



Gwent Public Services Board

Executive summary (DRAFT)

Gwent Well-being Assessment

Document reference: G01



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1. Introduction

The draft Gwent well-being assessment tells us about all aspects of well-being across Gwent and looks at how it is most likely to develop in the future based on challenges such as social and economic differences, an ageing population, health inequality, educational attainment gaps, and climate change. How we collectively respond to these long-term challenges will impact on well-being both now and for future generations.

The assessment covers five very different local authority areas and includes rural countryside areas, urban centres, and valley communities. Each area has its own distinct strengths and challenges related to its social, economic, environmental and cultural experiences.

To help us understand and explain the differences in our communities, local assessments have also been produced telling us about factors influencing the well-being of the people that live and work there. This means that, as well as collaborating on issues that affect the whole region, we will need to think locally about how to provide bespoke solutions and interventions for some of our communities.

We put much effort in considering well-being in a joined-up way, have collaborated widely in producing this assessment, and have involved people that live and work in our communities.

There are parts of our communities where the data is telling us that well-being is good:



Gwent has a diverse economy that is well placed to contribute to the industries of the future, including contributing towards the transition to a zero carbon wales, providing decent jobs for future generations.



Gwent's rich culture and heritage plays an important role in supporting people's well-being, from bringing people together, helping to combat loneliness and providing opportunities to learn new skills, to supporting healthy lifestyles and enjoyment of the environment. Gwent is also well placed to contribute towards the creative economy sector and to contribute to the future prosperity of the region.



Our communities are strong with many people feeling connected to their neighbourhoods and proud of their surroundings. During Covid-19 lockdown we have seen our communities come together to support the most vulnerable their friends, family, neighbours.



Gwent's distinct and iconic natural environment is a significant resource providing a rich, biodiverse habitat for plants, mammals and invertebrates. It includes the Gwent Levels, the Wye Valley Area of Outstanding Natural Beauty and part of the Brecon Beacons National Park, all attracting many visitors to Gwent.

The well-being assessment also highlights the inequality that exists in our communities, that has the potential to impact on all aspects of well-being both at a personal and community level. There are also a range of challenges that could potentially widen these inequalities in the future and impact negatively on well-being.

People who live in more deprived communities have fewer years of life that are free from ill health and are more likely to have shorter lives. This is evidenced by the gap in healthy life expectancy across Gwent.

Additionally, children from deprived households achieve poorer school results; limiting their opportunities and increasing the risk that poverty will be passed from one generation to the next.

We also know that some people in our communities are experiencing in-work poverty, and that the amount of disposable income a household has will impact on their ability to afford food, transport, energy and to be digitally connected – especially as costs increase.

The assessment is telling us that house ownership is unaffordable for many low-income households, and house prices are rising, which is putting pressure on our social housing stock. Future Gwent will also need more housing stock that meets the needs of an aging population and changing family structures and is resilient to a changing climate.

Some of the data is also telling us that interventions are treating the symptoms rather than the cause, for example food banks and free school meals are indicators of the inequalities that exist in our communities. We want future generations to get decent work,

earning enough money to buy the things they need, to live in warm homes to make healthy life choices. We will all need to work together to prevent problems from occurring or worsening.

Gwent is abundant in natural resources, but not all our natural resources are in a good condition and we know that biodiversity is in decline. Improving the condition and resilience of our natural resources means that we will be better able to address challenges such as climate change, poverty and inequality, as well as contribute to the economy by providing jobs in the industries of the future such as renewables, energy efficiency and decarbonisation and supporting good health.

Many of the unsustainable approaches that are putting pressure on our natural resources are also causing the climate to change.

We need Gwent's natural resources to be resilient to the impacts of a changing climate including more extreme weather events.

There will also be challenges associated with transitioning to a low carbon future, and we will need to consider the whole energy system – heat, power and transport. Whilst projections of milder winters associated with a changing climate may help to reduce fuel poverty, we know that much of our housing stock has poor thermal efficiency and will be challenging to retrofit.

This assessment has been done during a time of global pandemic. Covid-19 has impacted on the economy and social interactions and has put our healthcare system under pressure. Lockdowns and furlough have led people to home school, stop using public transport, or even to lose their jobs. Businesses have been closed or




working at limited capacity while others were able to move online, many were not and so had to close.

Covid-19 has seen more services moving online, although this brings various benefits, we also understand that there is a risk of people being left behind by this shift, so we will be mindful of this when looking at future service delivery.

The long-term impacts of Covid-19 are not yet fully understood, and these along with challenges such as climate change, and leaving the European Union, have the potential to further widen inequalities and affect how well-being develops in the future.

For some of the challenges Gwent is facing, public services already have collective and individual programmes of work already in place. In the next phase of planning for well-being, we will need to determine if our approaches are still the right ones, if we need to be doing more of some things and less of others and how we can best work together. Covid-19 has already seen public bodies working at pace and across boundaries to tackle problems and the new Gwent Public Services Board will use these approaches, positively building on what has gone before to improve the long-term well-being of people living in Gwent.

2. About Gwent

Area 	The total area of Gwent is 158,500 hectares – approximately 7.6% of the total area of Wales.
Population 	The estimated population of Gwent is 594,164, approximately 19% of the total population for Wales ¹
Population density	The population density of Gwent is 3.75 persons per hectare. The population density is 1.52 people per hectare in Wales.
Dwellings 	The dwelling count in Gwent is 275,882 approximately 18.2% of the total number of dwellings in Wales ² .

General	For the purposes of assessing well-being, Gwent has been broken down into 22 local community areas.				
Blaenau-Gwent	Caerphilly	Monmouthshire	Newport	Torfaen	
Ebbw Fawr	Upper Rhymney	Usk & Raglan	City Centre	Cwmbran	
North Ebbw Fach	Valley	Monmouth	North West	Pontypool	
South Ebbw Fach	Mid Valleys West	Sevenside	South West	Blaenavon	
Sirhowy	Caerphilly Basin	Abergavenny	North East		
	Mid Valleys East	Chepstow & Lower Wye	East		
	Lower Islwyn				



Figure 1: Map showing the 5 Gwent local authorities.

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Overall population	The overall population in Gwent is projected to increase by 6.2 % between 2019 and 2043, roughly similar to the Welsh average (5.2%). For Gwent this would mean 36,987 extra people ³ .
Aged 16-64	The number of people aged 16-64 living in Gwent is projected to slightly rise by 0.7% by 2043, similar to the Welsh average (-0.5%). For Gwent this would mean 2,367 extra people in this age range ⁴ .
Aged 65 and over	The number of people aged 65 and over living in Gwent is projected to increase by 31.2% between 2019 and 2043, roughly similar to the Welsh average (29%). For Gwent this could mean an extra 37,263 people in this age range ⁵ .
Aged 85 and over	The number of people aged 85 and over living in Gwent is projected to increase by 74% between 2019 and 2043, slightly higher to the Welsh average (69.5%). For Gwent this could mean an extra 10,615 people in this age range ⁶ .

