
- Ystradgynlais

For 2021-22, the average budget share per pupil for Powys primary schools is £4,857, which is higher than the Welsh average of is £4,613. In Powys, 46 of our primary schools are below the Welsh average.

We have 11 secondary schools over 13 buildings and catchment areas. For 2021/22, the average budget share per pupil for Powys secondary schools is £5,471, which is lower than the Welsh average of is £5,488. 9 of our 11 secondary schools are below the Welsh average.

(Welsh Gov, 2021-22)

Powys has three special schools, two of the schools (Brynllwarch Hall and Ysgol Cedewain) are in the Newtown locality and one (Ysgol Penmaes) is in Brecon locality.

(Schools Service (PCC), 2020)

As of the 31st of August 2021, there were 214 active pupils on the Elective Home Education (EHE) register meaning that we have seen a **54% increase in pupils being registered for EHE during 20/21**. There is a link to COVID-19 and the increase in the number of students that are EHE. Welshpool and Montgomery locality has the highest EHE uptake with 33 pupils registered while Crickhowell has the lowest with only four EHE pupils in the locality.

Destination bilingual: the benefits of choosing a Welsh-medium education has been created to provide parents with the latest information about Welsh-medium education and the benefits of bilingualism.

The average **percentage of students educated through the medium of Welsh in Powys primary schools is 21%** (Welsh Gov, 2021). The highest catchment area with students taught through the medium of Welsh is Machynlleth with **84%**. Three of four schools in the catchment offer full Welsh medium provision. The five catchments (Welshpool, Newtown, Presteigne, Hay and Talgarth and Crickhowell) neighboring the English border have no Welsh medium provision available.

The average **percentage of students educated through the medium of Welsh in Powys Secondary schools is 12%** (Welsh Gov, 2021). The highest catchment area with students taught through the medium of Welsh is Machynlleth with **68%**. Six catchments (Welshpool, Newtown, Presteigne, Hay and Talgarth, Crickhowell and Ystradgynlais) have no Welsh medium provision available.

Follow the link to view more [information about Schools Benchmarking in Powys and how we compare to Wales via our interactive report.](#)

Support to pupils during the COVID pandemic

As a result of the COVID-19 pandemic, Welsh Government legislation on the 3 July 2020 temporarily removed the duties on governing bodies and local authorities to provide data on teacher assessment outcomes. In addition, the Welsh Government introduced a revised assessment system for formal qualifications, which included non-examination assessments, internal assessments, and externally set and marked assessments. This was then extended into the 2020-21 academic year. This means that there is no data available for the pupil attainment levels during 2019-20 and 2020-21.

The local authority acted swiftly and put in place appropriate community-based support for children and young people within the County. Three key multi-agency working groups, focused on emergency childcare provision, continuity of learning, and learner and staff well-being worked together to adapt existing services and develop new processes where required.

In response to the directive from Welsh Government, Powys staff and schools staff repurposed schools and provided free childcare for the children of key workers and the most vulnerable children and young people. In Powys, emergency childcare was provided between 8am and 6pm for seven days of the week and this extended into school, public and bank holidays. Emergency childcare commenced in Powys on 27 March 2020 and provided 16 Emergency Childcare Hubs (ECH) and two dedicated Emergency Childcare Specialist Hubs (ECSH), sited within the special schools to support our most vulnerable learners. The total weekly numbers of children accessing the hubs ranged between 148 – 245 over the period of provision.

Emergency childcare provision was also made available for pre-school children between 23 March and 29 June 2020. 28 settings were open to support the children of key workers and vulnerable children. During this period 271 pre-school children per week accessed emergency childcare provision.

(Schools Service (PCC), 2020)

Educational attainment

Nearly all schools have tracked and monitored learner progress over the course of the academic year. As COVID-19 operational guidance has been implemented in schools, this has resulted in schools not being able to resume their normal assessment procedures. In many Powys primary schools, most pupils have maintained expected progress in literacy and numeracy over the remote learning period and when they returned to face-to-face learning.

Nearly all schools report that where pupils were supported during remote learning, progress was at least maintained. In many Powys secondary schools, many pupils have maintained or exceeded their expected levels of progress. There were subjects that schools were able to deliver successfully remotely and there were other, mainly more practical subjects, which have been more limited during remote learning.

(Schools Service (PCC), 2020)

What have people said?

We conducted a survey of pupils and parents to capture experiences of remote learning during the pandemic (carried out during January 2021). A total of 3,422 responses were received from pupils and parents at primary, secondary and special schools across Powys.

Parents and pupil feedback showed that:

- Most (90%) agreed that they / their child had received the right amount of support, learning activities and lessons from their school.
- Many (86%) reported that they / their child had received live lessons.
- Most (93%) agreed that the school had successfully engaged with their pupils.

- The majority (64%) agreed that they had opportunities to work with other pupils whilst working online.
- Many (85%) agreed that the school had provided regular feedback on their work.
- Most (90%) agreed that they felt well supported by their school through regular contact.
- Nearly all (97%) agreed that they could contact the school if there was a problem, with 49% strongly agreeing, and
- Many (82%) agreed that they / their child had enjoyed most of the learning / activities available online.

Free school meals and educational attainment

Free School Meal eligibility is a key proxy measure of household income. At all key stages, **learners eligible for free school meals tend to perform significantly less well than those not eligible.**

Over the past two years from 2018-19 to 2020-21, Powys has seen the second largest increase (46% increase) among all Welsh Local Authorities in the number of children eligible for Free School Meals (Monmouthshire also experienced a 46% increase). The number of children eligible increased from 1,820 to 2,651 children. (Welsh Gov, 2021)

In Powys **Primary** Schools, **15% of all pupils are receiving Free School Meals**, the highest being Maesyrrhandir C.P. School in Newtown catchment area with 46% of pupils receiving Free School Meals. The Newtown catchment has the highest Free School Meals take up (23%). (Welsh Gov, 2021)

The following three primary schools have no pupils receiving Free School Meals;

- Ysgol Pontrobert
- Ysgol Gynradd Carno
- Llanfihangel Rhydithon C.P. School

The catchment with the lowest number of pupils receiving Free School Meals is Crickhowell, with only 7% of pupils receiving Free School Meals.

In Powys **Secondary** Schools, **14% of all pupils are receiving Free School Meals**, the highest up take is Ysgol Maesydderwen in Ystradgynlais catchment area with 23% of pupils receiving Free School Meals. This is followed by Newtown High School with 19% of pupils receiving Free School Meals.

Crickhowell High School has the lowest number of pupils receiving Free School Meals with only 7% of pupils receiving Free School Meals.

Poor educational attainment is likely to harm children and young people's future life chances and perpetuate the cycle of poverty.

- **15% of pupils in Powys are eligible for Free School Meals**, which is lower than the national Average of 22%.
- **33% of children and young people in Powys who are eligible for Free School Meals are currently not receiving them** (Wales 35%).

(Welsh Gov, 2021)

Follow the link to view more [information about Schools Benchmarking \(including free school meals and take up\) in Powys and how we compare to Wales via our interactive report.](#)

Educational attainment for pupils in Mid Wales at Key Stage 4 shows that **those eligible for free school meals have lower outcomes than the rest of the population.**

The gap between those receiving Free School Meals and those who are not achieving Level 1⁵ is **8%**. At Level 2⁶ it was **33%** and those achieving 5 A*-A grades **was 17%**.

(Welsh Gov, 2018/19)

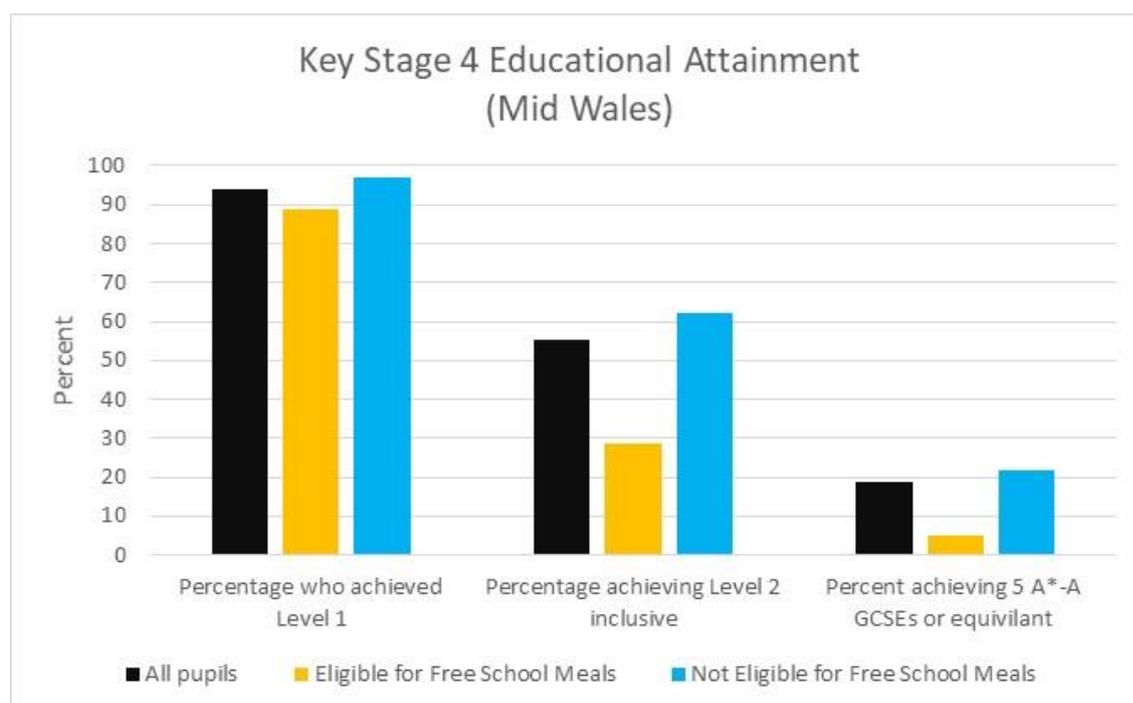


Figure 16 Key stage 4 Educational Attainment for level 1, level 2 and GCSE (Welsh Gov, 2018/19)

The educational attainment above is for academic year 2018-19. On the 18 March 2020 Welsh Government (along with the other devolved nations of the UK) took the decision to

⁵ Level 1 – 5 GCSE's A*-G

⁶ Level 2 – 5 GCSE's A*-C

cancel examinations for summer 2020. As a result, all schools provided pupils with centre assessed grades and legislation had disappplied the obligations on a school to supply the data.

This meant there was no verification process of examination grades or comparative data available to local authorities. In addition, Welsh Government legislation dated 3rd July 2020 removed the duties on governing bodies and local authorities to provide data to local authorities and Welsh Government, respectively, on teacher assessment outcomes.

Due to the coronavirus pandemic and impact on learning over the 2020-21 academic year, Welsh Government removed examinations for GCSE and A Levels. Each school used Centre Determined Grades to award overall grades to pupils for their GCSEs and A levels. However, Centre Determined Grades are not verified or published by Welsh Government.

What have people said?

School leaders including governors are required to carefully monitor the progress of vulnerable pupils and are required to publish plans detailing how the Pupil Development Grant (PDG) will be used. All schools are required to evaluate the impact of the grant, and nearly all schools state that they make good use of this grant.

Exclusions

There has been a consistent rate of permanent exclusions in schools, however there is variation between schools and exclusions are a complex issue.

Since 2018-19 the number of exclusions has reduced by 150 exclusions (from 492 to 342), 99% of these were fixed term and 1% were permanent exclusions.

68% of all exclusions were for those aged year seven and above, and 32% were for those year one through to year six.

Reasons for exclusions were: -

- 25% of all exclusions were for disruptive behaviour
- 19% for assault and/or violence against another learner
- 19% for verbal abuse/threatening behaviour against an adult
- 14.5% for assault and/or violence against staff
- Other reasons included substance misuse and damage to property

(Schools Service (PCC), 2020)

Childcare Sufficiency

Childcare is provided to 61% of 0-4 years olds within Powys, there are a total of **190 registered childcare settings**, offering 3,568 places. This is above the Wales provision of 48%.

Powys is sixth highest out of all 22 Welsh Local Authorities in terms of the childcare places offered, Merthyr Tydfil has the lowest provision with only 24% and Denbighshire has the highest with 73%.

These registered childcare settings are made up of a mixture of privately operated, volunteer based, and school run organisations.

(Welsh Gov, 2021)

% childcare places against 0-4 year olds population



Figure 17 Map showing % childcare places against 0-4 year olds population (Welsh Gov, 2021)

Child Play Sufficiency

“The right to play is a child’s first claim on the community. Play is nature’s training for life. No community can infringe that right without doing deep and enduring harm to the minds and bodies of its citizens”. David Lloyd George (1925)

"Play encompasses children's behaviour which is freely chosen, personally directed and intrinsically motivated. It is performed for no external goal or reward and is a fundamental and integral part of healthy development - not only for individual children, but also for the society in which they live". Welsh Government "Creating a Play Friendly Wales" 2012

Play Wales states that playing is one of the easiest and most natural ways that children of any age can engage in necessary levels of physical activity. The Welsh Government's Healthy Weight: Healthy Wales consultation, lists play as a main influencer on children's healthy weight behaviours.

The 'Physical Activity of Children and Young People' paper was written by the National Assembly for Wales in 2019, it sees the new curriculum as a chance to increase physical activity within schools, along with other benefits.

The paper recommends that all schools should provide wider access to their facilities to local communities, which will encourage more physical activity and an accessible space outside of the school day. (Powys County Councils Play Sufficiency Assessment (2019))

According to the National Survey for Wales (2018/19), in Wales:

- 58% of respondents were satisfied with play areas (30% dissatisfied)
- 55% were satisfied (26% dissatisfied) with clubs and organised activities
- 42% were satisfied (43% dissatisfied) with places for children to get together with friends.

During the 2017-18 national survey for Wales, it was noted that parents had concerns about the safety of the local area as a reason for dissatisfaction with play areas (this increased between 2014-15 and 2017-18):

- 36% stated there was too much crime and antisocial behaviour (compared with 21% in 2014-15)
- 32% stated they had concerns about strangers (compared with 16% in 2014-15)
- 31% had concerns about traffic (compared with 16% in 2014-15)

Play opportunities in Powys reduced dramatically during the Covid-19 pandemic; thankfully this was addressed by Welsh Government and additional funding was awarded in June 2021 to deliver a 'Summer of Fun' to children and young people 0-15 years across Powys. **Over 11,000 play sessions were delivered over July and August**, children and young people had access to sporting sessions, craft activities, outdoor pursuits, creative writing and dance classes and STEM activities, all free of charge.

As the Summer of Fun initiative was a huge success, additional funding has been awarded to support a Winter of Wellbeing and Play Capital funding has been allocated to develop some of our play parks in Powys. Further opportunities will be offered over the next 12 months to ensure children and young people have sufficient play opportunities.

What have people said?

Powys County Councils [Play Sufficiency Assessment](#) (2019) shows that during ‘Have Your Say Days’ and other engagement events children were asked **“how good are your opportunities for playing and hanging out?”**

- 57% said it’s great and couldn’t be much better
- 23% said it’s great but could be made even better
- 9% said it’s not good and needs to be made better
- 8% said it’s rubbish and need to be made much better

Children were asked **“do you have enough time for playing or hanging out with friends?”**

- 36% said Yes, I have loads
- 35% said yes, I have enough
- 21% said no, I would like a bit more
- 8% said no, I need a lot more

When asked, “what is good about play in Powys?” responses included walking routes, feeling safe, green spaces, fresh air, trees, safe to ride bikes, animals, parks, surrounding community and space for football.

When asked, “what is not good about play in Powys?” responses included old play equipment, lack of space for ‘older’ young people, cars, limited pavements, lack of sites for bikes and skateboards, litter, public transport, cost of transport, dog fouling, rurality.

Sufficiency of Nursery Education

As part of the Welsh Government’s Childcare Offer for Wales, the local authority receives funding to ensure that all children have access to ten hours of early years education from the beginning of the term following the child’s third birthday. The education is provided in approved, funded preschool education settings, which include playgroups, Cylch Meithrin, day nurseries and school-based settings.

Following the establishment of a framework of providers in 2017 the LA currently contracts with 74 settings to deliver Early Years Education, 18 of which are Welsh-medium settings.

The Local Authority administers admissions for the Early Years Education places. As the number of children eligible for Early Years Education increases termly throughout the

academic year, the Local Authority contracts additional places to meet demand and try and ensure parental preferences are met; in cases of oversubscription, admissions criteria is applied and a suitable alternative offered.

TABLE 1 NUMBER OF CHILDREN ACCESSING EARLY YEARS EDUCATION IN 2020-21

Term	Number of children
Autumn 2020	1,056
Spring 2021	357
Summer 2021	275
Total	1,688

28.9% (422) of children in 2020/21 who accessed Early Years Education **attended an early year's provision through the medium of Welsh.**

The Local Authority is currently undertaking a review of Early Years Education to inform the future tender of provision across the County (current contracts run until Aug 2024). (PCC, 2022). The findings from this review will be considered when available.

Social summary

Social well-being covers a vast array of topics, and each contribute to the well-being of Powys residents.

We know that housing plays an extremely important part for the well-being of Powys residents. We currently have **58,345 households in Powys** (ONS, 2011) (this figure is from the 2011 census we will be able to understand the housing make up from the 2021 census when the new data is released), and this figure is projected to rise. Powys **average household size is 2.2 persons.** (Welsh Gov, 2018)

According to future trends report (Welsh Gov, 2021), the number of people living in single-person households is likely to increase in the future. **It is predicted that Powys single person households will increase by 4.2% over the next 10 years.** Powys already has a higher than national average level of single person households, with this trend set to increase this may put **more pressure on already limited single housing stock in Powys for future generations.**

There is a need for more affordable, energy efficient housing. In Powys, **3,500 people are listed on the Council's housing demand register.** A quarter of those are already social

housing tenants. Many require smaller accommodation, often one or two bedrooms, whilst others need larger homes to cater for their growing families. (Housing PCC, 2021)

There has been a **16% increase in homelessness** between 2019 and 2020 (from 527 to 621). (Housing PCC, 2021) Mostly single homeless presentations. We anticipate more families with dependent children to present due to the end of the furlough scheme.

Respondents to our survey have shown that affordable housing, carbon neutral housing, and sustainable housing stock are key priorities for them in the well-being plan.

All of the above indicated that there is a real need for the availability of smaller homes that are affordable and sustainable, we have an unmet demand across the county and if we do nothing the projected increase in those requiring smaller homes will lead to a housing crisis for future generations. **If we do not act, we will see an increase of overcrowding, homelessness, a generation that cannot afford to buy their own homes or afford to rent a home in their local areas forcing those to find homes outside of Powys.** This will have a knock-on effect on older generations who will not have family locally able to provide them with help and support.

Inflation in the UK has risen, with increasing fuel, food and transport costs are worrying for many across the country. Powys is no exception, the cost of living in such a rural area has always been more expensive than the rest of the country. As the cost of living rises this will cause even more pressure on people and families in Powys struggling with poverty. **In Powys 4,088 families live in absolute poverty**, 31% (1,248) of these were lone parent households (Department for Work and Pension, 2019-20). There has been a **48% increase in those eligible for Free School Meals** over the past two years, rising faster than the Welsh average. **33%** of children and young people in Powys who are eligible for Free School Meals are currently not taking them up (receiving them). (Welsh Gov, 2021)

We need to do more to understand poverty within our communities. As the cost of living increases and energy price rise, many families experiencing poverty will see the effects on their physical health (heat or eat) and mental health and ability to remain in their own homes.

17% of people in Powys report feeling lonely, if applied to the current population, there could be potentially 22,600 residents across Powys who are feeling lonely. We know that as you get older you are at a higher risk of becoming lonely and as people live longer there will be an increased need for help and support at home and in the community. By 2043 the population aged 65 and over is projected to **increase by 25.2%**. (Welsh Gov, 2018) Future trends report says, the old age dependency ratio will increase over time as the number of pensioners grows faster than the number of working aged people. The old age dependency ratio in Wales has historically been higher than the UK average. As Powys has a higher than the Welsh average of older people **this dependency ratio will cause increasing pressure on future generations in Powys.**

Another impact of an aging population could be a continuing rise in unpaid carers. During the 2011 census, 12% (16,154) of the Powys population were unpaid carers, with more unpaid carers in south Powys, particularly the Ystradgynlais locality. In the last 10 years the ageing population in Powys has seen a large increase in the number of carers, and with added pressures due to COVID-19, the number of carers will have increased even more. A report conducted by Carers UK in June 2020 shows that across the UK **there is an estimated 50% increase in carers since the 2011 census.** (Carers UK, 2020). If we apply the Carers UK Welsh national average, in terms of the percentage of carers against the Powys population today, we estimate the number of unpaid carers in Powys (before COVID-19) to be **25,275, an increase of 56% (9,121) since 2011.**

With the additional pressures of COVID-19, the average percentage of carers in Wales rose to 27%, in Powys meaning a rise to **35,918 carers, an additional increase of 10,643 carers since the beginning of the coronavirus pandemic.** However, in 2022 we will have more up to date figures once the 2021 Census data is released.

45% of respondents to our survey identified themselves as a carer, of these 59% had never had contact about their caring responsibilities. When we have looked at the carers that are “known” to us (through Powys County Council social services or through [CREDU Cymru](#)) we estimate that potentially only 10% of carers are getting support, **leaving up to 90% of carers in Powys without any official advice or support around their caring responsibilities.**

With an ageing population and projected increase in carers, we will need to ensure that we offer the right level of support to those with caring responsibilities to help support them and give them time away from their caring responsibilities to focus upon their own well-being. **If we do nothing, many of those who are currently being cared for by informal carers such as friends and family may not have the available support to live independently and remain within their community. This will likely increase the need to be provided services by social care, which will increase demand on health and care services.**

The coronavirus pandemic has increased existing health inequalities. Deprived groups have been more vulnerable during lockdowns and declining income. Mental health issues are increasing due to the coronavirus pandemic. For working aged people, the most common mental health disorders are anxiety and depression, 25% of older adults have depression requiring an intervention and over 40% of those in their 80s are affected by depression (Powys Teaching Health Board, 2021). 23% of respondents to our survey highlighted they had mental health issues. **More work needs to be done in Powys to understand the levels of mental health in Powys and in our 13 localities.**

Maintaining a healthy lifestyle is critical to our overall health and well-being. Preventative measures, like eating healthily and taking part in regular exercise will help ease increasing pressures on health services. Overall Powys’ health is better than the Welsh average, however it is still indicated that 14.5% of adults smoke, 19.7% of adults’ alcohol consumption is above guidelines and 65.9% of adults ate less than five fruit or veg (the

previous day). (Welsh Gov, 2020). **The current Substance Misuse provision in Powys caters for the maintenance of approximately 500 individuals.**

The level of physical activity is better than in Wales overall, 60.8% of adults in Powys were active at least 150 minutes (in previous week). However, in Powys, **nearly 60% of adults are overweight or obese and this is predicted to continue to rise, and 24.5% of children were overweight or obese by the age of 5.**

Childcare is provided to 61% of 0-4 years olds within Powys, there are a total of **190 registered childcare settings**, offering 3,568 places. This is above the Wales provision of 48%. Child Play opportunities in Powys reduced dramatically during the coronavirus pandemic; to address this Powys delivered a 'Summer of Fun' to children and young people 0-15 years across Powys. **Over 11,000 play sessions were delivered over July and August 2021.** Nursery education in Powys saw **1,688 children access early years education across Powys.**

Cross cutting themes

Social well-being is also affected by many other cross cutting themes seen in the other Well-being topics, Economy, Culture and Community and Environment.

		How does Social interact with the other Well-being themes?
Economy	<ul style="list-style-type: none"> • Jobs and Wages • Businesses • Tourism • Staying Connected • Poverty and Deprivation 	<p>Social and economic outcomes are interlinked, an individual's economic circumstance is linked to their social well-being. For example, an individual's employment and wages will have an impact upon their ability to live independently and maintain a happy home life.</p> <p>Housing affordability (average salary vs average house price) is getting difficult for many residents, as the gap between salaries and house prices widens, there is an increased need for smaller, affordable social housing across Powys. Additionally, those with limited access to economic resources will likely have reduced access to tourism and business opportunities in their local communities. Limited access to economic resource often leads to longer term impacts to mental and physical health and impacts on young people's educational outcomes.</p>

Culture and Community	<ul style="list-style-type: none"> • Welsh Language • Communities coming together • Participation in cultural life • Anti-social 	<p>Culture and community are intertwined within the various components of social well-being. An engaged community will improve an individual's home-life and ability to live independently. Active participation in cultural life leads to improved well-being and a sense of connectedness, helping to create friendships and support networks.</p> <p>Providing opportunities to use the Welsh language across all areas of social well-being is essential, by having good quality education and enabling residents to access services and groups through their language of choice (active offer) ensures that residents can fully immerse themselves in the Welsh culture.</p>
Environment	<ul style="list-style-type: none"> • Improving Biodiversity • Sustainable Land, Water and Air • Reconnecting People and Places • Forestry Resources • Climate Change 	<p>The environment in which people live has a large impact upon an individual's social well-being. For example, extreme weather situations such as flooding can have a detrimental impact to an individual's social well-being, it de-stabilises their homelife, ability to live independently and potentially has negative longer term health impacts. However, the natural world can improve social well-being through creating spaces and places with increased biodiversity. A community with many natural resources, (such as green spaces, clean air, rights of way) enables an individual to thrive in their local area.</p> <p>We need to ensure that we think sustainably (meeting our needs without compromising the need of future generations) when developing housing and businesses, producing renewable energy, and growing nutritious food that is affordable and accessible to all.</p>
High Level Impacts	Ageing population	<p>It is important to consider the impacts of an aging population when considering social well-being as older people will face pressures trying to maintain an independent home life within their community. As we get older, we are likely to encounter health and lifestyle issues associated with old age, needing support from those around us. It is vital that we have communities that look out for one another and services that enable our older population to live a happy life. Life expectancy in Powys like the rest of Wales has plateaued.</p> <p>For future generations there are going to be less working-age people living here to support those needing help and care, this is going to be a key focus for the short to medium-term.</p>
	Rurality	<p>There are challenges to social well-being due to Powys's rural make up. Over half of the Powys population live in villages, hamlets, or dispersed settlements and must travel a long way to access services (such as schools, hospitals, shops, public transport, or meet up with others). Obtaining affordable housing in the community you want to live can</p>

		<p>be difficult, and accessing services such as domiciliary care can be limited due to geographical constraints.</p> <p>Powys is unique in that it does not have a district general hospital and residents must travel out of county, to other parts of Wales or over the border to England, to access certain types of health services.</p>
	Britain's exit from the European Union	<p>Whilst the full extent of the impact of Britain's exit from the European Union still remains largely unknown at a local level, it is important to note that this will impact social well-being over time, with scenarios such as the possible reduction in staff in the Health and Care sector (due to the reliance of European workers) having a longer-term impact to the populations access to health and care services.</p>
	COVID-19	<p>COVID-19 has increased loneliness and isolation across all age groups (especially children and the older population). Whilst education and health and care continued the services had to adapt and so have the residents of Powys, highlighting the importance of social well-being for all service users.</p> <p>Whilst this assessment has been produced during the coronavirus pandemic, which is still ongoing, the longer-term impact is still to be determined. However, the pandemic has highlighted new short-term issues affecting social well-being and has had a worse impact on deprived households, increasing inequalities and widening the socioeconomic gap.</p>

Economy

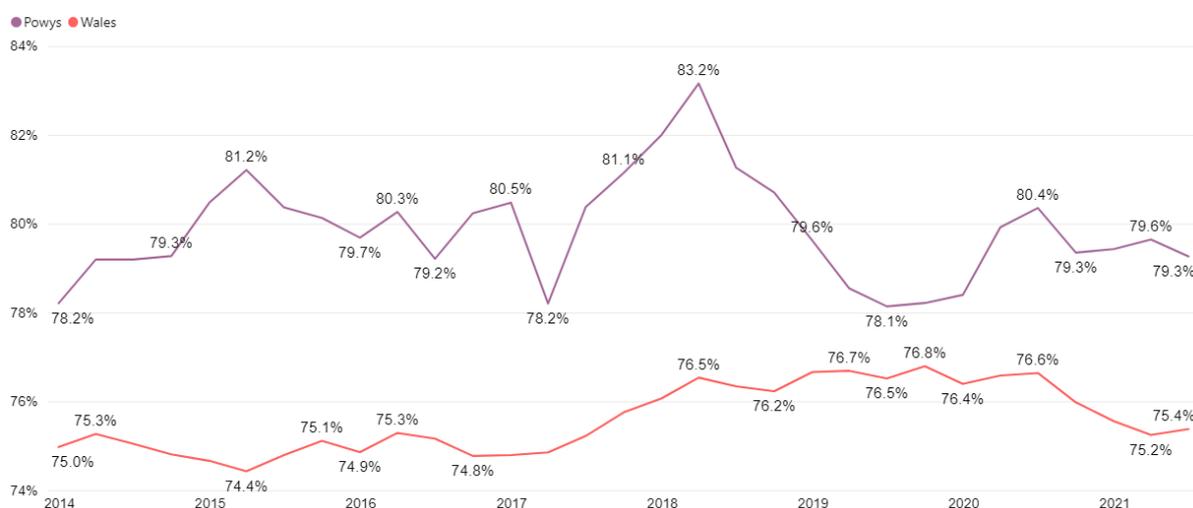
Jobs and wages	79
Employment rates and unemployment	79
Gross Value Added	83
Employment by industry	84
Jobs.....	87
Salaries	88
Income – household and disposable.....	88
Housing prices	91
Businesses.....	93
Business size, births, and deaths.....	93
Powys Business survey	93
COVID-19 business grants	96
Tourism.....	98
Day visitors, Room nights and Average spend	98
Staying connected	98
Digitally excluded	98
Connectivity.....	100
Poverty and Deprivation.....	102
Economy summary	104

Jobs and wages

Employment rates and unemployment

According to the Annual Population Survey (ONS, Dec 2021) Powys has maintained a higher rate of economically active residents (aged 16-64) than the rest of Wales, data going back to 2005 shows that Powys' rate has continually been higher than the Welsh average.

