Pembrokeshire Public Services Board

Bwrdd Gwasanaethau Cyhoeddus Sir Benfro

DRAFT WELL-BEING ASSESSMENT 2027 - 2032

This item is also available in Welsh / Mae'r eitem hon ar gael yn Gymraeg hefyd

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INTRODUCTION

What is a Well-being Assessment?

Pembrokeshire's Public Services Board (PSB) is a statutory strategic partnership established under the Well-being of Future Generations (Wales) Act 2015. The purpose of the Act is to improve the social, economic, environmental and cultural well-being of Wales and it establishes seven national Well-being Goals which set out the vision for what Wales should look like now and in the future. While the focus of Pembrokeshire PSB's work is local, the national Well-being Goals provide the overarching framework for its work. By aligning local activity with these Goals, the PSB can make a contribution to improving the well-being of Wales as a whole.

Pembrokeshire Public Services Board is made up of representatives from a wide range of organisations which deliver public services across the County. The Act requires that members of the PSB work together to improve well-being in Pembrokeshire by thinking more about the longer-term; working better with people, communities and each other; and looking to prevent problems before they happen.

The Act also requires PSBs to demonstrate a commitment to what is known as 'the 5 ways of working' - or the 'Sustainable Development principle' - in all of their work. The Sustainable development is the underlying key principle of the Well-being of Future Generations Act. One of the simplest ways of thinking about what this means in practice is that we should always look to work in ways which ensure that the needs of present generations are met without compromising the ability of future generations to meet their future needs. The table below provides examples of how and where we have adhered to the five ways of working throughout the delivery of this assessment, and how we will continue to do so.



Long term

- Consideration of Future Trends
- Highlighting where we might need to do further research within the issues/concerns identified for each chapter in the Assessment, to support our understanding of gaps in our knowledge and data over the longer term
- Well-being Survey – included a question asking what would improve people's future well-being

Integration	• Structure of the assessment supports an integrated understanding of how different issues affect people at a population, community and individual level • Objectives for public bodies considered holistically and looks at how each partner can contribute to collective goals
Involvement	• Opportunities for the involvement of citizens and stakeholders in the development of the Assessment • Pembrokeshire PSB Engagement Group involved in co-ordinating in-person engagement • Identifying additional opportunities to engage with young people outside of the planned engagement period
Collaboration	• Assessment process delivered through a collaborative approach involving key partners and stakeholders • Development of regional well-being survey across PSB partners • Regional Well-being Co-ordinator in post to work across the three PSB areas supporting work to produce the assessment, utilising Welsh Government PSB funding
Prevention	• Outcomes from assessment point to number of potential areas where preventative work can be undertaken, to be taken forward at either a local or regional level e.g. climate change, poverty

The PSB must prepare and publish a Well-being Assessment every five years. Its purpose is to set out what is important to people and communities in Pembrokeshire in terms of well-being. The findings from the Well-being Assessment will be used by the PSB to identify and prioritise actions for the next five years to improve well-being in Pembrokeshire now and in the future.

This is the third Well-being Assessment produced by the PSB since the introduction of the Act. The aim of the Assessment is to provide a snapshot of current data and a clear picture of what matters to people in terms of individual and community well-being, by looking at a range of social, environmental, economic and cultural factors. It is informed by data, research and evidence gathering, from listening to people and stakeholders, and through

consideration of future trends - things which we can reasonably project might happen in the near future, which we need to start planning for today.

How is the Assessment structured?

The Assessment begins with a broad overview of Pembrokeshire as a county, in terms of its people, geography and communities, in Pembrokeshire in Context. The Act also requires the PSB to define specific community areas in Pembrokeshire as it is important we try to understand not only what well-being means to Pembrokeshire people as a whole but also to particular communities in Pembrokeshire.

For the last Assessment, the PSB agreed that the most useful community geography to use was that of Mid Layer Super Output Areas (MSOAs). An MSOA is a geographic hierarchy used by the Office for National Statistics (ONS) in England and Wales to improve the reporting of small area statistics, which generally contain 5,000–15,000 residents or 2,000–6,000 households. What this means for Pembrokeshire is explored further in the Pembrokeshire in Context section.

The remainder of the Assessment is then structured by theme, where a range of data and research is explored to identify trends, performance and the most important issues affecting Pembrokeshire. The themes are;

- Culture, Language and Leisure
- Economy
- Education and Learning
- Environment and Climate Change
- Health, Care and Support
- Poverty
- Safe, Resourceful and Cohesive Communities

Additional information

Annex 1 to this report contains Community Area profiles.

Annex 2 is the Engagement Report which outlines the engagement that has been undertaken with people and groups in Pembrokeshire.

Annex 3 outlines the data sources and evidence base used in development of the Assessment, including the statutory reviews and assessments which have been considered and a review of the National Indicators.

Executive Summary

The purpose of this section is to summarise the issues and areas of concern that have been identified through the Well-being Assessment process from data, future trends and engagement. The themes that have been identified will allow us to target areas of need when we move from the Assessment to development of the next Well-being Plan over the course of the next year.

When considering if, or how, to respond to the issues and concerns outlined below, we have considered whether this is something that the *collective action of the PSB can influence*, or whether this is an issue for one or two PSB partner organisations or statutory partnerships. The symbols in the tables below equate to;

✓	This is an important issue and should be prioritised as the PSB can collectively influence
?	Further discussion by PSB required
X	Take no action – this is more an issue for individual organisations or other statutory partnerships rather than the PSB collectively

Data and/or Engagement and/or Future Trend	**Issue / concern**	**Response / Rating**		
		No action – outside PSB ability to influence	**Further discussion by PSB required**	**Prioritise – PSB can influence**
Culture, Language and Leisure				
Data / Engagement	Census data showed that Welsh speakers fell from 19.2% in 2011 to 17.2% in 2021. Concern that Welsh language will die out – desire to protect heritage and cultural identity		**?**	
Data / Engagement	Barriers to accessing cultural and leisure opportunities include: o Limited public transport/rural isolation.			✓

Data and/or Engagement and/or Future Trend	Issue / concern	Response / Rating		
		No action – outside PSB ability to influence	**Further discussion by PSB required**	**Prioritise – PSB can influence**
	o Cost of attending events/affordability. o Digital exclusion and lack of awareness of opportunities/events			
Engagement	Limited creative opportunities or opportunities to participate in a wider range of leisure activities		**?**	
Economy				
Future Trend	Pembrokeshire's ageing population, technological change and evolving patterns of employment are likely to increase demand for lifelong learning and workforce reskilling			✓
Engagement	Not enough placement or apprenticeship opportunities for young people or opportunities for young people to remain in the County to work			✓
Engagement	Need for better transport links to access employment			✓
Engagement	Pressure on infrastructure from tourism (water, sewage and utility infrastructure)	**X**		
Education and Learning				
Data	There is significant surplus school capacity across the county due to demographic change and outward migration of young people	**X**		
Future Trend	Demand for mental health support continues to grow; the issue is expected to have an increasing influence on educational attainment, behaviour, attendance, inclusion, and progression into post-16 education, training and employment		**?**	
Future Trend	Recruiting Welsh-speaking teachers, childcare practitioners and support staff is likely to become increasingly important to meet demand for Welsh-medium education	**X**		

Data and/or Engagement and/or Future Trend	Issue / concern	Response / Rating		
		No action – outside PSB ability to influence	Further discussion by PSB required	Prioritise – PSB can influence
Future Trend	Pembrokeshire's rural geography means that transport, connectivity and access to services are likely to remain barriers for some learners and families.			✓
Engagement	Concern about the loss of young people from Pembrokeshire who leave for higher education or in search of skilled employment and do not return due to limited local career prospects	**X**		
Engagement	There is a need for accessible local training and further education and reducing the need to travel long distances to study alongside costs associated with study, which are seen as barriers to access.	**X**		
Engagement	Need for stronger links between education and employment - concerns about limited local career options and employment pathways		**?**	
Environment and Climate Change				
Data / Future Trend	Pembrokeshire faces risks from rising sea levels, stronger storms, coastal erosion and flooding - coastal squeeze is causing loss of important habitats and flooding incidents are becoming more intense, reflecting the increasing volatility of weather patterns linked to climate change			✓
Data	Climate change is affecting the amount and severity of wildfires, with an increase in fires during summer months caused by heatwaves			✓
Data	Water quality in the Cleddau rivers and Milford Haven Waterway is a significant concern, with high levels of nitrogen and phosphorus which is damaging biodiversity and habitats	**X**		

Data and/or Engagement and/or Future Trend	Issue / concern	Response / Rating		
		No action – outside PSB ability to influence	**Further discussion by PSB required**	**Prioritise – PSB can influence**
Engagement	Water quality – concerns raised about pollution and sewage discharges into rivers and the sea and comments specifically referencing water company pollution and poor water quality	**X**		
Engagement	Biodiversity and nature loss was a recurring concern throughout the comments received, including; • Decline in wildlife and habitats. • Protection of species and ecosystems. • Sustainable land management and soil health. • Concerns that some developments may negatively affect biodiversity			✓
Engagement	Specific concerns raised around the marine and coastal environment, including coastal pollution and damage to beaches and marine habitats and litter and waste generated by tourism.			✓
Engagement	Young people raised concerns about air pollution, carbon emissions and deforestation and its impact on air quality		**?**	
Health, Care and Support				
Data / Future Trend	Pembrokeshire has an ageing population which is increasing pressure on health and care services.			✓
Data	Health inequalities remain a significant challenge and are linked to social, economic and environmental factors. They remain a major challenge, particularly in more deprived communities.		**?**	
Data / Future Trend	Mental health, increases in chronic disease due to an ageing population, obesity, alcohol misuse and social isolation are growing concerns.		**?**	

Data and/or Engagement and/or Future Trend	Issue / concern	Response / Rating		
		No action – outside PSB ability to influence	Further discussion by PSB required	Prioritise – PSB can influence
Data / Future Trend	Demand for health, social care and carer support services is increasing, highlighting the need for continued investment in prevention, community support and early intervention.			✓
Data / Future Trend	Referrals to substance misuse services continue to rise, and emerging concerns include prescription medication misuse, non-fatal overdoses, and increasing risks among older women.	**X**		
Future Trend	With increasing care needs and an ageing population, reliance on unpaid carers is likely to grow.	**X**		
Engagement	Residents were concerned about social isolation.		**?**	
Engagement	There were strong concerns raised about access to healthcare services, including GPs, dentists, hospitals and mental health support.	**X**		
Engagement	Accessibility was a major concern, both in terms of specific services to support groups such as older people or those with disabilities and long term health conditions, but also linked to poor public transport and bus services leading to difficulties accessing healthcare, social activities and services.			✓
Poverty and Inequalities				
Data	Child poverty remains a significant concern; in Pembrokeshire, 27.7% of children under 16 live in relative low-income families			✓
Data	Children experiencing poverty often face barriers including limited digital access, lack of study space and transport difficulties.			✓

Data and/or Engagement and/or Future Trend	Issue / concern	Response / Rating		
		No action – outside PSB ability to influence	Further discussion by PSB required	Prioritise – PSB can influence
Data / Future Trend / Engagement	Many working households are struggling to meet housing, energy and everyday living costs.			✓
Data / Future Trend / Engagement	Fuel poverty is a major issue, particularly in older, less energy-efficient homes common in Pembrokeshire and disproportionately affects lower-income households, pensioners, renters and those on benefits.			✓
Data	Insufficient heating and poor insulation contribute to physical health problems, particularly respiratory conditions, as well as mental health impacts.	**X**		
Data	Affordable housing shortages are one of Pembrokeshire's most significant challenges. High property prices, second homes, holiday lets and inward migration have reduced housing affordability for local residents.	**X**		
Safe, Resourceful and Cohesive Communities				
Data	There are growing concerns around online threats and harms, particularly affecting children and young people.		**?**	
Data	Drug and alcohol misuse continue to drive crime, violence, exploitation and poor health outcomes.		**?**	
Data	Violence Against Women, Domestic Abuse and Sexual Violence (VAWDASV) remains a major concern, with domestic abuse-related crimes increasing since 2021.		**?**	
Data	There are ongoing concerns about misinformation and online narratives, particularly around migration, identity and international events, affecting local community relations.		**?**	

Data and/or Engagement and/or Future Trend	Issue / concern	Response / Rating		
		No action – outside PSB ability to influence	Further discussion by PSB required	Prioritise – PSB can influence
Data	Road safety is one of the most significant concerns for residents and partner organisations. Rural roads, high speeds, seasonal traffic and limited transport alternatives increase risk in Pembrokeshire.		?	
Data / Future Trend	Being older, having mental health issues, social isolation and increasing deprivation are identified as factors increasing vulnerability to dwelling fires.		?	
Data / Future Trend	The growing use of lithium batteries in e-bikes, e-scooters and vapes is highlighted as an emerging fire risk.		?	
Data / Engagement	Loneliness and social isolation are recurring concerns, particularly among older residents and people living alone. Rural isolation can limit access to support, services and social opportunities.		?	
Data / Future Trend	An ageing population is increasing demand for transport, housing adaptations, health support and social connection.		?	
Data / Engagement	Affordability, lack of digital skills, confidence and accessibility concerns are preventing some residents from accessing increasingly digital public services. Older people, those with long-term illnesses, social housing tenants and people in rural areas face the greatest barriers.	X		
Data / Engagement	Information gathered through engagement with communities has shown that the biggest concerns are around road safety, drugs and anti-social behaviour.		?	
Data / Future Trend	The growing demand for support from the Pembrokeshire Community Hub and Community Connectors, alongside an increase in the complexity			✓

Data and/or Engagement and/or Future Trend	Issue / concern	Response / Rating		
		No action – outside PSB ability to influence	Further discussion by PSB required	Prioritise – PSB can influence
	of people's needs suggests continued pressure on community support, advice, and social care services in future years.			
Engagement	Promoting flexible volunteering opportunities, increasing support for volunteers and engaging a more diverse group of individuals in community activities was seen as important.			✓
Engagement	Young people were particularly concerned about feeling unsafe in their communities. They raised concerns about antisocial behaviour, bullying, harassment, fighting, drugs and alcohol, intimidating behaviour and some public spaces feeling unsafe.		**?**	

PEMBROKESHIRE IN CONTEXT

Overview

Pembrokeshire is situated at the south-west tip of Wales and covers an area of approximately 1600 sq km, of which roughly 615 sq km has National Park status. The county is renowned for its outstanding natural beauty, its coastline, wildlife and rich habitats. The coastal path is walkable from one end of the county to the other and is 186 miles long. Pembrokeshire's cultural heritage can be seen in both its landscape and many historic buildings

Around half of the population live in or around the main towns of Haverfordwest, Milford Haven, Pembroke and Pembroke Dock. Outside of the main towns, the county is comprised of many villages and hamlets and agriculture dominates the landscape. Figures from the 2021 census show that a relatively high number of people in Pembrokeshire are employed directly or indirectly through agriculture. Milford Haven estuary is one of the deepest natural harbours in Britain, and this natural advantage has led to it being the largest port in the UK for the import/export of energy products.