There are many benefits from people living longer including the positive contribution they can make to family and the wider community. We want our older people to be as healthy as possible for as long as possible.

An aging population could mean higher demand for social care and health services in the future. An aging population will require housing that meets their needs.

Understanding how the population might change in the future can help us think about key well-being challenges and opportunities such as an aging population.

The number of older people in Gwent is expected to rise in the next 20 years.

3. Social Well-being

The assessment highlights the inequalities that exist in our communities around health, housing and education and that these are often interconnected; housing quality can impact on health and poor health can impact on educational performance and people's ability to find or sustain employment.

Children and young people need to have the best start in life is clear and we know that much of the inequality and poor life circumstances experienced in our communities is preventable or its impact can be reduced.

We also know that the most disadvantaged in our communities are more likely to experience some of the negative impacts of a changing climate –whilst milder winters will help to reduce fuel poverty, we know that much of our housing stock is harder and more expensive to heat in cold weather or cool in hot weather.

Increased rainfall also increases the risk of flooding. People who are more disadvantaged are less likely to have insurance, making it harder for them to repair their homes.

3.1 Deprivation

WIMD identifies areas with the highest concentrations of several different types of deprivation. The index provides evidence about the most deprived areas of Wales and ranks all small areas in Wales from 1 (most deprived) to 1,909 (least deprived).

WIMD is currently made up of eight separate domains (or types) of deprivation. Each domain is compiled from a range of different indicators⁷. The domains included in WIMD 2019 are:

- Income
- Education
- Community Safety
- Employment
- Access to Services
- Physical Environment
- Health
- Housing

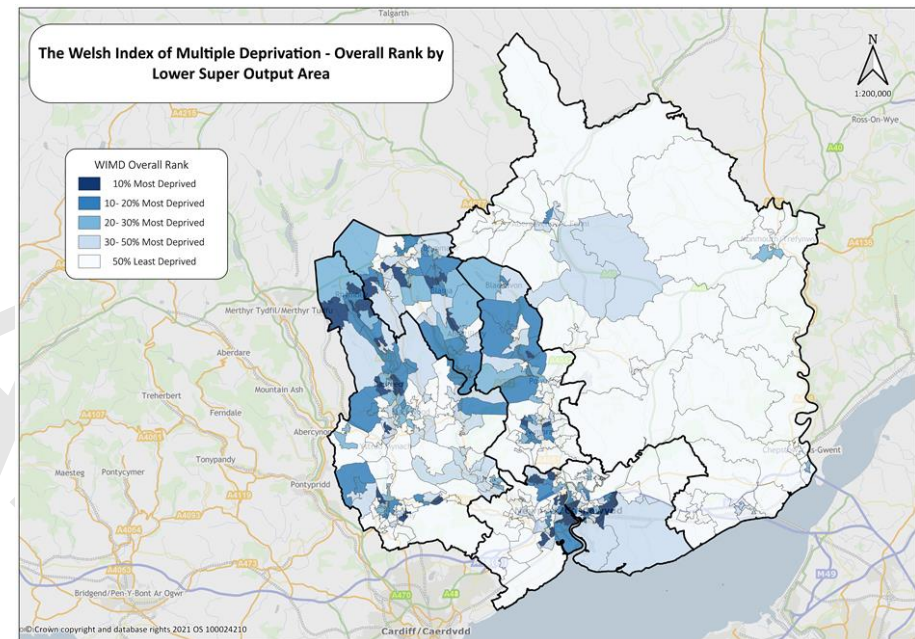


Figure 2: Gwent local authorities in highest overall WIMD deprivation ranking

The thematic map shows more overall deprivation in the valley communities as well as surrounding the town and city centres. Alongside these areas of deprivation are areas of significantly less deprivation, which make the differences starker.

Overall deprivation	The number of LSOAs in the top 20% most deprived overall in Wales per local authority ⁸ .		
	Area	Number	%
	Blaenau Gwent	21	45
	Caerphilly	26	24
	Monmouthshire	1	2
	Newport	33	35
	Torfaen	19	32

27% of the Lower Super Output Areas in Gwent are within the top 20% most overall deprived in Wales. Blaenau Gwent has the highest proportion in Gwent (45%) and Monmouthshire has the lowest (2%). St. James 3 in Caerphilly is the most deprived LSOA in Gwent and is ranked 3rd most deprived in Wales.

3.2 Housing

A home is a vital part of people's lives – it affects their health, their quality of life and the opportunities available to them. Decent homes are essential for well-being along with being able to afford to heat their homes, especially during the cold winter months.

Housing is also central to our communities and it drives the demand for local services, shops and facilities and can attract investment. Without a settled home people may have difficulties accessing employment, education, training and health services.

All development, including housing, has an impact on the environment and needs to progress in a way that is sensitive to local areas, limits energy consumption and embraces a sustainable approach to planning and design.

The WIMD housing domain is constructed of indicators which include people in over-crowded households, likelihood of poor-quality housing, likelihood of housing containing serious hazards and likelihood of housing being in disrepair⁹.

The thematic map shows the most housing deprivation is clustered around Newport city centre which has 12 LSOAs in the top 10% deprived in Wales, with the highest being Victoria 3 (10th most deprived in Wales). Elsewhere the pattern of housing deprivation across Gwent looks quite spread out, but noticeable in much of Monmouthshire where other categories of deprivation are generally low. This might be due to people being asset rich and income poor.

This may also be due to a lack of suitable housing to move or downsize to.

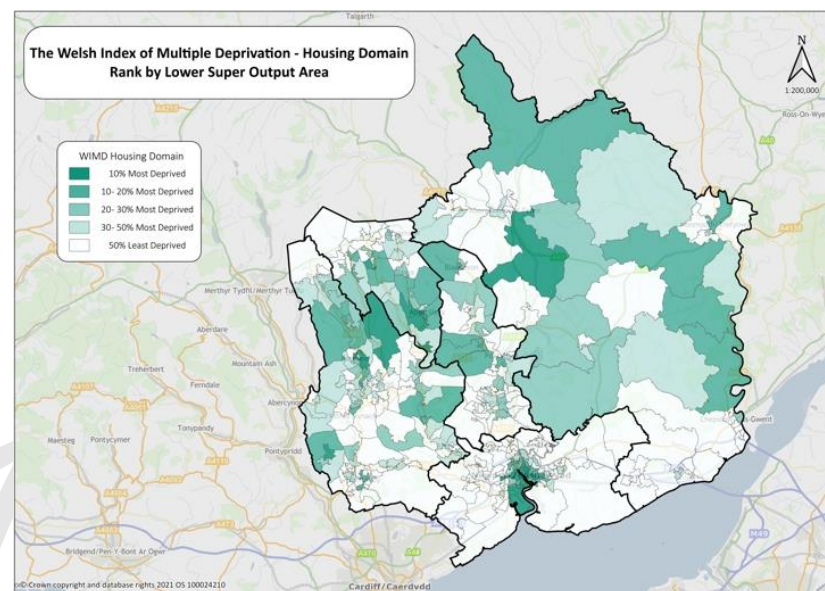


Figure 3: Gwent local authorities in highest housing WIMD deprivation ranking

Housing deprivation

Number of LSOAs in the top 20% most deprived for housing in Wales per local authority¹⁰.