In the last 10 years the economic activity rate has remained stable, with the rates for Powys varying between 76% and 83%.



For year ending June 2021, **79.2% Powys residents aged 16-64 were economically active**, this is above both the Welsh average 75.4% and UK average 78.2%.

Powys ranked 3rd highest out of all Welsh authorities for the most economically active residents, Monmouthshire were highest with 80.3% followed by Vale of Glamorgan with 78.1%.

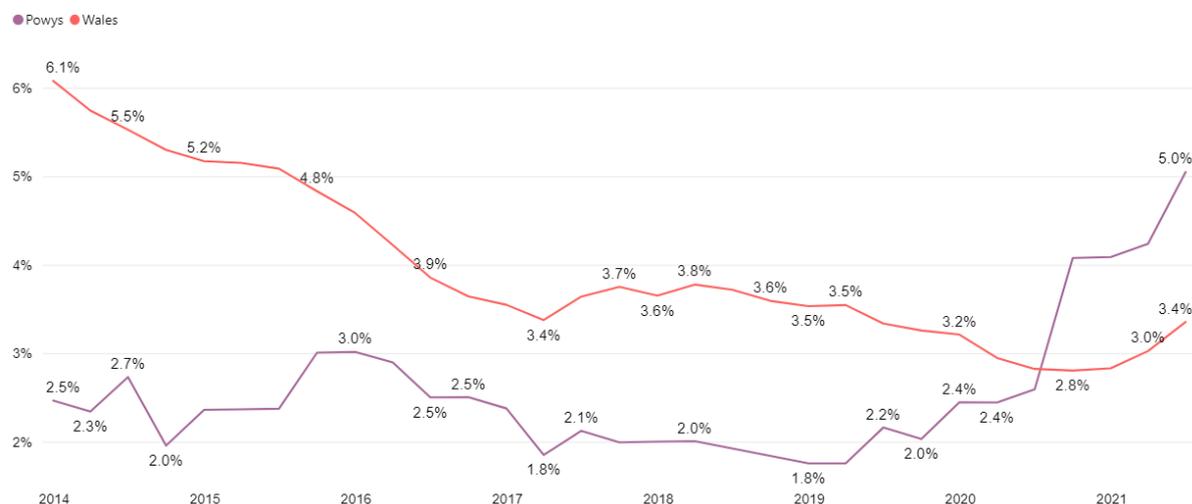
The Future Trends report (Welsh Gov, 2021) says “Over the period since the mid-1990s, the historic gap in employment rates between Wales and the rest of the UK has narrowed, and over the recent past the labour market in Wales has performed as well or better than a number of other UK countries and regions” in Powys we have seen the same stable performance, and we anticipate this will remain stable for future generations. However, there is a need for focus on the quality of jobs in Powys.

For year ending June 2021, **17.8% of residents in Powys were registered as self-employed**, this is higher than both the Welsh and UK averages at 8.9% and 9.4% respectively. With this rate, Powys had the highest rate of self-employment amongst all local authorities in Wales, Ceredigion ranked 2nd (14.9%) and Denbighshire 3rd (13.3%) (ONS, Dec 2021).

Unemployment rates from the Annual Population Survey (ONS, Dec 2021) also show that for many years Powys has consistently lower rates of unemployment compared to the rest of Wales.

Between March 2005 and March 2020 Powys had below Welsh average rates of unemployment.

From March 2014 to March 2019 there have only been small variances in the rate of unemployment in Powys (fluctuated between 2% and 3%).



However, Since June 2019, as a result of COVID-19, **unemployment has risen sharply in Powys.**

The Annual Population Survey (ONS, Dec 2021) results show that between December 2019 and June 2021 unemployment in Powys has **doubled**. The unemployment rate **increased from 3.1% to 6.3% (+3.2%) in Powys**, Welsh average from 4.2 to 4.4% (+0.2%).

The percentage change in unemployment rate from December 2019 to June 2020 shows that Powys has seen the **largest increase in unemployment of all 22 local authorities in Wales**, since the beginning of the coronavirus pandemic.

As a result of this increase Powys went from ranking 12th out of 22 for the lowest rate of unemployment in Wales, to 6th lowest, **and (as seen above) for the first time Powys' unemployment rate exceeded the Welsh average.**

Follow the link to view more [information about employment workforce economic activity rates in Powys and Wales via our interactive report.](#)

To understand what impact the increase in unemployment has had across our 13 localities we must look instead at Claimant Count data (ONS, 2021). The Claimant Count data shows the number of people who are claiming Jobseeker's Allowance and those claiming Universal Credit who are required to seek work as an indicator of unemployment and this information may be viewed at a locality level for Powys.

There has been a small increase in the number of claimants in Powys since late 2018 because of the roll out of Universal Credit, however the considerably more rapid increase

that occurred between March and September 2020 is in response to the coronavirus pandemic.

From March 2020 to September 2020, claimant figures show an **increase of 151% in Powys** (Wales 92%). In September 2020 the records show an **additional 2,155 claimants in Powys**.

Powys had the **highest increase in claimants from March to September 2020 among all Welsh Local Authorities with 151%**, Monmouthshire was 2nd with an increase of 137% and Ceredigion was 3rd with an increase of 132%.

All age groups in Powys and Wales have seen a similar increase.

In Powys there has been a 35% (Wales 26%) reduction to the claimant count from September 2020 to September 2021, however when compared to March 2020, **the number of claimants in Powys and Wales are still higher than pre COVID-19 times**.

In September 2021, Powys has an increase of 64% of claimants (Wales 43%) when compared to pre-COVID-19 (March 2020), this equates to an additional 910 claimants. This is the 3rd highest increase in claimants amongst the 22 Welsh Local Authorities, Monmouthshire is 1st (75% increase) and Ceredigion is 2nd (66% Increase).

This general trend of claimant increase during March and September 2020 is present across all 13 Powys localities, but some areas saw a higher percentage of new claimants than others.

Between March 2020 and Sept 2020:

- Hay and Talgarth locality saw the largest percentage increase in the claimant count with an increase of 338% (from 40 to 175 claimants, 135 new).
- Llanfair Caereinion locality was 2nd highest with an increase of 300% (increased from 40 to 160 claimants, 85 new), and
- Llanidloes locality is 3rd with 289% increase (increased from 45 to 175 claimants, 100 new)

Newtown locality saw the highest overall increase in the **number of claimants with 405 new claimants during the same period**, equating to an increase of 140%. Next Welshpool and Montgomery saw 300 new claimants (140% increase) and Brecon with 210 (168% increase).

- 11 of 13 localities in Powys saw unemployment grow by over 130%
- Llandrindod and Rhayader saw 91% increase
- Ystradgynlais which had the lowest change, still experienced an increase of 87%

In September 2021, five of our 13 localities still have over 100% increase in claimants when compared to pre-COVID-19 (March 2020).

- 1st Hay and Talgarth 200% (+80 claimants)

- 2nd Knighton and Presteigne 143% (+100 claimants)
- 3rd Llanidloes 122% (+55 claimants)
- 4th Llanfair Caereinion 113% (+45 claimants)
- 5th Llanfyllin 107% (+80 claimants)

As of September 2021, Powys has 2,340 claimants. The Newtown locality has the highest number and the highest percentage of claimants out of all our 13 localities.

The Newtown locality accounts for 16.5% of all Powys' claimants (385), 2nd is Llandrindod and Rhayader locality with 14.1% (330) and Welshpool and Montgomery locality is 3rd highest with 13.2% (310) claimants.

[Follow the link to view more information about claimant count in Powys, understand this at a locality level, and see how this has changed over time, via our interactive report.](#)

The Future Trends report (Welsh Gov, 2021) says “Unemployment levels have been falling across Wales since 2013, although this is not occurring at an equal rate across the country – southeast Wales has seen steep decreases in unemployment, whereas mid Wales has experienced very little change”. Due to the coronavirus pandemic little is known about the true impact of unemployment long term in Powys. Looking at the past trends and the information in the future trends report it is hopeful that we should return to a level like pre pandemic times. We will need to closely monitor this to understand how these levels change and what we expect the impact on future generations to be.

The Coronavirus Job Retention Scheme (CJRS) (HMRC, 2021) was announced on 20 March 2020 and has supported employers in paying their employees during the coronavirus pandemic.

In July 2020, Powys had its highest number of furloughed employments (8,900).

This equated to a 17% take up rate for Powys employments (Wales 17%). Powys ranked 7th highest amongst all Welsh local authorities.

The latest data release shows that for August 2021, **Powys furloughed employment reduced to 1,900, with a take up rate of 4% (Wales 4%)**. Powys has mostly mirrored the Welsh average for take up rates, Powys was slightly above this average between January 2021 and May 2021.

It might reasonably be expected that there was an increase in unemployment figures at stages when the furlough scheme changed, as employers were forced to address the longer-term viability of their business and consider the possibility of making staff redundant.

The Coronavirus Job Retention Scheme ended on 30th September 2021, as such there may be a further increase in redundancies across vulnerable sectors. As staff will be entitled to

due notice, the effects on the unemployment figures may not become apparent for some times.

[Follow the link to see more information about the number and rate of furlough in Powys and Wales via our interactive report.](#)

Powys has an above average level of qualifications among working age people, however, as of December 2020, an estimated **4.3% of the 18-64 age population had no qualifications** meaning that Powys ranked **20th** amongst Welsh Local Authorities (**Wales 7.3%**) (ONS, Dec 2021).

What have people said?

In the 'Living in Powys' well-being survey respondents were asked if they worked or studied in Powys, of the 464 responses, 79% answered 'yes'.

When asked "How did the coronavirus pandemic affect your working life?"

- 33% reported no changes
- 54% of respondents said that they 'changed to working from home'
- 5% were redeployed to another role
- 3% were furloughed
- 5% lost their jobs

Gross Value Added

Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry, or sector. Simplistically it is the value of the amount of goods and services that have been produced, less the cost of all inputs and raw materials that are spent on production.

Productivity measures are often used to indicate how well a country can use its human and physical resources to generate economic growth. Strong economic growth will generally mean an improvement in living standards. However, productivity alone does not tell us everything about the economic well-being of different areas. The potential of any given place depends on the mix of industries, infrastructure, and the size of settlements there. Based on these circumstances, even an area with low productivity might be performing as well as it can (GOV.UK, 2021).

Powys' Gross Value Added (GVA) per hour worked is 58% of the UK average (2019), well below the Welsh figure of 73%, and the worst of all local authorities in the UK. There were five local authorities in Wales with lower figures compared to the UK. Richmondshire (North Yorkshire, England) is the 2nd worst in the UK at 62% and is 4% below Powys.

In 2008, Powys fell to 63.5% of the UK average and became the worst local authority in the UK for GVA. Since 2008 Powys' GVA has continued to fall relative to the UK average and is still the worst local authority in the UK (ONS, 2021).

The reason for this is Powys residents work on average much longer hours than other areas (mainly due to our strong agricultural sector), **full time workers worked on average 40.9 hours per week in Powys** with only Herefordshire having a higher figure at 41.1 hours per week (ONS, 2021).

We also have higher rates of economic activity than most areas, so the overall GVA is masking the poor level of pay for work (ONS, 2021).

The Future Trends report (Welsh Gov, 2021) says "GDP is projected to grow following a drop during the pandemic, however projections for recovery vary" and "As with other parts of the UK, productivity growth in Wales has been weak since around the time of the financial crisis. The UK compares poorly with other countries in terms of its level of labour productivity, and, in turn, Welsh performance is weaker than most other parts of the UK. The gap in productivity between Wales and the UK as whole widened over the years leading up to the financial crisis but has been broadly unchanged since".

Employment by industry

According to the latest Annual Population Survey (ONS, Dec 2021) results, it is estimated that 60,600 people in Powys are in employment within the following industries:

Wholesale, retail, transport, hotels, and food	16,400
Public administration, defence, education, and health	12,900
Agriculture, forestry, and fishing	8,600
Production	7,100
Professional, scientific, and technical activities	7,000
Other service activities	3,200
Construction	3,100
Information and communication	1,000
Real estate activities	800
Finance and insurance activities	500

In terms of job numbers, Powys' highest industry is Wholesale, retail, transport, hotels, and food with 16,400 jobs, this equates to 27% of Powys' overall employment (Wales 26%). Powys ranks 8th highest for this category amongst the other local authorities in Wales.

14% (8,600) of Powys' employment is in Agriculture, forestry, and fishing, well above the Welsh average of 3%. Powys ranks the highest local authority in Wales for this industry. Ceredigion is a close second with 13% then Pembrokeshire with 10%.

Follow the link to view more [information about Powys and Wales's employment by industry via our interactive report.](#)

The Future Trends report (Welsh Gov, 2021) says “Globally, businesses are increasingly adapting to digitalisation and adopting new technologies. The overarching trend is one of accelerating digitalisation of work processes. Evidence indicates that there is a trend in the UK towards increasing provision of remote working opportunities.” It is too early though to understand the impact of opportunities for businesses in Powys (though the public sector in Powys has shown the potential) but it is possible we might see growth of employment in non-traditional Powys industries.

There is uncertainty surrounding Brexit, we know that the Sustainable Farming Scheme will be launched in 2025 and have impacts on our agriculture sector. With a focus on nature and the environment, there could potentially be a rise in future food prices if farmers are incentivised to offset land currently used for grazing livestock for rewilding.

Brexit will also have wider implications for our workforce, the domiciliary care sector has utilised European workers, and leaving the European Union will present difficulties in terms of future staff recruitment and retention.

Number of businesses by industry

Powys has 8,665 businesses. 38% of Powys businesses are in agriculture, forestry and fishing, the highest-ranking business industry in Powys. Second is construction with 9.9% businesses and 3rd is Professional, scientific, and technical accounting for 6.8% of Powys businesses. (ONS, 2021)

The impact of COVID-19 across key sectors can vary widely but many businesses and industries have found the past years extremely difficult. Businesses, particularly those in retail, hospitality and tourism have relied on the business grants provided by government.

Our agriculture sector has continued, however social activities where farming families meet such as livestock sales and the Royal Welsh Show have not happened, and many events have been virtual, which has excluded those who cannot access the digital World.

Farming businesses who are dependent on seasonal labour and workers from the European Union have faced additional challenges to find workers in recent years. While farms that have diversified and sell services directly to the public (Agri-tourism, visitor attractions, farm shops) and those reliant on non-farm household income sources have been and continue to be affected by COVID-19. The ability of the government to bring in new post-Brexit policy during a period of social and economic shock may be especially compromised (Centre for Rural Economy, 2020).

Powys has 3,340 registered businesses in the agriculture, forestry, and fishing industry.

Llanfyllin locality are the highest ranked locality for the number of businesses in agriculture, forestry, and fishing with 11.5% (385) of the total businesses in Powys.

The agriculture, forestry, and fishing (mining and quarrying) industry provided 3,650 (4.4%) jobs in Powys in 2018 and contributed £127 million (5.6%) to Powys' Gross Value Added (GVA) (Welsh Gov, 2021) .

Between March and September 2020 Llanfyllin locality had a rise in their claimant count of 187% (140 new claimants), this locality still retains a high level of unemployment compared to pre-COVID-19 times, with an increase of 107% in September 2021 when compared to March 2020 (+80 claimants).

Powys has 855 registered businesses in the construction industry. Welshpool and Montgomery locality are the highest ranked locality for the number of businesses in construction with 14.6% (125) of the total businesses.

Construction provided 2,250 (4.4%) jobs in Powys in 2018 and contributed £109 million (5%) to Powys' 2019 GVA (Welsh Gov, 2021). In March and April 2020, this industry saw an estimated reduction in GDP of -40%.

During March and April 2020, the industry had 1,348 jobs, a reduction of 902 jobs compared to 2018.

Between March and September 2020 Welshpool and Montgomery locality had a rise in their claimant count of 140% (300 new claimants), this locality still retains a high level of unemployment compared to pre-COVID-19 times, with an increase of 44% in September 2021 when compared to March 2020 (+95 claimants).

Accommodation and food services are the industries that have been hit hardest by the coronavirus pandemic.

Powys has 565 registered businesses in the Accommodation and food services industry.

Brecon locality is the highest ranked locality for the number of businesses in accommodation and food services with 13.2% (75) of the total businesses in Powys (ONS, 2021).

Accommodation and food services provided 4,200 (8.3%) jobs in Powys in 2018 and contributed £95 million (4%) to Powys' 2019 GVA (Welsh Gov, 2021). In March and April 2020, this industry saw an estimated reduction in GDP of -92%.

During March and April 2020, the industry had only 369 jobs, a reduction of 4,131 compared to 2018.

Between March and September 2020 Brecon locality had a rise in their claimant count of 168% (210 new claimants), this locality still retains a high level of unemployment compared to pre-COVID-19 times, with an increase of 64% in September 2021 when compared to March 2020 (+80 claimants).

Follow the link to view more [information about Powys' businesses by industry and understand the distribution of businesses across our 13 localities via our interactive report.](#)

Jobs

Powys saw an increase in full time employment, from 68% to 75% between March 2013 and December 2019 among those aged 16 to 64. In 2020 this figure fell to 66% and it is unclear if this will continue. Over the same period, the UK and Wales have seen a long-term increase like that in Powys but have not experienced the sudden downturn in 2020 (ONS, Dec 2021).

70% of Powys' employees worked full time (as at June 2021), and part time employment has generally maintained the same rate in Powys over recent years. Since the start of the coronavirus pandemic, there has been a large range in full-time employment, with lows of 24% in December 2019 and highs of 34% in December 2020 (ONS, Dec 2021).

As at June 2021, **30% of 16-64 years olds were in part time employment** (ONS, Dec 2021).

In June 2021, **24% of residents in Powys were registered as self-employed**, this is much higher than both the Welsh and UK averages at 12% and 13% respectively (ONS, Dec 2021).

Powys has the highest rate of self-employment amongst all local authorities in Wales, Ceredigion was second highest (20%) and Denbighshire third (19%) (ONS, Dec 2021).

Powys has maintained a higher-than-average rate of self-employed persons aged 16-64. With lows of 20% in June 2011 and highs of 27% in December 2015 (ONS, Dec 2021).

What have people said?

In the recent Living in Powys Well-being Survey, when asked “**what is your current employment status?**” out of the 472 responses,

- 45% are working full time
- 24% working part time
- 8% self employed
- 1% are unemployed
- 14% are retired
- 2% volunteering

- 1% did not say
- 4% other

‘Other’ responses included:

- Working and studying
- Unpaid carer
- Living on savings
- Homemaker/Stay at home parent
- Unable to work due to poor health

Of those respondents who stated that they were employed, 79% stated that their job is within Powys.

Salaries

Median full-time earnings for Powys were £537 a week in 2021, compared with £571 in Wales and £613 in the UK. Powys was ranked 18th among Welsh local authorities in 2021 (ONS, 2021).

Powys has below average earnings compared to the rest of Wales and the UK, and this is further masked by the long hours that people work in Powys.

	Powys	Wales	Great Britain
Gross Weekly Pay			
Full-time workers	£537	£571	£613
Male	£584	£600	£656
Female	£463	£528	£558
Hourly pay (excluding overtime)			
Full-time workers	£12.87	£14.40	£15.65
Male	£13.15	£14.79	£16.26
Female	£11.84	£14.02	£14.86

(ONS, 2020)

Future Trends Wales states that the “average (median) pay in Wales has in broad terms kept pace with the UK since around the time of devolution”, therefore we expect Powys to retain its relative position compared to the rest of the UK in the future.

Income – household and disposable

Income is defined by PayCheck as gross household income from all sources including earnings, benefits, and investments. It provides income by band from £5,000 up to £200,000 plus. PayCheck provides financial health intelligence about the Powys population at detailed postcode level, delivering detailed insight and data enhancement not available via other sources. This information helps us to understand and benchmark affordability, assess the effects of welfare reform change, and allocate resources effectively (CACI, 2021)

According to household income data 2021 (CACI, 2021), **Powys' average household income is £33,700**, this is below both the Welsh average of £34,700 and UK average of £40,257.

The distribution of household income is skewed towards lower income households. The mean income for an area (total income divided by total number of households) will be many thousands of pounds higher than the median income (the income of the middle household in an area), and so low income in an area may be hidden by a few households with high earnings.

Against the Welsh average of £34,700 household income:

- **Four** of our 13 localities household income are **above the Welsh average** (Crickhowell, Hay and Talgarth, Llanfair Caereinion and Welshpool and Montgomery).
- **55% (33,149) households earn below** the Welsh average
- **35% (21,284) earn half or less** than the Welsh average (income bands 0-20k)
- **8.5% (5,075) earn double or more** than the Welsh average (income bands of £70,000 and higher)

Against the UK average of £40,257 household income:

- **One** of our 13 localities household income are **above the UK average** (Crickhowell)
- **70% (42,107) households earn below** the UK average
- **35% (21,284) earn half or less** than the UK average (income bands 0-20k)
- **5.7% (3,437) earn double or more** than the Welsh average (income bands 80k+)

Crickhowell locality has the highest average household income of our 13 localities with £42,116. Second highest is Hay and Talgarth locality with £36,333 and third highest is Llanfair Caereinion locality with £35,448.

Llandrindod and Rhayader locality have the lowest average household income of 13 localities with £30,140. Second lowest is Ystradgynlais locality with £30,367 and third lowest is Knighton and Presteigne locality with £31,678.

Follow the link to view more [information about household income in Powys and how this differs across our 13 localities compared to the Wales and UK average.](#)

The Powys average gross disposable household income (income available after taxes and benefits are taken out) was £18,287 (in 2019). This represented 85% of the UK average (£21,433) but was higher than the Welsh average of 81% (£17,263) (ONS, 2021).

The Future Trend report states that “wealth across the UK, like in many economically developed countries, is unequally divided. The richest households own a disproportionate and increasing proportion of the country’s total wealth, a trend that looks set to continue in the future. With less wealth and fewer higher earners, Wales has lower levels of income and wealth inequality than many other parts of the UK”. Given that the average Powys household income is slightly lower than the Welsh average, Powys’ household income position is not going to improve in the short to medium-term (Welsh Gov, 2021).

Powys previously had a figure closer to the UK average (peaking at 92% in 2011) but has fallen from that level according to the most recent data. As earnings have been falling in Powys relative to elsewhere in recent years, there is no expectation that Powys’ ranking will improve.

PayCheck Disposable household income 2021 (CACI, 2021), provides an estimate of the average available household income after tax, National Insurance, and other essential outgoings are deducted.

The data shows that in Powys annually, average household income is spent: -

- 35% Income tax and National Insurance
- 29% food and clothing
- 16% council tax, utilities, and insurance
- 8% mortgage and rent
- 8% childcare and student loans

(CACI, 2021)

What have people said?

In the Living in Powys survey, when asked “**How well would you say you yourself are managing financially these days?**”

- 25% of respondents said they were living comfortably
- 46% were doing alright
- 22% just about getting by
- 6% finding it quite difficult
- 1% very difficult

Housing prices

In August 2021, **the average house price (for all properties) in Powys was £216,998**, higher than the Welsh average of £194,575. (Land Registry, 2021)

The most expensive area to purchase a property in Wales was Monmouthshire (average cost: £295,000). In contrast, the cheapest area to purchase a property was Blaenau Gwent (average cost: £112,000). **Powys ranks as 6th highest amongst the other local authorities in Wales.**

For different property types the average prices in Powys are:

- £288,603 Detached houses (Wales £295,890)
- £193,160 Semi-Detached (Wales £189,195)
- £151,232 Terraced houses (Wales £151,730)
- £92,229 Flats and maisonettes (Wales £126,094)

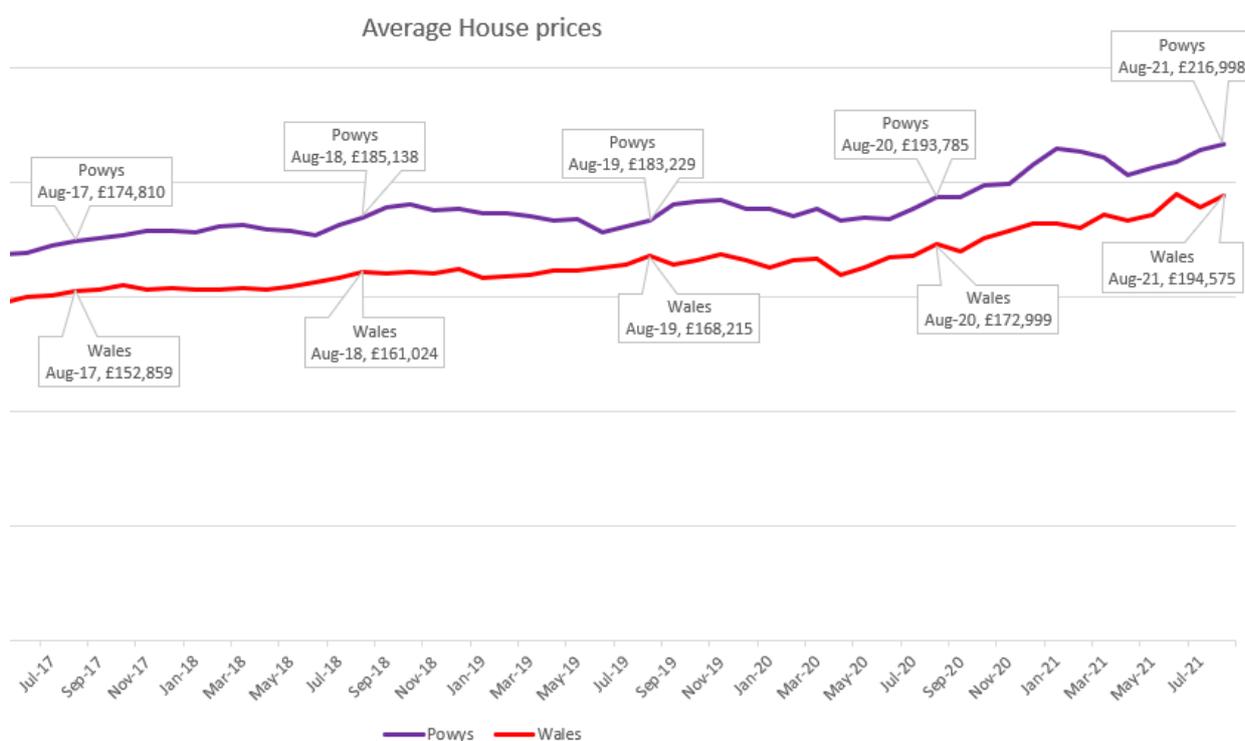


Figure 18 Average house prices in Wales and Powys over 3 years (Land Registry, 2021)

In Powys, house prices increased by 12% during the year up until August 2021, this is just under the average for Wales (12.5%) but growing faster than the UK annual rate of 10.6% in the year to August 2021. Notably, from May 2020 to May 2021, house prices in Powys increased by 17% (Wales 13%), **this was the fastest annual rise in average housing prices in Powys since 2005.**

In Wales, all local authority areas showed an increase in average house prices in August 2021 when compared with August 2020. Pembrokeshire showed the strongest growth, rising by 24% to £222,000 in the year to August 2021. In contrast, Monmouthshire showed the lowest annual change, with an increase of 1.2% in the year to August 2021, with the average house price at £295,000.