There are two ferry ports in Pembrokeshire operating from Fishguard and Pembroke Dock, with crossings to Rosslare, Ireland. Rail services into the county terminate at Milford Haven and Fishguard (via Haverfordwest) and Pembroke Dock. Broadband connectivity has improved significantly over recent years and as of September 2026, 80.6% of Pembrokeshire's residents and business have access to gigabit-capable broadband (1000 Mbps).

Community areas

The Well-being of Future Generations Act requires the PSB to define specific community areas in Pembrokeshire, as it is important to understand not only what well-being means to people in Pembrokeshire as a whole but also to particular communities in the County. As in the last Assessment, community areas in Pembrokeshire have been defined in terms of Mid Layer Super Output Areas (MSOAs). There are benefits to using MSOAs in that they are designed to have reasonably consistent population totals. However, there remain some disadvantages in terms of how towns and villages have been incorporated into each MSOA, with Haverfordwest split into North and South, and Milford Haven split into East and West. As these are major towns within the County, we have merged them into Haverfordwest (incorporating Haverfordwest North and South) and Milford Haven (incorporating Milford Haven East and West) for ease of reference.

Using this approach, there are 14 community areas in Pembrokeshire, and the table below shows some of the towns or villages which comprise each area.

MSOA name	**Includes;**
Cilgerran and Crymych	Nevern Boncath Crymych Eglwyswrw Blaenffos Hermon
Crundale, Clynderwen and Maenclochog	Spittal Ambleston Walton East Maenclochog Crundale Clarbeston Road New Moat Llandissilio Clynderwen
Fishguard	Goodwick Fishguard Scleddau Puncheston Dinas Cross Newport Trecwn
Haverfordwest	Haverfordwest Merlins Bridge
Johnston, Broad Haven and St Ishmaels	Roch Camrose Broad Haven Little Haven Johnston Tiers Cross Herbrandston St Ishmaels Marloes Dale
Milford Haven	Milford Haven Steynton Hakin Liddeston
Narberth	Narberth Llawhaden

	Robeston Wathen Templeton Lawrenny Rhos Lampeter Velfrey Llandewi Velfry
Neyland	Neyland Waterston Rosemarket Burton Houghton Sardis Llangwm Hook Freystrop Cross
Pembroke Dock	Pembroke Dock Pennar
Pembroke East and Manorbier	Pembroke (part of) Cosheston Milton Carew Lamphey Hodgeston Manorbier St Florence Lydstep
Pembroke West and Castlemartin	Pembroke (part of) Monkton Hundleton Stackpole Bosherston Castlemartin Angle
Saundersfoot	Saundersfoot East Williamston Pentlepoir Begelly Kilgetty Stepaside Amroth Llanteg Jeffreyston Cresselly
St Davids and Letterston	St Davids

	Solva Croesgoch Trefin Mathry Letterston Wolfscastle Hayscastle Cross
Tenby and Caldey	Tenby Penally New Hedges Caldey Island

A full analysis of our Community Areas can be found at Annex 1.

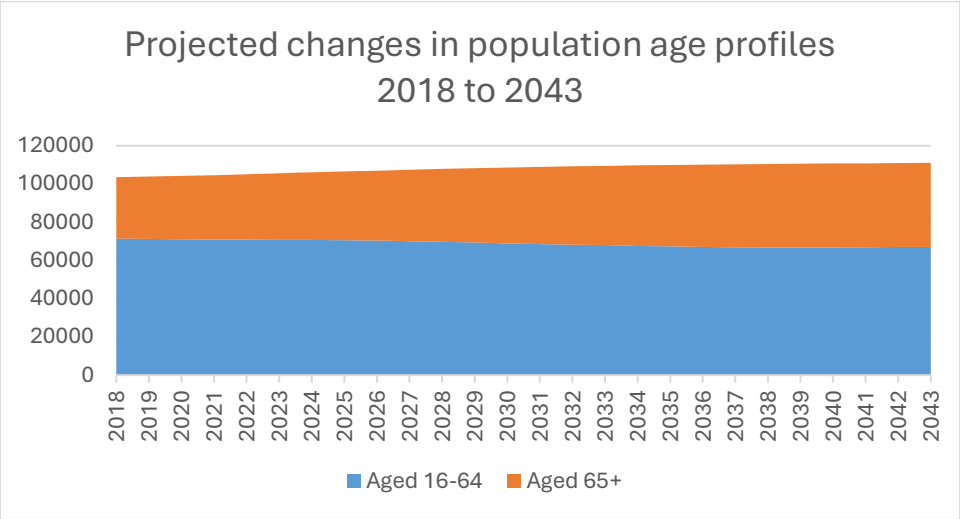
Demographics and Population Data

Age structure

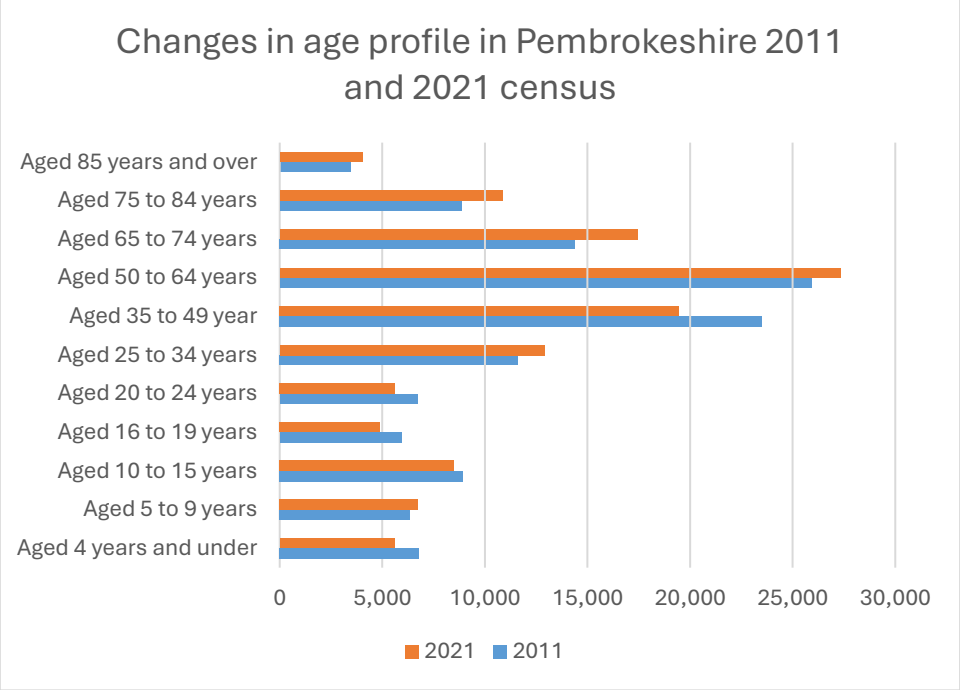
The latest population estimate for Pembrokeshire is approximately 126,000. Based on the most recent (mid-2022) Welsh Government projections our population will increase gradually up to mid-2032 to just under 133,000 (an increase of roughly 5.5%). The number of births is expected to decrease at a negligible rate (1,017 to 999), while the numbers of deaths is expected to increase by approximately 9.3% over the same period.

The population of Pembrokeshire is older and is ageing. Between 2011 and 2023, the '65 and over' age group grew by 23.9%, with a corresponding decrease in the number of people aged '15 and under' (6.2%) and '16 to 64' (3.6%). In 2023, about 27% of Pembrokeshire's population were aged over 65 – the 4th highest in Wales. The increase in our population aged over 65 is projected to continue to increase markedly over the next decade or so and will have an inevitable impact on the ability of some PSB partners to deliver statutory services.

Current projections suggest there will be a corresponding decrease in the 16-64 age group for the same period. This shrinking of the working age population will potentially reduce the available labour force and perhaps lead to labour shortages in key areas.



Census data taken in 2011 and 2021 shows that the changes in population age profile are following this trend.



Pembrokeshire has a relatively ageing population compared with the rest of the UK. Age structure and profile is an important consideration for provision of services in the county as it has a clear impact on how many people are in paid employment, the general population health, the number of younger people requiring school places, as well as the number of people with protected characteristics living in an area.

Welsh language

According to the 2021 Census, the communities of Cilgerran and Crymych, Fishguard, St. Davids and Letterston and Crundale, Clynderwen and Maenclochog have the largest

number of people who can speak, read and write in Welsh, as might be expected for communities in the north of the county. Those living in Milford Haven and Pembroke West and Castlemartin have the fewest Welsh language skills.

Information from the 2011 Census showed that around 19.2% of people in Pembrokeshire spoke Welsh, roughly the same as the Welsh national average at the time. The 2021 census showed that this figure had decreased to 17.2%, a trend repeated across Wales, with the national average standing at 17.8%.

Census 2011			**Census 2021**		
Age category	**Number who can speak Welsh**	**% of total population in age group who can speak Welsh**	**Age category**	**Number who can speak Welsh**	**% of total population in age group who can speak Welsh**
Age 3-15	7,268	40.3%	Age 3-15	5,617	31.8%
Age 16-24	3,070	24.3%	Age 16-24	2,544	24.2%
Age 25-34	1,718	14.8%	Age 25-34	2,193	17.0%
Age 35-49	3,101	13.2%	Age 35-49	2,680	13.8%
Age 50-64	3,491	13.5%	Age 50-6	3,283	12.0%
Age 65+	4,138	15.5%	Age 65+	4,310	13.3%
Total	**22,786 (19.2% of total population)**		**Total**	**20,627 (17.2% of total population)**	

The table above shows that the biggest decrease in Welsh speakers was in the 3-15 years age group and the biggest increase was amongst those aged 25-34. This age group was the only one that saw an increase in Welsh speakers. However, the figures for the 3-15 years age group should be treated with caution. The 2021 census was undertaken during covid when children were not in school (or had not been in school) regularly. Therefore, it is highly likely that parents would not have heard them speaking Welsh at home, particularly in non-Welsh speaking households, influencing their response to these questions in the census.

Equalities

In common with other predominantly rural Welsh Counties, Pembrokeshire is not a particularly diverse place in terms of ethnicity or other equality characteristics.

In 2011, 1.9% of the population identified as a 'non-white' ethnic group. In 2021, 2.4% of Pembrokeshire's population identified as a 'non-white' ethnic group, increasing to 2.9% if people with a Gypsy, Traveller and Roma heritage are included.

The 2021 Census was the first time that questions on sexual orientation and gender identity were asked (but only for those aged 16 years and over). Sexual orientation is a term that covers a person's sexual identity, attraction and behaviour, whereas gender identity refers to a person's feelings about their own gender, and whether they identify as male, female or another category (such as non-binary). The data showed that with regard to sexual orientation, most people identified as heterosexual (89.8%), with 2.1% identifying as gay, lesbian or bisexual. When looking at gender identity, 93.4% said that they were the same sex registered at birth, with only 0.3% identifying as a trans man, trans woman or a different (but not specific) gender identity.

Key points

- Outside of its main towns, Pembrokeshire is a predominantly rural county
- The population of Pembrokeshire is older and is ageing - the number of people aged over 65 is projected to continue to increase over the next decade, whereas the number of births will decrease
- Communities in the North of the county have the most Welsh speakers, but Welsh speakers overall decreased between 2011 and 2021
- Pembrokeshire is not a particularly diverse place in terms of ethnicity or other equality characteristics

CULTURE, LANGUAGE AND LEISURE

Overview

Culture, language and leisure activities play a vital role in supporting well-being and are central to creating places where people feel connected, fulfilled and proud to live. Access to music, theatre, visual arts, literature and creative spaces provide opportunities for self-expression, learning and social engagement. Participation in the arts has been linked to reduced stress, improved confidence and stronger social bonds, making it an important aspect of preventative well-being. The historic environment, festivals, local fairs, exhibitions and performances bring people together and also stimulate the local economy. These events can foster social connection, reduce isolation and create positive memories that reinforce attachment to an area.

The Welsh language is a significant part of cultural well-being and for Welsh speakers, the ability to use their language in everyday life contributes to feelings of inclusion and belonging. Although language usage varies across Pembrokeshire, Welsh remains important in terms of a shared heritage and social connection and supporting the use of the language in schools, workplaces and community life helps to promote cultural identity.