Area	Number	%
Blaenau Gwent	13	28
Caerphilly	14	13
Monmouthshire	6	11
Newport	24	25
Torfaen	8	13

Blaenau Gwent has the highest proportion of most deprived (28%) in Gwent and Monmouthshire has the lowest (11%). Victoria 3 in Newport is the most deprived LSOA in Gwent and is ranked 10th most deprived in Wales.

For many low-income households, purchasing a house is unaffordable. Single applicants would have to spend 7.6 times their salary in Monmouthshire and 3.8 times in Blaenau Gwent.

Average cost of property



The average cost of a property across Gwent during 2020¹¹.

Area	Average sold price
Blaenau Gwent	£109,498
Caerphilly	£159,854
Monmouthshire	£312,219
Newport	£211,593
Torfaen	£180,052

Average annual gross pay



Average annual pay across Gwent during 2020¹².

Area	Average annual pay gross	House price to income ratio
Blaenau Gwent	£28,531	3.8
Caerphilly	£31,550	5.1
Monmouthshire	£41,285	7.6
Newport	£32,187	6.6
Torfaen	£33,405	5.4

Given house prices, having enough social housing is increasingly important, especially for low-income households.

The latest Wales Government data shows the following amounts of affordable housing that was constructed in 2019-20, and the numbers planned for 2020-21.¹³

Additional affordable housing	2019-20 Delivered	2020-21 Planned
Caerphilly	126	86
Blaenau Gwent	12	138
Torfaen	141	74
Monmouthshire	113	165
Newport	239	232

Figure 5: Table showing Additional affordable housing by area¹⁴

Low-income households can spend a disproportionate amount of their income on heating their homes. People living in poorly insulated and/or poorly heated homes may also have high energy costs. We know that there are high levels of fuel poverty in many areas across Gwent, something that is being exacerbated by rising energy costs, and in particular the large increases that have been seen in 2021.

	All Households	No. of Households in fuel poverty	% of households in fuel poverty
Caerphilly	77,000	7,000	9%
Blaenau Gwent	31,000	3,000	11%
Torfaen	40,000	3,000	8%
Monmouthshire	39,000	4,000	10%
Newport	63,000	6,000	9%

Figure 5: Households in Fuel Poverty by local authority, 2018¹⁵

The UK climate risk assessment identifies risks to health and well-being from high temperatures. It also highlights that the level of risk to current and future homes in Wales is unknown ¹⁶.

Climate change is also expected to increase the frequency, severity and extent of flooding¹⁷. Flooding events can significantly impact homes, businesses, key infrastructure and whole communities. **59%** of properties (home and businesses) in flood warning areas in Gwent are signed up to NRW's flood warning service¹⁸. This service provides warning messages by phone, email or text message to properties at risk of flooding.

The number of single person households is predicted to rise by over 30% in the next 20 years impacting on the need for housing. Despite this, there is likely to be less suitable land available for development as flood plains and other lower lying land becomes increasingly prone to flooding.¹⁹

Future Gwent needs housing that is resilient to a changing climate. We will also need more housing stock that is suitable for an aging population and changing household structures.

Although much of our housing stock has poor thermal efficiency and will be challenging to retrofit, there will also economic opportunities related to decarbonising the region's housing.

A recent study carried out for Gwent identified that wind has the potential to generate sufficient electricity to power over 300,000 homes and that ground mounted solar could potentially generate enough electricity to power the equivalent of over 4 million homes²⁰.

3.3 Health

Poor health can impact the people in our communities – their educational attainment, family life, and ability to access and sustain decent employment. We also know that housing, education, employment, income, community safety and environmental factors can all impact people’s mental and physical health.

The WIMD health domain is constructed from indicators which include GP-recorded chronic conditions, limiting long-term illness (LLTI), premature death, GP-recorded mental health, cancer incidence and low birthweight babies²¹.

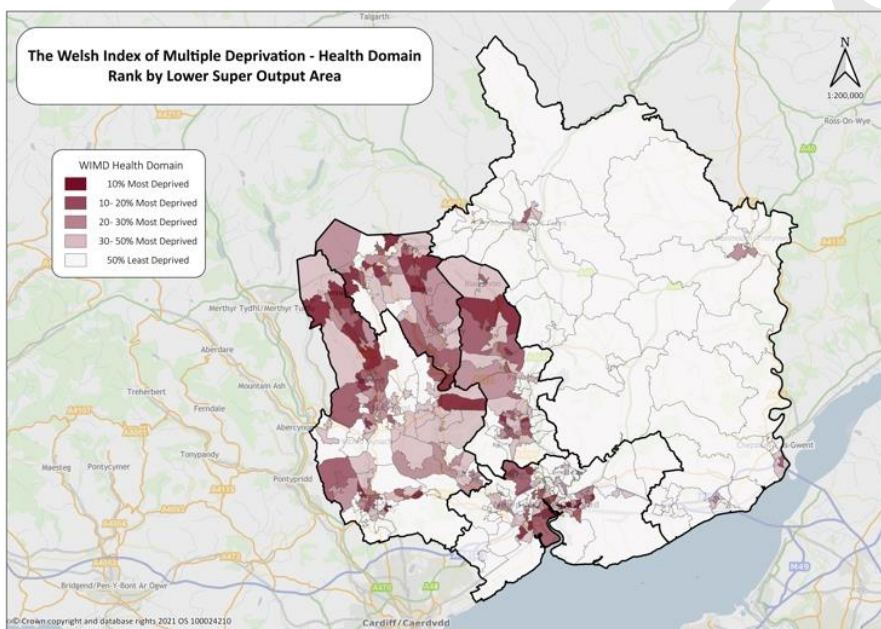


Figure 4: Gwent local authorities in highest health WIMD deprivation ranking

The thematic map shows that **significant health inequalities** exist in Gwent and there are pockets of communities across Gwent that health deprivation is in the top 10% most deprived. These are cluster mainly in Newport, Torfaen, Caerphilly and Blaenau Gwent.

Health deprivation

The number of LSOAs in the top 20% most deprived for health in Wales per local authority²².

Area	Number	%
Blaenau Gwent	17	36
Caerphilly	27	25
Monmouthshire	2	4
Newport	25	26
Torfaen	18	30

Blaenau Gwent has the highest proportion of LSOAs that are most deprived for health (36%) in Gwent and Monmouthshire has the lowest (4%). St. James 3 in Caerphilly is the most deprived LSOA in Gwent and is ranked 7th most deprived in Wales²³.