Powys ranked 14th out of the 22 local authorities in Wales for the percentage increase in house prices for August 2021.

Of all property types in Wales, detached houses showed the biggest annual growth, rising by 13.2% in the year to August 2021 to £296,000. The lowest annual change of all property types in Wales was for flats and maisonettes, with an increase of 7.6% in the year to August 2021 to £126,000.

There is anecdotal evidence that suggests people are moving into Powys from more urban parts of England and Wales. Much of this movement is due to flexible working and people being able to work from home and keep their current role. This will have an impact on the availability and affordability of homes for existing residents in Powys.

To understand housing affordability, we can compare the average house price against disposable income. **In Powys average housing prices are 11.8 times higher than the average disposable income** (Land Registry, 2021) (ONS, 2021).

Powys ranks **5th highest amongst the 22 Local Authorities in Wales** for having the most expensive houses compared to gross disposable income.

Powys reached a peak of 12.4 times higher than the average disposable income in 2007, just before the 2008 recession.

Businesses

Business size, births, and deaths

There were **8,700 business in Powys** in 2021 (ONS, 2021).

The change in the number of businesses was flat, with 405 new business start-ups (births) and 430 businesses closed (deaths) (ONS, 2021).

Powys consistently has a very low turnover of businesses with new or closing businesses representing the lowest percentage. This is probably due to the largely static agricultural sector which makes up a large percentage of businesses in the area, and unless recent shocks to the economy have an impact on these numbers, we would not expect much variation.

Table 2 Number of businesses in Powys by size band

	Total	Micro (0 to 9)	%	Small (10 to 49)	%	Medium-sized (50 to 249)	%	Large (250+)	%
Powys	8,660	8,035	93%	545	6%	70	1%	10	0.1%
Wales	107,085	95,995	90%	9,305	9%	1,470	1%	315	0.3%
UK	2,765,150	2,480,140	90%	232,815	8%	41,655	2%	10,540	0.4%

Powys has the highest percentage of small businesses amongst Welsh local authorities and higher than the Welsh and UK average.

(ONS, 2021)

Powys Business survey

In response to the coronavirus pandemic a Powys Business Survey was conducted by Powys County Council. The survey took place online from Thursday 11 June to Sunday 12 July 2020. **There were 1,016 responses in total.**

To help the council understand the full effects of COVID-19 on the county's business community, businesses were asked for their views in a short survey.

Their views have been analysed and the results form part of ongoing discussions with Welsh Government, Business Wales, and other partner organisations as we work together to rebuild the Powys economy.

A wide range of businesses from all over the county completed the survey - big and small, old, and new.

- 39% of business respondents were from accommodation and food service industries, 13% from wholesale and retail and 8% from arts, entertainment, and recreation. **63% of respondent businesses consider their business to be tourism related.**
- 31% of respondents were sole traders, 41% had between 1-4 employees and 15% had between 5-9 employees.
- 34% of respondent businesses have been operating for 20+ years, 25% were trading between 1-5 years and 5% had been trading for less than 1 year.

Key statistics: impact of COVID-19

- 99% said their business has been affected by the pandemic
- **81%** rated the impact on their business as **severe**
- **344** said they had **laid off staff temporarily** (83 was the highest number of staff laid off by one company)
- **96** responded saying they had laid off staff **permanently** (38 was the highest number of staff permanently laid off by one company)
- **16% are very worried and likely to go out of business** and 50% are worried about the impacts of COVID-19 and staying in business.
- 99% of businesses reported a monthly decrease in revenue, 50% reported a 100% monthly decrease in revenue because of COVID-19.

More financial support is needed

Many businesses acknowledged the big difference that grants, and other financial support has made, but more of this is needed for businesses to recover. Uncertainty around finance was a strong theme throughout the survey.

66% are worried about the future of their business and 86% said their main cause of concern was their 'lack of income'.

Lifting restrictions is key to recovery

Since the survey closed, many businesses have been allowed to resume trading therefore not all comments made in relation to restrictions remain current. Lockdown measures have had a significant impact on the economy and businesses are keen to reopen safely and get back to work. **As one respondent commented: "Everything hangs on when we can welcome our clients back."**



63%

consider their business to be tourism related



99%

said their business has been affected by the pandemic



81%

rated the impact on their business as severe



344

responded saying they had laid off staff temporarily



96

responded saying they had laid off staff permanently



99%

of businesses reported a monthly decrease in revenue as a result of Covid-19

Small businesses and sole traders feel overlooked

Over 70% of respondents were either sole traders or had four or less employees. From this survey, many commented that they have failed to qualify for most support schemes and do not have the reserves that many bigger companies can fall back on.

Clear guidelines and timeframes are needed

It was noted by several respondents that they wished updates from Government were clearer, quicker, and more consistent. Plans need to be communicated quickly and effectively to ensure businesses are prepared and reassured.

Wider marketing of Powys as a top destination

Several businesses touched on the need for wider tourism promotion to support the hospitality sector and the seasonal businesses which have suffered extreme losses. Businesses are keen to see Powys promoted on a larger scale outside of the county.



Follow the link to [view the full findings to the Powys Business Survey.](#)

What have people said?

Businesses were asked what could be done to make the Powys and Welsh economy more resilient in the face of future crises. Here are some of the common themes that emerged:

“A dedicated disaster recovery fund which will also help businesses affected by natural disasters like flooding.”

“Speed up the Mid Wales Growth Deal”

“Learn from this pandemic - plan better and act faster”

“Home working is possible, and people should be allowed more flexibility going forward.”

“Clearer messages from Government. We need clarity at a time like this.”

“Continue to promote the tourism industry and everything we have to offer.”

“Online development and marketing of Powys-based businesses.”

"The support we've had has been excellent. Businesses need to recover but not aware of any additional support needed."

“Increase the profile of Powys (especially North Powys) given its accessible location.”

“Speak to people who have tried to set up businesses in the area and listen to them.”

COVID-19 business grants

To help businesses during the coronavirus pandemic, Welsh Government has a varied range of support available to businesses to get through this difficult period. These packages of support are designed to cover as much of the Welsh Economy as possible and are mainly focused around providing financial support for businesses.

Powys County Council (along with the other local authorities in Wales) have been distributing business grant payments since 30th March 2020 until 3rd August 2021. There have been nine different grant types available to businesses.

During this period just over £85.6 million of support have been paid to Powys businesses.
(Powys County Council, 2021)

We can see the distribution of these payments by our 13 localities. Brecon locality has received the highest value of funding totalling £10.32m, Welshpool and Montgomery locality are 2nd highest with £9.33m and Newtown locality is 3rd with £8.77m. (Please note: Grant payment values depend on several factors, including type of grant, business size etc.)

5,084 businesses have been supported with grants during this period.

We can see the distribution of businesses in receipt of payments by our 13 localities. 602 businesses in Brecon locality have received grant payments, 568 in Welshpool and Montgomery, the 2nd highest number of businesses and Newtown locality is 3rd with 528 businesses.

A total of 14,663 payment transactions have been completed during this time.

As more grants and funding became available businesses were able to apply for more funding, according to the number of transactions each business has averaged 2.8 grant payments.

Follow the link to view more [information about Powys businesses grant funding value and the number of businesses paid over time and how this differs across our 13 localities via our interactive report.](#)

What have people said?

The council has received a lot of positive feedback from local businesses. Many of these comments refer to the swift processing of business grants, which were received by 56% of respondents (Powys business survey 2020).

“Powys County Council has in my opinion been extremely supportive. The grant arrived swiftly, and staff were well-informed and helpful.”

“The grant was efficient and has helped pay essential bills and wages.”

“I was very impressed by the speed in which the grants were paid out by the council. It made a big difference.”

“I think Powys CC adapted well to forced changes and have been good to us regarding advice and accessing grants.”

“I applaud the speed at which various measures were implemented by Welsh Government and PCC.”

Tourism

Day visitors, Room nights and Average spend

Due to the impact of COVID-19, there is no recent data on tourism.

As of 2019:

- there were 3-million-day visitors, a small decline from the previous year.
- 960,000 paying visitor nights (up 0.2% from the previous year) (Powys County Council, 2021).

12.1 million visitors spent £1.012 billion in Powys in 2019, an average of £84 per person. This was up £4 from the previous year. (STEAM, 2020)

Post COVID-19, it is unclear how things will have changed. The number of day visits and average spend will be lower than in previous years due to the numerous lockdowns, however, may also rebound well due to the reduction in foreign travel, and events such as the Royal Welsh Show being back in the calendar. However, it is important to recognise that the rising cost of living will impact a household's ability to spend money on non-essentials, instead opting for free outdoor activities in their local green space.

Staying connected

Digitally excluded

"The term 'digitally excluded' describes a form of social deprivation where a person or household has no home internet access, through either desktop or mobile devices.

This might be due to a lack of money for hardware and connectivity, a lack of digital skills to navigate the Web, or a lack of desire to engage with the online world." Broadband deals Copyright © Bonus Media Ltd 2021

According to [Digital Communities Wales](#) (Welsh Gov, 2021) **10% of people in Wales today are not online**. As more and more vital public services are being delivered online, these people are at danger of being left behind. Organisations which work with the public, particularly in the health and care sector, need to think about how to increase digital inclusion so that everyone in Wales can benefit.

The level of digital exclusion in Wales is higher than in the UK, with as many as 10% of the population, or 255,000 people, not using the internet. Digitally excluded people are some of the heaviest users of health and social care services, so risk being left behind in the digital health revolution.

Applied to the current Powys population as many as 13,300 residents in Powys could be digitally excluded.

Future Trends Wales says “Internet usage is increasing across Wales and the UK. The number of proportion of adults in Wales who do not use the internet has dropped to around 10 per cent. However, the proportion of people aged 75 and over in the UK who do not use the internet is increasing. This age group also uses the internet ‘on the go’ far less than other adults – a trend which decreases with age” but as schemes to improve accessibility to the internet roll out across Powys, together with the population aging on and those who have become used to using the internet become older, the gaps would be expected to narrow (Welsh Gov, 2021).

Digitally excluded people are likely to be:

Older adults: There is a higher proportion of digitally excluded people in older age groups. **Only 36% of people over 75 have basic digital skills** (in Powys 36% of 75+ is 6,147 people), compared with 84% of 16–49-year-olds. Older adults are not, however, a homogenous group. Internet use is increasing among older adults. 53% of people aged 65-74 have all five basic digital skills.

People with disabilities or long-term health conditions: 82% of people with a disability or long-term health condition use the internet, compared with 90% of those without. People with disabilities may require help in identifying appropriate assistive technologies.

Those with lower educational attainment: 81% of those with qualifications at degree level or above demonstrated all five digital skills, compared with 49% of those with no qualifications. Many may benefit from more assistance in initial adoption of digital services or in broadening the range of services and activities which they use and participate in online.

Lower income individuals and families: Those who are economically inactive are less likely to visit a website (71%) than those in employment (82%). Lower income families and individuals may be affected by access to and affordability of devices and connectivity. As they may not have access to devices and networks, they may also not have developed digital knowledge, motivation, or skills.

People in rural areas: People living in rural areas who are not online are usually excluded due to problems in broadband provision, both for fixed line and mobile broadband services. There are still many areas of Wales affected by not-spots, although the prevalence of these is diminishing.

Welsh speaking people and others who do not use English as their first language: Digital systems and their associated support processes need to be designed to accommodate the needs of Welsh speakers and speakers of common minority languages. This does require consideration in how services are implemented and supported.

Socially isolated and lonely people: Digital exclusion can be a facet of other social issues faced by individuals, for example, those facing social isolation and loneliness may also be excluded from digital interaction.

Homeless people: It may be assumed that homeless people are excluded as a by-product of their situation. Homeless people, however, include groups that, while they may not have access to permanent housing, may be 'sofa surfing' or may be in temporary accommodation such as hostels. Many people in these situations do have access to mobile devices and may face issues of affordable connectivity rather than complete exclusion from digital services.

There are clear public policy and equality reasons for improving digital inclusion, as well as a strong business case.

What have people said?

In the 'Future-proofing Powys' survey at the end of 2020, we asked residents "What support would help you, or someone you know, to access more services online?". We received the following responses:

Option	Total	Percent
Bookable sessions in your local library	47	17%
Support in your local community from a volunteer	46	17%
Videos on Powys Council's website	39	14%
Printable 'how to' guides	43	16%
I don't need any help accessing services online	96	36%

Other responses included:

"If I'm hard of hearing or blind or have a disability, if I'm living on my own and can't access a computer, if I'm just fed up with dealing with everything online, I want to see someone face to face sometimes. I want a choice!!"

"Options that do not involve using online services, some people do not have computers, internet, the desire or the capabilities due to learning disabilities for example to use online services. Everything should be possible via post and telephone too. Bookable sessions at Citizens Advice and Job centre for ALL government services should also be available"

"The Councils website, has compliance problems, for Voice activated software, it does reasonably well with screen readers, however the information is very circular and not detailed enough in many respects, also the capacity to download forms is sparse and the customer visitor journey on the website is appalling."

Connectivity

In response to lockdown more of us are working from home and many businesses have been forced to adapt and boost online sales to recoup some loss of earnings. Broadband connectivity is poor in Powys when compared with other parts of Wales and this may have a negative impact on the ability of both businesses and individuals to adapt effectively to the new working practices.

According to OFCOM (OFCOM, 2020) **12.2% of properties in Powys have an internet connectivity speed of under 10mbps** (megabits per second) and this situation is likely to continue for the foreseeable future.

Powys has the highest rate of those unable to receive 10mbs amongst all local authorities in Wales. Second highest is Ceredigion with 11.5% and third is Carmarthen with 6.9%.

21% of premises in Powys are unable to access 30 mbps internet connectivity speed.

Powys has the highest rate of those unable to receive 30mbs amongst all local authorities in Wales. Second highest is Ceredigion with 19% and 3rd is Monmouthshire with 15%.

A closer examination of the situation regarding access to Broadband within Powys indicates that of the 79 LSOAs that make up the County, **29 LSOAs are falling below the standard of 30 mbps**

- 65% of households in the Llansilin LSOA,
- 58% in Beguildy and
- 55% in Llanafanfawr are unable to obtain this speed of connection.

Follow the link to view the [Powys LSOA broadband report](#).

According to findings from the Centre for Rural Economy, working from home is more challenging for many of those living in rural areas because of inferior access to high quality broadband. This weakness in communications infrastructure will also have a negative impact on households who are home educating their children during school closures and the situation may be worsened by the level of competing demand for a limited supply of available bandwidth (data transfer capacity) among multiple household members (2020).

In common with other rural locales, Powys faces a real challenge, with significant obstacles that need to be removed if businesses are to compete on an online level playing field and these issues are leaving many struggling with poor quality connectivity. The challenging situation is further exacerbated in many cases by a lack of the technical knowledge required to optimise the opportunities offered by online marketing for isolated rural businesses.

Mobile network coverage in Powys has its difficulties, due to the rural nature of Powys there are mobile blackspots throughout. According to OFCOM (OFCOM, 2020) 5.8% of Powys premises have no 3G indoors, this is the second highest percentage amongst all Welsh local authorities, first is Ceredigion with 6.3%, and third is Pembrokeshire with 3.5%.

7.3% of Powys properties cannot receive 4G mobile signal indoors, again this is the second highest amongst all local authorities, first is Ceredigion with 7.9% and third is Carmarthenshire with 3.9%. (OFCOM, 2020)

Follow the link to view more [information about Powys and Wales broadband and mobile coverage via our interactive report.](#)

What have people said?

When asked “Can you list five things that you think positively impact on the health and well-being of you, your family, your business or employment?” in the Living in Powys survey, some respondents highlighted the need for better broadband and mobile phone signal.

When asked to consider what they could do personally or collectively to improve the likelihood of them happening, responses included:

“Community bid for community broadband”

“As a community we are looking into the Government Rural Gigabit Broadband voucher scheme to get better connectivity”

Poverty and Deprivation

Least and most affluent areas

WIMD (Welsh Index of Multiple Deprivation) (Welsh Gov, 2019) is the Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation. WIMD ranks all small areas in Wales from 1 (most deprived) to 1,909 (least deprived).

Powys has 79 Lower Super Output Areas (LSOAs). These small areas have been ranked by overall WIMD and show overall that 11% (9) of Powys' LSOAs are in the top 30% most deprived areas of Wales. These include:

- Ystradgynlais 1, ranked in top 10% most deprived in all Wales
- Llandrindod East/West, Newtown East, Newtown South, Welshpool castle, ranked in top 20% most deprived in all Wales
- Newtown Central 1, Newtown Central 2, St John 2 (Brecon) and Welshpool Gungrog 1, ranked in top 30% most deprived in all Wales

Powys does not contain any LSOAs in the top 10% least deprived in Wales, however we do have 10 LSOAs in the least deprived 20% including Builth 2, Forden and Guilsfield. And in the top 30% least deprived we have a further 16 LSOAs including Crickhowell, Knighton 2 and Newtown Llanllwchaiarn North.

Income

These small areas have been **ranked by WIMD category Income** and show overall that 11% (9) of LSOAs in Powys are amongst the top 30% most deprived in all of Wales, with:

- 1.2% (1) of Powys' LSOAs are in the **top 10% most deprived (Ystradgynlais 1)**
- **3.7% (3) LSOAs are in the top 20% most deprived** (Newtown Central, Newtown South, Welshpool Castle)
- **6% (5) LSOAs are in the top 30 % most deprived** (Llandrindod East/West, Llandrindod North, Newtown Central 2, Newtown East, St John 2)

Follow the link [understand more about WIMD in Powys and how we rank against Wales using our interactive report.](#)

What have people said?

When we distributed the 'Living in Powys' well-being survey regarding poverty we asked residents if they felt that they were affected personally by fuel poverty and/or poor-quality housing.

- 18% responded yes
- 75% said no
- 7% said don't know

Respondents were also asked "In the last twelve months which of the following have you done for family members (not living with you) or friends?", the answers were as follows:

- 27% have given or lent money
- 17% have given or lent food
- 28% have given or lent other things
- 11% have taken them out for an evening
- 17% had either babysat in the evening or looked after children in the daytime

And in the last twelve months which of the following have members of their family (not living with them) or friends done for them, the responses were as follows:

- 21% had given or lent you money
- 16% had given or lent you food
- 28% had given or lent you other things
- 15% had taken you out for an evening
- 20% had either babysat in the evening or looked after your children in the daytime

Economy summary

The economy plays a huge part to the well-being of the residents in Powys.

Powys has consistently lower rates of unemployment compared to the rest of Wales. However, Since June 2019, because of COVID-19, **unemployment has risen sharply in Powys.**

The Annual Population Survey (ONS, Dec 2021) results show that between December 2019 and June 2021 unemployment in Powys has **doubled**. The percentage change in unemployment rate from December 2019 to June 2020 shows that Powys has seen the **largest increase in unemployment of all 22 local authorities in Wales**, since the beginning of the coronavirus pandemic.

As a result of this increase Powys went from ranking 12th out of 22 for the lowest rate of unemployment in Wales, to 6th lowest, **and for the first time Powys' unemployment rate exceeded the Welsh average**. Looking at the past trends and the information in the future trends report it is hopeful that we should return to a level like pre pandemic times. **We will need to closely monitor this to understand how these levels change and what we expect the impact on future generations to be.**

During the coronavirus pandemic, in July 2020 Powys had its highest number of furloughed employments (8,900). This equated to a 17% take up rate for Powys employments (Wales 17%). As at August 2021, **Powys furloughed employment reduced to 1,900, with a take up rate of 4% (Wales 4%)**. The furlough scheme ended in September 2021 (HMRC, 2021).

79.2% of people are economically active and 17.8% are self-employed (ONS, Dec 2021). Powys had the highest rate of self-employment amongst all local authorities in Wales and is nearly double the Wales and UK average of 8.9% and 9.4% respectively (ONS, Dec 2021).

70% of Powys' employees work full time and 30% of 16-64 years olds are in part time employment (ONS, Dec 2021). The median weekly **full-time earnings in Powys is £519** (Wales: £542, UK £586) (ONS, 2021).

The **average household income in Powys is £33,458** (Wales: £34,700, UK: £40,257). 55% of households in Powys earn *below* the Powys average (£33,458) (CACI, 2021).

27% of all jobs in Powys are in the Wholesale, retail, transport, hotels and food sector (Wales 26%), 14% are in Agriculture, forestry, and fishing, well above the Welsh average of 3% (ONS, Dec 2021).

Powys had 8,665 businesses. 38% of Powys businesses are in agriculture, forestry and fishing, the highest-ranking business industry in Powys. Second is construction with 9.9% businesses and 3rd is professional, scientific, and technical with 6.8% businesses (ONS, 2021).

Powys has the lowest gross value added per hour worked in the UK (since 2008) (ONS, 2021). The reason for this is Powys residents work on average much longer hours than other areas (mainly due to our strong agricultural sector), **full time workers worked on average 40.9 hours per week in Powys** with only Herefordshire having a higher figure at 41.1 hours per week (ONS, 2021).

Powys has maintained a higher rate of economically active residents (aged 16-64) than the rest of Wales. In the last 10 years the economic activity rate has remained stable, and we anticipate this will remain stable for future generations. **However, there is a need for focus on the quality of jobs in Powys.** High levels of employment in industries such as agriculture and tourism (and not in high-quality industries), this tempered with high rates of self-employment, long working weeks, and very low levels of Gross Value Added per job/hour worked means that residents in Powys are working hard for low pay. **Coupled with the rising cost of living this will push more individuals and families into hardship or poverty.**

The **average house price** (for all properties) **in Powys was £216,998**, higher than the Welsh average of £194,575, and **Powys ranks as 6th highest amongst the other local authorities in Wales.** From May 2020 to May 2021, house prices in Powys increased by 17% (Wales 13%), **this was the fastest annual rise in average housing prices in Powys since 2005** (Land Registry, 2021).

To understand housing affordability, we can compare the average house price against disposable income. **In Powys average housing prices are 11.8 times higher than the average disposable income** (Land Registry, 2021) (ONS, 2021). Powys ranks **5th highest amongst the 22 Local Authorities in Wales** for having the most expensive houses compared to gross disposable income.

Research has shown that during the lockdown **30% of predominantly privately rented households with children experienced problems in the homes such as damp, mould, electrical hazards, and leaking roofs or windows**, with fewer than a third of those managing to resolve such problems (PCC, 2021).

There were **8,700 business in Powys** in 2021. 93% of those are Micro businesses, 6% small and 1% Medium sized or large. **Powys has the highest percentage of small businesses amongst Welsh local authorities and higher than the Welsh and UK average** (ONS, 2021).

According to the Powys Business survey, conducted in response to the coronavirus pandemic, 99% said their business has been affected by the pandemic, 81% rated the impact on their business as severe, 16% are very worried and likely to go out of business and 50% are worried about the impacts of COVID-19 and staying in business. The impact of COVID-19 across key sectors can vary widely but many businesses and industries have found and will find the coming months and years extremely difficult. More needs to be done to monitor the impact of the coronavirus pandemic across these sectors in the coming years.

Evidence indicates that there is a trend in the UK towards increasing provision of remote working opportunities. It is too early to understand the remote working opportunities for businesses in Powys (though the public sector in Powys has shown the potential) but it is possible we might see growth of employment in non-traditional Powys industries in the future. If we do not adapt to this new digital workplace Powys will be left behind.

We need to ensure that those residents who do not or cannot adapt to these new technologies are still supported, digital exclusion is still an issue in 2022.

According to [Digital Communities Wales](#) (Welsh Gov, 2021) **10% of people in Wales today are not online**. As more and more vital public services are being delivered online, these people are at danger of being left behind. Digitally excluded people are likely to be older adults, people with disabilities or long-term health conditions, people with lower educational attainment, lower income families, people in rural areas, Welsh speakers or those who do not use English as their first language, socially isolated or lonely people and homeless people.

12.2% of properties in Powys have an internet connectivity speed of under 10mbps (megabits per second) and **21% of premises in Powys are unable to access 30mbps internet connectivity speed**. This situation is likely to continue for the foreseeable future (OFCOM, 2020). This is the highest rate amongst all local authorities in Wales for both speeds. 7.3% of Powys properties cannot receive 4G mobile signal indoors, again this is the second highest amongst all local authorities, first is Ceredigion with 7.9%.

Continued development of digital working skills and the roll out of internet connectivity is critical to helping support businesses and residents to get online. If we do nothing Powys residents may miss out on new job opportunities/ training or learning which would help them improve their economic well-being.

The rural nature of Powys, in particular the poor road network and sparse population, makes it a challenge to attract large scale investment and businesses. The rise in digital business may be beneficial to Powys.

Powys has 79 Lower Super Output Areas (LSOAs). These small areas have been ranked **by overall WIMD** (Welsh Index of Multiple Deprivation) **and show overall that 11% (9) of Powys' LSOAs are in the top 30% most deprived areas of Wales**. These include:

- Ystradgynlais 1, ranked in top 10% most deprived in all Wales
- Llandrindod East/West, Newtown East, Newtown South, Welshpool castle, ranked in top 20% most deprived in all Wales
- Newtown Central 1, Newtown Central 2, St John 2 (Brecon) and Welshpool Gungrog 1, ranked in top 30% most deprived in all Wales

These small areas have been **ranked by WIMD category Income** and show overall that 11% (9) of LSOAs in Powys are amongst the top 30% most deprived in all of Wales, with:

- 1.2% (1) of Powys' LSOAs are in the **top 10% most deprived (Ystradgynlais 1)**
- **3.7% (3) LSOAs are in the top 20% most deprived** (Newtown Central, Newtown South, Welshpool Castle)
- **6% (5) LSOAs are in the top 30 % most deprived** (Llandrindod East/West, Llandrindod North, Newtown Central 2, Newtown East, St John 2). (Welsh Gov, 2019)

It is important to explore the reasons for deprivation in our small areas and consider how we can tackle deprivation to improve well-being for future generations.

Cross cutting themes

Economy and well-being are also affected by many other cross cutting themes seen in the other Well-being topics, Social, Culture and Community and Environment.

		How does Economy interact with the other Well-being themes?
Social	<ul style="list-style-type: none"> • Homelife • Living Independently • Health and Lifestyle • Education our Children 	Social and economic outcomes are highly interlinked, as individuals' economic circumstances is often a driver for their social well-being. For example, an individuals' employment and wages will have an impact upon their ability to live independently and maintain a happy home life. Additionally, those with limited access to economic resources will likely have reduced access to tourism and business opportunities in their local communities. Digital exclusion can impact our most vulnerable residents as more services move online. Alongside this, limited access to economic resource often leads to longer term impacts to health and young people's outcomes in education.
Culture and Community	<ul style="list-style-type: none"> • Welsh Language • Communities coming together • Participation in cultural life • Anti-social 	Culture and community are intertwined with the various components of economic well-being, as individuals with access to economic resources are increasingly likely to be engaged with their wider culture and community. Additional drivers of community wellbeing include areas such as community cohesion and anti-social behaviour, which are often linked to individuals experiencing reduced economic well-being. Additionally, it is important to ensure all citizens have equitable access to opportunities within their community, such as cultural assets.