Libraries are valuable community resources that support both education and social well-being. They act as important social infrastructure as they support those who may lack internet access or a quiet study place at home and provide key spaces to support literacy development as well as providing spaces for study and community interaction.

The county's coastline, beaches, woodlands and walking routes are not only environmental assets, but also part of the identity of the region. Time spent in nature is often associated with reduced anxiety, improved mood and greater physical activity, making it an essential component of overall well-being.

Sports and leisure opportunities are equally important. Access to sports facilities, clubs and recreational activities promotes good physical health, mental resilience and social participation. Leisure spaces provide important opportunities for all age groups to remain active, build confidence and develop social networks. Participation in organised or informal activities can be especially valuable in reducing social isolation and supporting mental well-being.

Culture, Heritage and the Arts

Pembrokeshire has a wealth of popular arts and cultural venues available across the county, including galleries and performance spaces. The Torch Theatre Milford Haven,

Theatre Gwaun Fishguard, Merlin Theatre at Pembrokeshire College, Queens Hall in Narberth and Haverhub in Haverfordwest are home to a wide range of events and activities from comedy and drama to music and pantomimes. Pembrokeshire's diverse arts scene includes the Oriel y Parc discovery centre, Tenby Museum and Art Gallery and the Riverside Gallery in Haverfordwest, which in partnership with the National Library of Wales brings art of national significance to Pembrokeshire.

Scolton Manor Park, Pembrokeshire's County Museum, is set in more than 60 acres of grounds and has been managed and operated by Pembrokeshire County Council since 1972, when it was sold to the Welsh Church Fund by Colonel Jack Higgon. The property of the Higgon family for nearly four centuries, Scolton was sold only on the strict condition that it be run for the benefit and enjoyment of the public in perpetuity.

Work by the Scolton team together with volunteers and collaborators has turned the manor and park into a popular destination that offers something for everyone, from the Manor House itself to the walled garden and a host of nature and play opportunities. The Scolton team works closely with community and volunteer groups to run, maintain and develop the site and ensure its continued vitality as one of Pembrokeshire's top destinations for local residents and tourists alike.

Pembrokeshire has a wealth of built historic environment features including over 2500 listed buildings, 531 Scheduled Monuments and 9 Historic Landscapes. Culturally significant landmarks such as St David's Cathedral, Pentre Ifan and Pembroke Castle provide a link to our past but are also as an asset for residents and a key attraction for visitors. The history of our towns and varied maritime heritage is celebrated through museums in Narberth, Haverfordwest, Milford Haven, Pembroke Dock and Fishguard. Most of the historic environment within the county is accessible to the public, so both locals and visitors can interact and form a relationship with Pembrokeshire's past. For those interested in their family history, or the history of their town, village, local church or chapel, Pembrokeshire Archives holds historical sources including census returns, parish registers, maps, photographs, deeds and letters ranging from a document from 1272.

Results from the National Survey for Wales in 2024-25 showed that nearly 70% of people had attended an arts event in the last 12 months, an increase from surveys undertaken in the previous 2 years. In 2022-23, the survey found that around 31% had attended a museum in the previous year, a decrease of around 10% from when the survey last asked this question in 2019-20. The barriers to not going to arts events include family commitments or lack of time, cost, access issues, health concerns or inability to get to events.

Welsh Language

Being able to use Welsh in everyday life has a significant impact on the overall well-being of Welsh-speaking individuals and communities, therefore it is important that those who wish to use the Welsh language in their everyday lives are able to do so without barriers. The percentage of Welsh speakers in Pembrokeshire fell by 2% from 19.2% in 2011 to 17.2% in 2021, slightly below the national average (17.8%). This was the joint-second largest decline with the largest decline in neighbouring Carmarthenshire. Across Wales, the percentage of Welsh speakers fell from 19.0% to 17.8%. In 2021, there were just under 2,200 fewer Welsh-speaking Pembrokeshire residents (over the age of three years) compared with 2011. The number of people who did not speak Welsh increased by 4,000. In both Pembrokeshire and Wales as a whole, the ability to read, write and understand Welsh has decreased since 2011.

As might be expected for Pembrokeshire, where Welsh has historically been spoken more, the 2021 census recorded that community areas in the North of the county – Cilgerran & Crymych; Fishguard; Crundale, Clynderwen & Maenclochog; and St Davids and Letterston - contained the most Welsh speakers. Communities in Pembroke, Neyland, Milford Haven and Pembroke Dock contained the least number of Welsh speakers.

The decrease in Welsh speakers between 2011 and 2021 is due to a drop in reported Welsh-speaking ability among children and young people and is particularly evident in the 3-to-15 age group (see Pembrokeshire in Context). Suggested reasons for the decrease in this age group include;

- Disruption due to the Covid-19 pandemic – when the Census was conducted in March 2021, children had been isolated from Welsh-speaking teachers and peers for some time, hindering language progression and limiting their everyday use of Welsh
- Decreased confidence in language skills - parents completing the census on behalf of their children may have under-reported their ability to speak Welsh, especially as the majority of their children's Welsh language use will have been in school in non-Welsh speaking homes
- Changes in demographics – there were fewer children and young people in 2021 that there were in 2011

Data for Pembrokeshire for the year ending March 2025 estimates Pembrokeshire has 30,000 Welsh speakers (24.5%) – approximately 1 in 4 people. A rolling three-year average suggests that the percentage of Welsh speakers in Pembrokeshire has been broadly consistent.

Cymraeg 2050 is Welsh Government's strategy to increase the number of Welsh speakers in Wales to 1 million by 2050, by increasing the number of Welsh speakers, increasing the use of Welsh and creating favourable conditions for using Welsh. Over 120 public bodies in Wales are subject to the legally binding Welsh Language Standards, which require organisations to treat the Welsh and English languages equally. These public bodies include those that are members of Pembrokeshire's Public Service Board. Compliance with these standards is overseen by the Welsh Language Commissioner.

In Pembrokeshire, work is ongoing to enhance opportunities to speak Welsh within early years and school-based educational settings through the Welsh in Education Strategic Plan. Pembrokeshire College also supports and encourages students to use and develop their Welsh skills while studying and provides opportunities for learners who are confident and fluent in the language, as well as opportunities for those who are less confident or are learning.

Welsh for Adults learning provision for Welsh learners at all levels across Pembrokeshire is provided by Learning Pembrokeshire (part of Pembrokeshire County Council) on behalf of the National Centre for Learning Welsh. In 2023-24, the centre recorded 18,330 unique learners (a unique learner counts each learner only once), an increase of 8% from 2022-23. In 2024-25 this figure increased to 20,445, an increase of 12%. From the last academic year 2024-25, data on the number of unique learners per local authority area is now being recorded – for Pembrokeshire this number was 875.

The National Eisteddfod was held in Llantwd, north Pembrokeshire during the first week of August 2026, leaving a lasting legacy for the county and attracting more than 100,000 visitors to a week-long celebration of Welsh language, culture and community. Eisteddfod y Garreg Las brought people from across Wales and beyond to Llantwd, with Pembrokeshire County Council's Pentre'r Garreg Las proudly representing the wider Eisteddfod region, including communities in south Ceredigion and west Carmarthenshire, showcasing the very best of the area through its people, language, culture, heritage, food and environment. The week also saw significant moments that celebrated Pembrokeshire's achievements and ambitions, including the signing of the Twf Welsh Language at Work charter.

Libraries

Libraries promote accessible education for everyone, promote literacy across all age groups and support digital inclusion. They act as cultural and creative hubs within communities, combining cultural engagement with social interaction. Pembrokeshire libraries regularly hold groups such as reading groups, knitting or crochet groups, Welsh conversation groups and book clubs, as well as Lego clubs, author visits and lectures.

Libraries offer specific activities for children and families, including baby rhyme time, storytelling sessions and promotion of the national Summer Reading Challenge. The Riverside library in Haverfordwest has a dedicated gallery space where art exhibitions are regularly held and where, in partnership with The National Library of Wales, some of the nation's treasures have been brought to the county. There are also small spaces for artwork to be displayed at both Pembroke Dock and Fishguard libraries.

Pembrokeshire has 12 libraries and a mobile library at home service. The service has been impacted over recent years by budgetary pressures, the cost-of-living crisis and the lingering effects of the pandemic, so in the summer of 2024 the service undertook a comprehensive Library Needs Assessment which included gathering feedback from users and non-users through public meetings, surveys and focus groups.

Community feedback from this engagement highlighted libraries as vital, inclusive community spaces that support social cohesion, digital literacy, and access to resources, especially for vulnerable groups. There were 2,611 responses from surveys and 185 attendees at public meetings, with focus groups involving protected characteristic groups. Respondents reported that libraries are valued as safe, welcoming spaces that combat social isolation, especially for young and vulnerable populations and that access to ICT, books, and information remains crucial, with recognition that not everyone has digital access at home. The assessment also highlighted the vital importance of libraries in fostering reading for pleasure, supporting early childhood development, and addressing literacy gaps. They play an important role in literacy recovery following the pandemic, which worsened literacy disparities, especially among disadvantaged children and promote lifelong learning across all ages. Feedback identified demand for expanded cultural programming in Pembrokeshire's libraries, including;

- More events and activities for children and young people
- Poetry readings / competitions
- Gaming or youth clubs
- More evening talks, lectures and cultural programming

The total number of visits (door count) to libraries were fairly consistent in 2025-26 compared to 2024-25, with only a 0.1% decrease. The biggest decrease in visits was at Pembroke Dock library, with an 18% decrease, directly attributable to a decrease in opening hours due to the need for savings to be made (the library was open for 30.5 hours per week in 2024-25, but from April 2025 onwards opening hours have been reduced to 23.5 hours per week). The biggest increase in visits was at Narberth library, which saw a 57% increase compared to the previous year. However, this figure has been affected by the closure and relocation of Narberth library between May 2024 and September 2024.

Haverfordwest continued to see the highest number of visitors, with this library accounting for 52% of total library visits across all libraries in 2025-26.

Many partner organisations also use libraries to offer a range of support services to local communities. Examples include counselling services, social groups, mental health support, drug/alcohol addiction support, promotional stands, employment support, active travel sessions, training sessions, and community banking.

Sport and Leisure

The Pembrokeshire Coastal Path covers 186 miles (299 km). From St Dogmaels in the north to Amroth in the south, the trail covers almost every kind of maritime landscape from steep limestone cliffs, undulating red sandstone bays, volcanic headlands, beaches, estuaries and flooded glacial valleys. Lying almost entirely within the Pembrokeshire Coast National Park, the trail displays an array of coastal flowers and bird life, as well as evidence of human activity from Neolithic times to the present. The path is an accessible way for the community to spend time in nature and stay active. It also brings visitors and offers a fertile ground for educational programmes for all ages.

Pembrokeshire currently has 10 Blue Flags, an award recognised worldwide given to beaches and marinas for cleanliness, safety and high-quality amenities. Keep Wales Tidy also promotes the Green Coast Award, awarded to 'hidden gems' of the Welsh coastline, which boast unspoilt beauty, excellent water quality and a high standard of environmental education. Pembrokeshire has the most 'Green Coast Award' beaches in Wales, with seven – Abereiddy, Freshwater East, Manorbier, Penally, Caerfai, Druidstone, and West Angle Bay – all retaining their status in 2025. The exceptional quality of many of Pembrokeshire's beaches are vitally important to the local economy, valued by residents and tourists alike, and a source of pride for many residents value the natural beauty and landscape. Access to the Coast also provides opportunities for volunteering and taking part in various activities.

Pembrokeshire has 6 local authority run leisure centres in Crymych, Fishguard, Haverfordwest, Milford Haven, Pembroke and Tenby. Participation has increased over recent years, with visits rising 7% between 2018/19 and 2024/25, and membership growing by 33%. This follows on from a number of major facility improvements which have been implemented over the last 10 years, including the Pembrokeshire Sports Village attached to Haverfordwest High School, refurbishments of fitness suites, installation of energy-efficient measures, new 3G pitches, and enhanced café offerings. Pembrokeshire also has numerous private gyms, grassroots sports clubs and one charity operated swimming pool in Narberth.

Across all leisure centres in 2025-26, the highest number of public visits were recorded in July 2025 and March 2026. A similar trend was observed in 2024-25. Throughout 2025-26, the leisure centres with the most public visits were Haverfordwest, Milford Haven and Tenby. Overall usage growth is also mirrored in membership figures which grew from 10,708 in April 2025 to 11,862 in March 2026, an increase of 1,154 members, or11%. Throughout the year, Haverfordwest Leisure Centre held the highest share of total leisure memberships across all leisure centres, with St Davids holding the lowest share of total memberships by March 2026. However, St Davids Leisure Centre had the largest annual growth in membership, with a 64% increase in members between March 2025 and March 2026. Comparatively, Milford Haven Leisure Centre saw the lowest annual growth in membership, with an 8% decrease in its membership between March 2025 and March 2026.

Pembrokeshire is also host to two internationally recognised large scale sporting events annually, the Long Course Weekend in June and Ironman Wales in September. The stunning, challenging courses wind through the Pembrokeshire Coast National Park and past historic landmarks, showcasing Pembrokeshire's natural beauty to a global audience.