Blaenau Gwent has the highest proportion of residents with limiting long-term illness (27.7 per 100 population) compared to Wales (22.7). However, local authority level statistics can mask localised pockets of higher concern with the highest LSOA in Gwent being St. James 3 in Caerphilly with a rate of 40.7, nearly doubling the Wales rate.

Blaenau Gwent is also the local authority with the highest premature death rate (before age 75) across Gwent, being 467.1 per 100,000

population, compared to Wales (382.4). Again, when looking at smaller geographies, the highest LSOA is Pillgwenlly 4 in Newport with a rate of 1006.0, more than doubling the Wales rate.

Healthy life expectancy data shows a level of health inequality throughout our communities. On a Gwent wide basis, this ranges from the lowest in Blaenau Gwent, being 55.9 years for males and 57.0 years for females, to the highest in Monmouthshire, being 66.4 years for males and 66.1 years for females²⁴. This is a gap of 10.5 years for males and 9.1 years for females – again showing the inequality that exists across Gwent.

We don't yet know what the long-term impact of the pandemic will be on health. [Build Back Fairer: the COVID-19 Marmot Review](#) published in December 2020 looked at socio-economic and health inequalities in England and highlights that the inequalities that exist in communities contributed to the high and unequal death toll from COVID-19 in England. The report also identifies that some health inequalities have been exacerbated by the pandemic and that investment in public health will need to be increased to mitigate the impact of the pandemic on health and on health inequalities and their wider determinants. The report concludes that much that can be done to improve the quality of people's lives with the right long-term policies, that health inequalities can be reduced²⁵.

3.4 Community safety

Community safety, how much crime, disorder and anti-social behaviour affect us and our communities, is an important issue for us all. It's not just about solving crimes, but also about looking at what can be done to prevent these activities happening altogether.

The WIMD community safety domain is constructed from indicators which include criminal damage, violent crime, anti-social behaviour, burglary, theft and fire incidences²⁶.

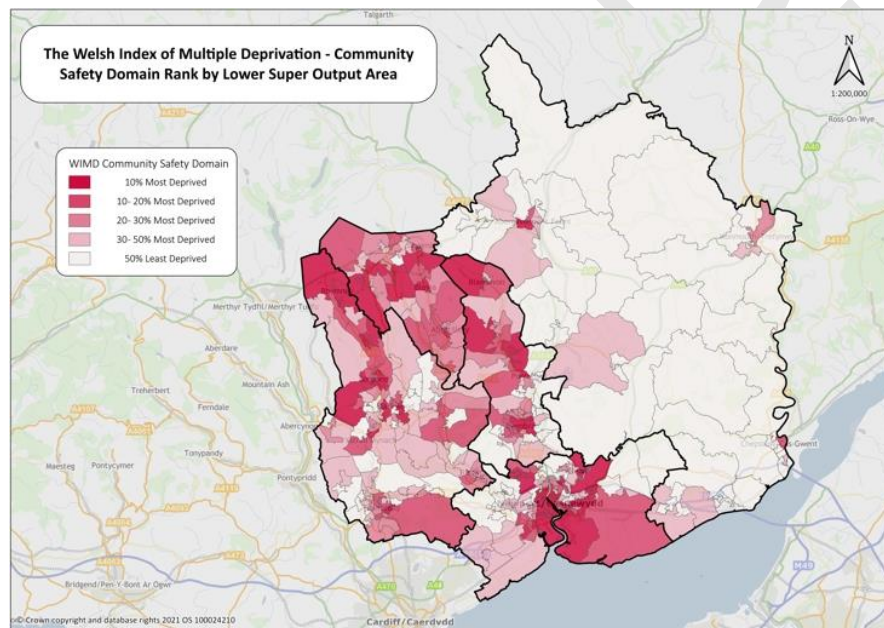


Figure 5: Gwent local authorities in highest community safety WIMD deprivation ranking

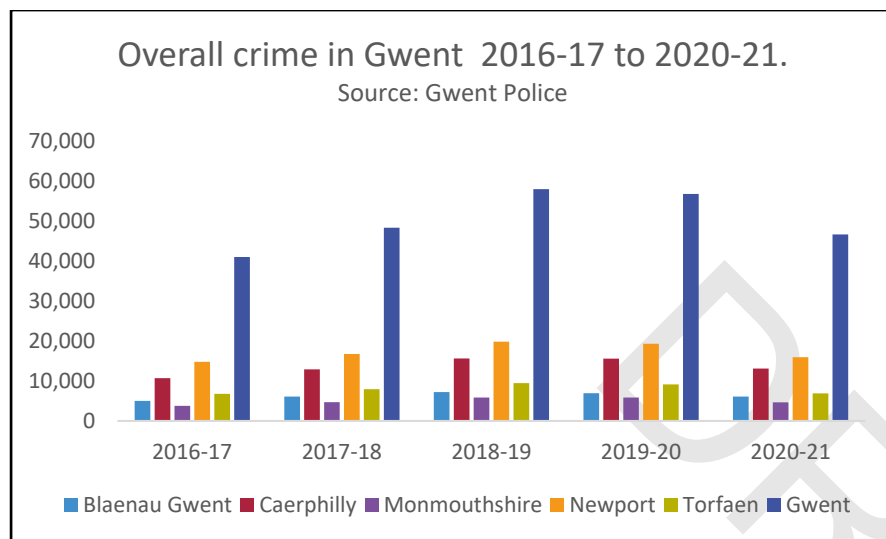
Community safety deprivation

The number of LSOAs in the top 20% most deprived for community safety in Wales per local authority²⁷.

Area	Number	%
Blaenau Gwent	25	53
Caerphilly	33	30
Monmouthshire	3	5
Newport	45	47
Torfaen	23	38

Blaenau Gwent has the highest proportion of LSOA in the top 20% most deprived for community safety (53%) and Monmouthshire has the lowest (5%). Stow Hill 3 LSOA in Newport is the 2nd most deprived in the whole of Wales in terms of community safety, with the highest factors being criminal damage (7.64 per 100 people), anti-social behaviour (16.68 per 100 people) and theft (3.7 per 100 people).

Overall crime levels in Gwent, and each of the constituent local authorities, increased between 2016 and 2019, before decreasing in the following two years (2019-20 and 2020-21)²⁸ which may in part be due to the restrictions in place as a result of the Coronavirus pandemic.



3.5 Education

A good education can play a key role in enabling young people to take full advantage of the opportunities available to them and to achieve their potential.

The WIMD education domain is constructed of indicators which include the average point score for foundation phase, key stage 2 and key stage 4, absenteeism, key stage 4 leavers entering higher education and adults aged 25-64 with no qualifications²⁹.