Environment	<ul style="list-style-type: none"> • Improving Biodiversity • Sustainable Land, Water and Air • Reconnecting People and Places • Forestry Resources • Climate Change 	<p>The environment provides many natural resources which are essential in manufacturing and production.</p> <p>The natural world can improve economic well-being by providing greenspace and places that people can use free of charge, enabling them to freely access opportunities to be outdoors and active.</p> <p>It is also important to note there is a longer-term sustainability of certain industries and sectors, based on their reliance upon natural resources, which can be combatted with the creation of a greener economy.</p> <p>Environmental incidents such as flooding have a detrimental impact to an individuals' economic well-being as it de-stabilises their homelife, ability to live independently and potentially has negative longer term health impacts.</p>
High Level Impacts	Ageing population	<p>It is important to consider the impacts of an increasingly aging population when considering economic well-being as an older demographic will face additional pressures in trying to maintain economic well-being within their community. An aging population could lead to a shortage of workers and potentially cause wage inflation, impacting the wider economy. Alternatively, with an increased life expectancy and potential to work longer, this could also become a barrier to young people's entering their local job market, which could impact the wider economy and lead to young people leaving the area for further education and employment.</p>
	Rurality	<p>There are also challenges to economic well-being due to Powys's rural make up. Due to its vast geography with more dispersed communities, it is largely reliant upon traditional areas of work, such as the Public Sector and agriculture, limiting the potential number of opportunities for individuals to improve their economic well-being. Rural communities are also likely to have limited access to resources such as public transport, hospitals, and schools, which impacts upon areas such as tourism. However, it is also important to note that rurality does have a positive impact to an individual's well-being as the affluence of green spaces and natural scenery lend itself to becoming a tourist economy.</p>
	Brexit	<p>Whilst the full extent of the impact of Britain's exit from the European Union remains largely unseen at a local level, it is still important to note that this will impact economic well-being over time, with scenarios such as increased product costs and reduced staffing having a longer-term impact to the population's economic outcomes.</p>

	COVID-19	<p>While this assessment has been produced during the coronavirus pandemic, which is still ongoing, the longer-term impact is still to be determined. However, the pandemic has already highlighted new short-term issues affecting economic well-being and exacerbated the existing challenges, such as its disproportionate impact to demographics.</p> <p>This has impacted an individuals' economic well-being as many people have faced increased challenges in their personal lives, jobs and business. Wider society has also re-considered the importance of economic well-being, as delivery models for jobs, businesses and tourism have had to adapt to cope with the ever-changing situation.</p>
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Culture and Community

Welsh language	111
Communities coming together	114
Volunteering in Powys	114
Food banks	116
Participation in cultural life	118
Use of libraries/ leisure centres	118
Town centres and local events.....	120
Anti-social	123
Fly tipping.....	123
Crime rates and public protection	124
Re-offending.....	128
Road Traffic Collisions	129
Fire.....	129
Culture and Community Summary	132

A community is more than just a geographically bounded group of people who interact with one another, it includes sub-groups that have shared interests. Many of these communities are now combining digital catchups along with physical interaction, this change in the way we meet has been largely due to the impact of COVID-19.

Culture incorporates many things, the Welsh language, traditional activities as well as other social activities in the community. Access to cultural assets and participation in culture, heritage and sports is linked to an increased sense of place and togetherness.

Welsh language

Powys is committed to ensuring that the Welsh language is promoted and treated no less favourably than the English language, and that people can live their lives through the medium of Welsh if they choose to do so.

The Welsh language forms an important part of cultural well-being in Wales, the proportion of Welsh speakers in Powys is very similar to that of the rest of Wales, with 19% of Powys residents able to speak Welsh (ONS, 2011).

In Powys the 2011 Census showed that:

- **72%** of residents in Powys had ‘No Welsh Skills’
- **14%** could ‘Speak, Read and Write Welsh’
- **14 %** had other combinations of Welsh language skills, including ‘Speaking and Reading Welsh’ and ‘Speaking and Understanding Spoken Welsh’

There is a difference in the percentage of Welsh speakers within our localities in Powys.

The top three localities with the highest percentage of Welsh speakers⁷ are

- Machynlleth locality: 54%
- Ystradgynlais locality: 39%
- Llanfyllin locality: 35%

However, it is important to recognise that there are Welsh speakers within every locality in Powys and that the language is used in each of our communities.

New Welsh Language Standards have been introduced, under the Welsh Language (Wales) Measure 2011, and issued by the Welsh Language Commissioner, which list ways in which the Council is expected to provide services through the medium of Welsh and provide opportunities to use the language, to assess the impact of policies and decisions on the Welsh language, and state how it will promote the Welsh language in order to increase the number of Welsh speakers and its use within the county (National Survey for Wales) (Welsh Gov, 2020).

The percentage of people aged three and over able to speak Welsh has decreased over the last century, from 44% in 1911 to 19% in 2011. The percentage able to speak Welsh varies by age and is highest for those aged five to fifteen years old. Since 2011 estimates from the National Survey for Wales of those who speak more than a few words of Welsh have

⁷ Welsh speakers are calculated by totalling the number of people in the following categories: ‘Can speak, read and write Welsh’ and ‘Can speak but cannot read and write Welsh’ categories.

remained stable at 19%, but there has been an increase in those who say they speak a little Welsh (Welsh Gov, 2017).

Follow the link to view more [information about Welsh language in Powys, how this differs across our 13 localities and LSOAs via our interactive report.](#)

According to the Future Trends Report (Welsh Gov, 2021) over time, the number of Welsh speakers in Wales is predicted to increase significantly. Projections based on 2011 census data, calculated in 2017 by the Welsh Government, estimated that there would be approximately 666,000 people 2050. This is equivalent to 21 per cent of the population and represents an increase of 100,000 Welsh speakers over the 40-year period. For Powys this means that we could have as many as 28,000 Welsh speakers, however the future trends report also highlights that they expect these figures to be surpassed by 2030, the overall increase is assumed to be driven by younger age groups and maintained through future generations.

What have people said?

In the recent Living in Powys survey, out of 469 responses, 17% answered 'yes' when asked "Do you have any concerns or evidence to suggest that the Welsh language is treated/used less favourably than English in Powys?"

Comments included:

"My children were not able to access Welsh-medium education in our area."

"During school our Welsh teacher left... we had no other teacher. Now when working in Powys you must understand Welsh, and the courses are available but not affordable. I don't have free money to pay for a course."

"Lack of bilingual resources. Local shops only displaying signage in English. Local green spaces have signs that are in English only. Lack of Welsh-speaking staff. Children not having the opportunity to speak Welsh outside of school. General negativity in the community regarding the Welsh language - described as "dead language", "waste of money" etc."

"You don't hear it spoken often and English is the dominant language in the area."

"Not enough opportunity to learn and put Welsh language into use. Need more groups to talk and discuss/learn"

When asked "What changes could be made so as to have a more positive effect on the Welsh language?" comments included:

"Service providers should aim to offer a service in Welsh or English, if requested. Schools and colleges in Wales should enable all pupils to choose to learn in Welsh or English and participate in regular basic language activities in the second language."

“Ensure that we have good Welsh medium education so that ‘we grow our own’ Welsh medium speakers’ who will stay in our communities.

“Free Welsh lessons. Providing Welsh tuition for non-Welsh speakers who take up professional posts.”

“There needs to be a balance to keep the language alive, but also to realise that skills are important to. Welsh language needs to be taught to young people in education, people need to accept that older people may not have the capacity to learn a language.”

“Protecting Welsh language communities (housing, employment, keeping communities together). Concerted efforts to promote the Welsh language and make it more visible. More Welsh language events (currently these tend to be organised within the Welsh language or learner’s communities, so they are not visible from the outside. This creates two different worlds, so English-only speakers do not recognise Welsh as thriving and in use about them - that diminishes its status and undermines efforts to encourage people moving in to learn the language.”

Communities coming together

Volunteering in Powys

In 2016-17, Powys had the highest percentage of people who volunteer with **38%** of the population volunteering, compared to the other Welsh Local Authorities (Wales 28%) (ONS, 2011).

By 2019-20 Powys had fallen two places with **32.1% of people volunteering (-4.9%)** and were the third highest behind Gwynedd with 32.8% and Monmouthshire with 32.3% (Wales 26%). (Welsh Gov, 2020)

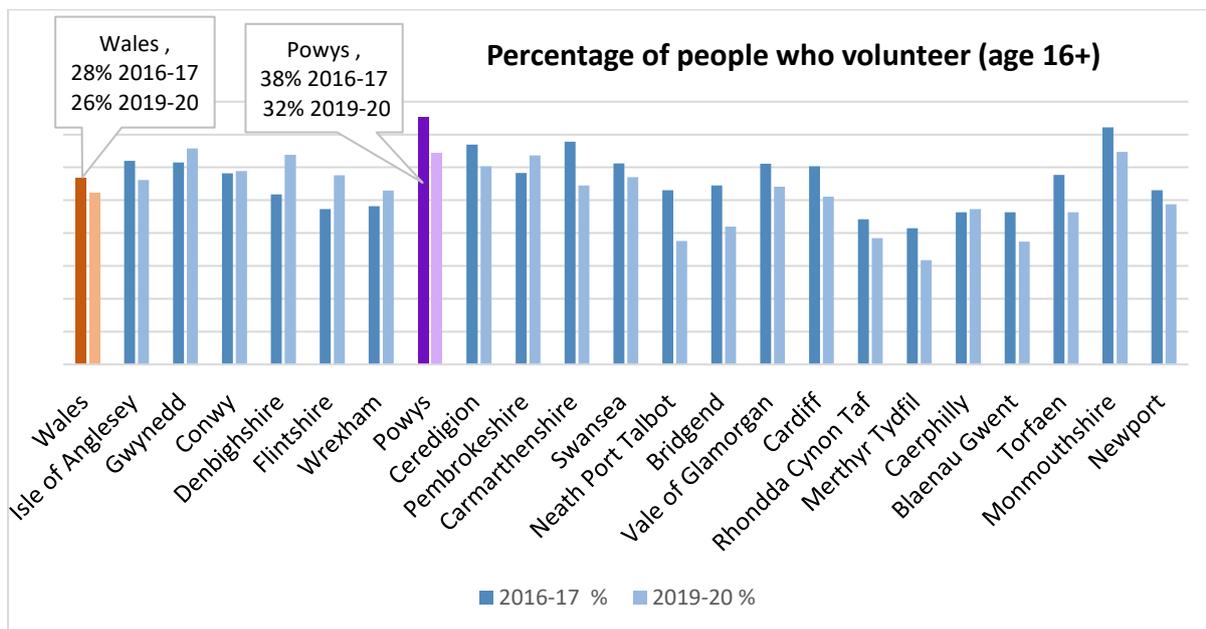


Figure 19 Percentage of volunteers by local authority over 2 years (Welsh Gov, 2020)

Calculated against the 2020 population, for Powys this would mean approximately 42,700 people volunteered during 2019-20.

According to the National Survey for Wales (Welsh Gov, 2020), people who volunteer are more likely to have one or a combination of the following characteristics:

- have higher educational qualifications
- use the internet
- be in good general health
- speak Welsh daily
- have a religious faith
- own their home
- participate in sport regularly
- feel that the things they do in life are worthwhile

Volunteering can aid social cohesion and connection as well as improve the subjective well-being of volunteers by through factors such as a sense of purpose, confidence in one's own abilities, and new social connections.

One example of volunteering in Powys is Community Transport, which offers accessible door to door transport for people with mobility problems, it reduces social isolation by providing access to towns for those who otherwise would not be able to participate in education and training, employment or other everyday things we take for granted. In Powys there are several successful schemes in operation, and most have been developed to meet the needs of disabled and older people.

PAVO Volunteers

Data provided by PAVO shows that the number of PAVO registered volunteers has varied in the last three years, both in the number of volunteers registered and the hours that they are volunteering.

Over three years (2018 to 2020), there have been 8,478 registered volunteers who gave their time and volunteered 33,620 hours.

In 2018 there were 1,274 registered volunteers providing 6,596 hours. This is an average of **5.2 hours of volunteering per person**.

In 2019 there was a **18.6%** increase of volunteers compared to 2018, this is a total of 1,511 persons (+237 new registrations). There was a significant increase in the number of hours provided with a **160% increase** compared to 2018, with a total of 17,195 hours in the year (+10,599 hours). This is an average of **11.4 hours per person**.

In 2020 there was an increase in registered volunteers again, with 5,693 (+4,182 new registrations), this is an increase of **276.7% increase** compared to 2019. However, the number of hours decreased by **42%**, with 9,829 hours in total for the year (-7,366 hours). This is an average of **1.7 hours per person**.

The category COVID-19 had the highest number of volunteer hours during the coronavirus pandemic, COVID-19 volunteering accounted for **54%** of all volunteering during 2020.

It is encouraging to see so many volunteering, and a young age group providing volunteer time, however we will closely monitor to understand the volunteering landscape post-pandemic.

Volunteering improves social cohesion and connection, and boosts the well-being of volunteers (**Boelman, 2021**).

PAVO volunteer demographics (2019-2020):

- **67%** female and **33%** Male

- Age bands
 - **17%** aged 65 and over
 - **49%** aged 45-64
 - **20%** aged 26-44
 - **14%** aged 0-25

In Wales, the experience of community groups during the coronavirus pandemic suggests that place-based and interest-based groups can help to alleviate loneliness and provide a sense of purpose (**Havers et al., 2021**).

Between April 2018 and March 2021 PAVO's **Community Connectors** have had referrals totalling **7,454 individual clients**, this is a rate of 563 per 10,000 population. (PAVO 2021)

Llandrindod and Rhayader locality had the highest rate of client referrals with 870 per 10,000 population. 2nd highest was Builth and Llanwrtyd locality with a rate of 641 referrals and 3rd was Ystradgynlais locality with a rate of 613 referrals per 10,000 population.

Llanfair Caereinion locality has the lowest rate of referrals per 10,000 population with 329, 2nd lowest was Crickhowell locality with 335 and Welshpool and Montgomery locality was 3rd lowest with 414 referrals per 10,000 population.

(PAVO, 2021)

What have people said?

In the Living in Powys survey, we asked respondents if they volunteered. Out of the 465 respondents that answered the question, 41% said yes. Of those, 12% said they signed up due to the Covid-19 pandemic

Food banks



There are many food banks in Powys, some are run by the Trussell Trust, while others are community led. These food banks help to provide emergency food and compassionate support to people who are in a time of need.

In 2020 the total number of parcels distributed in Wales was 70,393.

Between April 2020 and March 2021, the number of 3-day emergency food aid parcels **given to families with children in Powys increased by 197%** (Wales 7%) when compared to 2019/20 (Child Poverty Action Group, 2021).

The child poverty action group showed that:

- 2,065 parcels were given to adults in 2019/20 and **3,871 parcels in 2020/21. This is an 87% increase** (+1,806 parcels) in 2020/21.
- 971 parcels were given to children in 2019/20 and **2,883 parcels in 2020/21. This is an 197% increase** (+1,912 parcels) in 2020/21.
- 3,306 parcels were given in total in 2019/20 and **6,754 parcels in 2020/21. This is an 84% increase** (+3,718 parcels) in 2020/21.

The number of food parcels may continue to rise in the short to medium term as the cost of living and inflation rise, and many families struggle to keep up with rising energy and fuel costs.

What have people said?

When asked in the recent Child Poverty in Powys survey “Can you think of any examples where something good has been done to tackle child poverty in your area?” responses included:

“The Ystradgynlais Food Bank has helped no end and the fuel poverty fund is amazing.”

“The nearby food Bank has a great, affordable charity store and they get to know people, run volunteer groups, get people active and step in gently and thoughtfully when help is needed but people might be afraid to ask for help because they dread that their children will be taken away.”

“The development of the food bank and other support at St Johns.”

Respondents were given the opportunity to comment on how poverty affects children and young people in Powys, responses included:

“People are depending on food banks due to the increased cost of living and insufficient wages.”

“The strong teaching tool of modelling is affecting children and young people in Powys such as: Increase in food bank use. Mental health issues of parents impacting on children. Cycle of non-working households being generational. Increase of drug activity in the area.”

Participation in cultural life

Use of libraries/ leisure centres

There are many opportunities within Powys to access arts and culture, with several theatres and art centres and numerous attractions. Arts and cultural services in Powys are primarily independently delivered largely through charitable organisations, some receiving regular support from Powys County Council and from the Arts Council of Wales, some organisations receive little or no support and are reliant on volunteers to operate.

The arts and cultural sector (made up of voluntary, third party and private groups) including the creative industries makes a significant contribution to the local economy as well as ensuring places and communities are active, vibrant, and cohesive.

Regular participation in arts, culture and heritage activities tends to be highest among people aged 16 to 44 years old (Welsh Gov, 2020).

Participation in arts activities and events is relatively high in Powys (70.83%), ranking 7th out of the 22 Welsh Local Authorities and above the Welsh average (69.56%) despite the drop in percentage between 2017 (76.02%) and 2019 (70.83%). (Welsh Gov, 2017) It is still unknown how this is likely to be affected by the pandemic and the restrictions imposed during this time.

Libraries and leisure centres and the activities that they provide, contribute to the well-being of their customers. In Powys there are **18 Libraries** offering a wide range of services.

Libraries in Powys were one of the first non-business critical council services to reopen following the first COVID-19 lockdown, facilitated by the implementation of a contact-free Order and Collect book service. The doorstep book collection and delivery service provided via Order and Collect allows the library service to connect customers with reading materials at a time when book browsing in branches is not a viable option for those isolating and unable to visit library facilities. A network of volunteers from libraries and partner organisations has ensured that reading for well-being has continued, despite intermittent restrictions on visits to libraries.

Digital engagement in libraries, museums and archives has accelerated following the coronavirus pandemic, and Welsh Government funding has been invested in the development of a digital strategy for the council's cultural services. Investment has been made in the creation of a cultural services website and accompanying digital tours, acquisition of a range of digital resources and in staff training to develop digital communication skills. Improvements to digital service provision has resulted in the creation of virtual events and activities, including author talks, money advice, adult craft workshops, children's activities, quizzes and more.

A Circular Economy funded iPad loan scheme has recently been launched, enabling the library service to connect those digitally and socially isolated with digital resources. Registered library members can borrow these devices, and accompanying mobile data, for a set period at no charge.

With regards to [Leisure Centres](#), Freedom Leisure currently run **16 leisure centres** in Powys offering a wide range of facilities and classes to the public which provide leisure activities and support residents in maintaining a healthy lifestyle.

In 2019, **29.2 % of people in Powys participated in sporting activities three or more times a week** which was below the Welsh average (32.2%). This had fallen since 2017 when in Powys 32.1%, had participated in sporting activities three or more times a week, which was the highest percentage in Wales and was 12.1% higher than 2016, which had the lowest percentage of people participating in sporting activities three or more times a week at 28.6% (Welsh Gov, 2020).

In 2016-2017 there was a rising trend (28.6% - 32.1%) of people in Powys who participated in sporting activities three or more time a week which fell in 2018 (28.9%) and slowly increased in 2019 (29.8%).

We do not know how Powys residents' health activities have changed throughout lockdown, however many residents did find enjoyment in the outdoors and participating in outdoor activities such as walking, running and cycling during the lockdown period.

48% of children and young people participated in sporting activities three or more times a week during 2019-20 (Welsh Gov, 2017)

In adults, a lower proportion of women participate in three or more sporting activities a week than men.

49% of 16–24-year-olds have the highest percentage of any age group of adults who participated in three or more sporting activities, 2nd highest is 25–44-year-olds with 38% (all age average 32%).

Regular participation in sports is associated with improved physical and mental health, with the greatest increases seen in those who take up sports from a low baseline and when participants are involved at least weekly. Participating in outdoor recreational activities is associated with better well-being. Nature-based recreational activities increase well-being suggesting that time in nature is beneficial by itself (Wales Centre for Public Policy, 2021).

What have people said?

During the 'Future-proofing Powys' survey at the end of 2020, we asked, "many services have been impacted by COVID 19 restrictions. What services have you missed during lockdown?". Out of 186 respondents, 92 selected 'libraries' and 102 selected 'gyms and/or swimming pools'.

In the same survey, when asked “Are there any other services that you think should be prioritised when decisions are being made for and in the future?” comments included:

“Keep gyms and swimming pools open for people well-being and mental health”

“Services which improve the health and well-being, and confidence of the rural community, promoting much learning, enjoying leisure, fulfilling and healthy lifestyle, which is all in harmony with the environment.”

In the ‘Digital Services for Archives, Museums and Libraries survey’ conducted in March 2021, when asked “What can the staff and buildings across Powys Library, Museums and Archives offer you that is not available online from other organisations elsewhere?” comments included:

“General advice with and access to any local or council services.”

“Access to material not available online, e.g., old maps, art gallery, archives.”

“A friendly face, genuine interest in a particular request or question.”

“Real’ books, ‘real’ heritage items - a sad world if everything is digital and excludes many - there is such a thing as digital poverty”

“Digital services are welcome, but they are not a substitute for face-to-face services.”

Town centres and local events

In Powys there are 23 regeneration projects and 51 sub-projects with a funding of approximately £28.29M. Most recently the Council was also awarded £6.9m for three projects – two in Brecon, including refurbishing Theatre Brycheiniog and establishing a multi-agency hub, and one in Llandrindod Wells, where a brown-field site will be redeveloped for housing.

Brecon, Llandrindod and Rhayader and *Welshpool and Montgomery* are the localities with the highest number of projects. The highest number of sub-projects are based in *Llandrindod and Rhayader, Brecon* and *Ystradgynlais*. The largest percentage of funding for these sub-projects has come from Powys County Council, UK Government and Welsh Government.

A temporary event notice is notification of licensable activities (sale of alcohol / regulated entertainment) for a brief period usually a day, but up to 1 week this is usually served for parties, weddings, village shows, small festivals etc. The number of Temporary Event Notices (TEN) issued has fallen, resulting in an 81% decrease between 2016 (1,114) and 2020 (213). The main reason for the downward trend is due to COVID-19, where events have not been permitted but are now starting to pick up again as restrictions are removed. Prior to the

pandemic the number of TEN's had steadily been increasing (In 2019, prior to the pandemic there were 1,207 licences issued).

The coronavirus pandemic led to a 64% drop in tourism in Powys (compared to the previous year), for instance total visitor days dropped by 66% and total visitor numbers dropped by 70%. The virus had a significant impact here in Powys, as it did all over the World (STEAM, 2020).

The **number of jobs based in the tourism sector declined by 40% due to COVID-19 and numerous government lockdowns**. This was complicated by the introduction of the furlough scheme, meaning that many jobs were part-supported by the government and part by tourism spend.

In most areas this means that the employment figures for 2020 declined less than would be expected (due to the furlough scheme supporting businesses to retain staff). There were still significant falls, due to business closures and a lack of seasonal and casual staff being taken on.

Due to the coronavirus pandemic many events in Powys have been cancelled. This will have had a profound impact on the events, the economy, and the communities that they are held.

What have people said?

Following feedback from a recent engagement exercise on the future of Powys town centres, temporary changes to the town centres that were introduced last year to encourage the public back into our town centres and to help businesses open safely and in compliance with Covid-19 restrictions will stay in place for now (in Brecon, Newtown, Hay-on-wye, and Crickhowell).

These measures were designed to facilitate social distancing and provide additional outdoor space for both pedestrians and businesses to utilise. Feedback from the survey included:

Crickhowell:

“Initially adding cones at the outset of the pandemic helped queuing outside shops. Since then, the seating areas are taking up already limited parking. If there is nowhere to park, then shoppers will go elsewhere.”

“Any ongoing measures need to take account of pre-existing problems e.g. parking and difficult disabled access.”

“Pedestrianise the high street during the day, allow deliveries only and allow cafes to put tables out to create a more open European feel- or alternatively, create one way system and increase footpath widths to allow above.”

Brecon:

“Just close the town centre off completely. Do away with the temporary signs and do something that it easily identifiable. Take a look at what they have done in Hereford, it works! perhaps something similar would work in Brecon?”

“The measures in place have only benefited a few businesses and with the increased traffic it has made my life as a resident more difficult.”

“Make the town a more desirable place to visit. Do up the park at the prom, not with another bandstand, but with some actual play equipment that can be used by all!!! And not just in that little space it's in now, spread it out. Families will visit for the park, then they will move into town. Put on more events in the town centre, like markets and music. Close off the town centre and spread it out. Advertise the events more so people know they are happening.”

Newtown:

“The streets of Newtown were already wide enough to allow social distancing. The removal of parking for planters was unnecessary and the repositioning of parking spaces on Broad Street did not achieve anything other than reducing free parking spaces in town.”

“I think it was an opportunity to consider closing Broad St altogether to traffic making it a pedestrian/ cyclist/market stalls only facility. The vast majority, if not all, the commercial and private buildings can be easily accessed from the back and side streets as indeed many do now.”

“The planters take up valuable parking places for customers who want to pop into the town.”

Hay on Wye:

“Money was spent on so called distancing measures, placing huge planters in the road which just clogs up the town even more and restricts deliveries to local shops and the chemist, not forgetting the centre of hay have residents living above many of the shops who need access to their properties especially if they have mobility problems. All it achieved is that a lot of locals now go to the supermarket to shop or out of town where parking is not an issue.”

“There is one morning each week when it is really necessary to restrict traffic going through the centre of town, Thursday, market day. Many visitors and local people come into the town for the market, and it is really dangerous and difficult to social distance and dodge the cars and vans coming down Castle St.”

“Most visitors are older generation and need vehicular access.”

Anti-social

Fly tipping

Litter and fly-tipping are a blight on our communities. They pose a threat to humans and wildlife, can damage our environment, and spoil our enjoyment of our towns and countryside.

Poor local environmental quality can also have a negative impact on people's mental health and well-being, with such anti-social behaviour often resulting in an area appearing run-down and neglected. This can result in further anti-social behaviour or crimes that are even more serious. These types of offences often disproportionately affect deprived communities (Welsh Gov, 2021).

Waste Data Flow data allows us to see fly tipping incidents in Wales and at a local authority level. During 2019-2020, **Powys had 494 recorded fly tipping incidents with a clean-up cost of over £29,000. That's an average of £60 clean-up cost per incident, this is above the Welsh average £53** (Welsh Gov, 2021)..

With 494 incidents Powys ranks 4th lowest amongst the other Welsh local authorities for the number of incidents. Ceredigion had the lowest number of fly tipping incidents with 159, Wrexham were 2nd lowest with 168 and Vale of Glamorgan were 3rd lowest with 371 fly tipping incidents.

During the same year there were 709 enforcement actions taken in Powys, ranking Powys 9th highest for issuing enforcement actions amongst all local authorities in Wales. Cardiff was highest with 5,443 enforcement actions; 2nd highest was Rhondda Cynon Taf with 2,979 and 3rd highest was Carmarthenshire with 2,472.

The number of fixed penalty notices served by Powys during 2019-20 was 57, this ranks Powys as the 3rd highest local authority in Wales, 2nd highest was Carmarthenshire with 67 and highest was Cardiff with 473 fixed penalty notices.

In Powys the number of fly tipping incidents dipped to a low of 551 incidents in 2011-12, from then the number of incidents has been rising year on year until a peak in 2017-18 of 1,436 fly tipping incidents, and during 2018-19 and 2019-20 has seen two years of lower recorded levels, 1,225 and 494 respectively.

From 2011-12 to 2015-16 enforcement actions in Powys remained at low levels annually, from 2016-17 there was a sharp rise in enforcement actions. From none in 2015-16 to 702 in 2016-17, and again an increase of 205% for the year 2017-18 (2,416 actions), when compared to 2016-17.

Since 2017-18 there has been a reduction year on year of both fly tipping incidents and enforcement actions in Powys.

[WIMD](#) (Welsh Index of Multiple Deprivation) is the Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation. WIMD ranks all small areas in Wales from 1 (most deprived) to 1,909 (least deprived).

Powys has 79 Lower Super Output Areas (LSOAs). These small areas have been **ranked by WIMD category Community Safety** and show overall that 11% (9) of LSOAs in Powys are amongst the top 30% most deprived in all of Wales, with:

- **5% (4) of Powys' LSOAs are in the top 10% most deprived** (Llandrindod East/West, Newtown East, St Mary 1 and Welshpool Castle)
- **3% (2) LSOAs are in the top 20% most deprived** (Newtown South, Welshpool Gungrog 1)
- **6% (5) LSOAs are in the top 30 % most deprived** (Newtown Central 1, Newtown Central 2 and Ystradgynlais 1)

Notably, Newtown East ranks 31st of all 1,909 LSOAs in Wales for most deprived for community safety.

Follow this link [understand more about WIMD in Powys and how we rank against Wales using our interactive report.](#)

Crimes and crime rates

In 2020, Wales total recorded crime was 237,089 with Powys having recorded 6,906 as part of that total. A decrease in number from the year before **(ONS , 2021)**.

In terms of rates that puts Powys at the bottom compared to other Local Authorities with just 375 total recorded crime per 10,000 population.

The highest type of crime recorded were **Violence against the person** (113 per 10,000 population) and the least being **Weapons of weapons offences** (3 per 10,000 population) and (0 per 10,000 population) **Robbery** at the bottom of the type of crime committed.