Held over three days, the Long Course Weekend starts on a Friday with the Wales Swim, one of the largest open-water swimming events in the UK. On Saturday, thousands of cyclists take on a choice of 112, 72 or 40 mile courses set across the Pembrokeshire Coast National Park and on Sunday the Wales Marathon, the Wales Half Marathon, the Wales 10k and the Wales 5k are held. Ironman Wales is a long-distance triathlon consisting of a 2.4-mile sea swim off North Beach Tenby, a hilly 112-mile bike course through the Pembrokeshire countryside, and a full 26.2-mile marathon. Both the Long Course Weekend and Ironman Wales events are designed to be inclusive and family-friendly, with various activities and entertainment options for spectators of all ages. They are also community focused and frequently partner with local causes, such as Hywel Dda Health Charities, to encourage athletes to raise funds for the Welsh NHS. They also inspire local residents, promoting health and fitness. These early and late-summer events also bring visitors to Pembrokeshire outside of the traditional peak season, which supports the tourist industry and local accommodations, restaurants, and shops.

The National Survey for Wales recorded that 35% of people said they participated in sport or physical activity three or more times per week in 2024-25, a decrease from 39% in 2022-23. People were also asked which sports activities they had done in the last 4 weeks. 59% of people said had done some type of sport, games, fitness activity, or outdoor pursuit. 56% of people said they had done fitness activities (such as fitness classes, running/jogging, cycling, or swimming) and 19% had played sports or games (such as football, rugby, table tennis or golf). 6% of people had done outdoor pursuits like climbing, mountaineering, kayaking, or sailing.

People were also asked whether there were any sports activities they would like to do or do more of. 35% of people said they want to do more sport or physical activity, an increase from 27% in 2022-23. 22% of people said they want to do more fitness activities, 12% said they want to do more sports or games, and 6% said they would like to do more outdoor pursuits.

Barriers to accessing cultural and leisure events in Pembrokeshire

Accessing cultural and leisure events in Pembrokeshire can be affected by a mix of geographic, socio-economic, and structural barriers. There is limited public transport across the county and although many events take place in towns (e.g. Haverfordwest, Tenby), rural bus services are infrequent, especially evenings and Sundays. Those without access to a car, including young people, older residents and low-income households, may also struggle to attend and due to Pembrokeshire's predominantly rural makeup, outlying villages may be a significant travel distance from venues. Hidden costs, including travel, parking, food and childcare can also add to the overall expense of attending events. Digital exclusion may also be an issue, as not all residents use social media or event platforms where activities are promoted.

Key points

- Pembrokeshire has a rich arts and cultural offer, including:
    - Torch Theatre (Milford Haven)
    - Theatre Gwaun (Fishguard)
    - Queens Hall (Narberth)
    - Haverhub (Haverfordwest)
    - Oriel y Parc
    - Tenby Museum and Art Gallery
    - Scolton Manor Park
    - Riverside Gallery
- The county has significant historic assets, which includes over 2,500 listed buildings, 531 Scheduled Monuments and 9 Historic Landscapes.
- Key heritage attractions include St Davids Cathedral, Pentre Ifan and Pembroke Castle.
- Around 70% of people attended an arts event in 2024–25, although cost, transport, health concerns and family commitments remain barriers for some residents.

- Welsh remains an important part of Pembrokeshire's cultural identity and community life.

- Census data showed that Welsh speakers fell from 19.2% in 2011 to 17.2% in 2021 - around 2,200 Welsh speakers
- More recent estimates suggest around 24.5% of residents (approximately 30,000 people) can speak Welsh.
- Welsh-speaking communities remain strongest in northern Pembrokeshire.
- Efforts to promote Welsh include:
    - Welsh in Education Strategic Plan.
    - Welsh language learning through Pembrokeshire College.
    - Welsh for Adults programmes.
- Pembrokeshire hosted the National Eisteddfod in 2026, providing a major opportunity to celebrate Welsh language and culture.

- Pembrokeshire has 12 libraries and a mobile library service. Recent engagement with communities in the County identified libraries as:
    - Safe and welcoming spaces.
    - Important for reducing social isolation.
    - Essential for people without internet access.
    - Valuable for children's literacy and development.
- Libraries increasingly host wider community services such as counselling, employment support, mental health support and social groups and demand exists for more cultural programming, youth activities, lectures and community events.

- The 186-mile Pembrokeshire Coast Path is one of the county's most valuable recreational assets, supporting health, tourism and education.
- Pembrokeshire has 10 Blue Flag beaches and the highest number of Green Coast Award beaches in Wales (7).

- The county operates six leisure centres and has seen increasing participation, with membership increasing significantly over recent years and public visits increasing by 7% since 2018/19.
- Pembrokeshire hosts two internationally recognised sporting events; the Long Course Weekend and Ironman Wales. These events promote health and physical activity, attract visitors outside peak tourist seasons, generate economic benefits for local businesses and raise money for local causes.
- 35% of people participate in sport or physical activity three or more times per week.
- Demand for greater physical activity is increasing; 35% of people would like to do more sport or exercise, with interest strongest in fitness activities, followed by sports and outdoor pursuits.

- Key barriers to accessing cultural and leisure opportunities include:
    - Limited rural public transport.

- Long travel distances.
- Cost of attending events.
- Childcare and parking costs.
- Digital exclusion and lack of awareness of opportunities.

Future trends/Looking Ahead

The Mid and West Wales Strategic Culture Partnership, which includes Pembrokeshire, Carmarthenshire, Ceredigion and Powys, is currently in the process of drafting a regional culture strategy. The emerging strategy aims to establish a shared vision for culture across the region, recognising the contribution culture makes to wellbeing, community cohesion, identity, learning, tourism and economic development. The strategy will focus on improving access to culture, strengthening cultural resilience, supporting place-based wellbeing, and encouraging greater collaboration across the region through four proposed strategic priorities:

- Participation and Inclusion
- Cultural Resilience and Sustainability
- Place, Identity, Economy and Wellbeing
- Leadership, Collaboration and Influence

The emerging vision is that "Mid and West Wales will be a region where culture is valued, visible and accessible to all; where collaboration strengthens communities, services and opportunities; and where culture plays a central role in shaping a resilient, creative and confident region."

Engagement feedback

Based on the responses to the main survey, the strongest concerns were about access, participation, heritage, language, and community cohesion. These included;

- Access to sport and physical activities and to affordable and accessible leisure opportunities for all ages.
- Preserving historic buildings, monuments and landmarks.
- Protecting local history and heritage and maintaining Pembrokeshire's distinctive character.
- Protecting and promoting the Welsh language and increasing opportunities to learn, practise and use Welsh.
- Retaining Welsh-speaking communities.
- Supporting the arts, including protecting and funding museums.

- Maintaining and expanding library services.
- Improving access to galleries, theatres, music events and creative activities.
- Transport and rural accessibility concerns - people cannot engage in cultural activities if they cannot reach them.

Respondents were most concerned about, protecting local heritage and the Welsh language, ensuring affordable access to sport and cultural activities, improving transport and reducing social isolation. Arts, museums, libraries and community facilities are widely viewed as important contributors to wellbeing and community identity.

People who took part in face to face sessions highlighted the importance of supporting community buildings and spaces, ensuring that these facilities and other nonprofit organisations have the necessary funding available to enable them to host affordable events and attractions to allow families to enjoy the arts together and to provide access to art for everyone.

Respondents to the Easy Read version of the survey rated 'supporting the arts' as the most important thing about culture. Comments included that culture makes us who we are and helps us to feel connected.

Young people highlighted concerns around access to sports and activities, opportunities for creativity, having their voices heard, and preserving Welsh culture and language. They highlighted;

- Access to sport and recreational activities for physical health and well-being, stress relief and enjoyment and socialising and making friends.
- Concerns around a lack of creative opportunities locally and limited support for pursuing careers in the arts.
- The importance of clubs, activities and social opportunities such as Cadets, community groups and sports clubs for creating friendships, reducing isolation and providing enjoyment and purpose.
- Although not in the highest ranked responses, the Welsh language generated passionate responses, with young people expressing concerns about decreased use of the language or the language dying out, preserving Welsh heritage and identity and making Welsh learning more accessible. Respondents described Welsh as an important part of cultural identity and felt more should be done to support its continued use and development.

Music, art and creativity were among the most valued aspects of cultural life for young people, who explained that creative activities help them express themselves, manage

emotions and connect with others. One respondent said, “I use art to express my feelings”, while another described music as “a way to express yourself” that “soothes the soul and feels therapeutic”. Others felt that creativity “brings people together”, boosts mental health and provides opportunities that are not always available through academic subjects. Several called for more creative opportunities, arts funding and support for creative careers.

Sport, games, clubs and activities were also viewed as important for friendship, health and enjoyment. Young people said that sport helps build “confidence and making friends”, while clubs provide opportunities to meet like-minded people and stay active. Air Cadets, youth groups and sports clubs were mentioned positively, with requests for a wider range of activities and more funding for youth provision.

Many respondents valued Welsh language, history and heritage as important parts of their identity. Young people described Welsh as “our language” and expressed concerns that it is declining. Others wanted more opportunities to learn Welsh and more teaching about Welsh history, traditions and culture.

Young people who took part in face to face sessions said they wanted more opportunities to learn about Welsh history, use Welsh outside school, attend Welsh-language activities and celebrate Welsh culture. They also said that culture and community access are limited by transport and cost; young people want wider access to live music, cinemas, sports, skate/bike facilities, and activities that bring different groups together.

ECONOMY

Overview

The strength of the local economy plays a vital role in shaping the overall well-being of communities within Pembrokeshire. Being able to find secure work, earn a stable income and maintain a good standard of living is a key part of a persons' life. When the economy is strong and inclusive, people are more able to meet their basic needs, plan for the future and participate and support their local communities. People spend around a third of their waking hours at work, so quality of work and whether people enjoy work is a major component of overall well-being.

Income levels are an important factor within an economy and Pembrokeshire has seen a rise in income in line with the Welsh average over the past 5 years (NOMIS Gross Weekly Pay). However, the level of income in Pembrokeshire and in Wales is still lower than the UK average; the level of weekly income in Pembrokeshire is 4% lower than the average UK income but 2.3% higher than the Welsh average. Income levels can shape many decisions in a person's life such as housing, childcare, education costs and the ability to engage in recreational activities. Having these choices and opportunities can impact the well-being of a person and family from a health and social well-being perspective, and people's ability to engage in activities outside of their home has a real impact on the local economy.

However, increased costs of living and a rise in the national minimum wage has seen businesses across Wales face far higher costs when operating, putting them under increased strain and making business owners reluctant to hire more staff or apprentices due to rising costs.

Retention of talent in the local area is also a real concern for counties in Wales, especially Pembrokeshire. Young people are most at risk of leaving to find work and education elsewhere if there are not adequate and appropriate opportunities for them to develop their skills, qualifications and career prospects in the local area. The availability of well-paid, secure employment shapes long-term economic resilience, influencing saving, retirement outcomes and population retention - particularly for younger people.

The rural nature of Pembrokeshire also shapes economic well-being. People often need to travel further to their place of work, education or services which can increase living costs and limit opportunities, especially for those adversely affected who may not have access to a vehicle and rely on public transport. The local economy underpins many aspects of daily life in and affects not only how much people earn, but also their health, housing and access to opportunities. A balanced and resilient economy is therefore essential for supporting long-term well-being across all age groups within the county.

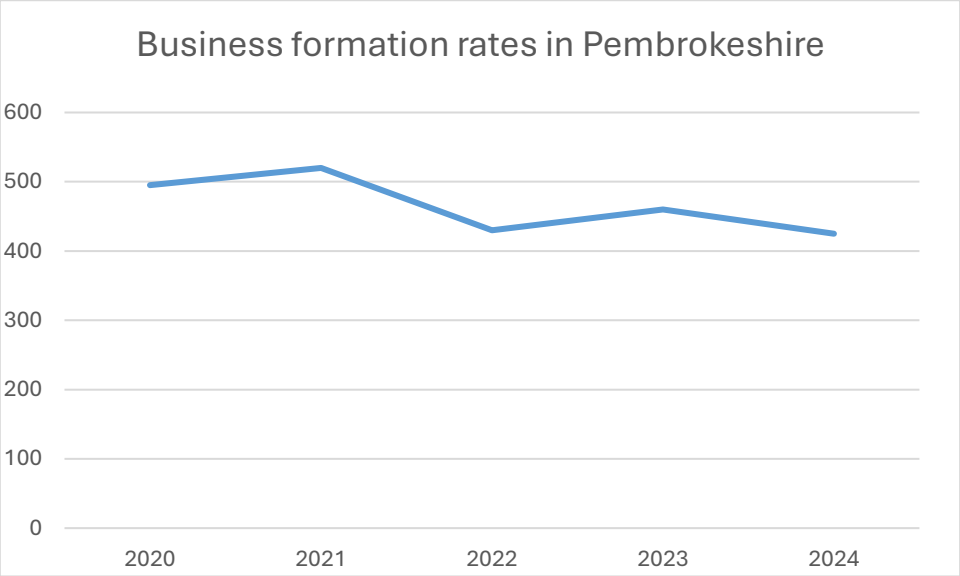
Businesses

Business size

At the start of 2025 there were 194,000 private businesses in Wales. In the last year, the number of private businesses in Wales decreased by 26,000, or 12%. Since 2020, the number of businesses has decreased in all UK areas and regions, but the country with the largest percentage decrease was Wales, at 7%.

Business formation and survival rates

Business formation rates and survival rates are a key measure of how well the economy is performing. The following table shows the number of new businesses formed in the past five years in Pembrokeshire. The figures show that the number of new businesses peaked in 2021 and has gradually declined since then, with a small increase in 2023.



Based on 2021 data, the business survival rates for new businesses formed in that year are higher than the Welsh average and around the upper quartile for Wales.