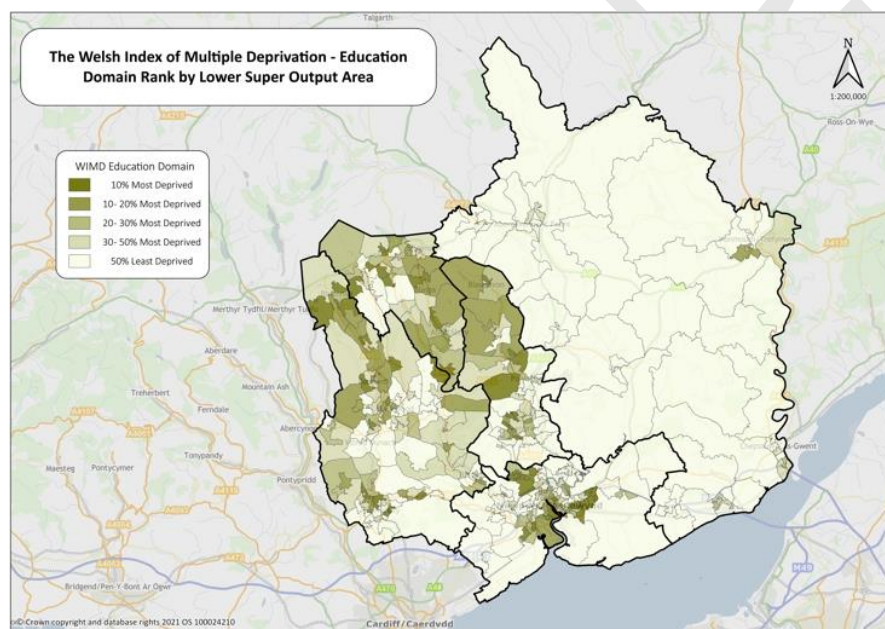


Figure 6: Gwent local authorities in highest education WIMD deprivation ranking

The thematic map shows that there are noticeable variations in attainment and qualification levels between areas in Gwent. Similarly, there are differences in attainment between less and more disadvantaged groups of children.

Education deprivation

The number of LSOAs in the top 20% most deprived for education in Wales per local authority³⁰.

Blaenau Gwent	18	38
Caerphilly	31	28
Monmouthshire	1	2
Newport	28	29
Torfaen	17	28

Blaenau Gwent has the highest proportion of LSOAs that are in the top 20% most deprived for education (38%) and Monmouthshire has the lowest (2%). Ringland 4 LSOA in Newport is the 6th most deprived in Wales with key stage 4 average point score of 80 for core subjects being the highest factor. Rogerstone 1 LSOA in Newport is the least deprived with a score of 145³¹.

There are families living in Gwent who are finding it hard to pay for the basics of life. Access to a good meal can improve health and support learning.

Free school meals

24.8% of pupils of compulsory school age in Gwent are eligible for free school meals³².

Free School Meal (FSM) data tells us that there are an increasing number of pupils eligible for FSM in all areas of Gwent.

School can be the first opportunity for young people to learn the skills to get on well with people from different backgrounds and to be active citizens.

Ethnicity	11.8% pupils aged 5 or over in Gwent are from an ethnic minority background ³³ .
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Coronavirus has had a disruptive effect on education. School attendance has been affected and led to periods of remote learning for pupils. We don't yet know what the long-term impact on learning will be.

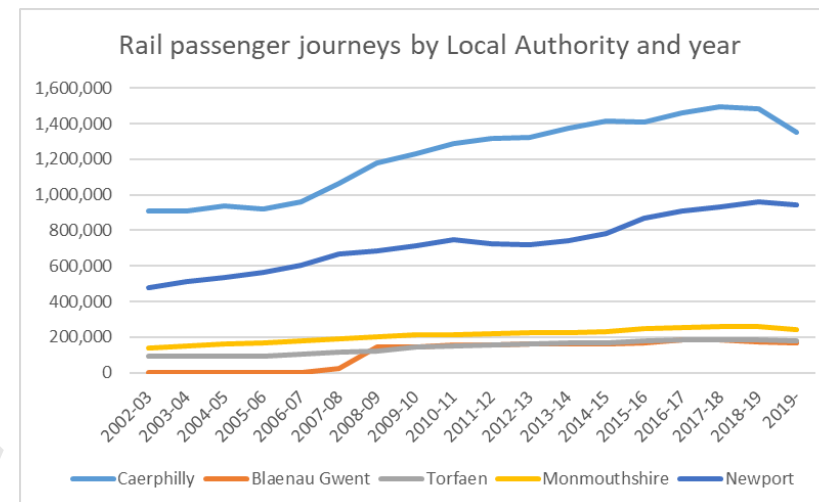
We need to make sure that young people are well prepared for the employment sectors of the future. There are also certain everyday things that will always be needed and so will need skilled people able to work in them.

3.6 Transport

Good transport links are critical to the local economy, enabling the goods, services, and raw materials that we all rely on to be available where and when we need them. Being able to move around easily plays an important role in people's everyday lives, getting children to school, people to work as well as connecting friends and family. It also enables people to access the countryside for recreation, to visit historic and cultural attractions, and to access sports and leisure facilities, helping people to stay healthy and active. This ability to travel is very important for reducing loneliness and isolation.

We know that active travel like walking, cycling and scooting can improve people's health and help an ageing population stay healthier for longer, as well as reducing pollution. However, the rural nature of parts of Gwent can make this difficult. New technology like electric bikes may make active travel viable to more people in the future.

Access to public transport varies greatly across Gwent. Caerphilly is well served with train stations into Cardiff and Newport has a main station, whereas there are fewer connections in Monmouthshire, Blaenau Gwent and Torfaen, which is reflected in the number of rail journeys taken³⁴. Public transport costs are also increasing more rapidly than inflation, meaning that it is becoming more expensive. However, the alternative of car ownership is not affordable for many people.



Good transport links are critical to the local economy, enabling the goods, services, and raw materials that we all rely on to be available where and when we need them. Being able to move around easily plays an important role in people's everyday lives, getting children to school, people to work as well as connecting friends and family. It also enables people to access the countryside for recreation, to visit historic and cultural attractions, and to access sports and leisure facilities, helping people to stay healthy and active.

We know that active travel can help support an aging population stay healthier for longer and that access to and affordability of transport is an issue for parts of our communities.

It is hoped that plans for the South Wales Metro and work being carried out by Cardiff Capital Region will make public transport faster, more frequent and joined up, and provide a better alternative to the car.

In most areas of Gwent, traffic levels have increased, especially in Monmouthshire and Newport, and this has an impact on air quality across Gwent, with several Air Quality Management Areas as a result of traffic pollution along busy roads and motorways. Many of our current transport modes are having a negative impact on our environment and people's health, changing our climate, increasing pollution and we will need to look at different ways of meeting our travel needs, such as active travel and electric and hydrogen vehicles.