Follow this link to view more [information about crime rates in Wales and Powys please via our interactive report.](#)

Data provided by Dyfed Powys Police for the time-period January 2018 to July 2021 shows that:

The three localities with the highest rate of crime are: -

- Newtown locality: 3,180 crimes per 10,000 population

- Llandrindod and Rhayader locality: 2,742 crimes per 10,000 population
- Brecon locality: 2,388 crimes per 10,000 population

The three localities with the lowest rate of crime are: -

- Llanfair Caereinion locality: 854 crimes per 10,000 population
- Llanfyllin locality with 967 crimes per 10,000 population
- Llanidloes locality with 1,235 recorded crimes per 10,000 population

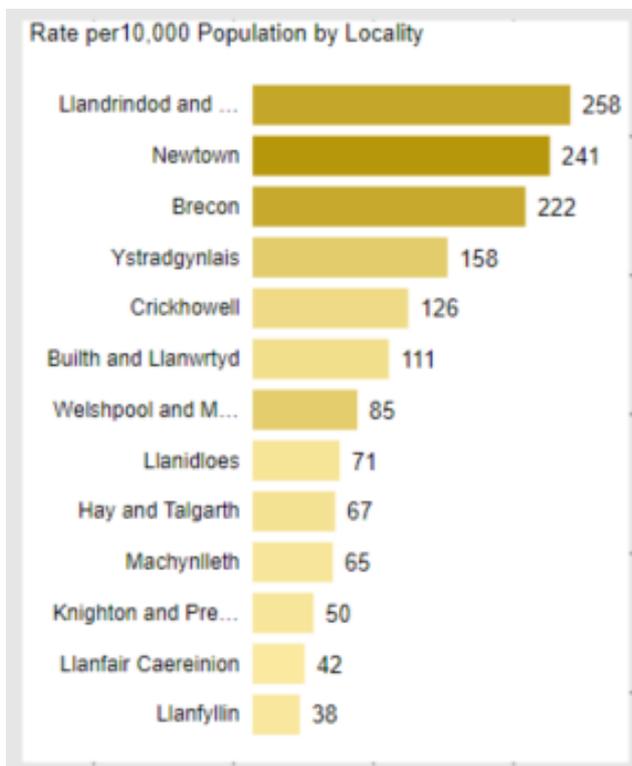
14.1% of crimes during this time were flagged as relating to Domestic Abuse and 10.5% related to cyber-crime.

The number of crimes increased by 81% between January 2018 and July 2021. There was a jump from 496 to 862 during its steepest incline between February 2021 and July 2021.

The highest number of recorded crimes in Powys is noted to have been in June 2021 with 996 number of offences and the lowest in January 2018 (476).

During this period:

- **67% of crimes were committed by men** (of those whose gender was known).
- Most offenders were aged **19–39-year-olds**
- **46% of victims were female** (where the gender was known)
- Most victims were aged **19–39-year-olds**



Drug related offences rate by locality (Jan 2018-July 2021)

- Llandrindod and Rhayader locality have the highest rate with 258 per 10,000
- Newtown locality 2nd highest with 241 per 10,000
- Brecon locality 3rd highest with 222 per 10,000

Between Jan 2018 and July 2021 there has been 1,847 recorded number of offences.

- 69% of drug related offences were committed by men
- 19–39-year-olds is the highest age band for offenders

16% of offences in Llanfyllin, Llandrindod and Rhayader, Newtown and Ystradgynlais localities were flagged for domestic abuse. The Powys average is 14%.

15% of offences in Knighton and Presteigne were flagged as cyber related, this is the highest locality in Powys. 2nd highest is Llanfair Caereinion with 13%. The Powys average is 10.5%. (All recorded crime figures, January 2018 - July 2021, Dyfed Powys Police)

According to Dyfed Powys Police: *“As restrictions began to lift nationally via the various “tiers” throughout England and Wales, an increase in demand was experienced specifically in relation to reporting of crime as well as ASB (Anti-social Behaviour). These crime categories included public order and behavioural crimes. For example, verbal abuse aimed at staff working within the retail industry and at large gatherings which brought demand for the police and partner agencies to manage.*

Parallel with the increase in reported crimes, work to improve our data integrity has been a key focus over recent months with many crimes within crimes being identified, thus resulting in an overall increase in volumes recorded.

Throughout the period reported, it could be suggested that the combination of many people working from home or being furloughed resulted in more reports of breaches of restrictions, resulting in a significant increase in reported ASB incidents. Furthermore, and indeed more recently, given the significant restrictions on travel, “staycations” have increased the population exponentially in Dyfed-Powys over the summer period. This has led to unprecedented volumes of demand both in terms of calls for service as well as crimes and incidents recorded.”

Dyfed Powys Police recognise there has been more anti-social behaviour within the community, with many instances linked to lockdown breaches. Anti-social behaviour reports have now returned to pre-COVID-19 levels. There are ongoing issues with regards to community tensions and protests/demonstrations against the vaccinations and COVID-19 Passes. Security staff are at the mass vaccination sites and the tensions are monitored weekly by the police and Local Resilience Forum.

What have people said?

In the Living in Powys well-being survey, when asked about priorities to put in a well-being plan, the following responses were given connected to crime:

“Get the police to do something about teenage hooligans harassing elderly people and to actually respond to 999 calls from elderly people in distress.”

“More police presence in the town on foot, rather driving around in their vehicles, and stop drivers on the bypass who may be exceeding the speed limit.”

“Tackling local bullying and discriminatory behaviour”

Re-offending

Proven reoffending statistics for England and Wales (Welsh Government , 2021) show that the reoffending rate was 1 in 4 (25.2%) in Wales for the October to December 2019, Powys’ rate was 19.1% for the same period.

There is a downward trend in the reoffending rate amongst offenders affected by the impact of the pandemic; it represents the largest year-on-year decrease since the same quarter in 2008 and the lowest rate in the timeseries.

Further information - [Proven reoffending statistics: October to December 2019 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/proven-reoffending-statistics-october-to-december-2019)

Powys re-offending statistics for the period January 2019 – December 2019⁸

Adult Reoffending – Powys

• Proportion of offenders who reoffend (%)	19.1%
• Average number of reoffences per reoffender	2.28
• Number of reoffences	340
• Number of reoffenders	149
• Number of offenders in cohort	781
• Average number of previous offences per offender	12.87

Youth Reoffending – Powys

• Proportion of offenders who reoffend (%)	-
• Average number of reoffences per reoffender	-
• Number of reoffences	21
• Number of reoffenders	10
• Number of offenders in cohort	26
• Average number of previous offences per offender	-

⁸ Number of offenders are suppressed if based on five or fewer offenders. This is to prevent the disclosure of individual information.

Road Traffic Collisions

The law defines reportable road traffic collisions as a collision involving a mechanically propelled vehicle on a road or other public area which causes damage or injury.

In 2020 there were 2,864 recorded traffic collisions in Wales. **With Powys' recording 9% (216) of all collisions.**

There was a steady downward trend in the number of collisions between 2016 and 2018, a small increase of 4.5% occurred in 2019 but **dropped by 62.5% in 2020. This is most likely due to the pandemic and the government restrictions imposed on travelling.**

During 2020, **34% Powys collision severity was classified as KSI** (Killed or seriously injured), (of the 216 recorded collisions) **ranking Powys highest amongst all local authorities in Wales** (Welsh Gov, 2021)

In Powys the highest road collision casualty encountered are *car, taxi, and minibus users* (66.10%), followed by motor cyclists (12.7%) and other road users (11.3%). 'Other road users' does not include pedestrians, pedal cyclists, motor cyclists, car taxi and minibus users (Infobase Cymru, n.d.).

Follow the link to see more [information about traffic collisions in Powys and Wales via our interactive report.](#)

Fire

Data provided by Mid and West Wales Fire and Rescue Service (**WAWWFR, 2021**) for the time frame 4th April 2018 to 18th July 2021 identifies:

- 358 fires, of which 48% were grass fires and 82% of fires were arson.

The three localities in Powys with the highest number of grass fire and arson incidents are: -

- Ystradgynlais locality: accounts for 35% (127) of incidents
- 2nd was Newtown locality: accounts for 14% (51) of incidents
- 3rd was Builth and Llanwrtyd locality: accounts for 10% (38) of incidents.

The three localities in Powys with the lowest number of grass fire and arson incidents are: -

- Llanidloes locality: accounts for 1% (3) of incidents
- Llanfair Caereinion: accounts for 2% (6) of incidents
- Llanfyllin: accounts for 3% (9) of incidents

The total number of incidents decreased by 78% between April 2018 and July 2021. The highest number of incidents was 41 in April 2020.

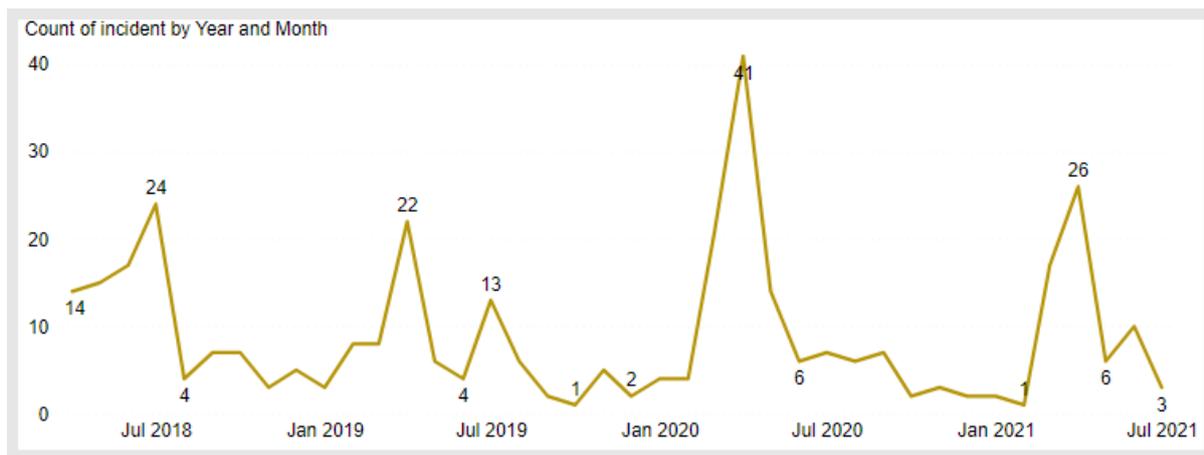


Figure 20 Fire incidents by month and year (MAWWFR, 2021)

Ystradgynlais has the highest rate per 10,000 population recorded during this period with 126 recorded incidents. Second highest was Builtth and Llanwrtyd with a rate of 54 per 10,000, 3rd was Newtown locality with a rate of 30 per 10,000 population.

Although the number of incidents seem to be quite sporadic throughout the years, April 2021 has the highest number of incidents (41) followed by July 2021 (26 incidents).

According to Mid and West Wales Fire and Rescue Service (MWWFRS), between 2015-2020 there were 15,576 grassfires across **Wales**. **4,947** of these **grassfires** were under the region of **Mid and West Wales Fire and Rescue Service**.

In that same time period, the Fire and Rescue Service attended to:

- 1,694 Flooding incidents
- 2,951 House fires
- 4,919 Road Traffic Collisions

Satellite data estimates **6,580 hectares of grassland burnt** across Wales in 2020 (that’s 12,296 football pitches burnt).

MWWFRS work with Local Authorities, Brecon Beacons National Park, and other key partners (including NRW) to prevent and reduce the impact of wildfires across the service area and have actions in place that limit these instances and has proven to be effective in safeguarding the environment as well as Public Health, as such, reducing the demand on fire and rescue resources utilised to control and extinguish the fire as well as provide valuable benefits to the immediate community.

The Arson Reduction Team and Farm Liaison Officers identify areas prioritised for protection including biodiversity, sensitive areas such as Sites of Special Scientific Interest, Special Areas of Conservation and Welsh Heritage sites. This work will involve partnership site assessments, analysis of incident data and pre-planning for annual prevention and

protection work. The Farm Liaison Officers work with farmers and land managers to best protect their property and livestock from the threat of fire.

Ill-considered or illegal burning can damage or destroy:

- Valuable grazing
- Plants and wildlife
- Habitats and historic features
- Alter the physical structure, composition, and hydrology of the soil
- Affect water quality

The incidents above are costly and attendance at grassfires means may delay response in attending other life-threatening emergencies. To deploy a single appliance cost approximately £400/hr. Larger fires can take hours, even days to extinguish with obvious impact of availability.

- Rhos, Carmarthenshire – 4 days – 10 appliances
- Esgair Dafydd – Llanwrtyd Wells – 2 days – 10 appliances
- Taf Fechan, Brecon Beacons – 4 days – 9 appliances
- Near Furnace, Ceredigion – 2 day – 6 appliances
- Ambleston Common – April 2020 – 4 appliances
- Feindre Farchog, Crymych – April 2020 – 4 appliances

The coronavirus pandemic has also impacted the Fire and Rescue service as well as its partners, especially in areas such as community engagement and multi-agency collaboration. Community initiatives and interaction have been significantly reduced as working parameters were restricted to essential work and core functions. Longer term, the lack of effective engagement had the potential to dilute the previously strong presence and awareness within communities.

Education and Youth Intervention has also been affected. Applied non-engagement policies, social distancing and PPE restrictions during the firebreak period meant that we had to adapt along with partners during community work and events including Operation wildfire patrols.

Long term planning includes tackling the complex effect of climate change and working on changing the public perception of wildfires and the causes of wildfires.

(WAWWFR, 2021)

Culture and Community Summary

A community is more than just a geographically bounded group of people who interact with one another, it includes sub-groups that have shared interests. Culture incorporates so many things, the Welsh language, traditional activities as well as other social activities in the community, and all these combined promote cultural well-being.

The Welsh language is an important part of cultural well-being, and the **proportion of Welsh speakers in Powys (19%) is like the rest of Wales**. However, there is variation across the county, from 54% of Welsh speakers in Machynlleth locality to 8.6% in Knighton and Presteigne. **Most Welsh speakers are aged 5-15 years old** (ONS, 2011), and estimates from the National Survey for Wales show that there has been an increase in those who say they speak a little Welsh. According to the Future Trends Report (Welsh Gov, 2021), the number of Welsh speakers in Wales is predicted to increase significantly, for Powys this means **we could have as many as 28,000 Welsh speakers**, and the increase is driven by younger age groups and maintained through future generations.

32.1% of people volunteer in Powys and those who volunteers are likely to feel the things they do in life are worthwhile and be in good general health. (Welsh Gov, 2020)

Volunteering has many benefits and promotes connection and social cohesion, giving volunteers a sense of purpose and confidence, as well as helping to connect with others.

There are many **food banks** in Powys, some are run by the Trussell Trust, while others are community led. Food banks provide emergency food and support to people who are in a time of need. **Between April 2020 and March 2021, there number of 3-day emergency food aid parcels given to families with children in Powys increased by 197%** (971 parcels) (Wales: 7%) when compared to 2019/20 (Child Poverty Action Group, 2021). In total, **6,754 parcels were given in 2020/21 (84% increase since the previous year)**. It is expected that these numbers will continue to rise in the short to medium term as the cost of living and inflation rise, and many families struggle to keep up with rising energy and fuel costs.

More needs to be done to understand the levels of food bank use in Powys. If the food banks have too much demand many families, children and individuals would go hungry. There is a risk of serious health conditions due to malnutrition, and in extreme cases this could lead to death.

There are **16 leisure centres in Powys offering a range of facilities** and classes to the public to help maintain a healthy lifestyle. **29.2% of adults participated in sporting activities three or more times a week** (below the Welsh average, 32.2%). **48% of children** and young people participated in sporting activities three or more times a week during 2019-20. Women tend to participate in sport less than men. Regular participation in sport is linked to improved mental and physical health.

There were 6,906 crimes in Powys during 2020, this equates to 375 crimes per 10,000 population. The highest type of crime recorded were **Violence against the person** (113 per 10,000 population) and the least being **Weapons of weapons offences** (3 per 10,000 population) and (0 per 10,000 population) **Robbery** at the bottom of the type of crime committed.

The **Welsh Index of Multiple Deprivation** (or WIMD) is the Welsh Government's official measure of relative deprivation for small areas in Wales. It identifies where there are high concentrations of several types of deprivation and ranks small areas in Wales from 1 (most deprived) to 1,909 (least deprived). Powys has 79 Lower Super Output Areas (LSOAs) and **6 of these are amongst the worst 20% in Wales for community safety** (Llandrindod East/West, Newtown East, Newtown South, St Mary 1 (Brecon), Welshpool Castle and Welshpool Gungrog 1). (Welsh Gov, 2019)

Most of Powys is poor for access to services (just under **half of Powys areas² are in the worst 20% in Wales in terms of access to services**). (Welsh Gov, 2019)

Newtown East ranks 31st most deprived area in Wales (of 1,909 areas² in Wales (Welsh Gov, 2019). It is important to explore the reasons for this and consider how we can tackle deprivation to improve well-being for future generations.

There were **358 fires in Powys** (between April 2018 and July 2021), **48% of these were grass fires** and **82% were arson**. The three localities in Powys with the highest number of grass fire and arson incidents were Ystradgynlais locality (accounts for 35% (127) of incidents), second was Newtown locality (accounts for 14% (51) of incidents), and third was Builth and Llanwrtyd locality (accounts for 10% (38) of incidents). Grass fire incidents are costly and attendance at grassfires may delay response in attending other life-threatening emergencies. To deploy a single appliance cost approximately £400 per hour. Many larger fires can take hours, even days to extinguish and the damage can have a devastating impact on habitats and wildlife.

Newtown East ranks 31st most deprived area² in Wales (of 1,909 areas² in Wales). (Welsh Gov, 2019) This is something to consider for future generations.

Cross cutting themes

Culture and community and well-being is also affected by many other cross cutting themes seen in the other Well-being topics, Social, Economy and Environment.

		How does Culture and Community interact with the other Well-being themes?
Social	<ul style="list-style-type: none"> • Homelife • Living Independently • Health and Lifestyle • Education our Children 	Culture and community is intertwined intertwined within the various components of social well-being; as an established and engaged community will improve an individuals' individuals' home-life and ability to live independently if required, if they feel they live in a positive, cohesive local community. Additionally, participation in culture life often leads to improved outcomes in education and supports positive lifestyle behaviours.
Economy	<ul style="list-style-type: none"> • Jobs and Wages • Businesses • Tourism • Staying Connected • Poverty and Deprivation 	Culture and community are highly interlinked with the various components of economic well-being, as individuals with access to economic resources are increasingly likely to be engaged with their wider culture and community. Additional drivers of community wellbeing include areas such as community cohesion and anti-social behaviour, which are often linked to individuals experiencing reduced economic well-being. Additionally, it is important to ensure all citizens have equitable access to opportunities within their community, such as cultural assets.
Environment	<ul style="list-style-type: none"> • Improving Biodiversity • Sustainable Land, Water and Air • Reconnecting People and Places • Forestry Resources • Climate Change 	The environment in which people live is a critical component of an individual's cultural and community wellbeing, as the environment is the natural world in which communities are living. It is important for communities to be established in spaces that are sustainable and well-connected, with sustainable resources to live accordingly. The potential implications posed by climate change and a changing environment can potentially de-stabilise local communities, as a community's response to increasingly extreme environmental events could lead to individuals leaving their communities, which could impact wider cultural areas such as the Welsh language if there is increased migration.
High Level Impacts	Ageing population	It is important to consider the impacts of an increasingly aging population when considering cultural and community well-being as an older demographic will face additional pressures in trying to maintain an independent home life within their community with high levels of community engagement and participation. An aging population is also likely to encounter additional health and lifestyle issues associated with older ages, which

		could limit their ability to interact with their local communities and culture.
	Rurality	There are also challenges to community and cultural well-being due to Powys's rural make up. Due to its vast geography with more dispersed communities, it can have an impact on the ability to secure housing in the area of your choice, potentially leading to moving away from their community. Rural communities are also likely to have limited access to culture resources with a limited public transport network potentially limiting peoples access to cultural assets, which could impact upon longer term well-being.
	Brexit	Whilst the full extent of the impact of Britain's exit from the European Union remains largely unseen at a local level, it is still important to note that this will impact cultural and community well-being over time, with scenarios such as migration disconnecting communities that had previously existed. Alongside this, cultural opportunities that previously existed due to European Union funding or easier travel are likely to have to look at alternative delivery mechanisms to adapt to the change, which could potentially have an impact to an individuals' cultural well-being.
	COVID-19	Whilst this assessment has been produced during the coronavirus pandemic, which is still ongoing, the longer term impact is still to be determined. However, the pandemic has already highlighted new short term issues affecting economic well-being and exacerbated the existing challenges, such as its disproportionate impact to particular demographics. This has impacted an individuals' economic well-being as many people have faced increased challenges in their job and/or business, whilst also exacerbating and increasing the number of people becoming impoverished. This has also forced the wider society to re-consider the importance of economic well-being, as delivery models for jobs, businesses and tourism have had to adapt to cope with the ever-changing situation.

Environment

Improving Biodiversity	138
Protected Sites	139
Invasive non-native species	140
Sustainable Land, Water and Air	140
Land.....	141
Water Quality.....	142
Flood risk.....	143
Air quality.....	145
Waste	148
Reconnecting People and Places	149
Access and recreation	149
Access to and onto Water.....	150
Green/social prescribing.....	151
Sustainable tourism	152
Active travel	152
Forestry Resources	155
Climate Change	159
Transport.....	163
Energy	164
Food	166
Environment Summary	169

[The second State of Natural Resources Report \(SoNaRR2020\)](#) (NRW, 2020) is an assessment of the extent to which Wales is achieving the sustainable management of natural resources (SMNR). **The report concludes that Wales, and all Local Authorities including Powys, are not yet meeting the four long-term aims of SMNR below:**

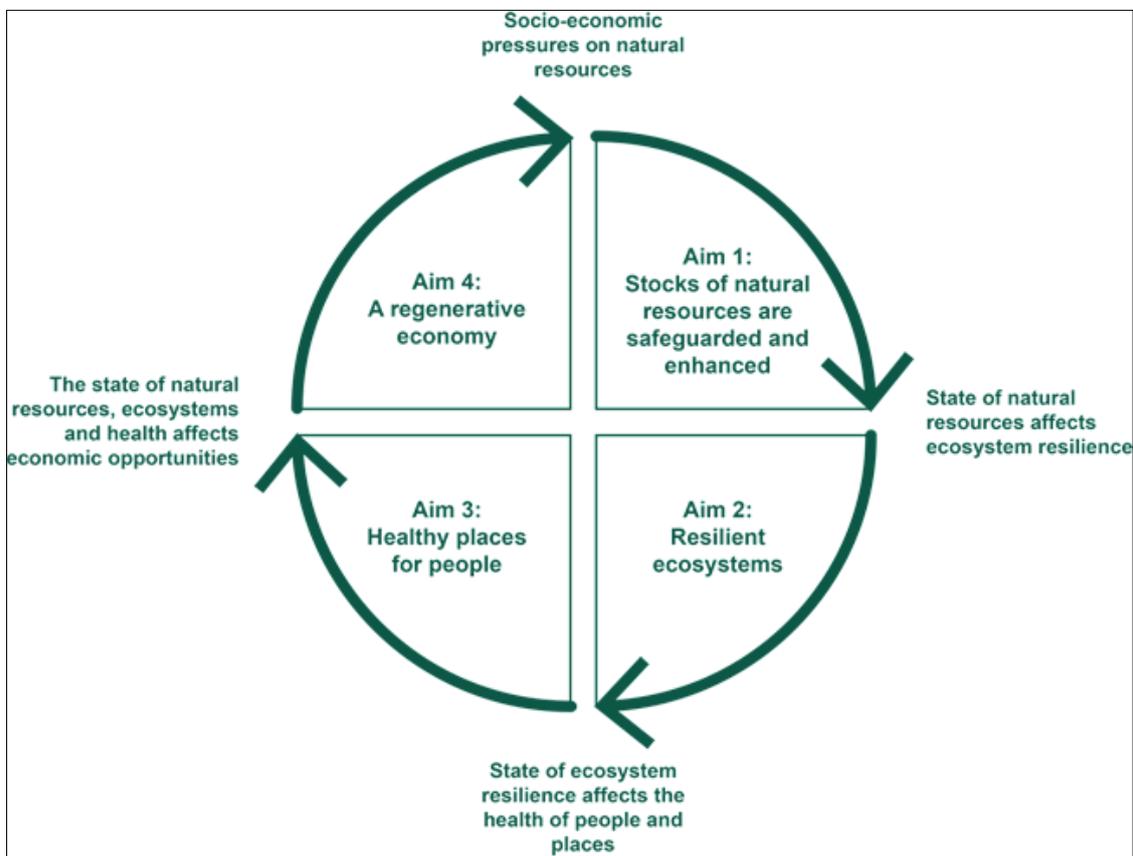


Figure 21: The four aims and the linkages of sustainable management of natural resources (NRW, 2020)

Powys is not maintaining stocks of natural resources (aim 1). Iconic species like curlews are predicted to become extinct within a couple of decades.

The deteriorating state of natural resources in Powys has a negative impact on the resilience of our ecosystems. Resilient ecosystems (aim 2) are declining in line with global trends. The UN predict that globally, one million of the estimated eight million species on the planet will be extinct within 20 years.

Without stable levels of natural resources and resilient ecosystems, we will not have health places for people to live (aim 3) and a regenerative economy (aim 4) cannot be achieved if economic activity takes place at the expense of the environment.

Sustainable development will not be achieved overnight, but Wales has laws and policy processes in place to achieve its well-being goals for a sustainable future. The Public Service Board’s Well-Being Assessment is one piece within this puzzle and allows us to highlight issues on a local level and to track progress over time.

The Well-being Assessment takes place every five years and is in line with [the Mid Wales Area Statement](#). (NRW, 2020)

The Mid Wales Area Statement was published in April 2020 and has been informed by a wide range of partner organisations. The Area Statement identifies the key risks, opportunities, and priorities that we all need to address to build the resilience of our ecosystems, support sustainable management of the natural resources and enhance and guarantee the well-being of future generations. It sets out actions that we can take forward to address the issues identified.

Improving Biodiversity

Biodiversity is essential to all ecosystems, with its complex interactions generating the services and benefits that human health, well-being and resilience depend on. This connection is so fundamental, an assessment of biodiversity is crucial to any wider assessment of the success of the sustainable management of natural resources (SMNR). The assessment picture is complex with both winners and losers for different aspects of biodiversity. However, the overall trend is one of serious decline, reflecting the global situation and internationally recognised nature emergency.

Biodiversity recovery is fundamental to sustaining the vital services that are provided by natural resources. Wales has more regulatory and policy frameworks in place to help protect and support these resources and with the recent increasing focus and investment on action, all parts of society need to act faster and more cohesively to help deliver improvements at a better and larger scale. There is a need to work more collectively on the dual plight presented by the climate and nature emergencies to win further support for the transformational and behaviour changes required.

Follow the link [for more information download the SoNaRR Biodiversity Chapter](#).

Following the first SoNaRR, this second report raises further concerns regarding habitat and species decline and reduced habitat connectivity and ecosystem resilience. The Powys Nature Recovery Action Plan (NRAP) is a helpful source of material alongside the published [Nature Recovery Action Plan \(NRAP\)](#) (Brecon Beacons National Park , 2019). The latter refers

- to the scarce or declining habitats and species of the Brecon Beacons National Park
- includes a useful summary of Welsh legislation and policies, plans and strategies
- sets out the five key objectives
- includes strong focus on developing resilient ecological networks, to understand what we are going to do to aid nature recovery

(Brecon Beacons National Park , 2019)

Welsh Government has also published the “[Nature Recovery Action Plan for Wales: Our Strategy for Nature](#)” with several objectives to support recovery

Urgent short-term action includes:

- Working with developers to enact Planning Policy and demonstrate progress
- Building delivery capacity and skills across all sectors
- Ramping up landscape scale nature projects

The need for urgent but longer-term actions was also identified to include:

- Environmental education to connect people and nature in a lifelong way,
- Continuing to tackle Invasive non-native Species,
- Exploring and developing new biodiversity valuation techniques e.g., valuation through the Green Book for Wales

(Welsh Gov, 2020-21)

Protected Sites

Protected sites represent some of our most important and cherished areas for biodiversity, habitats and species. Natural Resources Wales (NRW) undertook a [Protected Sites Baseline Assessment in 2020](#), which assessed the quality of the protected sites evidence base to help understand (where possible) the relative ‘health’ of key species and habitats across earth science, freshwater and terrestrial features on protected sites in Wales. The condition of species and habitat at our best sites can provide some indication as to the health of biodiversity across the region, given that they provide some of the best condition examples of biodiversity. (NRW, 2020)

NRW currently has sufficient evidence to determine the condition of around 51% of the features on these sites in Mid Wales (Powys and Ceredigion combined). Of those features, an estimated 41% are ‘favourable’, around 57% are ‘unfavourable’ and almost 2% are destroyed. This information suggests that our habitats and species are under increasing pressure across the region.

There are **264 Sites of Special Scientific Interest** (commonly known as SSSI’s) that lie wholly or partially in Powys as well as important national nature reserves such as Cors y Llyn, Stanner Rocks, Rhosgoch Bog, the Berwyn Mountains, Craig Cerrig Gleisiad, Craig y Ciliau and Ogof Ffynnon-du.