Area	Births	1-year survival	1-year per cent	2-year survival	2-year per cent	3-year survival	3-year per cent
Pembrokeshire	520	495	95.2	380	73.1	310	59.6
Wales	13,945	12,705	91.1	9,580	68.7	6,640	47.6
United Kingdom	363,995	339,920	93.4	256,265	70.4	194,685	53.5

Sector analysis

Pembrokeshire is a predominantly rural and coastal economy where the economy is driven by several longstanding core industries.

Tourism is one of the largest contributors to local employment and a major employer in the county, driven by the coastline, national park, and heritage attractions. Tourism has strong links to accommodation, food services, and retail, but is highly seasonal, creating fluctuations in employment and income for those working in this area.

Next to energy and agriculture, tourism is the largest industry in Pembrokeshire, providing 23% of all employment, £604 million in economic value in 2023, and 6.3 million visitors of which 1.1 million stayed overnight.

Agriculture and the rural economy is a key traditional sector, especially dairy and livestock farming. Agriculture and rural communities play a vitally important role in Pembrokeshire's economy and indeed that of Wales as a whole.

Figures from the 2021 census show that a relatively high number of the population (third highest in Wales) is employed directly or indirectly through agriculture, and the rural economy has broad consequential benefits for businesses specialising in local produce which support supply chains in food processing and other rural services.

The **energy and industry sector** in the county means that Pembrokeshire a plays a nationally significant role in energy supply. It is a higher productivity sector compared with much of the local economy and includes oil refining, LNG terminals, and associated energy infrastructure in Milford Haven, housing large employers such as Valero refinery and the South Hook and Dragon LNG terminals.

There is an increasing emphasis on decarbonisation, with growth in offshore wind, marine energy and hydrogen, with Pembrokeshire occupying a strategic position within the Celtic Sea renewable energy zone. The transition to low-carbon energy represents a major long-term economic opportunity for the county.

The UK government approved the **Celtic Freeport** in November 2024. The Port of Milford Haven and Pembrokeshire County Council are key partners in its delivery, alongside Associated British Ports (ABP) and Neath Port Talbot Council. The Freeport also works alongside renewables developers, energy companies, industrial complexes, innovation assets, academic institutions and education providers.

The Freeport aims to provide the backbone for a cleaner future based on floating offshore wind, the hydrogen economy, sustainable fuels, carbon capture and storage, cleaner steel and low-carbon logistics and to generate well-paid job opportunities. The expectation is that as the businesses that make-up the Freeport evolve and expand, they will offer diverse roles from welders, electrical engineers and data analysts to marine surveyors, project managers and gas engineers and that the economic expansion of the Freeport will create opportunities for supporting businesses and hospitality within the local area.

In June 2026, the Celtic Freeport published its Five-Year Plan, outlining how it will accelerate investment, create high-quality jobs and strengthen South and West Wales's position as a leading hub for energy, manufacturing and engineering.

The **retail and town centres sector** continues to present a changeable picture. In the latest Pembrokeshire Town Centre Survey conducted in Autumn 2025, Pembrokeshire County Council identified that town centres show a variety of changes since the last survey was conducted in 2023.

- The vacancy rate for *Haverfordwest Town Centre* remains high, with slightly over a quarter of Class A units empty in 2025. The vacancy rate has remained over 20% since 2020. Since 2023, the number of shops providing services has increased considerably by 25 units.

- *Fishguard Town Centre* shows an improving picture overall with a 3% decrease in vacancy rates from 2023. The number of convenience and service shops shows little change since 2020.

- *Milford Haven Town Centre* continues to show a generally improving trend in terms of vacancies, with figures showing a marked increase of all shop types since 2023. The vacancy rate in Milford Haven has fallen significantly, from 21% to 12%. The vacancy rate in Milford Marina (now known as *Milford Waterfront*) shows a dramatic

increase from 4 to 27%, although it is a small centre and the figures are significantly affected by change in a small number of units.

- *Narberth* continues to operate as a healthy town centre and has the lowest number of vacancy rates.

- *Pembroke town centre* is showing a promising sign of improvement with a decrease in vacant units since 2023, dropping from 20% to 16%.

- *Pembroke Dock town centre* has an increased number of vacant units since 2023, with almost a quarter of units empty (22%).

The towns of Fishguard, Milford Haven, Narberth and Pembroke all have a lower vacancy rate than the national UK average.

Reasons for high levels of vacancies are varied and complex and not exclusive to Pembrokeshire. Government policy, inflation and rising costs have impacted many retailers with both national chains and independent shops impacted. For example, some well-established national chains have all been present in Haverfordwest for many years, but business decisions made at UK level are being felt locally. Other towns in Pembrokeshire are dominated by independent retailers which are facing rising costs across the UK. However, *Savills* reports that town centre footfall continues to hold up, with evidence of some growth in town centres across the UK together with a stabilising of vacancy rates.

Labour force

Age of workforce

According to the most recent data, between January 2025 and December 2025, 76.6% of people aged 16 to 64 in Pembrokeshire were employed (higher than the Welsh average of 72.5%) and 21.9% were economically inactive (lower than the Welsh average of 24%).

Data from the 2021 Census showed that Pembrokeshire saw Wales' second-largest percentage-point fall in the proportion of people aged 16 years and over (excluding full-time students) who were employed (from 53.0% in 2011 to 50.4% in 2021). However, many of these people continue to 'work' in the sense that they are doing activities that have a clear economic value: carers, students and volunteers are some examples. Pembrokeshire also saw Wales' largest percentage-point rise in the proportion of people aged 16 years and over and in employment who said they usually worked 15 hours or less per week (from 10.3% in 2011 to 11.3% in 2021). Pembrokeshire overtook Gwynedd, Swansea and Cardiff to become the Welsh local authority area with the second-highest percentage of adults in employment working 15 hours or less.

Looking to the future, as the state pension age rises it is reasonable to assume that there will be more older people who remain economically active and part of the formal workforce.

Self-employment

Pembrokeshire has high levels of self-employment. This is often viewed as positive and a sign of greater entrepreneurship. However, not everyone who is self-employed is so out of choice.

Data from 2025 shows that the number of people who are self-employed in Pembrokeshire is around twice the Welsh average at 15.8%, an increase from 12.9% in 2024. Pembrokeshire's self-employment figures are consistently higher than the Welsh average, an indication of the county's reliance on tourism and agriculture as two of the main sources of income.

Unemployment

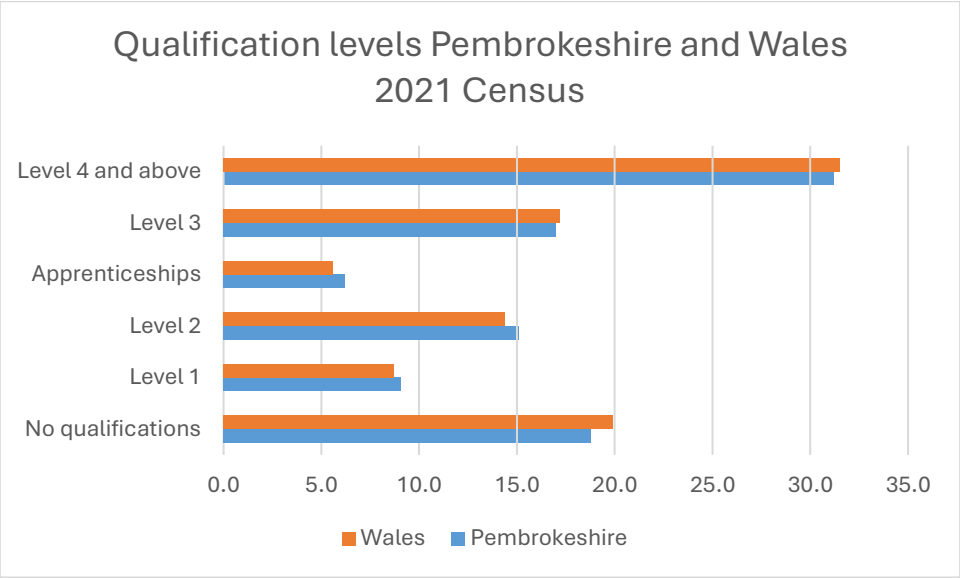
Claimant count is a measurement of the number of people claiming unemployment related benefits. The latest data shows that the proportion of people aged 16 to 64 years in Pembrokeshire who were claiming unemployment-related benefits was 3.4% in March 2024, the same as in March 2023 when it was also 3.4%.

Average pay

As of 2024, Pembrokeshire's had a median gross weekly pay of £674.8 for full-time workers, the 13th highest of all 22 counties in Wales. This is a significant increase on the 2020 figure of £499.5. For annual pay, Pembrokeshire was ranked 15th out of the 22 counties in Wales in 2024, with a median annual salary of £33,401.

Skills

In general, skills levels in Pembrokeshire are similar to the rest of Wales. Data from the 2021 census showed that 18.8% of Pembrokeshire adults have no formal qualifications (19.9% for Wales) and 31.2% of Pembrokeshire adults have a qualification equivalent to a HNC/HND or Degree (31.5% across Wales).



Key points

- The number of private businesses in Wales has declined in recent years, with Wales experiencing the largest percentage decrease of any UK nation since 2020.
- New business creation in Pembrokeshire peaked at 520 new businesses in 2021 but fell to 425 new businesses in 2024.
- Business survival rates in Pembrokeshire are strong and exceed the Welsh average

- Tourism is one of Pembrokeshire's largest industries and employers.
- In 2023 tourism supported 23% of all employment, generated £604 million in economic value and attracted 6.3 million visitors, including 1.1 million overnight visitors.
- The sector is highly seasonal however, leading to fluctuations in employment and income

- Agriculture, particularly dairy and livestock farming, remains a key pillar of the local economy, with Pembrokeshire having one of the highest proportions of people employed directly or indirectly in agriculture in Wales.
- The sector supports wider supply chains, food production and rural businesses.

- Pembrokeshire has a nationally significant energy sector centred around Milford Haven, where major employers include Valero Refinery, South Hook LNG and Dragon LNG.
- Growth opportunities exist in offshore wind, marine energy, hydrogen production and other low-carbon technologies.
- The Celtic Freeport, approved in 2024, covers Milford Haven, Pembroke Dock and parts of Neath Port Talbot. Expected employment opportunities include

engineering, marine industries, project management, data analysis and supporting local businesses.

- Retail performance varies across Pembrokeshire's towns.
- Key findings from the 2025 Town Centre Survey show that:
    - Haverfordwest continues to have high vacancy rates, with over 25% of retail units empty.
    - Fishguard and Milford Haven have seen improving vacancy rates.
    - Narberth remains the strongest-performing town centre.
    - Pembroke has shown signs of improvement.
    - Pembroke Dock has experienced increasing vacancies.
- Rising business costs, inflation and national retail trends continue to impact both independent retailers and national chains.

- Employment among working-age adults (16–64) stands at 76.6%, above the Welsh average of 72.5%.
- Economic inactivity is lower than the Welsh average.
- There has been an increase in part-time working, with Pembrokeshire having one of the highest proportions of people working 15 hours or fewer per week in Wales.
- Self-employment is particularly high in Pembrokeshire; 15.8% of workers were self-employed in 2025, roughly double the Welsh average.
- This high rate reflects the importance of tourism, agriculture and small businesses on employment and the economy of Pembrokeshire.

- Median gross weekly earnings for full-time workers reached £674.80 in 2024, up significantly from £499.50 in 2020.
- Median annual earnings were £33,401 in 2024.

- Skills levels in Pembrokeshire are broadly similar to Wales overall; 18.8% of adults have no formal qualifications, slightly better than the Welsh average; 31.2% of adults hold higher-level qualifications (HNC/HND, degree or above), which is similar to the Welsh average.
- Apprenticeship attainment is slightly higher than the Welsh average.

Future trends

Net-Zero and Green Economy Skills

The transition to a low-carbon economy is expected to create significant demand for new technical and vocational skills. Major regional investment in renewable energy, floating offshore wind, marine industries, decarbonisation and sustainable infrastructure is likely to generate new employment opportunities across South West Wales. Pembrokeshire College

has already adapted elements of its curriculum to align with the emerging energy engineering sector and labour market requirements. As these sectors continue to develop, Pembrokeshire Schools and the College will play a critical role in ensuring that local people can access the skills and qualifications needed to benefit from future employment opportunities and support regional economic growth.

Lifelong Learning and Workforce Reskilling

Pembrokeshire's ageing population, technological change and evolving patterns of employment are likely to increase demand for lifelong learning and workforce reskilling. Individuals are increasingly expected to update their knowledge and skills throughout their working lives as industries change and new technologies emerge. Flexible learning opportunities, including part-time, online and employer-led provision are likely to become increasingly important. Adult and community learning will continue to play a vital role in supporting employability, social inclusion, digital participation and personal wellbeing, particularly for those facing barriers to accessing education and training.

Engagement feedback

Some of the main points raised by respondents to the regional Well-being Survey around the Economy were;

- Need for good quality employment opportunities and concerns about a lack of well-paid jobs and career progression.
- Importance of retaining skilled workers and young people.
- Need for better transport access to employment and concerns about transport connections between communities and key services.
- Pressure on infrastructure from tourism and concerns about water, sewage and utility infrastructure.
- A need for better support for local businesses and opportunities for business networking and growth.
- Availability of childcare and the impact of childcare costs on employment and economic participation.

Respondents identified employment and wages as the biggest economic concern, highlighting the need for well-paid jobs, career progression, and opportunities to retain skilled workers and young people. Transport was another major issue, with concerns about poor public transport and reduced bus services. Infrastructure problems, including potholes, traffic congestion, and pressure on utilities, were also frequently raised. Respondents called for stronger support for local businesses and green economic

initiatives, while childcare affordability and availability were seen as significant barriers to employment and economic participation.