When looking at how easy it is to travel to places, the WIMD data shows that 39% of Monmouthshire LSOAs are in the top 20% for access to services in Wales, compared with only 5% for Torfaen and Caerphilly. This means that it takes much longer for people living in rural areas in Monmouthshire to travel to services such as doctors, shops or leisure centres using public transport.

Because Gwent is close to urban centres such as Cardiff, Swansea and Bristol, as well as Hereford, Gloucester and the Midlands, there are large numbers of people who commute outside the county where they live. More people commute into Newport, whereas more people commute out of Blaenau Gwent, Caerphilly and Torfaen.

Access to services deprivation

The number of LSOAs in the top 20% most deprived for access to services in Wales per local authority³⁵.

Area	Number	%
Blaenau Gwent	8	17
Caerphilly	5	5
Monmouthshire	22	39
Newport	8	8
Torfaen	3	5

The Covid 19 lockdown meant that many people worked from home and commuting has reduced. This has had environmental benefits, so in future organisations may consider saving money on office space by allowing more home working. For this to be effective, it will be important for there to be adequate digital infrastructure across the region. It will also be important for local authorities to use the planning system to make sure that services and employment sites are based locally, to reduce the need for long journeys.

In addition, we have seen how extreme weather events have disrupted our transport systems and so future approaches will need to be resilient to a changing climate.

3 Economic well-being

Having decent, well paid and regular work gives people enough money to do the things they enjoy. However, many people are on low pay and don't always work enough hours to meet their basic needs, leading to in-work poverty.

Although overall rates of unemployment and workless households have reduced since 2011, there are still high levels of income and employment deprivation and this coupled with an increasing cost of living is impacting on the well-being of some people in our communities.

The WIMD income domain is constructed from people living in income deprivation.

Blaenau Gwent has the highest proportion of LSOAs that are in the top 20% for income deprivation (36%) and Monmouthshire has the lowest (4%). St. James 3 LSOA in Caerphilly is the 8th most deprived in Wales with 47% of people in receipt of income-related benefits and tax credits.

Income deprivation	The number of LSOAs in the top 20% most deprived for income in Wales per local authority ³⁶ .		
	Blaenau Gwent	17	36
	Caerphilly	27	25
	Monmouthshire	2	4
	Newport	31	33
	Torfaen	14	23

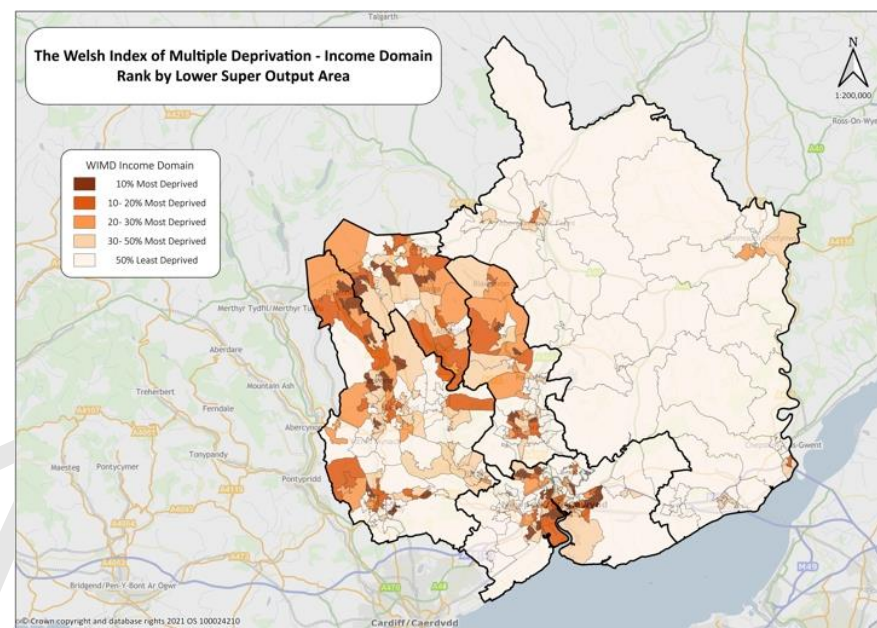


Figure 7: Gwent local authorities in highest income WIMD deprivation ranking

Blaenau Gwent has the highest proportion of LSOA that are in the top 20% for employment deprivation (49%) and Monmouthshire has the lowest (2%). St. James 3 LSOA in Caerphilly is the 4th most deprived in Wales with 34% of working-age people in receipt of employment-related benefits.

The number of LSOAs in the top 20% most deprived for employment in Wales per local authority³⁷.

Cost and availability of **childcare** can be a barrier to working parents being able to work.

- The **cost** of childcare is a **barrier** for many families across Gwent
- **More flexible** opening times/wrap-around childcare arrangements are needed to assist parents on irregular shift patterns.
- Both these factors are contributing to **increased** economic inactivity.

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We don't yet know the long-term impact of pandemic on the economy. We do know that Covid-19 resulted in many jobs being furloughed jobs and reduction in tourism and retail activity.

Industry of employment	The largest industries of employment in Gwent are manufacturing (15%), health (14.8%) and retail (10.1%), education (7.4%), accommodation and food services (7.2%), agriculture, forestry and fisheries (6.8%), and business administration and support services (6.6%) ³⁸ .
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The Cardiff City Region has identified priority sectors that will be important for the region's economy over the next 10-20 years, and these will be important to future Gwent's prosperity.

Gwent is in a good position to take advantage of the emerging sectors that will play an important part in future economic prosperity.

We need to make sure that people living in Gwent have the right skills to support the industries of the future.

Future Gwent will also need to be resilient to the changing climate including extreme weather events, and to shocks in global markets. Developing local supply chains and local energy production will help with this, and has the potential provide local, decent employment

including for those who may find it difficult to find suitable work currently.

The UK Climate Risk Assessment identifies risks to business sites from flooding and risks associated with the loss of coastal locations and infrastructure³⁹. Water scarcity, and reduced employee productivity due to high temperatures and infrastructure disruption have also been identified as risks⁴⁰. Water shortages could be problematic for those businesses that are reliant on this resource for production processes – such as the food sector.

More local energy generation and more efficient processes would give protection from rises to wholesale energy costs.

5. Environmental well-being

As well as several sites of national and international significance, Gwent is made up of a number of distinctive landscape areas, all of which contribute to the iconic natural environment.

Natural resources are our life-support systems, so it is vitally important that they are in good condition.

Alongside providing for our essential needs including food, clean water, fuel, aggregate and timber, there are less obvious ways natural resources contribute to well-being, including by helping to regulate carbon by locking it away, providing flood protection by managing water in the landscape and supporting our capacity to adapt to climate change

Covid-19 has also reminded many of us of the health benefits of having access to good quality and accessible greenspace close to home. Many jobs and training opportunities are also linked to the environment. 6.8% of Gwent's employment base is agriculture, forestry and fisheries.