There are also 17 Special Areas of Conservation (SACs) and 3 Special Protection Areas (SPAS) wholly or partially within Powys.

(NRW, 2020)

There is only **one Local Nature Reserve (LNR) in Powys at the Lake Park in Llandrindod**, but a wide range of local wildlife sites, Wildlife Trust reserves and there are references to road verge nature reserves in the Powys [Local Development Plan “Biodiversity and Geodiversity” Supplementary Planning Guidance \(2018\)](#).

Like other SSSIs in Wales, many of our sites are small and fragmented and are therefore vulnerable to management changes and the influence of surrounding land use. (PCC, 2018)

What have people said?

According to SoNaRR2020 there are a variety of pressures and demands affecting biodiversity. Agricultural intensification has been identified as having the single biggest impact on biodiversity in the UK. Other key drivers include land and sea use change, direct exploitation of species, climate change, pollution, and invasive non-native species.

The Mid Wales Area Statement seeks to:

- identify the main causes of the nature emergency including what needs to be done, by whom and where
- improve the Favourable Conservation Status of designated sites
- identify opportunities for connectivity between those sites and other areas
- make nature a priority through planning, policy, and practical measures

Invasive non-native species

Invasive non-native species are defined as any non-native animals or plants that can spread outside their native range causing damage to the environment, the economy, our health, and the way we live. Invasive non-native species have been estimated to cost the Welsh economy £128 million annually.

Widely spread invasive non-native species in Mid Wales include Japanese knotweed (*Fallopia japonica*) and Himalayan balsam (*Impatiens glandulifera*) particularly along larger river catchments, such as the Wye and Usk. More detailed information about the distribution and impact of invasive non-native species can be found in the following story map [“Invasive Non-Native Species \(INNS\) \(arcgis.com\)”](#) on the Wales Environmental Information Portal.

(NRW, n.d.)

Sustainable Land, Water and Air

Land, water, and air are essential for people’s lives and well-being, well managed land plays an important role in meeting human needs while ensuring the long-term health of

ecosystems and the economy. Managing land areas in regenerative ways can deliver a range of environmental and well-being benefits for future generations including food, flood risk reduction, recreation opportunities and clean air.

Our rivers, lakes, groundwater, and estuaries provide us with important natural benefits, many of which contribute to the well-being of local communities and the wider population. These natural benefits include access to drinking water, clean rivers for recreation and relaxation, income generation from business and industry, tourism, green energy production and angling. By working together to improve and maintain the quality of these watery assets we can deliver benefits for the environment, the local economy, health, and quality of life.

Clean air is a critical natural resource and is essential to protect human health and Wales's natural environment. Air pollution is recognised by the World Health Organisation (WHO) as being the biggest environmental contributor to the burden of disease in Western Europe. Public Health Wales estimates that around 1,600 deaths are attributable to fine particulate matter (PM2.5) exposure and around 1,100 deaths to nitrogen dioxide (NO2) exposure each year in Wales.

Land

The total productive land area in Wales has remained stable for many years but there are pressures from other land uses that need to be considered more holistically. Agriculture accounts for approximately 80% of the land use in Wales. Farmed land comprises of four ecosystems – enclosed farmland, semi-natural grassland, coastal margins and mountain, moor, and heath. A smaller proportion of land is used for forestry and woodlands (15%, some of which is within enclosed farmland) (NRW, Forest Research, 2019) and urban (approximately 11%) with some integration of use. A small fraction of land can be considered 'unmanaged' or 'abandoned'.

Urban expansion has often been at the expense of the most productive land, although the predicted annual loss of best and most versatile (BMV) agricultural land to urbanisation over the next five decades is expected to be minimal when compared to historical losses (enclosed farmland natural resources register).

An ongoing commitment to tree planting will take land out of agricultural production. According to Forest Research, in 2017 there were estimated to be 92,700ha of tree cover (urban and rural) outside National Forest Inventory (NFI) defined woodlands (Forest Research, 2017). This is comprised of small woods less than 0.5 hectares in size (49,200ha), groups of trees (33,400ha) and lone trees (10,100ha). The total woodland as a percentage of land cover in Wales is 15%. If you include trees outside woodland, this brings the total land cover of woodlands and trees in Wales to 19.4%.

Land utilised for renewable energy development has continued to increase to help meet the target of 70% of Wales's electricity consumption from renewable energy sources by 2030 (Woodland natural resources register). These include wind, solar, hydropower, ground heat source, energy from waste and bioenergy projects plus the required electricity supply infrastructure.

Follow the link to view more [information about Powys' and Wales low carbon energy projects via our interactive report.](#)

The way in which land is used is in continual flux. Historically, conversion of arable land to permanent pasture, removal of hedgerows, and land drainage have reduced diversity across the landscape. Up until now, there has not been a mechanism to consider this productive resource. It is important to consider what current and future generations need from Wales's land resource, and how Wales is best placed to deliver that in a global marketplace.

Water Quality

In Powys, most rivers are not achieving good ecological status under the Water Framework Directive 2018 interim classification. A range of pressures are compromising the health of our freshwater ecosystems, including climate change, diffuse and point source pollution, physical modification, abstraction, and invasive non-native species. Local water courses, particularly in the River Wye catchment area, are suffering from an increase in nutrient pollution arising from agriculture and development. Invasive non-native plants are also threatening habitats through Powys.

The tables below provide an overview about the ecological status of all 271 surface water bodies in Mid Wales for the years 2015 and 2018.

Table 3 The ecological status of all rivers in Mid Wales (2015)

Local Authority Area	High	Good	Moderate	Poor	Bad	Total
Powys	0	85	101	15	0	201
Ceredigion	0	13	37	9	0	59
Span both	0	0	9	2	0	11
Whole of Mid Wales	0	98	147	26	0	271

Table 4(2018)

Local Authority Area	High	Good	Moderate	Poor	Bad	Total
Powys	0	92	89	19	1	201
Ceredigion	0	15	34	10	0	59
Span both	0	1	7	3	0	11
Whole of Mid Wales	0	108	130	32	1	271

[Wales's Environmental Pollution Incidents report](#) has recorded **335 water-related pollution incidents in Powys** (between March 2016 to December 2020). In 2020 alone there were 85 water-related pollution incidents recorded in Powys – or in other words almost two water pollution incidence per week (NRW, 2016-20).

There is a need to tackle water quality issues by focusing on the following areas:

- support farm businesses to minimise their impact on the environment
- take measures to reduce pollution incidents through better management of potential sources of pollution (such as slurry and manure stores)
- work with businesses, communities, and policy makers to review current agricultural policies and schemes and explore new options for payment for Ecosystem Services
- manage our water resources to improve the quality and quantity of available water, without causing detriment to the natural environment

(NRW, 2016-20)

Flood risk

Flooding continues to threaten our communities, businesses, and environment, as witnessed in the winter of 2020. NRW produced an extensive [review of the February 2020 floods](#) (NRW, 2020) including a multimedia [story map](#) which shows the devastating impacts that this event has had in Powys and elsewhere. As incidents of flooding are set to become more frequent in the future because of climate change, the communities of Mid Wales need to become more adaptive and resilient, enabling them to respond more quickly to events through better planning and management.

In Powys, there are 9,613 properties with a flood risk (all ratings):

- 5,700 properties are low flood risk
- 1,429 properties are medium flood risk
- **2,404 properties are high flood risk**

Follow the link to view more [information about flood risk in Powys and Wales via our interactive report.](#)

The 2018 preliminary flood risk assessment outlines the significant flood risk areas (second cycle Flood Risk Regulations). Significant flood risk areas are the key areas in Wales and shows the top 32 communities in Wales. Individual ranking for communities at risk within Wales can be obtained from Lle or my map; Welsh Government Funding is directed to the at most communities at risk/communities affected by flooding.

(NRW, 2018)

Table 5: Top ten communities at risk from flooding in Powys.

Local Authority	Fluvial	Tidal	Pluvial	Combined	Significant Flood Risk Area 2018
Powys	Llanfyllin Carno Plas Llysn Brecon Knighton Cilcewydd Llanfrynach Presteigne Llandiloes Llangattock	Not applicable	Ystradgynlais Newtown Llandridod Wells Brecon Welshpool Llanidloes Machynlleth Penrhos Llanllwchaiarn Llanfair Caereinion	Ystradgynlais Newtown Brecon Llanfyllin Llandrindod Wells Carno Llandiloes Welshpool Plas Llysyn Knighton Llanfair Caereinion	None

741 properties in the county receive flood warnings.

The consequences of flooding are not just financial. Even **modest flooding events can significantly impact on the physical and mental well-being of the individuals** affected for many years after the actual flooding event. **Often, the worst affected are the more vulnerable in society.** Several recent studies point to the need for commissioners and providers of primary care, community services and mental health services and emergency planners to be alert to the potential for poor mental health amongst people whose homes have been flooded, as well as those whose lives have been disrupted by flooding and to plan for an increased need for services in areas affected, or likely to be affected, by flooding (see e.g. [PHE 2017](#)).

The Mid Wales Area Statement recognises the significant consequences that flooding can have on rural communities like Powys, particularly disrupting access to essential services, transport, education, work, and businesses.

The Mid Wales Area Statement identified **Natural Flood Risk Management (NFRM)** as one way to help address flood risk. NFRM can provide environmentally sensitive approaches to reducing flood risk in areas where further hard flood defences are not feasible or cost-effective.

These can include **tree planting, in-stream obstructions (such as porous dams), soil and land management, dune and beach management and creation of new wetlands**. The principal aim of adopting NFRM measures is to help slow water flows ('slow the flow') through a catchment, thus reducing and delaying peak flows. It is often most effective in larger catchment scale projects.

Air quality

Poor air quality is one of the largest environmental risks to ecosystems and human health in Wales. Air pollution adversely affects biodiversity and has led to widespread changes to species distribution and to the quality of habitats in Wales. Poor air quality threatens the conservation status of many habitats and reduces the ability of ecosystems to deliver their services such as clean drinking water and timber.

Air pollution is a local, regional, and international problem caused by the emission of pollutants, which either directly or through chemical reactions in the atmosphere lead to negative impacts on human health and ecosystems. **It is important to stress that air pollution affects both urban and rural areas**, and that there are interlinkages across space (see [Bosanquet 2021](#)).

Most air pollutants have declined in Wales in recent decades. **However, concentrations of ammonia are rising and having an impact on sensitive ecosystems**. Ammonia emissions from the UK and Europe continue to be above damage thresholds, resulting in widespread exceedance of critical loads (deposition) and critical levels (atmospheric concentrations) for both acidity and ammonia. This pollution also contributes to ozone production, which damages not only vegetation but human health (Public Health Wales, 2016) and many human-made materials such as plastic, rubber and metal.

Ammonia and nitrogen pollution from agriculture is affecting 59% of the land area of Wales. In 2018 88% of sensitive habitats exceeded their critical load for atmospheric nitrogen (down from 98% in 2009). It is currently having an adverse effect on 29% of the most sensitive habitats for plants and wildlife (Guthrie et al., 2018).

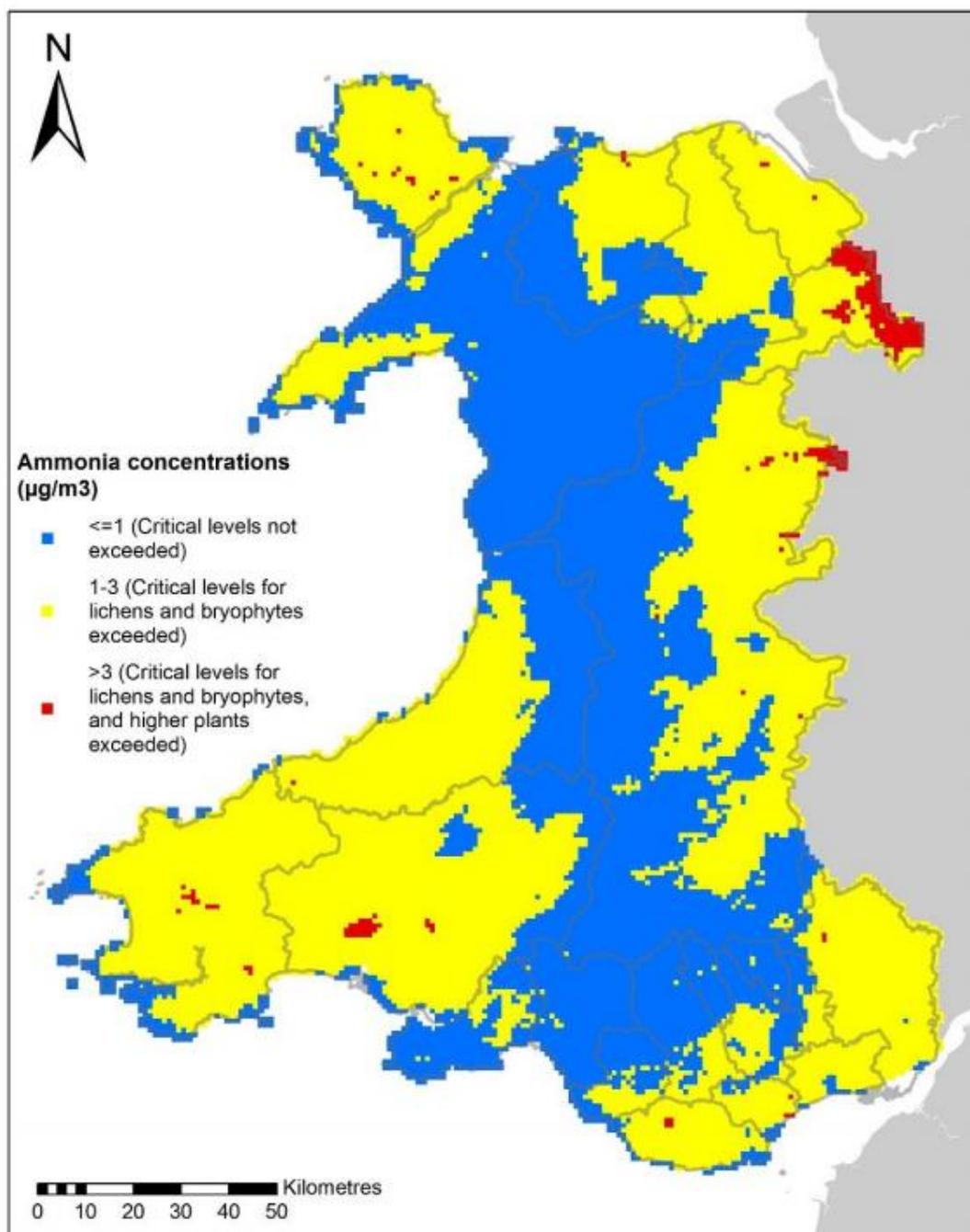


Figure 22: Ammonia concentrations in Wales (Source Rowe et al. 2020)

A key concern identified in SoNaRR 2020 and one which is particularly relevant to Powys are

“The localised impacts of new ammonia sources associated with the rapid expansion of intensive poultry developments” (Aazem and Bareham, 2015 cited in SoNaRR 2020).

The [infographic of the European Environmental Bureau](#) illustrates how agricultural emissions also affect peoples’ health. In this context it is critical to understand that agricultural emissions can transform in the atmosphere and contribute to increased levels of particulate matter and ozone. Particulate matter is of concern to both ecosystems and people, with smaller particle sizes having a greater effect on people as they are easily

inhaled. Overall concentrations of PM_{2.5} (particulate matter 2.5 microns or less in diameter) in most of Wales are low, although hotspots in industrial and densely populated urban areas exist. For Wales this means that agriculturally-dominated and sparsely populated counties like Powys have an important role to play – and arguably a responsibility for – mitigating any negative impacts of agricultural emission on the well-being of people in other parts of the country.

PM particles are formed because of burning fuel and chemical reactions that take place in the atmosphere. Natural processes such as forest fires also contribute to PM_{2.5} in the air. PM₁₀ is a particulate matter 10 micrometres or less in diameter.

For this indicator Powys ranks 5th lowest of local authorities in Wales. Powys is lower than the Welsh average at 10.25, Welsh average 11.62.

The PM₁₀ pollutant has decreased in Powys over the years, in 2007 the concentrations were 13.33 and in 2019 this has fallen to 10.25.

PM_{2.5} is a particulate matter 2.5 micrometres or less in diameter. PM_{2.5} is generally described as fine particles. For this indicator Powys ranks 5th lowest of local authorities in Wales. Powys is lower than the Welsh average at 6.53, Welsh average 7.48.

The PM_{2.5} pollutant has decreased in Powys over the years, in 2007 the concentrations were 7.43 and in 2019 this has fallen to 6.53. (Welsh Gov, 2021)

Follow the link to [understand more about air pollutants in Powys and how we rank against Wales via our interactive report.](#)

What have people said?

SoNaRR 2020 has highlighted the adverse effects of air pollution on peoples' well-being. It states:

“A growing body of evidence indicates that the impact of air pollution goes beyond physical health and can impact on human well-being due to people’s personal connections to the richness of their natural environment. The health impacts from air pollution, for example exposure to particulate matter reducing lung function, reduces people’s ability to access nature and benefit from other ecosystems services; it therefore affects their quality of life. Measures to combat air pollution, for example green infrastructure, can help transform urban and rural spaces by improving enjoyment and promoting positive behavioural changes. In addition, the cultural services imparted by ecosystems often depend on nitrogen-sensitive biodiversity, for example, in flower-rich meadows or lichen-draped woodlands. (Theme: Air Quality, p. 22) (SoNaRR NRW, 2020)

For more information please [download the SoNaRR2020: Air quality chapter \(PDF\).](#)

The Mid Wales Area statement acknowledges that urgent measures are required to address ammonia pollution in Powys. Ammonia pollution from the increasing number of intensive agricultural units is now a very significant threat to the survival of the rich variety of rare pollution-sensitive lichens scattered throughout Mid Wales.

Waste

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

Wales is transitioning to a high recycling nation which is a necessary component of a circular and regenerative economy. However, more needs to be done to prevent waste from being generated if we are to achieve zero waste and one planet living. The pace of becoming a high recycling nation must be matched with the provision of suitable waste facilities and end markets for materials, particularly for material streams that are currently difficult to recycle. [For more information download the SoNaRR2020: Waste Chapter.](#) (NRW, 2020)

During 2019-20, **Powys reused, recycled, and composted (RRC) 63%** (34,732 tonnes) of **waste**. There was a large increase in the percentage of waste that was RRC, increasing from 51% to 65% (between 2012-13 and 2016-17). This dropped in 2017-18 to 60% and since has slowly been increasing. (Welsh Gov, 2021)

Follow the link to view more [information on Waste Management by Welsh Local Authority via our interactive report.](#)

Waste crime poses risks to the condition and resilience of ecosystems and the benefits they provide through mismanagement of waste.

During 2019-2020, **Powys had 494 recorded fly tipping incidents with a clean-up cost of over £29,000. That's an average of £60 clean-up cost per incident, this is above the Welsh average (£53).** (Welsh Gov, 2021)

Follow the link to view more [information on fly tipping by Welsh Local Authority via our interactive report.](#)

Reconnecting People and Places

Reconnecting people with the environment emerged as a key theme for Powys due to Natural Resources Wales Area Statement engagement. Recreation and tourism are major contributors to the local economy of Powys. Activity tourism is rapidly growing in the area, and with parts of the Brecon Beacons, the Cambrian mountains, many watercourses, and two National Trails (Offa's Dyke & The Glyndwr Way) within its boundary this is not surprising. There are many **leisure related businesses currently supporting 10% of the Welsh tourism economy**. In Powys, a rural and sparsely populated part of Wales, this income is vital to many local communities.

The natural environment of Powys offers us many outdoor activities, however the value of these is often not fully appreciated by society, and sometimes those who live closest to it are least aware of its advantages. It is time to highlight these resources and reconnect both visitors and local people alike with places here in Powys. This section looks at access and recreation, green/social prescribing, sustainable tourism, and active travel.

Access and recreation

Over 300,000ha of land in Wales is accessible under the Countryside and Rights of Way [CRoW] Act 2000 by virtue of it either being Open Country or Registered Common Land. This right of access allows people to access the land “for the purposes of open-air recreation” on foot (without precluding a pushchair, wheelchair, or “invalid carriage”).

Public rights of way and Access Land are the main means by which people can access the countryside of Mid Wales. The network is significant to the economy and tourism and play an important role in improving the health and well-being of people of Mid Wales. Public rights of way represent a major public asset that is protected by law. The local highway authority has a duty to ensure that they are kept open, available, and properly maintained.

Local highway authorities are required by the Countryside and Rights of Way Act 2000 to produce a [Rights of Way Improvement Plan](#) for their area. Many of the new plans long-term vision will be to support a network of paths, easy to use and useful, connecting the countryside with the towns and villages ensuring that the network is well used by people of all ages and abilities, walking or riding for leisure or for work.

NRW manages a vast and varied estate. Almost 100,000ha of NRW managed Welsh Government-owned woodland has already been dedicated as access land. Natural Resources Wales also coordinates the delivery of two National Trails in Powys. The **Offa's Dyke Path traverses the length of Powys** as it follows all the way down the England/Wales border. **Glyndwr's Way is entirely situated within the county**. These two routes provide great linear walks with a high standard of way-marking.

A new opportunity is that a series of short circular walks is now being developed that use sections of the trails plus nearby Public Rights of Way. These circular routes will satisfy the needs of residents who want a good but shorter walk in their area, with all the associated health benefits and a better feeling of a sense of place.

Access to and onto Water

Powys has many streams, rivers, reservoirs, and some lakes. It almost goes without saying that access to these water bodies is highly sought after for a variety of reasons.

Simply walking by a watercourse can provide mental health benefits. Other obvious uses and pastimes include fishing, canoeing, wild swimming and even paddling in rockpools.

There are difficulties in some areas where heavy use of a river for canoeing is considered by some other users to be a problem. These issues may take time to resolve, and there may not be a perfect solution. But rather than just focusing on honeypot sites it makes sense to seek out alternative and additional locations where the stress on the environment and other users may be lower and more manageable. An example of this is the River Wye at Glasbury where it is heavily used for canoe launching, however in **Newtown there is a new option for canoeing the River Severn in an area where there is no conflict.**

The quality of the water environment is critical to all the above, so putting great effort into ensuring high water quality is essential.

Another indicator that still appears useful to understand peoples' access to the benefits of greenspaces was mentioned in the Greenspace Toolkit (2011). This tool recommends that **no person should live more than 300m from their nearest natural greenspace.** This is roughly the equivalent of a six-minute walk. Provision should be made for at least 0.25ha of accessible natural greenspace per 1000 population following a system of tiers into which sites of different sizes fit, as follows:

- Tier 1: no person should live more than 300m from their nearest natural greenspace
- Tier 2: there should be at least one accessible site of >20ha within 2km of home;
- Tier 3: there should be one accessible 100ha site within 5km;
- Tier 4: there should be one accessible 500ha site within 10km.

According to this classification practically all of Powys is covered with greenspace infrastructure, in fact all of Powys is within a 300m buffer area of a greenspace infrastructure of at least 0.25ha. However not all these sites have full legal access, and no distinction was made between different types of green infrastructure (due to lack of time resource). This number is decreasing to around 75% of the population with access to sites of >20ha within 2km from home and about half of the population lives within 10km of one accessible 500ha site in Powys.

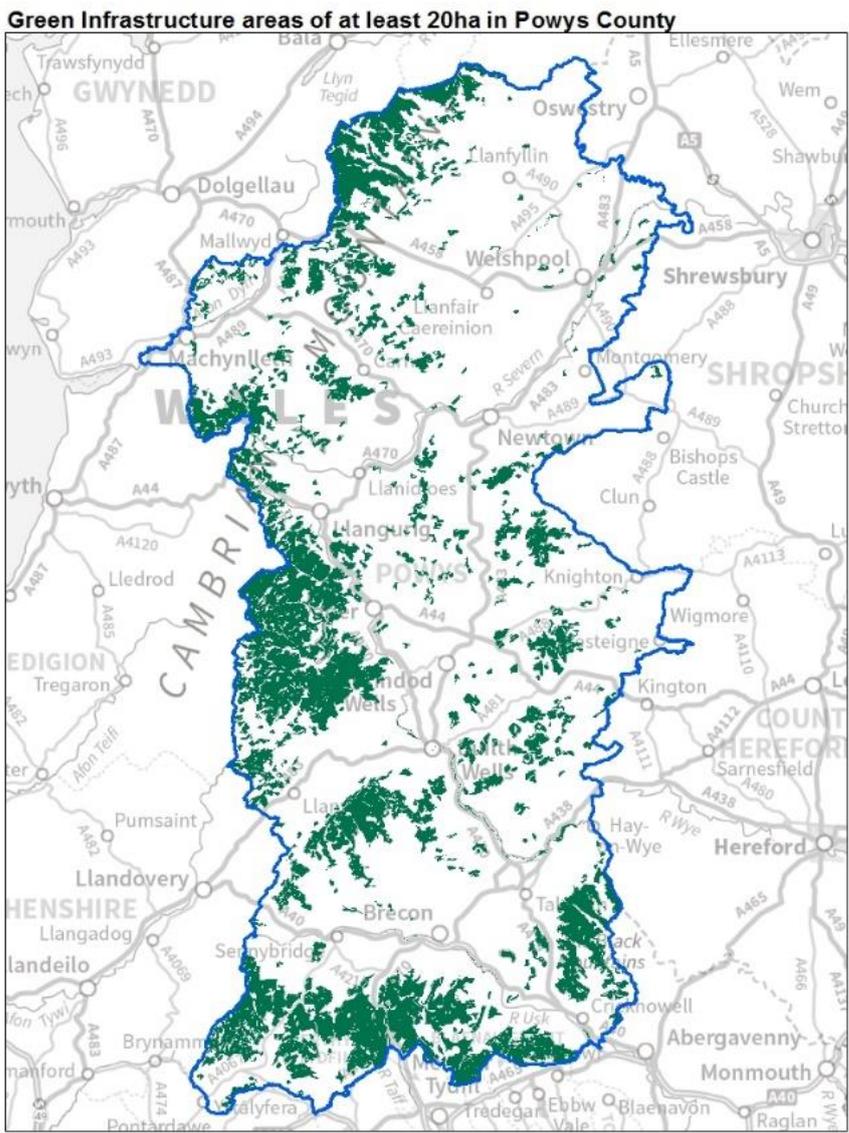


Figure 23 Map showing green infrastructure areas of at least 20ha in Powys

Green/social prescribing

There is increasing evidence that being in the natural environment can benefit people’s mental well-being. Our urban and rural green spaces, parks, woodlands, fields, mountains, and water help us feel better both mentally and physically. Access to the natural environment can provide a range of opportunities in addition to physical activity, including companionship, meaningful activity, reflection, adventure, and learning.

Outdoor recreation can make a significant positive contribution to our physical health. Increasing levels of physical activity is known to help reduce the incidence of chronic diseases. Outdoor recreational activities are often free and provide opportunities for everyone, regardless of age or ability.

Sustainable tourism

More sustainable management of ‘honeypot’ visitor attractions, and increased public awareness and empathy for the natural environment they visit

Community led engagement to better connect local people to nature & the environment

Channel visitors to less popular (non-honeypot) areas: With two aims

- 1. to reduce pressure on heavily visited areas,**
- 2. Encourage spending at these less popular areas and contributing to the local economy.**

Active travel

Active Travel means walking or cycling for everyday short-distance journeys. It covers trips to school, shops, work, services, and transport hubs. Also, it can include the use of electric wheelchairs or mobility scooters. Yet it does not include journeys purely for recreation, or social reasons. Local authorities must encourage walking and cycling, they achieve this by improving cycle routes in all road developments.

Existing Route Maps’ (ERMs) detail the current Active Travel routes approved by the Welsh Government. They do not show every walking or cycle route in an area, but only the existing routes deemed suitable for Active Travel by Local Authorities. [For further information on ERMs visit the local authority active travel pages.](#)

New routes and improvements to existing routes should avoid creating conflicts of use. For instance, cyclists heading to work tend to cycle quickly, whereas any dog-walkers on the same route will probably have dogs on long leads and inadvertent conflict may result. Multi-user routes work in some places but should not be seen as the universal answer.

There are also many other places people can visit including Local Nature Reserves, country parks and most National Nature Reserves. Horse riding is allowed in some NRW managed woodland. There are cycle routes across Wales allowing active travel and more technical mountain bike routes in some woodland. Enjoyment of the outdoors is also an important part of appreciating the cultural and landscape heritage of Wales. Outdoor recreation can make a significant contribution to the physical health and mental well-being of the population; increasing levels of physical activity has beneficial consequences in terms of increasing healthy life expectancy and reducing the incidence of chronic disease, including cardiovascular disease, some cancers, type 2 diabetes, and osteoporosis. Many outdoor recreational activities are free to all, enabling participation across and between communities.