Feedback from face to face engagement mentioned the creation of better job opportunities for local young people to discourage them from moving away and the need for more non-seasonal jobs that can provide stable employment. Skills development was also raised. Transport was also raised as an issue and expanding job opportunities that include transport solutions was suggested.

Those who responded to the Easy Read version of the survey said that a good income and earnings was most important to them, followed by good transport links, access to healthy affordable food and opportunities to learn and gain skills.

Responses from young people about the economy, jobs and future employment opportunities was one of the strongest themes in the responses to the young people's version of the survey. Many expressed concerns about;

- Lack of local employment opportunities.
- More jobs locally, especially for young people.
- More opportunities in creative industries.
- Better support into university and employment.
- More inclusive employment opportunities, including for autistic young people.

Face to face engagement sessions with Young Voices for Choices found that young people want fairer employment opportunities and more apprenticeship and employment opportunities from PCC, PSB partners and other employers. Transport was also seen as a barrier to taking up work.

Engagement with Futureworks learners aged 16–20 found that young people want more work placements, paid work, apprenticeships and vocational options.

EDUCATION AND LEARNING

Overview

Education and learning are fundamental to shaping individual well-being being. Far beyond academic attainment, access to high quality education influences life opportunities, health outcomes and social mobility. With Pembrokeshire being a predominantly rural county, where access to services and employment can be uneven, education plays an especially important role in enabling people to thrive and remain connected to their communities.

At its core, the importance of education lies in the development of essential skills such as literacy and numeracy. These foundation abilities are critical not only for academic success but also for everyday life from managing finances to accessing information and engaging with society. Strong literacy and numeracy skills are linked to improved employment prospects and higher earning potential which in turn support better living standards and overall well-being. Gaps in these skills can contribute to long-term disadvantage, limiting opportunities and increasing the risk of poverty and social exclusion.

Early intervention is a key factor in addressing these challenges, and programmes such as Flying Start play a vital role in Pembrokeshire. By providing support such as access to childcare and parenting support for families with young children in areas of disadvantage, the programme helps to build strong developmental foundations. These early experiences are crucial for physical, emotional and social development, all of which influence long-term well-being and educational outcomes.

Further education providers such as Pembrokeshire College provide pathways for young people and adults to develop vocational skills, gain qualifications and purse career ambitions without needing to leave the area. This is particularly significant in a rural context where outward migration for education and work can weaken local communities. By offering accessible routes into employment, further education contributes to both individual confidence and the strength of the local economy.

Early years and Play

Childcare Sufficiency Assessments are a statutory duty that require local authorities to evaluate the supply and demand of childcare in their area. They measure local supply and parental demand for childcare, highlighting market gaps. Councils then use these insights to plan targeted support, ensuring families can access reliable care to work or train.

Pembrokeshire's last assessment was completed in 2022. Overall, the assessment found that provision was generally high quality but unevenly distributed throughout the county,

as there were both vacancies and waiting lists which indicated a mismatch in supply versus demand. The main issues identified were;

- Affordability and accessibility – the biggest barriers for families were high costs, lack of local availability and lack of flexible hours.
- Shortages of wraparound provision before and after school, and also of holiday provision
- Limited supply of Welsh medium provision and difficulties in recruiting Welsh speaking staff
- Lack of 1:1 support and trained staff for those children with ALN (Additional Learning Needs)
- Difficulties with recruitment and retention of staff generally, exacerbated by the pandemic

There were found to be high levels of vacancies and childcare supply in the wards of Haverfordwest Priory, Milford Central, Cilgerran, St Ishmaels and Pembroke Monkton, with most of these being areas of high deprivation. There was also found to be limited specialist Additional Learning Needs (ALN) provision in the north of the County. Welsh provision was also mainly concentrated in the north of the County. The assessment also indicated that many parents relied on informal childcare, that provided by family and friends, to try and overcome these barriers.

The childcare provision available was consistently noted by parents and stakeholders as high-quality and overall availability throughout the county was found to be positive. The assessment also noted the diversity of the childcare market, with different types of care available, and that there was good uptake and availability of funded childcare.

The action plan which accompanies the assessment outlines several ways in which the issues outlined in the assessment can be overcome and how positive elements such as flexibility, engagement with parents and communities and the infrastructure to provide funded childcare can be built upon. The next CSA is due to be completed in 2027.

Based on the most recent review of admissions and capacity data, Pembrokeshire County Council concludes that there is sufficient nursery education provision available across the local authority area to meet current demand. There is no evidence of systemic shortages of nursery places, and no nursery applications have been refused due to a lack of capacity. Whilst demand varies between schools and localities, the maintained sector retains significant overall surplus capacity. The local authority will continue to monitor demographic changes, admission patterns and Welsh-medium demand as part of its annual admissions planning processes.

Flying Start is a Welsh Government programme providing funded childcare places, targeted at children from families in disadvantaged areas under 4 years old. Welsh Government is also in the process of making 12.5 hours of Flying Start childcare available to all 2-year-olds across Wales. The programme is designed to support children's development and supplement the nurturing traditionally provided by parents and carers by contributing to the acquisition of skills and abilities, socialisation and the ability to play and concentrate. These are crucial, not only to a child's ability to learn, but also to support their concentration, enabling them to engage and participate effectively in groups. In Pembrokeshire there are now 54 settings delivering the Flying Start Childcare programme.

The latest National Evaluation of Flying Start published by Welsh Government in February 2026 identifies that some of the benefits of the programme include improved social skills and confidence, better school readiness, enhanced speech and language development as well as broader cognitive and developmental gains and overall development. Funded childcare was also found to reduce the stress and anxiety of parents and carers and to allow them to use the money they would have spent on childcare on other essentials. The evaluation also identified that parents using Flying Start provision were able to go back to work or return to study and that it gave them flexibility in caring for other children.

The core Flying Start programme – which includes Health Visiting, Early Language and Development, Parenting and Childcare available to children aged 0-3yrs 11months - and the funded childcare element - which is available to children from the term after their 2nd birthday to the term after their 3rd birthday, are available across most of Pembrokeshire. There are currently five areas in the county without provision but with plans in place to expand into these final areas once additional funding is received from Welsh Government.

Play Sufficiency Assessments are carried out by Local Authorities in Wales every three years. Play is essential to a happy and healthy childhood, contributing significantly to children's well-being, development, and sense of community, building essential skills such as communication, confidence and school readiness. There is a well-established body of evidence that shows the contribution that play can make to children's long-term well-being, to their physical and mental health and to resilience. The Council must assess the sufficiency of play in their local authority area which identifies strengths, gaps, and areas for improvement, to ensure that Pembrokeshire continues to provide enriching play experiences for children of all backgrounds and abilities.

Pembrokeshire's latest assessment was undertaken in 2025. An analysis of population data revealed variations in the number of children, and the ages of those children, across different wards in the county, highlighting the need for targeted play provision in some areas. Economic data also identified social inequalities that may impact access to play in areas which have high levels of unemployment and child poverty, emphasising the need

for targeted play initiatives to support disadvantaged families. Responses to the survey undertaken as part of the assessment indicated that most children have ample playtime and feel safe playing outdoors. However, parental feedback, whilst emphasising the importance of outdoor play, highlighted concerns about safety, accessibility, and the condition of play areas.

A number of actions will be taken as a result of the findings of the latest Play Sufficiency Assessment, including;

- Targeted actions to invest in improved play facilities in areas with the highest child populations, and addressing safety concerns through better maintenance and community engagement
- Aiming to provide more inclusive play opportunities, including Welsh-medium play and initiatives supporting children from disadvantaged backgrounds
- Addressing gaps in play provision by seeking funding opportunities, fostering collaboration with local communities, and prioritising play initiatives that cater to the needs of different age groups.
- Investing in well-maintained, accessible play areas and expanding nature-based play opportunities, making play more affordable and available to all children.
- Continuing to monitor population trends and adapt provision accordingly, ensuring long-term sustainability and accessibility.

Schools

Pembrokeshire has 60 schools, including 1 special school, with 19 schools that are Welsh Medium or dual stream. As of January 2025, there were 16,248 Full Time Equivalent pupils in Pembrokeshire schools, compared with 16,564 in January 2024 and 18,822 in 1996. It is anticipated that there will be a further decline in pupil numbers over the next 10-15 years of around 12%. This is partly due to high levels of out-migration among Pembrokeshire's young adults for further/higher education, training or employment purposes.
Pembrokeshire has some of the smallest schools in Wales, with 11 schools containing less than 90 pupils.

There is a considerable variation in the size of Pembrokeshire's primary schools, which have the capacity to offer places to about 10,150 pupils. The largest primary school has around 575 pupils, the smallest only 23. The vast majority of primary schools offer nursery provision. There are approximately 1,640 surplus places for primary schools.
Pembrokeshire's two middle schools offer 2,752 places (819 Primary and 1933 Secondary). Two of these are Welsh medium schools. There is variation in the size of secondary schools in Pembrokeshire. The largest has 1,699 on roll, the smallest around 574. There are about 5,347 secondary students on roll whereas the capacity is 6,075.

Post sixteen education is delivered within the framework of a Memorandum of Understanding with Pembrokeshire College. The aim of this is greater collaboration between Schools and the College to minimise duplication and maximise the offer of courses to students. Campus 6 at Pembrokeshire College offers a wide range of A-levels and vocational equivalents.

Portfield, Pembrokeshire's Special school, caters for children and young people with severe, profound and complex learning difficulties in the age range 3 -19 years.

Learning Resource Centres provide additional support for young people with additional learning needs (e.g. autism) with the aim of supporting young people to reach their potential within a mainstream school setting. Whilst not a school it its own right, as young people remain on the roll of their own school, there is also a pupil referral unit which provides intensive support for children and young people with Behavioural, Emotional and Social difficulties.

Pembrokeshire faces an attainment disadvantage gap of over two years between pupils eligible for Free School Meals (FSM) and those who are not. Data shows that FSM entitlement appears to have more of an impact on attendance and the GCSE headline measures of Literacy, Numeracy and Science than the amount of money spent per pupil. This indicates that socio-economic disadvantage is a stronger driver of educational outcomes than school funding alone and that factors linked to poverty - such as home environment, access to resources, health, and parental support - play a major role in pupils' attainment.

In terms of performance, the latest self-assessment for schools in Pembrokeshire undertaken in 2025 shows that;

- Results from standardised termly assessments, which compare pupils' reading skills against a pre-COVID UK national benchmark, indicate that attainment remains significantly below historical expectations across all pupil groups. The analysis also highlights notable disparities, with boys performing significantly less well than girls and Year 3 pupils recording the weakest outcomes compared with older cohorts.
- In 2025, outcomes in the headline measures for Literacy, Numeracy and Science all improved compared with 2024, contrasting with the national picture, where performance remained broadly unchanged. Notably, Literacy outcomes in Pembrokeshire exceeded the national average for the first time since the measures were introduced in 2019, highlighting the strong progress made by learners across the county. However, outcomes in Numeracy and Science reveal wider disadvantage gaps than those observed in Literacy, with these gaps exceeding those seen nationally.

- Work to increase attendance and reduce exclusions provided a clear example of where a preventative approach resulted in improved outcomes and reduced demand on other services. Overall primary school attendance was similar for the 2024-25 financial year compared to previous years. Secondary school attendance improved by 0.8 percent points. Attendance figures for both primary and secondary schools are close to the Welsh average.
- Oversight and support for Elective Home Educated children has been strengthened, together with an increase in formal intervention.
- A robust approach to managing mobile phone use in schools has been implemented through collaborative working, which is beginning to show a positive impact on behaviour and learning environments. 96% of staff reported improved pupil concentration and 94% reported fewer behavioural challenges. The policy was also praised by the Senedd's Petitions Committee, which identified it as a sensible and well-balanced approach for the Welsh Government to consider as a model for other local authorities.
- Although controversial, the Council committed to undertake a review in 2024-25 of Pembrokeshire's schools, as there are too many school places for the number of children it has and is likely to have in the future. By addressing this mismatch, the Council aims to meet four objectives: improving standards; extending Welsh medium provision; creating sustainable education communities; and ensuring schools are housed in better quality buildings.
- A progress report on the Council's Welsh in Education Strategic Plan 2022-2031 was considered by Cabinet in April 2025. The report concludes that targets of at least 33% (or an aspirational target of 37%) of Year 1 learners to be taught through the medium of Welsh by 2031 can only be achieved by changing existing schools to Welsh medium, or by establishing new Welsh medium provision.

Data shows that Pembrokeshire's 60 schools have declining pupil numbers and significant surplus capacity, reflecting demographic changes and out-migration. School sizes vary widely, with some very small primaries and uneven secondary enrolment. Overall performance remains positive, with fewer schools requiring follow-up activity. However, important challenges remain, particularly in improving outcomes in reading, numeracy and science, and in narrowing attainment gaps related to gender and socio-economic disadvantage.

There is growing evidence of increasing demand for emotional wellbeing and mental health support within Pembrokeshire schools and Pembrokeshire College. Key issues include the impact of anxiety, social isolation and neurodiversity on learner attendance, engagement and, critically, educational attainment. Schools and the College benefit from well-established mental health and wellbeing services, reflecting the recognition that learners' emotional health is fundamental to their educational success. However, increasing

demand for these services continues to place significant pressure on available provision. The importance of mental health and wellbeing support has also been highlighted by the further education sector in discussions with Welsh Government.