The assessment tells us that the health of the natural world in Gwent is under threat. Stocks of natural resources are being used unsustainably and resilience is declining in line with global trends.

Biodiversity loss	An assessment in 2020, looking at the condition of species and habitat at key sites in Gwent found that for approximately 45% of the features on these sites (compared to a national figure of 49%), an estimated 29% are 'favourable' and around 71% 'unfavourable'. This information suggests that our habitats and species are under increasing pressure across the region ⁴¹ .
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The Assessment provides more in-depth analysis into the status of Gwent's broad habitats. Condition assessments show **native woodlands** in Gwent to be 'unfavourable', **Grassland** connectivity and condition to be poor and the condition of our **Mountain, Moor, and Heathland** to be less than favorable. The majority of our **rivers** are poor or moderate status and the health of our best rivers towards the East of the county are registering significant failure rates for phosphorus levels with Salmon stocks in decline. Similarly, the Severn **Estuaries** special status is also under threat with predicted extreme impacts of climate change likely for our coastal habitats.

Species loss	The recently published Gwent State of Nature Report (GSoN) has analysed up to 120,000 species records to provide more detailed information on the fate of our species in Gwent. The lowland and upland farmland bird indicators show declines of 45% and 30% respectively, largely in accordance with UK and Welsh patterns of decline.
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Competing demands on land are causing habitat loss and fragmentation. We are always going to need land for housing, and employment purposes, but we need to get better at making decisions which ensure that our future generations are both free from environmental risks and able to benefit from sustainably managed natural resources.

Climate change, lack of management, over-use, invasive species, pollution, landscape crime and antisocial behaviour are also threatening Gwent's natural resources.

Climate Change	The Intergovernmental Panel on Climate Change (IPCC) report (2018) indicates that global warming in excess of 1.5°C above pre-industrial levels will undermine life-support systems for humanity. It is predicted that if the world warms by 2°C, one in twenty of all species will be threatened with extinction
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Gwent, like many other places in Wales is likely to experience an increase in rainfall, river flow and intensity of extreme weather events. This is projected to lead to an increase in the likelihood of flooding of infrastructure, businesses, and homes. It will not be possible to prevent all flooding; there is therefore a need to use a range of approaches to not only reduce the risk where possible, but to adapt our communities and infrastructure to be prepared for severe weather events and rising sea levels.

Flood Risk	In Gwent, 14,014 residential properties are at risk of tidal flooding. 12,539 residential properties are at risk of fluvial (river) flooding. 22,382 residential properties are at risk of surface water flooding ⁴²
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Annual temperatures in Wales are expected to rise and more extreme heatwave events causing impacts on people's health and well-being are likely to become more prevalent as a result. Iconic landscapes and cultural heritage assets could also be more vulnerable to wildfire exposure in future.

There is a major challenge to reduce agriculture's negative impact on the environment while simultaneously maintaining food production for a growing population. Leaving the European Union could have a significant future impact on land management in Gwent and while trade deals and policy creation is being looked at nationally, more can be done to reduce the impact of future changes at the local level such as increasing local food supply chains and networks. Future climate projections indicate that drought risk will have a significant

impact on the quality of agricultural land and our ability to produce food in the future.

Food	Farmed land represents 65% of the area of Gwent ⁴³ . There were an estimated 2,084 active farms in 2018, covering 105,199ha ⁴⁴ , giving an average farm size of 50ha. Grassland accounts for 78% of this, and arable and horticulture is just 13%. There are also 6,654ha of woodland within farms
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Ecological footprint refers to the amount of productive land and sea that is required to support all the resources we use in our daily lives. If the rest of the world lived as we do in Wales then we would need 3.3 planets to support us all⁴⁵. The numbers are similar for Gwent.


Ecological footprint 	Ecological footprint per person (global hectares) by local authority ⁴⁶ .										
	<table border="1"> <tr> <td>Blaenau Gwent</td><td>3.1</td></tr> <tr> <td>Caerphilly</td><td>3.1</td></tr> <tr> <td>Monmouthshire</td><td>3.4</td></tr> <tr> <td>Newport</td><td>3.2</td></tr> <tr> <td>Torfaen</td><td>3.1</td></tr> </table>	Blaenau Gwent	3.1	Caerphilly	3.1	Monmouthshire	3.4	Newport	3.2	Torfaen	3.1
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We need to get to one planet living so that we don't use the resources that future generations will need to support themselves. To do this we will need to look at our food, energy and transport systems - many of our current approaches are also causing the climate to change.

Consumption patterns are also having a negative impact on the global environment and we need to use resources efficiently and proportionately. Reducing and reusing waste is one way to reduce our consumption of resources and provide positive benefits to people and nature.

Gwent recorded recycling rates at or above the Welsh average figure in 2019. However, we will need to move to a circular economy model, where waste is prevented from being generated in the first place and things are used for as long as possible, if we are to achieve zero waste and one planet living.

How we travel is having a negative impact on our environment and people's health, changing our climate, increasing pollution and we will need to look at different ways of meeting our travel needs.

Air quality 	In Gwent there are 2 Air Quality Management Areas in Caerphilly, 2 in Monmouthshire and 11 in Newport, all declared because of nitrogen dioxide levels as a result of traffic pollution along busy roads and motorways ⁴⁷ .
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Housing makes a significant contribution to emissions, specifically in relation to the requirement to heat space and water using fossil fuels

Achieving the energy system transformation alone would create new jobs and livelihoods for the people of Gwent. Meeting decarbonisation targets can also lead to improvements in the quality of life for communities which suffer from the adverse impacts of poor air quality.

We need to get to one planet living so that we don't use the resources that future generations will need to support themselves. To do this we will need to look at our **food, energy** and **transport** systems – many of our current approaches are also causing the climate to change. We need to explore new approaches which promote the health and prosperity of nature rather than putting pressure on our natural world. By protecting and enhancing Gwent's natural resources in this way we will leave a positive legacy for future generations.

6 Cultural Well-being

Gwent has a rich and diverse cultural heritage incorporating highlights such as the Blaenavon World Heritage Site, Abergavenny Food Festival and a section of Wales' famous coastal path. It is home to Roman forts, castles and stately homes and a Ryder Cup golf course.

Cultural interests can bring people of different ages together. We know that the inequalities that exist in some of our communities can make it hard for people to get involved in cultural activities with affordability and access particular problems.

Apart from Newport, which is the most multi-cultural of the local authority areas, the region has little ethnic diversity. This lack of ethnic diversity could make it more difficult for people to understand each other's cultures and beliefs, as there are far fewer opportunities to interact with people from diverse backgrounds.

Welsh Speakers	The percentage of people aged 3+ across Gwent that can speak Welsh continues to be below the Welsh average in all five local authorities ⁴⁸ .
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Increasing the number of Welsh speakers across the region will also positively contribute to people's sense of place and well-being.