What have people said?

Reconnecting people with their natural environment emerged as a key priority from the Area Statement engagement sessions, stakeholders told us that:

- Using the environment to tackle health and well-being was an essential part of our society
- social isolation can be a major contributor to poor mental health
- Widespread green/social prescribing through local community initiatives and GP surgeries is desirable
- they would like to see improved mental, physical health, and well-being across Mid Wales
- they would like an increase in sustainable recreation and better access to green space
- they value nature and want to be better connected to their local environment
- we need to increase sustainability in managing tourism and developing the local economy

The main areas of focus under this Area Statement theme are to:

- promote sustainable tourism opportunities to help boost the local economy
- promote, encourage, and support sustainable recreation, reconnect local people and visitors with access to the natural environment
- look for new ways in which people can connect with their local environment to help improve their health and well-being
- work with different organisations to develop opportunities for using the natural environment on our doorstep as a tool in preventative medicine
- develop the evidence base to further support the theories around health and well-being and links to the natural environment

In the recent Living in Powys survey (July 2021), when asked “***What would make it easier for you to access nature?***” residents responded with a variety of comments including:

- “Promoting local areas, listing areas that are accessible, how to get there, where to park, child friendly info etc”
- "I would like to know more about wild swimming spots in the area. More publicised walks and group walks to introduce me to new areas whilst meeting new people"
- “Being able to access somewhere to grow things”
- “Improve cycling opportunities to access green space or to ride into town. Cycling on the main road in Llandrindod is difficult, especially with a child”
- “More disabled access places and public toilets”
- “Nothing really, where I live nature is easily accessible”
- “Park and ride from Brecon to the beacons”

- “Public transport links, not necessarily everyday but more opportunities to go to places like Lake Vrnwy, Bala, beaches etc.”
- “Secure areas and walkways away from livestock”
“Improved rights of way network - signposts and signs etc”

Forestry Resources

Woodlands deliver a range of ecosystem services which are important for well-being. These include providing timber, supporting biodiversity, storing carbon, improving air and water quality, reducing the risk of flooding and drought, improving our physical and mental health, and providing opportunities for education and learning.

Woodland types in Wales vary from ancient to recent, semi-natural to plantations (conifer, broadleaf and mixed). Wales's woodlands include significantly important semi-natural woodland habitat types and species.

The character of woodland in Wales has been influenced by both historic land use and previous government policy. Woodlands now cover approximately 15% of the land area of Wales. In the early 1900s, coverage was as low as 5% but this increased significantly in the mid-1900s as state owned forests were established. However, Wales remains one of the least wooded countries in Europe and there is a strong push to increase the rate of new woodland creation. [SoNaRR2020: Woodlands chapter](#); see also [Forest Research: Forestry Statistics 2020](#).

Powys has 15.75% (or 81820 ha) woodland cover which is slightly higher than the average across Wales (Scottish Government, 2020).

Woodland Cover in Powys (National Forest Inventory 2018)

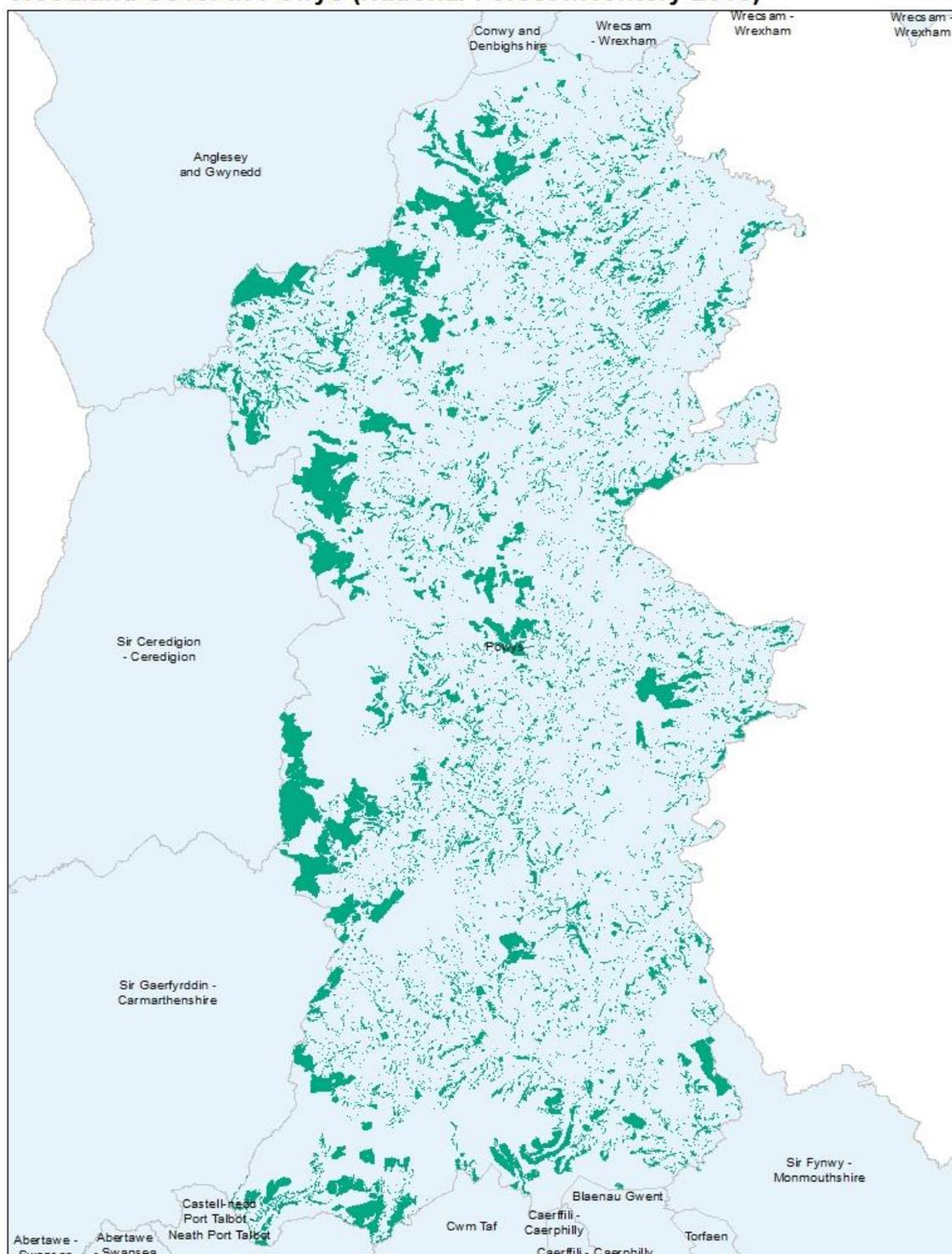


Figure 24 Map of Woodland cover in Powys

Urban tree cover: In Wales, we have over 16% canopy cover in our urban areas (over 14,000 ha in total) which is mid-range in world rankings. The mean urban tree cover in Wales was estimated to be 16.3% for 2013, down from 17.0% in 2009.

Powys' urban cover was estimated to be 14.5% in 2013, down from 15.3% in 2009. (NRW, 2016).

“Urban woodlands represent 35% of Wales’s urban canopy cover, with Powys on 30%. The rest is made up of so-called ‘amenity’ non-woodland trees, those individual and groups of trees growing along streets, gardens, car parks and other urban public and private open spaces” (NRW, 2016). Tree cover in deprived areas tends to be lower and relatively less rich in amenity trees.

Economic value: Timber, as a sustainable and natural resource, makes a valuable contribution to the Welsh economy and there is potential for it to contribute more (SMNR Aim 4). Forestry based industries are worth over £400 million per annum to the Welsh economy, however, we still import 63% of softwood and 94% of our hardwood timber. National harvest of timber is approximately 1.65million metres cubed per annum and around 11,000 people are employed in forestry or forestry-related business (Confor).

This is likely to be higher in Powys, as Powys has a higher proportion of forest, and as forestry production jobs tend to be more focussed in rural areas. Softwood removals in Wales (combined public and private) over the last 10 years have fluctuated from a low of 1,038,000 green tonnes in 2009 to a peak of 1,541,000 green tonnes in 2017 with an average of 1,308,600 green tonnes over the ten-year period (Forest Research, 2019d).

Key trends:

- **Tree health is declining**, due to pests and diseases and variations in the seasonal amount and pattern of rainfall and temperature. The situation is likely to be further exacerbated by future climatic changes as well as global trade.
- **Climate change will affect Welsh woodlands in future** with current predictions suggesting a drier/warmer climate in the east of the country which may cause drought stress with species such as Sitka spruce but also bring opportunity to plant high yielding species such as Douglas Fir in the uplands; a warmer / wetter climate in the North & West which may increase timber yields but could also cause more wind instability and damage to forest infrastructure. Recent research (Environment Systems, 2020) suggests changes in the availability of land suitable for planting of sessile oak and Sitka spruce. Environment Systems (2020) states that planting schemes should take a longer-term view to consider the large geographic shift in land suitability (from lowland to upland areas) which is predicted to occur between 2050 and 2080, as these trends could affect the viability of woodlands planted between now and 2050.
- **Increasing tree cover across Wales:** A total of 1,300 ha of new woodland was created in Wales between 2016-2019 (Forest Research, 2019a). Welsh Government’s ambition is to achieve 2,000 ha of new woodland creation per annum, rising to 4,000 ha per annum as rapidly as possible (Welsh Government, 2019a). [Opportunity mapping](#) for woodland creation.

- **Decreased timber availability** current forecasts of timber availability (Forestry Commission, 2014a; Forestry Commission, 2014b) predict a drop in softwood timber availability over the next 30 years which is a potential concern for the sector and more widely for Wales as it risks the continued flow of ecosystem services and well-being benefits from woodlands. Future predicted changes in the availability of softwood and hardwood timber may affect the forestry sector and its potential contribution to the Welsh economy, including the reliance on imports to meet domestic needs.

The Mid Wales Area Statement has identified the following priorities under the Forestry Resources theme:

- Managing forest resources sustainably, while also supporting the timber industry
- Increasing woodland cover with conifer, broadleaved and mixed woodland, following the 'right tree, right place' principle (which ensures that important areas that are already storing significant carbon, support priority habitats and species, or are protected sites are not planted with trees where there are negative effects on the interest of the site)
- Supporting training and local employment opportunities in forest management and skills
- Valuing woodlands for their commercial, recreational and biodiversity value
- Adapting to the impacts of tree disease and climate change
- Working with policy makers to balance the need for re-stocking upland forests whilst avoiding damage to natural peatland habitats
- Seeking opportunities for carbon capture and storage through well managed woodlands

Climate Change

The Mid Wales Area statement highlights how climate change is one of the defining issues of our time for communities across Powys. From shifting weather patterns threatening food production to rising sea levels and the prospect of catastrophic flooding, the impact of climate change is global in scope, unprecedented in scale, and of widespread concern to our local communities. Immediate, effective action needs to be taken to reduce our carbon footprint, while also establishing policies and taking action to improve our resilience for the future. It is important to note that simply leaving adaptation for the future will make it more difficult and costly and leaves us open to the risk that we act too late.

The influence of humans on the climate system is clear. Emissions of greenhouse gases stemming from human activity (sometimes referred to as anthropogenic emissions) are the highest in history. Recent reports have confirmed that the UK climate is already changing rapidly. [The 'State of the UK Climate' report \(Royal Meteorological Society, 2020\)](#), finds that disruptive climate change is impacting on our daily lives, with the UK becoming 6% wetter and 0.9C warmer in the last 30 years. These changes will have impacts for the frequency and magnitude of extreme weather events such as heatwaves and floods.

The IPCC have recently published the findings of [Working Group 6](#), [presenting the physical science basis underpinning our understanding of how climates may change in the future \(IPCC , 2021\)](#). The [Summary for Policy Makers](#) finds that extreme weather events such as heatwaves and intense rainfall have become more frequent and intense across most of the Earth's landmasses since the 1950s, due to human influence on the climate system (IPCC , 2021). The chart below shows projected annual emissions of CO₂ across five illustrative scenarios (SSPs) used by the IPCC:

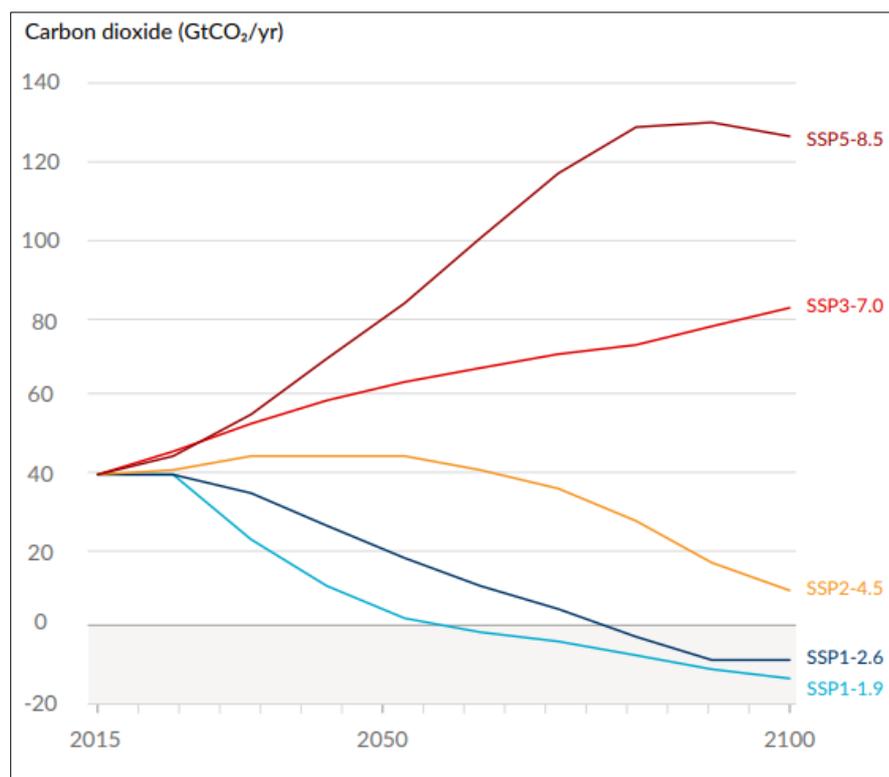


Figure 25: Different scenarios of projected annual emissions of CO₂, IPCC 2020

In 2021, the UK [Climate Change Committee](#) released the [third independent assessment of UK Climate Risk](#) (CCRA3) (Climate Change Committee, 2021).

Key findings from the report show that adaptation has not kept pace with evidence that the climate risk is likely to be more severe than previously thought.

Eight risks have been marked as the highest priority UK wide which require urgent adaptation action in the next two years:

1. Risks to the viability and diversity of terrestrial and freshwater habitats and species from multiple hazards
2. Risks to soil health from increased flooding and drought
3. Risks to natural carbon stores and sequestration from multiple hazards leading to increased emissions
4. Risks to crops, livestock and commercial trees from multiple hazards
5. Risks to supply of food, groceries, and vital services due to climate-related collapse of supply chains and distribution networks
6. Risks to people and the economy from climate-related failure of power system
7. Risks to human health, well-being, and productivity from increased exposure to heat in homes and from other buildings
8. Multiple risks to the UK from climate change impacts overseas

The CCC have also produced a [Summary for Wales](#) (Climate Change Committee, 2021), which shows that 26 risks from climate change have increased since the second risk assessment carried out 5 years ago.

Table 6: Climate change risks for Wales that have increased in the last 5 years (CCC 2021)

Risk and opportunity	Urgency score CCRA2	Urgency score CCRA3
N2. Risks to terrestrial species and habitats from pests and pathogens and invasive species	Sustain current action	More action needed
N6. Agricultural and forestry productivity	Research priority	More action needed
N7. Risks to agricultural and forestry from pests and pathogens and invasive species	Sustain current action	More action needed
N14. Risks to marine species, habitats, and fisheries from changing climactic conditions	Research priority	More action needed
N16. Risks to marine species and habitats from pests, pathogens and invasive species	Sustain current action	More action needed
N.18 Risks and opportunities from climate change to natural heritage and landscape character	Watching brief	Further investigation

CCRA 3 also lists new risks that did not appear in CCRA 2. The Summary for Wales identifies the following risks as high magnitude, requiring action now:

1. The impact of climate change on the natural environment (terrestrial, freshwater, coastal and marine, forests and agriculture)
2. Increases in the range, quantities and negative consequences of pests, pathogens, and invasive non-native species
3. More frequent flooding and coastal erosion, leading to: (a) damage to coastal businesses; (b) increased severity and frequency of flooding to homes and communities; and (c) damage to infrastructure services (energy, transport, water supplies and ICT)
4. The impact of high temperatures, high winds, and lightning on the transport network
5. The impact of high temperatures on people's health and well-being
6. Extreme weather events causing disruption of health and social care services
7. Changes in temperature, precipitation, groundwater, and other landscape changes causing damage to cultural heritage assets
8. International impacts of climate change (e.g., food availability, safety and security, risks to international law/governance) that could affect the UK through disruption of trade routes, supply chains and public health

(Climate Change Committee, 2021)

NRW's [State of Natural Resources Report 2020](#) (SoNaRR NRW, 2020) draws on the [Welsh Donut Report](#) (OXFAM, 2020), which evaluates how well we are living within sustainable

levels in respect of a suite of both environmental and societal parameters. Currently, Wales is not meeting goals related to society and well-being, nor are we within sustainable limits for our use of environmental resources (SoNaRR NRW, 2020).

As outlined above, CCRA 3 Summary for Wales specifies eight high magnitude risks that require action to enhance adaptation and resilience to future climatic shifts. CCRA 3 also highlights those UK-wide risks that require urgent action in the next two years. The next Powys well-being plan will need to consider how to advance cross-cutting policies, procedures, and strategies to address these risks, incorporating technology, economics, and society.

The [Welsh Donut Report](#) (OXFAM, 2020), SoNaRR 2020 and CCRA 3 all make it clear that in order to address the challenges faced by climate change, a transformative approach is needed. Technological, societal, and economic systems need fundamental reorganisation, coupled with equally important input from individuals to reduce production and consumption while maintaining levels of well-being. Reducing our environmental footprint cannot come at the expense of the well-being of our societies and communities.

In a report produced by the [National Atmospheric Emissions Inventory in 2021](#), it shows that 68% of all emissions in Wales are produced by energy supply, businesses, and transport (National Atmospheric Emissions Inventory, 2021). It is therefore recommended that policies and strategies are aimed at these areas in the first instance, while seeking to tackle the highest priority risks identified in CCRA 3.

The Welsh Government [Well-being of Wales Report 2019](#) makes it clear that if everyone used resources at the same rate as we do in Wales, it would require 2.5 planets. This is clearly not sustainable for the future (Welsh Gov, 2018/19).

SoNaRR 2020 uses the example of '[One Planet Cardiff](#)' as a case study of the kind of transformative, integrated approach required to ensure that we fulfil the principles of SMNR, while meeting the seven well-being goals set out the in Well-being of Future Generations Act.

Ideas that could be adapted for Powys and explored in future well-being plans include:

- Reducing our reliance on fossil fuels and energy consumption
- Prioritising green infrastructure across the county, increasing, and connecting green spaces in both rural and more urban areas
- Encouraging an increase in the use of active travel and public transport, with a focus on 'clean' vehicles
- Increase recycling rates and minimise waste – ensure Powys participates fully in making Wales a Zero Waste nation by 2050
- Reduce the impact of food choices on the environment, e.g., community farms and gardens

- Undertaking appropriate actions to increase the resilience of our communities to flooding and other extreme weather events

With regards to a regenerative economy, SoNaRR 2020 recommends using the '[DISRUPT](#)' approach (NRW, 2020):

- Design for the future
- Incorporate digital technology
- Sustain and preserve what is already there
- Rethink the business model
- Use waste as a resource
- Prioritise regenerative resources
- Team up to create joint value

The DISRUPT model makes it clear that achieving the degree of necessary transformation in the economy, technology, transport, and society cannot be done by any one organisation alone. NRW has implemented the Area Statements and is a statutory participant in the Powys Public Service Board, with the overarching purpose of achieving the goals of the Well-Being of Future Generations Act, and the principles of SMNR (NRW, 2020).

An advantage of the PSBs is that they foster the creation of a 'civil society', incorporating a wide range of non-profit, non-governmental community organisations and volunteering networks, faith groups and charities (SoNaRR NRW, 2020) This diversity enables delivery of change at a range of scales, both county-wide and within individual communities. We need to consider how to strengthen these communities across Powys in a range of activities designed to appeal to diverse interests. It will be important to incorporate work looking at values, behaviours, and different forms of knowledge, rather than more traditional technological or economic focused approaches (SoNaRR NRW, 2020)

Transport

Transport remains the third highest producer of greenhouse gases in Wales for 2019. Wales has had [consistently high rates of car use for commuting since 1990](#), which is likely to be due to the rural nature of much of the country, and this is particularly true in Powys (NRW, 2020).

In such a challenging context, SoNaRR 2020 recommends considering actions in the social sphere, driving change in how and why people travel or transport things.

- Build on the change of lifestyle we all experienced during the COVID-19 pandemic - more working from home, limited travel, people staying local for holidays and recreation

- Build on the impact Covid-19 had on how we shop – encourage purchase of local produce to reduce transport costs
- Enact policies to convert to electrically powered vehicles for public transport, where possible (or within Powys' control)
- Increase the number of charging points for electric vehicles – **Powys as a county is approximately 112 miles from top to bottom**, so having opportunities to charge vehicles will be critical to the uptake of electric cars
- Establish community networks for electric car users (this has already commenced in Powys) to share tips and knowledge
- Improve active travel routes, particularly in towns or areas where commuting in this way is possible; try to join up existing schemes that can be piecemeal in nature

Energy

Powys has old and inefficient housing, and therefore there are potentially significant reductions in carbon output to be made in terms of improving energy efficiency. We can explore some of the following:

- Encourage the local generation of energy (e.g., support the installation of technology such as solar panels or battery storage systems; transfer communities to electrical heating from fossil fuels).
- Promote demand management and energy efficiency (e.g., the roll out of smart meters).
- Establish policies to include energy efficient technology into any new housing development.
- Establish policies, networks and community initiatives to encourage 'prosumers' - energy users who produce and/or conserve energy through use of solar panels, heat pumps, energy storage devices (such as batteries) and electric vehicles.

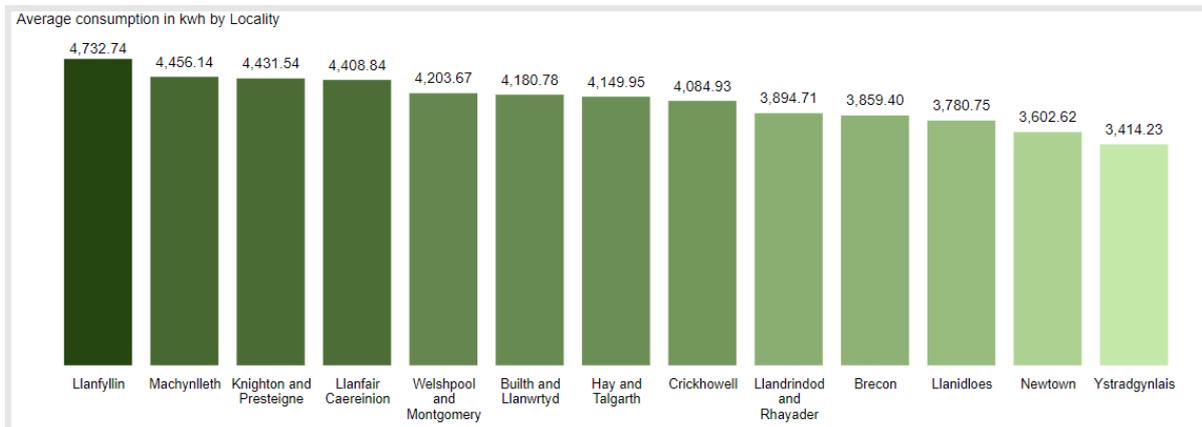
Many homes in Powys are not connected to the gas network due to Powys' rural nature. These homes are likely to rely on other, more carbon intensive and expensive forms of heating, such as oil, liquid petroleum gas, and coal (ONS, 2011).

Powys' average household electricity consumption is significantly higher than the Welsh average, as well as the UK average (Department for Business, Energy & Industrial Strategy, 2021).

The average domestic electricity consumption is 4,037 kWh per annum for Powys, which is higher than the Welsh average 3,578 kWh/annum, but lower than the GB average 4,079 kWh/annum. Between 2015 and 2019, electricity consumption in Powys has fallen by 5%, Wales and GB have fallen by 8%.

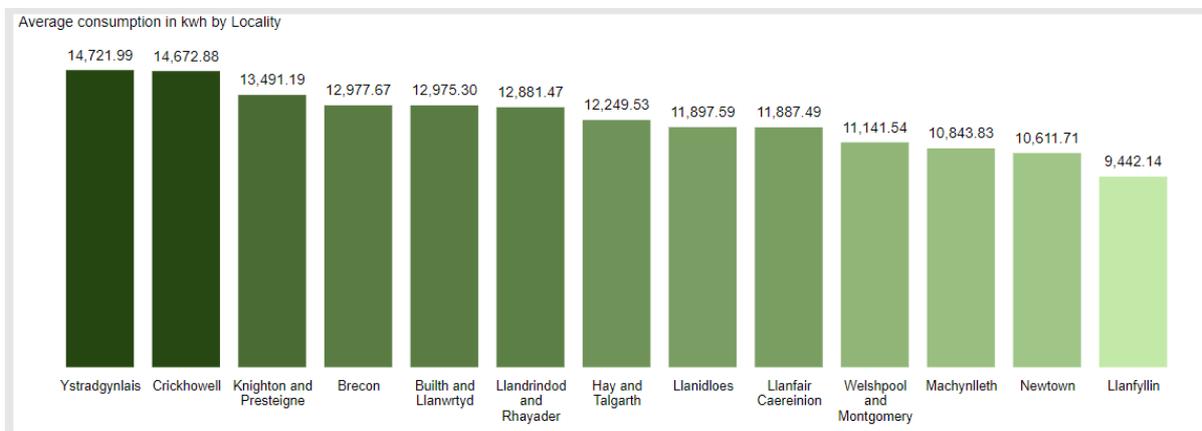
The average domestic gas consumption per meter is lower than both the Welsh and the UK average.

The average electrical consumption differs across Powys, with Llanfyllin locality showing the highest electricity consumption of all 13 localities, the lowest being Ystradgynlais.



The average domestic gas consumption per meter in Powys is 12,442kWh/annum which is lower than both the Welsh average 13,502 kWh/annum, and higher than the GB average 12,368 kWh/ annum. Between 2015 and 2019, mean domestic gas consumption in Powys has risen by 2%, and Wales 2% GB by 1%.

The average gas consumption differs across Powys, with the opposite from electrical consumption Ystradgynlais locality showing the highest gas consumption of all 13 localities, the lowest being Llanfyllin.



Due to the rurality of Powys, more rural localities will not be connected to the gas network.

In Powys, 53% of properties are not connected to the gas network (Wales: 15%, UK: 10%).

Estimates of the number of properties not connected to the gas network vary, with one source **estimating that 43,000 properties in Powys are not connected to the gas network (ONS, 2011).**

Due to rising energy prices, many residents are finding it difficult to heat their homes to a comfortable standard.

The percentage of households in Powys who are in fuel poverty was 17% (Welsh average: 12%). Powys ranks third highest amongst all local authorities in Wales (Gwynedd is highest (23%) and Ceredigion second highest (21%) (Welsh Gov, 2018)..