School Leavers and post-16 education

Pembrokeshire College, located in Haverfordwest, is the county's largest post-16 education provider. It offers school leavers a wide variety of provisions, including A-levels, vocational technical qualifications, apprenticeships, and specialised Additional Learning Needs (ALN) or Life Skills programs, preparing students for university or employment. For school leavers, the College provides an environment that acts as a stepping stone towards university and the world of work. There are approximately 2,000 full-time and 12,500 part-time learners at the College. Academic and vocational courses are available across sectors such as Health and Care, Engineering, Construction, Food and Farming, Life Science, Information Communication & Technology, Finance, Tourism, Hospitality, Catering and Creative Arts. The college has a focus on mitigating emerging regional skills shortages by aligning its curriculum with local growth sectors, particularly the green energy and marine engineering industries.

The most recent Estyn assessment of work-based learning provision at the College undertaken in 2025 found that most learners value their learning experiences and demonstrate a strong commitment to developing their skills and that they become valued members of their employer's workforce by undertaking apprenticeships through the College. The report noted the strong commitment to learner well-being and that strong partnership working had resulted in strong learner outcomes.

The Memorandum of Understanding (MOU) between Pembrokeshire County Council, Schools and Pembrokeshire College regarding the delivery of post-16 education in the county was established in 2018 and last reviewed in June 2026. Post-16 education delivery in Pembrokeshire is currently provided by four of the eight secondary schools, and the purpose of the MOU is to support learners in accessing whichever post-16 pathway they choose to follow, whether A Levels, vocational courses or work bases training.

The College's range of transition activities outlined in the MOU reflects its strong commitment to partnership working, pupil engagement and widening participation. Targeted interventions, and personalised support is offered to ensure that learners are empowered to make confident, informed choices about their future, which supports the objectives outlined in the Pembrokeshire NEET (Not in Education, Employment or Training) Strategy.

Destination data collated by Careers Wales on behalf of Welsh Government indicates that there were 35 NEET Year 11 school leavers in 2025, (2.9% of the cohort of leavers compared to a 2.1% Welsh average). This was a reduction from 46 in 2024 but still demonstrates a concerning increasing trend since the pandemic. The recent rise in NEETs since the pandemic for the Year 11 age group is attributable to those young people that are unable to enter ETE because they face a barrier (e.g. mental or physical health challenges), comprising a cohort of 30 young people in 2025. NEET numbers remain low for Year 12 (3 NEET, 0.8% compared to a 0.6% Welsh average), but higher for Year 13 leavers (10 NEET 3.3% compared to a 3.6% Welsh average).

The Pembrokeshire NEETS Strategy, approved by the Council's Cabinet in June 2026, is built around the early identification of young people who are at risk of becoming not in education, employment or training (NEET) or homeless, understanding their needs, putting appropriate support and/or provision in place and monitoring their progression. Provision includes School-based provision, where youth workers based in secondary schools support young people to access relevant information including support to access Carers Wales, visits to post-16 settings and suitable employment searching and a targeted intervention aimed at Year 11 students where learners have the opportunity to spend one day per week accessing a variety of engagement programmes and vocational tasters linked to Jobs Growth Wales Plus WBL pathways at Futureworks and Pembrokeshire College.

Pembrokeshire County Council's Futureworks programme provides expert employment and skills training support and has over 30 years' experience of helping people to find jobs and move forwards in their lives. The programme has helped more than 3000 people in Pembrokeshire to change their lives for the better by starting lasting employment.

There are many things that mean the jobs market can be difficult for some people to access, including for those who may not have been employed for a while and need help with confidence or skills to look for work again, who have a health condition or disability, who have been out of work caring for a child or a relative or for those who might wish to gain skills or qualifications to help them move towards work.

Futureworks practitioners help individuals to put together a personal action plan and can also provide a range of support including one-to-one expert mentor guidance, help with preparing for interviews and writing a CV, help to prepare for work through work placements and work trials and signposting to specialist organisations for ongoing support.

Adult and Further Education

Adult and further education in Pembrokeshire is primarily delivered by Pembrokeshire College and the county-wide community network, Learning Pembrokeshire, part of Pembrokeshire County Council. Both providers work together to promote and market the courses available, and an annual promotional event is hosted by Pembrokeshire College. Pembrokeshire College offers A-levels, apprenticeships, vocational training, Access to Higher Education courses, as well as flexible evening/online courses. Learning Pembrokeshire operates from locations in Haverfordwest, Pembroke Dock, Fishguard, Tenby, Crymych, and Narberth and provides part-time adult community learning courses including Essential Skills (maths, reading, writing), ESOL (English for Speakers of Other Languages), digital skills, and languages (including Welsh), as well as general interest and leisure courses covering subjects including arts and crafts, music, history, pilates and yoga. Learning Pembrokeshire has a partnership arrangement with Menter Iaith Sir Benfro to develop adult learning workshops through the medium of Welsh and also operates Springboard family learning across several primary schools with a focus on access to learning opportunities for parents.

Data shows that in the 2024-25 academic year the number of part-time learner numbers decreased, for the first time in 4 years, but that Local Authority community learning numbers were higher than before the pandemic. The completion rate for adult community learning activities increased from 95% in 2023/24 to 96% in 2024/25. Data also shows that people accessing community learning are more likely to live in deprived neighbourhoods.

Key points

- Pembrokeshire's Childcare Sufficiency Assessment found childcare quality is generally high, but provision is uneven across the county.
- Key childcare challenges include; high costs and affordability issues; limited availability and flexible hours; shortages of wraparound and holiday childcare; limited Welsh-medium provision; insufficient support for children with Additional Learning Needs (ALN); and recruitment and retention difficulties for childcare staff.
- Pembrokeshire’s 2025 Play Sufficiency Assessment found most children have sufficient opportunities to play and generally feel safe outdoors.
- Concerns raised by parents included; safety of play areas; accessibility issues; and maintenance and quality of facilities.
- Future priorities include; improving play facilities; expanding inclusive and Welsh-medium play opportunities; increasing nature-based play; and targeting disadvantaged communities.

- Pupil numbers in schools are steadily declining and are expected to fall by around 12% over the next 10–15 years.

- There is significant surplus school capacity across the county due to demographic change and outward migration of young people
- Educational performance is generally improving
- Fewer schools are requiring Estyn follow-up
- Attendance has improved and is close to Welsh averages.
- A mobile phone management policy has improved concentration and reduced behavioural issues in schools.
- School reviews are underway to address surplus places, improve buildings and expand Welsh-medium education.

- Strong partnerships between schools, Pembrokeshire College and employers support progression into employment, apprenticeships and higher education.
- NEET (Not in Education, Employment or Training) rates remain relatively low but have increased since the pandemic, particularly among young people facing health-related barriers.
- The Pembrokeshire NEET Strategy focuses on early identification and targeted support for vulnerable young people.

- Participation in community learning remains above pre-pandemic levels despite a recent reduction in learner numbers.
- Completion rates for adult learning programmes increased to 96% in 2024–25.

Future trends

Mental Health

Supporting the mental health and wellbeing of children and young people is likely to remain a significant challenge. As demand for support continues to grow, these issues are expected to have an increasing influence on educational attainment, behaviour, attendance, inclusion, and progression into post-16 education, training and employment. There is likely to be an increasing need for early intervention and preventative approaches to ensure that learners receive timely support before difficulties escalate and impact on educational outcomes.

Increasing Demand for ALN Support

Demand for Additional Learning Needs (ALN) provision is expected to continue to rise, alongside increasing complexity in the needs of children and young people accessing education and training settings. Pembrokeshire schools and the College are experiencing growing numbers of learners requiring specialist interventions, tailored support and multi-

agency input. Recruiting and retaining suitably qualified staff, including specialist teachers and support workers, is likely to remain a significant challenge.

Growth in Welsh-Medium Education

Implementation of the Welsh in Education Strategic Plan (WESP) is expected to increase demand for Welsh-medium education across Pembrokeshire. Achieving national and local targets will require continued investment in workforce development, leadership capacity and educational infrastructure. Recruiting Welsh-speaking teachers, childcare practitioners and support staff is likely to become increasingly important, particularly in areas where Welsh-medium provision is limited. Future growth may also require changes to existing school structures and the development of new Welsh-medium pathways to ensure that learners can continue their education through the medium of Welsh at all stages.

Digital Skills and Artificial Intelligence

Artificial intelligence, automation and digital technologies are reshaping the skills required by employers across a wide range of sectors. Pembrokeshire Schools and the College will increasingly need to equip learners with digital literacy, critical thinking, cyber security awareness and the ability to use emerging technologies safely and effectively. As AI becomes more integrated into education and the workplace, there will be growing opportunities to enhance learning, improve productivity and support innovation. At the same time, education providers will need to ensure that learners understand the ethical, social and practical implications of these technologies and develop the adaptability needed for a rapidly changing labour market.

Net-Zero and Green Economy Skills

The transition to a low-carbon economy is expected to create significant demand for new technical and vocational skills. Major regional investment in renewable energy, floating offshore wind, marine industries, decarbonisation and sustainable infrastructure is likely to generate new employment opportunities across South West Wales. Pembrokeshire College has already adapted elements of its curriculum to align with the emerging energy engineering sector and labour market requirements. As these sectors continue to develop, Pembrokeshire Schools and the College will play a critical role in ensuring that local people can access the skills and qualifications needed to benefit from future employment opportunities and support regional economic growth.

Lifelong Learning and Workforce Reskilling

Pembrokeshire's ageing population, technological change and evolving patterns of employment are likely to increase demand for lifelong learning and workforce reskilling. Individuals are increasingly expected to update their knowledge and skills throughout their working lives as industries change and new technologies emerge. Flexible learning opportunities, including part-time, online and employer-led provision are likely to become increasingly important. Adult and community learning will continue to play a vital role in supporting employability, social inclusion, digital participation and personal wellbeing, particularly for those facing barriers to accessing education and training.

Recruitment and Retention Challenges

Recruitment and retention challenges are expected to remain a significant concern across the education sector. This includes lecturers, teachers, childcare practitioners, Welsh-speaking staff and specialist ALN professionals. Rurality can create additional barriers to recruitment including travel distances, limited workforce availability and competition from neighbouring areas and sectors. Workforce shortages can place pressure on service delivery and limit the capacity to expand provision in priority areas such as Welsh-medium education and specialist support services. Developing sustainable workforce pipelines and supporting professional development will therefore remain important priorities.

Rural Access Inequalities

Pembrokeshire's rural geography means that transport, connectivity and access to services are likely to remain barriers for some learners and families. Longer travel times can affect participation in education, extracurricular activities and post-16 opportunities particularly for those living in more remote communities within the county. Although digital technology provides opportunities to improve accessibility, disparities in digital connectivity and access to devices persist. Future education provision may need to make greater use of blended, flexible and digitally enabled learning models to ensure that all learners can access opportunities regardless of where they live.

Engagement feedback

Education and learning emerged as a strong cross-cutting theme linked to economic wellbeing, community sustainability and opportunities for young people. Some of the key themes were;

- The importance of having good opportunities to learn, gain skills and achieve qualifications.

- Better education and vocational skills development.
- Opportunities to learn throughout life, not only in formal education settings.
- Education as the foundation for improving life chances and creating stronger local economies.
- Stronger links between education and work and preventing young people leaving the county in the search for skilled employment.
- Concerns about educational performance in Wales and young people leaving education without essential skills required for employment.
- The importance of reducing the need to travel long distances to study and aligning training opportunities with local labour market needs.

Respondents felt that education, skills development and lifelong learning are key drivers of economic wellbeing and community resilience. Respondents said that improved educational opportunities, stronger links to employment, better local training provision and support for young people to remain in Pembrokeshire are critical priorities for the future.

People who participated in face to face sessions noted that better education and training as being essential for workforce preparation as well as eliminating barriers to access, such as affordability and travel issues, as important for education.

Based on survey responses from young people, educational achievement is viewed as the pathway to future success, with many young people linking doing well at school or college with access to good jobs and financial security. Learning was also valued not only for its educational value but also for personal growth, to pursue personal interests and ambitions and build confidence.

Some respondents identified challenges within education, including pressure to achieve, lack of recognition for effort, bullying and feeling misunderstood. Several responses focused specifically on college experiences and progression, including university preparation and support with applications and requests for more college opportunities in the area. Some young people also highlighted the importance of learning Welsh and of making Welsh more accessible to learners, suggesting that education is viewed by some as an important vehicle for cultural preservation and identity.

Overall, young people view education not simply as achieving qualifications, but as a means of building a positive future, developing their identity, and accessing meaningful careers and opportunities within Pembrokeshire.

Education remains a major issue for young people. What Matters to You? showed improving the school experience as the biggest priority. Rurality and access to transport to attend education provision were noted as barriers. Enhancing education and training in relevant subjects for workforce preparation and lifelong learning opportunities, and access to education and opportunities including further and higher education, were also seen as important priorities.

ENVIRONMENT AND CLIMATE CHANGE

Overview

Pembrokeshire's environment is not only a defining feature of the region but also a fundamental determinant of well-being for those who live there. With its coastline, farmlands, woodlands and protected landscapes such as the Pembrokeshire Coast National Park and over 60 Sites of Special Scientific Interest (SSSIs) as well as multiple Special Areas of Conservation (SACs); the Pembrokeshire Marine SAC for example it is one of the largest marine SACs in the UK covering roughly 138,069 hectares and is Wales's only statutory Marine Conservation Zone (MCZ), protecting waters around Skomer Island and the Marloes peninsula. Pembrokeshire offers a rich natural setting that supports both physical health and mental well-being; however, environmental pressures and climate change are increasingly shaping how our communities experience the benefits of these natural resources, making relationships between environment and well-being increasingly complex and urgent.