Covid-19 restrictions have had a significant impact on the sports, cultural and tourist sectors and the people who work in them.

The economic contribution of tourism in Gwent reduced considerably during 2020 to £297m (70% decrease on 2019), whilst the total number of FTE jobs supported by direct tourism spend reduced by 52% on 2019⁴⁹.

The creative economy, has been identified by Cardiff Capital Region, as having an role to play in the prosperity of the regional economy going forward ⁵⁰ and has the potential to increase the economic contribution provided by the cultural sector, however, this is likely to take several years.

Gwent needs to make sure that it has the right skills and employment base to benefit from potential opportunities related to the creative economy sector, there may also be opportunities for business diversification or new start-ups.

Volunteering can be an opportunity to meet new people and an opportunity to learn new skills.

An aging population in Gwent may mean that there are more people able to support their communities through volunteering.

The highest levels of volunteering in Gwent are in Monmouthshire and the lowest in Bleanau-Gwent. Volunteering rates may be linked to available time and financial freedom to volunteer.

Gwent's iconic natural environment is an important part of the cultural and tourism offer. The UK Climate Risk assessment identifies risks to the natural environment and heritage from extreme weather and wildfire events⁵². This could impact on the distinct local landscape and heritage assets and their ability to contribute to our shared cultural history and to the cultural economy.

There may also be future economic opportunities related to tourism and outdoor sports and leisure activity due to warmer temperatures associated with a changing climate.

Volunteering

% of people who volunteer by local authority⁵¹.

	2016	2019
Blaenau Gwent	23.17	18.68
Caerphilly	23.19	23.65
Monmouthshire	36.10	32.34
Newport	26.52	24.40
Torfaen	28.86	23.16

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- ¹ ONS mid-2019 population estimates
- ² Gwent Authorities dwelling data. GeoPlace 2021
- ³ Local authority 2018-based population projections, Welsh Government
- ⁴ Local authority 2018-based population projections, Welsh Government
- ⁵ Local authority 2018-based population projections, Welsh Government
- ⁶ Local authority 2018-based population projections, Welsh Government
- ⁷ Welsh Index of Multiple Deprivation (WIMD) 2019. Results report. Welsh Government.
- ⁸ WIMD 2019, Welsh Government
- ⁹ Welsh Index of Multiple Deprivation (WIMD) 2019. Results report. Welsh Government.
- ¹⁰ WIMD 2019, Welsh Government
- ¹¹ Land Registry. 2020.
- ¹² Average survey of hours and earnings (ASHE), ONS, 2020
- ¹³ <https://statswales.gov.wales/Catalogue/Housing/Affordable-Housing/Provision/additionalaffordablehousingprovision-by-location-year>
- ¹⁴ <https://statswales.gov.wales/Catalogue/Housing/Affordable-Housing/Provision/additionalaffordablehousingprovision-by-location-year>
- ¹⁵ Welsh Housing Conditions Survey (WHCS) 2017-18: Local area Fuel Poverty estimates modelling and results summary <https://gov.wales/local-area-fuel-poverty-estimates-april-2017-march-2018>
- ¹⁶ UK Climate Change Risk Assessment 2017: Evidence Report. Summary for Wales.
- ¹⁷ UK Climate Change Risk Assessment 2017, Synthesis report: priorities for the next five years. Committee on Climate Change.
- ¹⁸ NRW 2021.
- ¹⁹ Welsh Government Future Trends Report 2017
- ²⁰ Renewable and Low Carbon Energy Assessment Regional Summary. Carbon Trust, December 2020
- ²¹ Welsh Index of Multiple Deprivation (WIMD) 2019. Results report. Welsh Government.
- ²² WIMD 2019, Welsh Government.
- ²³ WIMD 2019, Welsh Government.
- ²⁴ Public Health Wales Observatory, 2021
- ²⁵ Michael Marmot, Jessica Allen, Peter Goldblatt, Eleanor Herd, Joana Morrison (2020). Build Back Fairer: The COVID-19 Marmot Review. The Pandemic, Socioeconomic and Health Inequalities in England. London: Institute of Health Equity
- ²⁶ Welsh Index of Multiple Deprivation (WIMD) 2019. Results report. Welsh Government.
- ²⁷ WIMD 2019, Welsh Government
- ²⁸ Safer Gwent Strategic Assessment. Gwent Police.
- ²⁹ Welsh Index of Multiple Deprivation (WIMD) 2019. Results report. Welsh Government.
- ³⁰ WIMD 2019, Welsh Government
- ³¹ WIMD 2019, Welsh Government
- ³² PLASC 2020/21, <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Provision-of-Meals-and-Milk/pupilsaged5to15eligibleforfreeschoolmeals-by-localauthorityregion-year>
- ³³ PLASC 2020/21, <https://statswales.gov.wales/Catalogue/Education-and-Skills/Schools-and-Teachers/Schools-Census/Pupil-Level-Annual-School-Census/Ethnicity-National-Identity-and-Language/pupilsaged5andover-by-localauthorityregion-ethnicity>
- ³⁴ <https://statswales.gov.wales/Catalogue/Transport/rail/rail-transport/railpassengerjourneys-by-localauthority-year>
- ³⁵ WIMD 2019, Welsh Government.
- ³⁶ WIMD 2019, Welsh Government.
- ³⁷ WIMD 2019, Welsh Government.

³⁸ Employment by industry type, aged 16-64, 2019. Nomis Business Register & Employment Survey.

³⁹ UK Climate Change Risk Assessment 2017: Evidence Report. Summary for Wales.

⁴⁰ UK Climate Change Risk Assessment 2017: Evidence Report. Summary for Wales.

⁴¹ Protected Sites Baseline Assessment in 2020, NRW

⁴² Note: These values should not be combined to give a total as some properties will be at risk from more than 1 flood source

⁴³ Statistics for Wales & Welsh Government (2019), Agricultural Small Area Statistics (2002-2018), Welsh Government Accessed here:
<https://gov.wales/agricultural-small-area-statistics-2002-2018>

⁴⁴ Statistics for Wales & Welsh Government (2019), Agricultural Small Area Statistics (2002-2018), Welsh Government Accessed here:
<https://gov.wales/agricultural-small-area-statistics-2002-2018>

⁴⁵ Ecological and Carbon Footprints of Wales - Update to 2011, Stockholm Environment Institute and GHD, July 2015

⁴⁶ Ecological and Carbon Footprints of Wales - Update to 2011, Stockholm Environment Institute and GHD, July 2015

⁴⁷ <https://airquality.gov.wales/laqm/air-quality-management-areas>

⁴⁸ Census 2011

⁴⁹ GTS (UK) Ltd STEAM data, November 2021

⁵⁰ [Cardiff Capital Region Industrial and Economic Plan](#)

⁵¹ National Survey for Wales

⁵² UK Climate Change Risk Assessment 2017: Evidence Report. Summary for Wales.