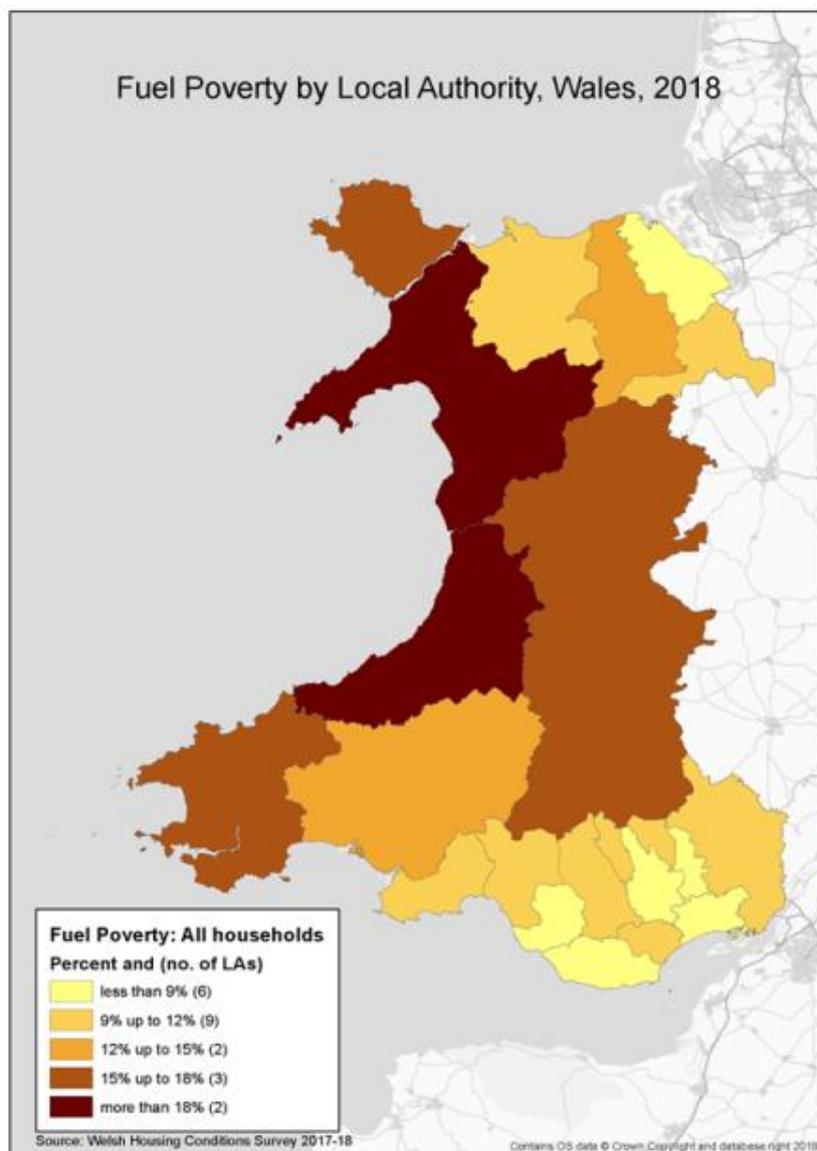


Figure 26 Map: Proportion of households in fuel poverty (10% definition), Wales (Welsh Gov, 2018)

Follow the link to view more about [energy consumption in Powys and our 13 localities via our interactive report.](#)

Food

The food system, in meeting society's nutritional needs, is responsible for many impacts on the environment. Examples include emissions of pollutants, depletion of resources, loss of biodiversity and degradation of ecosystems in Wales and beyond.

Options for making the existing food system more efficient include:

- Low carbon management practices

- Increased biodiversity-friendly management practices
- New incentives and regulatory mechanisms
- Changing diets
- Reducing food waste
- Increasing food production from a smaller area of land

What have people said?

Living in Powys survey (July 2021)

82% of 468 respondents to the 'Living in Powys' survey agreed or strongly agreed that we are seeing more extreme weather events including flooding. 5% answered that they strongly disagreed, and 13% answered neutral.

When asked "what action they are taking to address climate change", 12% of respondents said that they would source renewable energy.

- 83% of respondents agreed or strongly agreed that action to address climate change is important to them.
- 74% agreed or strongly agreed that they are acting to address climate change and 72% felt informed about climate change.

Respondents were asked what action they take to address **climate change**, highest answers included:

- 17% reduce what I buy new
- 17% repair what I already have
- 16% expand lifetime of products through good maintenance
- 14% buy used, refurbished or re-manufactured
- 14% buy sustainable options e.g. From recycled content or low carbon
- 10% source renewable energy
- 1% said do nothing

For those selecting 'nothing' they were asked what is preventing them from acting, responses included:

- "I feel climate change is an exaggerated problem designed to increase taxation of everyday items, force us into buying very expensive electric cars and undermining our lifestyles."
- "Absolutely no need to do anything."
- "Climate has always changed, CO2 is not a pollutant, wind and solar are expensive yet useless. Wasteful use of resources is wrong but so far fossil fuels are the most effective, efficient, and beneficial provisions of the Creator God for mankind. The Maldives will show us when sea level change happens. I am all for good stewardship

of resources, but not to be done under the false pretences of the current "climate change" agenda. "While the earth remains, seedtime and harvest, cold and heat, winter and summer, and day and night shall not cease". God's promise, Bible (Genesis)."

- "It is over exaggerated. All climate is cyclical."

Some respondents mentioned **electric and hybrid cars** in their response to what their priorities would be in a well-being plan:

- "Powys will need many more charging stations for all the electric and hybrid cars that will be taking over from petrol and diesel vehicles. How will you make sure there is capacity for us all to charge when we are not at home?"
- "Businesses can install more electric vehicle charging infrastructure and create more green spaces around the town."

Environment Summary

There are connections between the people of Powys and the natural world. Communities in this part of Wales are acutely reliant on and impacted by the benefits and risks that the county's natural resources provide in a way which is more immediate and direct than other urbanised regions of Wales. This direct reliance on natural resources is particularly evident when we look at the economic, social and cultural well-being benefits derived from Powys' special and significant broad ecosystems:

Enclosed farmland in Powys contributes to approximately 24% of the entire Welsh resource, around 249,166ha in extent. **This ecosystem covers around 47% of Powys and comprises the improved and semi-improved agricultural land that is surrounded by field boundaries.** The ecosystem is managed mostly for food production, in particular the production of livestock for meat and milk. Enclosed farmland is an intensively managed ecosystem with small areas of high biodiversity value such as hedgerows, traditional orchards, wood pasture, parkland and extensively managed arable land. Agricultural productivity has remained relatively stable for the last two decades. The provision of food has negative impacts on other ecosystem services. Ammonia emissions and nutrient run-off have the potential to cause pollution to land, water and air. This, along with the planting of crops and species-poor grassland, causes the loss of native biodiversity. Agriculture faces a major challenge in reducing its contribution to climate change. It needs to reduce greenhouse gas emissions and has a role to play in storing carbon. More efficient use of nutrients at field, farm and catchment scales could reduce diffuse pollution and improve soil condition without affecting the amount of food production. However, system changes to current agricultural practices are required to fully address both the nature and climate emergencies.

Mountains, Moorland and Heath in Powys contribute to approximately 35% of the entire Welsh resource, around 129,000ha in extent. **This ecosystem covers around 25% of the land area in Powys and provides key benefits including carbon storage, flood mitigation, food, fibre and some of Wales's most iconic species and landscapes valued by residents and tourists.** The predominant land use is stock rearing, with sheep being the major component, and there is also commercial forestry. The majority of Mountains, Moorland and Heath ecosystems occur in the uplands, the land lying above the upper limit of enclosure. This upland part of the ecosystem accounts for 19.3% of the Welsh land making it the largest continuous block of habitat. It includes large areas of acid grassland much of it resulting from overgrazing of heath and bog. The uplands are crucial in supplying clean drinking water, sequestering carbon and providing renewable energy. Mountains, Moorland and Heath landscapes also have huge cultural and heritage value, are key areas for access and recreation and play important roles in physical, mental and spiritual well-being. In contrast, the lowland peatlands and heathlands are frequently small, highly fragmented and impacted by neighbouring land uses. Decline in traditional grazing and other management practices are often apparent and lead to loss of valued features. Problems are compounded

in both upland and lowland Mountains, Moorlands and Heath by aerial and groundwater pollution with high levels of reactive nitrogen.

Freshwater: Rivers, lakes, ponds and floodplains harbour rich biodiversity including some of the most threatened wildlife in Wales such as the freshwater pearl mussel, salmon and water vole. In Wales, only 44% of rivers are achieving good ecological status under the Water Framework Directive 2018 interim classification. A range of pressures are compromising the health of our freshwater ecosystems, including climate change, pollution, physical modification, abstraction and invasive non-native species. The sustainable management of freshwater ecosystems is intimately linked with the neighbouring land within their catchments. Freshwater ecosystems provide important ecosystem services including water supply, renewable energy production, flood management, waste disposal, fisheries and recreation. Balancing the use of these services with one another and the sustainable management of catchments is a significant challenge.

Powys includes part of some of the most important river systems in Wales including the Wye, Usk, Severn and Dyfi. The rivers Wye and Usk are designated riverine Special Areas of Conservation (SACs). In January 2021, NRW published new evidence on phosphate levels for all river SACs across Wales. The evidence shows that overall, phosphorus breaches are widespread within Powys' SAC rivers. **The river Usk was assessed to have an 88% failure rate and the river Wye a 60% failure rate for phosphorus.** Too much phosphate can cause eutrophication, resulting in decreased levels of oxygen and the subsequent destruction of plant and animal life. This threatens some of Powys' most special wildlife such as the Atlantic salmon and wild trout. Phosphates can enter river systems from land management practices, sewerage and foul water that contain detergents and food waste. Local Planning Authorities are required to ensure that all planning applications within SAC catchment areas meet stringent tests. This has created an impasse on certain developments, which could have damaging impacts on local economies and communities.

Woodlands in Powys contribute to approximately 25% of the entire Welsh resource, around 83,979ha in extent. Woodlands and trees provide a variety of benefits to well-being. They help regulate our climate, provide income and jobs from timber and other activities, store carbon; contribute to reducing flood and low river flow risk; safeguard soils; improve air quality; reduce noise; and regulate pests and diseases. They play a major role in pollination, soil formation, nutrient cycling, water cycling and oxygen production, all of which are crucial in supporting well-being. Upland oakwoods are the characteristic and iconic woodland type of Mid Wales, accounting for around 60% of the native woodland area (national average c. 50%) and widely recognised for its high biodiversity and cultural value. In common with native woodlands throughout Wales, **the condition of woodlands in Powys shows that many of them are in unfavourable condition.** Some of the main factors influencing their condition are habitat loss and fragmentation, grazing management, structure and management, INNS, pests and diseases and pollution.

Data and evidence shows that we fall short of achieving the sustainable management of natural resources in Powys. We are using stocks of our natural resources at a rate which is unsustainable and that our ecosystems are under increasing pressure and threat from the impacts of climate change, land use change, invasive non-native species (INNS), pollution and over-use. **This jeopardises the ability of our natural environment to provide a number of vital well-being benefits now and in the future.**

Climate risk is an increasing concern which is predicated to have a significant impact on the habitats, people and places of Powys. This assessment has looked at some of the risks to the environment using future climate predictions, but more work will need to be done to make sure we take an integrated approach to climate risk across cultural, economic and social well-being.

The failure of current practices to achieve a model of sustainable natural resource management is putting the well-being of future generations at risk in Powys.

Brexit is a key risk which has the capacity to have a significant future impact on land management in Powys and while future trade deals and policy creation is a national issue, more can be done to reduce the impact of future changes at the local level.

More work needs to be done to address the drivers of unsustainable management which exist outside of the environmental well-being sphere. As a result of this analysis, it is recommended that a closer and more integrated look at key challenges is taken, where transformation and systemic change would have significant well-being benefits to all four well-being themes. **Transformation in the food, energy and transport sectors has the greatest potential to improve well-being in Powys.**

Cross cutting themes

The environment and well-being is also affected by many other cross cutting themes seen in the other Well-being topics, Social, Economy and Culture and Community.

		How does Environment interact with the other Well-being themes?
Social	<ul style="list-style-type: none"> • Homelife • Living Independently • Health and Lifestyle • Education our Children 	<p>The environment in which people live has a large impact upon an individual's social well-being. For example, extreme weather situations such as flooding can have a detrimental impact to an individuals' social well-being as it de-stabilises their homelife, ability to live independently and potentially has negative longer term health impacts. However, the natural world can improve social well-being through creating spaces and places with increased biodiversity and a community that has an affluence of natural resources which allows for an individual to thrive within the environment of their local community.</p>

Economy	<ul style="list-style-type: none"> • Jobs and Wages • Businesses • Tourism • Staying Connected • Poverty and Deprivation 	<p>The environment in which people live has a large impact upon an individual's economic well-being. For example, jobs and wages alongside commercial opportunities such as business and the tourism industry will be impacted upon by increasingly extreme weather situations such as flooding. This can have a detrimental impact to an individuals' economic well-being as it de-stabilises their homelife, ability to live independently and potentially has negative longer term health impacts.</p> <p>However, the natural world can improve economic well-being through creating spaces and places with increased biodiversity and a community that has an affluence of natural resources which allows for an individual to thrive within the environment of their local community.</p> <p>It also important to note a clear link between the longer-term sustainability of certain industries and sectors, based on their reliance upon natural resources, which can be combatted with an innovate environmental approach or an extension of a greener economy. We need to make use of locally sourced materials, particularly wood grown in Wales, rather than buying in goods. Sustainability is key, ensuring that we use goods produced or grown locally and replant to ensure a sustainable future for the next generation.</p>
Culture and Community	<ul style="list-style-type: none"> • Welsh Language • Communities coming together • Participation in cultural life • Anti-social 	<p>The environment in which people live is a critical component of an individual's cultural and community wellbeing, as the environment is the natural world in which communities are living. It is important for communities to be established in spaces that are sustainable and well-connected, with sustainable resources to live accordingly. The potential implications posed by climate change and a changing environment can potentially de-stabilise local communities, as a community's response to increasingly extreme environmental events could lead to individuals leaving their communities, which could impact wider cultural areas such as the Welsh language if there is increased migration.</p>
High Level Impacts	Ageing population	<p>It is important to consider the impacts of an increasingly aging population when environmental well-being, as an older demographic. An aging population is likely to encounter additional health and lifestyle issues associated with older ages, alongside additional affects from the current which could limit their ability to interact with their local communities and culture.</p>

	Rurality	Due to Powys's rural make up and vast geography, the role of the environment to well-being is essential. For example, people living within these communities are likely to have living amongst increased biodiversity and feel more connected to their natural environment, with easier access to green spaces. Rural communities are also likely to be impacted by the impacts of climate change as there is an increased dependence on natural resources compared to urban areas, with agriculture also affected due to land becoming less fertile.
	Brexit	Whilst the full extent of the impact of Britain's exit from the European Union remains largely unseen at a local level, it is still important to note that this will impact environmental well-being over time as UK/Welsh policy and legislation changes to move away from those that were previously worked to as part of the EU.
	COVID-19	Whilst this assessment has been produced during the coronavirus pandemic, which is still ongoing, the longer-term impact is still to be determined. However, the pandemic has already highlighted new short-term issues affecting economic well-being and exacerbated the existing challenges, such as its disproportionate impact to particular demographics. This has impacted an individuals' economic well-being as many people have faced increased challenges in their job and/or business, whilst also exacerbating and increasing the number of people becoming impoverished. This has also forced the wider society to re-consider the importance of economic well-being, as delivery models for jobs, businesses and tourism have had to adapt to cope with the ever-changing situation.

Methodology

Our assessment combines quantitative data and insight, alongside qualitative user feedback. We have used publicly available data, our own engagement information from all partners, as well as national research, reports, and evidence to help understand the situation and experience of residents and those using services.

Partners engaged with people throughout the county and encouraged everyone to share thoughts and ideas. All engagement activity was structured around the four core themes and the data and intelligence gathered was a mixture of new engagement as well as utilising existing user feedback and previous consultation and engagement information.

The assessment was delivered in three phases:

Phase 1 – Data Gathering (June – September 2021)

We identified what data was readily available and the data gaps we had from our previous assessment. All relevant quantitative and qualitative evidence from any recent consultations that partners have been involved in was considered. The group developed a list of stakeholders to engage with, as well as the best mechanisms to do so, e.g., utilising existing groups to better engage. The team realised that COVID-19 would be a feature of the Well-being Assessment, however it would not be the sole focus.

Phase 2 – Engagement and Testing data (September – November 2021)

Partners worked together to conduct consult and engage on the emerging data gaps, using a range of channels and techniques to capture further insights. This included a mix of digital and ‘piggy-backing’ opportunities. We engaged with hard-to-reach groups and the public on our insight and tested these.

Phase 3 – Analysis (November 2021 – January 2022)

Detailed analysis of the results collected were carried out and included a mix of qualitative data and insights (e.g., resident attitudes and feelings) which complimented the more traditional quantitative information that we captured (e.g., numbers of residents satisfied with a service). By effectively cross-referencing the two types of data we ensured that had a robust assessment.

The written Well-being Assessment evolved during this process and was refined during each step as we had access to richer insights from our residents and service users.

We engaged with a vast number of stakeholders across a huge area and a common set of groups, we undertook a detailed stakeholder mapping exercise to ensure our assessment reflects people’s needs as accurately as possible.

Living in Powys survey

We conducted a Living in Powys Well-being survey over a period of 8 weeks in June/July 2021. The survey (which was available in English and Welsh) was themed closely to the national well-being goals with the aim of understanding the differences across the county.

Due to the Covid-19 pandemic, and Welsh Government regulations, face-to-face focus groups, on-street surveys, and public events, have been unable to take place and our well-being engagement exercises were primarily online, with printed copies only distributed if/when required.

This engagement campaign targeted the population of Powys, and whilst it was not possible to collect information from the whole population, we used a sample of those whose key characteristics were representative of the target group. To ensure we had results representative of the Powys population, 384 responses were required to have a confidence level of 95% (with a margin of error of +/-5%). Our initial 'Living in Powys' survey received 475 responses and our follow-up 'Well-being Assessment' survey received 614 responses.

The survey was promoted through: Powys County Council and PSB partner social media accounts; the local press; direct emails to PSB Partners, their staff and stakeholders, the Powys People's Panel 1,000+ members, County Councillors, Town and Community Councils; internal communications to Council staff; and on bus stops throughout Powys.

As we move into the well-being plan, Welsh Government Covid-19 regulations allowing, it would be good to have face-to-face engagement with residents and local groups to gain more qualitative data and even case studies to include in the plan. Using more qualitative data will help highlight sentiment across the county and re-occurring themes and in which geographical areas they are most prevalent.

Stakeholders

We engaged with many groups. Please note this is not an exhaustive list:

- Partnership Engagement Forums
- Town and community councils
- The workforce
- Service user and carer groups
- Citizens panels
- Carers Fora
- PSB partners
- Disability / access groups
- Environmental groups
- Dementia action groups
- Tenant associations
- PCC housing tenants

- Other equality groups
- Youth groups
- Women's Institute
- 50+ groups
- Pensioner groups
- Eat Carrots Be Safe from Elephants
- Powys Youth Forum
- Corporate Parenting Group Members
- Schools
- Sports associations
- Governing bodies
- Voluntary groups and charities (via PAVO)
- Businesses

To ensure engagement activities were successful, we employed the following tactics:

- Be clear about what we are asking and why
- Focus on 'what matters' to people
- Make sure any events or engagement materials are meaningful, accessible, and easy to understand
- Use existing networks as much as possible to avoid duplication (piggybacking)
- Use a wide range of techniques and a multi-channel approach
- Ensure seamless communication between partners throughout

We used the following channels to ensure we captured people's views:

- Surveys
- Focus groups
- Press releases
- Social media
- Intranets
- Video
- Virtual forums
- 'Piggy-backing' events and meetings
- Email

Wherever possible, we have provided a locality level picture. As Powys is such a large county, with a landmass covering a quarter of Wales, the 13-locality approach helps understand differences across place.

Data Gaps

Well-being Theme	Local Well-being: Areas of focus	Data Gaps
Demographics		<ul style="list-style-type: none"> • <u>Ethnicity and Place of Birth</u> - The latest data available is from the census, 2011. This is now over 10 years old
Social	Homelife	<ul style="list-style-type: none"> • <u>Number of households</u> – The latest data available is from the census, 2011. This is now over 10 years old • <u>Loneliness and Isolation</u> – The latest data available is from the census, 2011. This is now over 10 years old • <u>Poverty</u> - The data made available to us is only down to Powys level.
	Living Independently	<ul style="list-style-type: none"> • <u>Carers</u> - The latest data available is from the census, 2011. This is now over 10 years old.
	Health and Lifestyle	<ul style="list-style-type: none"> • <u>Mental Health</u> – Data we had made available to us is at national level (Wales). • <u>Staying Healthy</u> – The data made available to us is only down to Powys level. • <u>Obesity</u> – The data made available to us is only to Powys level
	Educating our children	<ul style="list-style-type: none"> • <u>Educational attainment</u> – latest data is from 2018/19 as examinations were cancelled due to COVID-19 in 2020. • <u>Childcare sufficiency</u> – The data available is only to Powys level. • <u>Child Play sufficiency</u> - The data available is only to Powys level. • <u>Sufficiency of Nursery Education</u> - The data currently available is only to Powys level.
Economy	Jobs and wages	<ul style="list-style-type: none"> • <u>Annual Population Survey</u> - The data made available to us is only down to Powys level. • <u>Gross Value Added (GVA)</u> - The data made available to us is only down to Powys level. • <u>Annual Survey of Hours and Earnings (ASHE)</u> -- The data made available to us is only down to

Well-being Theme	Local Well-being: Areas of focus	Data Gaps
		Powys level. Only with age and gender, no other protected characteristics available
	Businesses	<ul style="list-style-type: none"> • <u>Business Register and Employment Survey BRES</u> - The data made available to us is only down to Powys level. • <u>UK Business Count</u> - The data made available to us is only down to Powys level.
	Tourism	<ul style="list-style-type: none"> • <u>STEAM model</u> - The data made available to us is mostly a Powys level (some Shire information available but not used). No data about protected characteristics of visitors.
	Staying connected	<ul style="list-style-type: none"> • <u>OFCOM</u> - The data made available to us is only down to Powys level.
	Poverty and deprivation	<ul style="list-style-type: none"> • <u>Annual Survey of Hours and Earnings (ASHE)</u> -- The data made available to us is only down to Powys level. Only with age and gender, no other protected characteristics available • <u>Welsh Index of Multiple Deprivation (WIMD)</u> - small area (LSOA data) available but only gives relative levels of deprivation, not actual numbers.
Culture and Community	Welsh Language	<ul style="list-style-type: none"> • <u>Welsh Language Skills</u> - The latest data available is from the census, 2011. This is now over 10 years old • <u>Projected Welsh Language Speakers</u> - We only data we had made available to us is at national level (Wales). • <u>Welsh Language</u> – Further explore the longer-term future of the Welsh language in Powys, in conjunction with national level predictions and relevance to your area.
	Communities coming together	<ul style="list-style-type: none"> • <u>People who volunteer (age 16+)</u> - Data we had made available to us is at national level (Wales). • <u>Foodbanks</u> - We only data we had made available to us is at national level (Wales). Levels of foodbanks within local communities unknown.

Well-being Theme	Local Well-being: Areas of focus	Data Gaps
	Participation in cultural life	<ul style="list-style-type: none"> • <u>Use of Libraries</u> – Data we had made available to us is at Powys level. • <u>Use of Leisure Centres</u> – No data available/provided • <u>Powys Cultural Assets and National Heritage</u> • <u>Town centres and local events</u> - Data we had made available to us is at national level (Wales).
	Anti-social	<ul style="list-style-type: none"> • <u>Fly tipping</u> - The data made available to us is only down to Powys level. No data about locality level fly tipping • <u>Road Traffic Collisions</u> - The data made available to us is only down to Powys level.
Environment	Improving Biodiversity	<ul style="list-style-type: none"> • <u>Protected Sites</u> – there is insufficient evidence to determine the condition of around half of the features on protected sites in Powys. • <u>INNS</u> - Information about actions to tackle INNS in Powys (size, effectiveness, drivers and cost of the actions).
	Sustainable Land, Water and Air	<ul style="list-style-type: none"> • <u>Land</u> - The state and trends of soils in Powys • Impact of <u>nutrient enrichment</u> due to diffuse pollution on ecosystems in Powys. • <u>Water quality</u> - Sources and impacts of water pollution on freshwater ecosystems in Powys • Interaction of chemical pollutants and their combined impact on ecology and human health alone and in combination with other pressures. • <u>Air quality</u> - Ammonia - more comprehensive field data is needed improve our understanding of the actual impacts and ensure our evidence-based decision making remains robust. • Impact of atmospheric pollution on broad ecosystem habitats in Powys • <u>Waste</u> - Current waste data sources are limited.
	Reconnecting People and places	<ul style="list-style-type: none"> • <u>Access & Recreation</u> – Lack of data about the quality of accessible green spaces to meet peoples' needs for health and well-being.

Well-being Theme	Local Well-being: Areas of focus	Data Gaps
		<ul style="list-style-type: none"> • Access to and onto water - The trends in numbers of people accessing freshwater ecosystems in Powys for outdoor recreation • Green/social prescribing – There’s a need to systematically capture data and information about green/social prescribing in Powys
	Forestry Resources	<ul style="list-style-type: none"> • The barriers in Powys preventing more woodland, particularly native woodland, being brought into planned management to improve resilience and the flow of ecosystem services, including well-being benefits, from them. • Understanding the interventions needed to increase the use of Welsh grown timber in construction in Powys, to support decarbonisation and a regenerative economy. • The Gross Value Added (GVA) contribution from the woodland sector that includes woodland-based recreation and other woodland-dependent businesses.
	Climate Change	<ul style="list-style-type: none"> • Climate change predictions indicate significant changes to water flows, levels and temperatures. However the magnitude of those changes, and the potential impacts and consequences on our ecosystems, natural resources and people’s well-being remains poorly understood. • Impact of emerging technologies for renewable energy on human well-being. • Likely impacts on human health of heatwaves in urban areas in Powys.
COVID-19 and BREXIT		<ul style="list-style-type: none"> •
Protected Characteristics		<ul style="list-style-type: none"> • While Powys is not very ethnically diverse, it would be worthwhile acknowledging how inequality affects people in Powys. For example, ethnicity and gender-based oppression can result in significant health inequalities. Some characteristics data not

Well-being Theme	Local Well-being: Areas of focus	Data Gaps
		<p>generally captured (unlike age and gender which is more common amongst datasets).</p> <ul style="list-style-type: none"> • <u>LGBT+ experiences</u> - Currently no reference within the assessment. Data generally not captured • <u>Disability</u> - Greater analysis (going beyond rates of disability) could be useful to understand levels of accessibility and experience accessing services in Powys. • <u>Awareness</u> - Welsh Government's Race Equality Action Plan, LGBTQ+ Action Plan, Disability Rights Taskforce and how these potentially affect Powys and organisations on the PSB.

Table of Figures

Figure 1 Icons for the five ways of working	10
Figure 2 Powys 13 Localities (PCC, 2022).....	13
Figure 3 Percentage breakdown of Mid-Year Estimates (ONS, 2020) by age bands.....	15
Figure 4 population trend over 20 years (ONS, Mid-Year Estimates 2020)	17
Figure 5 Population projections by year (Welsh Gov, 2018 based household projections for Wales)	18
Figure 6 Number of Households by locality (ONS, 2011)	22
Figure 7 People feeling lonely by Local Authority 2019-20 (Public Health Wales, 2021)	31
Figure 8 Life expectancy Male and Female 2017-2019 (ONS, 2017-19).....	45
Figure 9 Healthy life expectancy at birth, Male and Female (ONS, 2017-2019)	46
Figure 10 Gap in life expectancy at birth between the most and least deprived, Male and Female, (PHW 2015-17)	48
Figure 11 Number of suicides in Powys 2010-2020 (ONS 2021)	50
Figure 12 Number of people with Dementia in Wales (Alzheimer’s Research UK, 2021).....	51
Figure 13 Top 10 Global burden of disease identified risk factors for disability (PHW 2017)	55
Figure 14 Working age adults of a health weight (PHW 2017-20)	60
Figure 15 Children age 5 of healthy weight or underweight (PHW, 2017-18)	61
Figure 16 Key stage 4 Educational Attainment for level 1, level 2 and GCSE (Welsh Gov, 2018/19).....	67
Figure 17 Map showing % childcare places against 0-4 year olds population (Welsh Gov, 2021)	69
Figure 18 Average house prices in Wales and Powys over 3 years (Land Registry, 2021)	91
Figure 19 Percentage of volunteers by local authority over 2 years (Welsh Gov, 2020)	114
Figure 20 Fire incidents by month and year (MAWWFR, 2021)	130
Figure 21: The four aims and the linkages of sustainable management of natural resources (NRW, 2020).....	137
Figure 22: Ammonia concentrations in Wales (Source Rowe et al. 2020)	146
Figure 23 Map showing green infrastructure areas of at least 20ha in Powys	151
Figure 24 Map of Woodland cover in Powys	156
Figure 25: Different scenarios of projected annual emissions of CO ₂ , IPCC 2020.....	160
Figure 26 Map: Proportion of households in fuel poverty (10% definition), Wales (Welsh Gov, 2018).....	166

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