Access to nature is one Pembrokeshire's most valuable assets. Natural resources in the county underpin local livelihoods whilst also enhancing quality of life. Time spent in natural environments has been consistently linked to reduced stress, improved mood and increased physical activity which is being recognised more by healthcare and support services as an extension and compliment to traditional medications and treatments. If managed sensitively to protect biodiversity, coastal walks, green and blue spaces and wildlife rich areas provide fantastic opportunities for recreation and relaxation which are particularly important in supporting mental health. For many residents, the environment is closely tied to identity and community, reinforcing a sense of belonging.

Pembrokeshire is one of the most important areas for biodiversity in Wales, containing internationally significant coastal, marine and terrestrial habitats that support a rich variety of wildlife, from seabirds and pollinators to seagrass meadows and rare plant species. Our landscape (geology, coastline, inland waterways etc.), natural resources and the biodiversity that they support, underpins the county's natural beauty, tourism economy, farming, fisheries and community wellbeing, while healthy ecosystems help improve resilience to climate change, flooding and pollution. However, national data shows continuing declines in species range, abundance and diversity, with most ecosystems degraded. It is likely that these national trends are mirrored in Pembrokeshire. Protecting and restoring nature in Pembrokeshire is therefore essential for both environmental recovery and the long-term prosperity of local communities.

Climate change presents challenges that threaten both the environment and well-being. Rising temperatures, changing weather patterns and more frequent extreme weather

events such as flooding are already affecting rural and coastal areas all around Wales. In Pembrokeshire, increased storm intensity and coastal erosion pose risks to homes, infrastructures and natural habitats. These changes can lead to anxiety about the future particularly for communities whose livelihoods depends on farming, fishing or tourism. The uncertainty associated with climate impacts can also place a strain on the local economy and public services.

Energy usage and the transition to renewable energy are key components of both environmental sustainability and social well-being. As a high energy consumer, Pembrokeshire has significant potential for renewable energy generation with opportunities such as wind, solar and marine energy. Floating offshore wind in the Celtic Sea could become a major driver of economic and environmental change. Developing these resources well and with local ownership and community benefits can reduce carbon emissions whilst also creating jobs, increasing resilience and improving energy security.

Agriculture plays a major role in the Pembrokeshire economy, and the health of the soil directly affects food production, biodiversity and environmental resilience. Ensuring land is managed sustainably is therefore essential. Poor land management can contribute to soil degradation, reduced agricultural productivity and increased runoff, with consequential impacts on water quality, biodiversity and the resilience of freshwater and marine ecosystems. Conversely, sustainable land management can deliver multiple benefits, supporting food production, nature recovery and sustaining rural livelihoods.

Flood risk and water quality are increasingly significant concerns. Coastal, river and surface water flooding can damage homes, disrupt communities and create financial and emotional stress for affected residents. At the same time, water quality is vital for both human health and the environment. Pollution from sources including agriculture, sewage treatment or industry can harm ecosystems and limit access to safe, clean water. The River Cleddau has been under continued scrutiny due to elevated levels of nutrient pollution. The river is vitally important to wildlife but high levels of runoff transporting silt, nitrates and phosphates into the rivers presents a real risk to habitats and species, with poor water quality now a barrier to new housing development in the Cleddau catchment. Protecting water resources is therefore essential for sustaining both environmental integrity and community well-being due to the risks it presents when waterways are not maintained.

Climate change and natural resources

The sustainable management of water resources is essential to ensure there is enough water for people and the environment. Natural Resources Wales regulates the extraction of water from river and groundwater sources for a wide range of purposes. In Pembrokeshire, the largest usage of water is for public water supply and power production. Large volumes

of water are also used in agriculture for spray irrigation of crops such as potatoes, and in the dairy industry. As we continue to see increasing pressure on our water resources during periods of low rainfall and high summer temperatures, there is a need to improve our resilience to such events by conserving water and using it wisely.
Wales's third State of Natural Resources Report (SoNaRR) published by Natural Resources Wales (NRW) in 2025, provides a comprehensive assessment of the sustainable management of natural resources in Wales. Biodiversity loss, climate change and pollution continue to put significant pressure on ecosystems, with almost one in five species at risk of extinction and only 40% of water bodies achieving good ecological status. Wales remains one of the world's most nature-depleted countries and continues to consume resources at an unsustainable rate. Across Wales, ecosystems are generally assessed as having low to medium resilience, with habitat fragmentation, declining condition and poor connectivity limiting their ability to adapt to future pressures.

The South West Wales Area Statement published by NRW sets out a shared vision for the sustainable management of natural resources across Swansea, Neath Port Talbot, Carmarthenshire and Pembrokeshire, covering around 23% of Wales' land area and 22% of its population. It aims to identify key environmental risks, opportunities and actions needed to improve resilience, support communities, strengthen the economy and protect the natural environment and is organised around four interconnected themes:

- Reducing health inequalities
- Ensuring sustainable land management
- Reversing biodiversity loss
- Mitigating and adapting to climate change (a cross-cutting theme)

The Marine Area Statement for Wales published by NRW sets out a shared vision for the sustainable management of Wales' inshore marine area, covering waters out to 12 nautical miles and accounting for approximately 43% of Welsh territory. It identifies the key challenges, opportunities and priorities for action needed to build resilient marine ecosystems, support coastal communities, enable sustainable economic growth and ensure that Wales' seas continue to provide benefits for future generations.

The UK's fourth Climate Change Risk Assessment (CCRA4-1A), A Well-Adapted UK, was published in May 2026. The report sets out climate risks, actions, and enablers across 14 key systems including health, land, and the economy. The report concludes that the UK is not adequately prepared for climate change and must urgently adapt to a future likely to reach 2°C of global warming by 2050. Climate impacts are already being felt, including deadly heatwaves, severe flooding, droughts, and record wildfires.

The Climate Change Committee identifies eight priority risks: extreme heat, flooding, water scarcity, nature loss, farming impacts, food insecurity, insurance availability, and cascading infrastructure failures. Without action, up to 92% of existing homes could overheat, flood risks could rise sharply, and water shortages could exceed 5 billion litres per day.

The report recommends focusing on three major adaptation priorities:

- Cooling homes, hospitals, schools and care settings to reduce heat-related deaths.
- Flood resilience, including stronger defences, better drainage and restricting development in high-risk areas.
- Water security, through reservoirs, water transfers, leakage reduction and efficiency measures.

It proposes targets such as keeping heat-related deaths and flooded properties at or below current levels by 2050, achieving water resilience to a 1-in-500-year drought by 2040, and protecting 30% of land for nature by 2030.

The Committee estimates adaptation will require around £11 billion per year from public and private sources, which will generate returns in the tens of billions. The Committee argues that the benefits will far outweigh the costs, with many measures delivering strong economic returns.

These reports and publications focus on environmental issues that are of local, national and global importance. By focusing on the information within these publications, common areas of concern have been identified which relate specifically to Pembrokeshire.

Coastal erosion and flooding

Pembrokeshire, as a coastal region, is particularly vulnerable to rising sea levels, coastal erosion, more intense storms and flooding intensified by climate change. Communities including Newgale, Amroth, Tenby, Fishguard, Goodwick and Newport face particular challenges from coastal change, while homes and businesses in low-lying river and estuary settlements such as Haverfordwest, Pembroke, Milford Haven and the Cleddau catchment are vulnerable to flooding from rivers, the sea and surface water.

Sea levels are expected to rise in Wales by up to 1 metre by 2100, as are the frequency of more severe storms and wave action. This will increase the risk of coastal flooding, coastal erosion and damage to coastal infrastructure. The SoNaRR 2025 notes that some habitats will naturally be able to respond to this change by rolling back inland, but in many cases the coastal habitats are unable to do so because of other land use. This is known as coastal squeeze, where intertidal habitats, such as sand dunes, are trapped between rising

sea levels and fixed human-made structures (e.g., sea walls, roads). Because these structures block habitats from naturally migrating inland, the ecosystem is squeezed out and destroyed. Key habitats where this is occurring include internationally important mud and saltmarsh habitats on Milford Haven Waterway; the inlets and estuaries of the Marine SAC and the Lower and Western Cleddau estuarine margins.

NRW's South West Wales Area Statement echoes this assessment, noting that as well as rising sea levels, more frequent storms, and coastal erosion, that flooding, drought and extreme temperatures are already affecting coastal communities, infrastructure, habitats and agriculture. Pembrokeshire's extensive coastline, estuaries and low-lying coastal habitats make it particularly vulnerable. Climate change also amplifies other environmental pressures such as biodiversity loss, water quality issues and invasive species.

Pembrokeshire's PSB received funding in 2022 to develop a county-wide climate adaptation strategy, building on the analysis for the UK and Wales within the last UK Climate Risk Assessment (CCRA3), to examine climate risks at a Pembrokeshire scale and identify specific actions to increase stakeholders and communities' readiness for change. The Pembrokeshire Climate Adaptation Strategy identified 39 priorities which all organisations and communities need to consider in planning ahead for a changed climate in Pembrokeshire, together with 24 specific actions designed to help build resilience to climate risks over the five years 2022 to 2027, which the strategy determined should be actioned and delivered by public bodies and third and private sector partners in Pembrokeshire, coordinated by the PSB.

Delivering the priorities and actions in the strategy over five years has been difficult. Although adopted by the PSB, the strategy outlines actions for organisations who are not members of the PSB, with only a limited number of actions having been completed. Some examples of work undertaken include the work of Pembrokeshire Coastal Forum, a member of the PSB sub-group that focuses on this area of work, have developed a county-wide Climate Adaptation Toolkit, designed to help communities in Pembrokeshire build resilience to the increased risks from climate change, such as extreme weather, sea level rise and risk of wildfire. The aim of the toolkit is to provide independent, reliable information on the risks, provide support, and to help to bring together local councillors, residents, experts and statutory authorities to work collaboratively to co-create bespoke, place-based climate adaptation plans.

Pembrokeshire County Council (PCC), as the Lead Local Flood Authority (LLFA), is responsible for Flood and Coastal Erosion Risk Management (FCERM) across the county. Its role includes managing local flood risk, investigating flood events, regulating ordinary watercourses, and approving Sustainable Drainage Systems (SuDS) to ensure new developments are resilient to future climate impacts.

The Local Authority has prepared a new Local Flood Risk Management Strategy, awaiting Welsh Government approval, which prioritises long-term adaptation to increasing flood and coastal risks. The Authority works with regional Coastal Groups to implement the National Flood and Coastal Erosion Risk Management Strategy for Wales, including reporting on Shoreline Management Plan (SMP) delivery and progress against adaptive coastal management actions. PCC also leads the Sustainable Coastal Communities initiative, engaging communities vulnerable to flooding and coastal change in developing locally informed adaptation responses. Through partnership working, awareness raising and knowledge sharing, this supports more sustainable approaches to coastal management. As Coast Protection Authority, the Local Authority also manages coastal erosion risks while promoting shared responsibility for long-term adaptation to coastal change.

Natural Resources Wales are also delivering their Coastal Adaptation Programme, providing technical expertise, climate risk information and support for communities most vulnerable to coastal change and flooding.

On average there are 52 flooding and water rescue incidents in Pembrokeshire annually attended by MAWW Fire Service, with incidents mainly linked to storms that occur between October and February. Typically, the majority of flooding incidents will occur in one or two days during a period of heavy rainfall; for example, in November 2025 there were 36 incidents which occurred over a few days but represented 13% of all the incidents that occurred within a 5 year period. In recent years, flooding hotspots have been focused in areas around Tenby. However flooding events have also occurred throughout the county with no specific hotspots visible. Incidents reflect the increasing volatility of local weather patterns, with heavy rainfall, rapid surface-water accumulation and river-related flooding continuing to affect communities across the county. The impacts of climate change are expected to cause more severe storms and changing weather patterns which may lead to more extreme flooding events.

A greater focus is required by all PSB Members and partners to ensure that the remaining actions of the Pembrokeshire Climate Adaptation Strategy are implemented and, where required, are updated to reflect changing circumstances.

Wildfires

In Pembrokeshire there are on average 76 grass fires annually. However, averages can hide annual activity levels as some years there is no significant activity and spate conditions in other years. Grass/wildfires in Pembrokeshire show strong geographical clustering, seasonal fluctuation, and links to weather conditions. Human-caused ignitions are a major

contributor, with 31% of grass fires recorded as deliberate; other common causes include anti-social behaviour such as deliberate ignition of scrub or heath, accidental spread from controlled burns, misuse of disposable BBQs or campfires, and sparks generated from machinery or agricultural equipment.

Grass and wildfires arise from a combination of environmental, human and land-use factors. Weather and seasonal conditions play a significant role, with dry spells in late winter and early spring (January–April) leaving vegetation highly combustible, while summer heatwaves increase fire spread potential and strong winds in exposed coastal headland areas. Land-use characteristics further influence risk, as Pembrokeshire contains extensive moorland, upland grazing areas, forestry edges, and bracken- or heather-dominated landscapes, all of which accumulate fine fuels – such as dry grass, bracken and littered heather - that ignite easily and burn rapidly under suitable conditions. Public access and recreation pressures add to this risk, particularly in areas near rights of way, viewpoints, trailheads and informal recreation spots, where increased footfall during peak tourism seasons elevates the likelihood of accidental ignition. The main locations for Wildfires in Pembrokeshire are within the Pembrokeshire Coast National Park, particularly the Preseli Mountains and coastal headland areas around Fishguard/Dinas, St Davids, Newgale and Marloes.

Wildfires can have multiple detrimental impacts on the environment, causing pollution, damaging the landscape and sites of special scientific interest and damaging wildlife habitats. Wildfires can also impact communities if evacuation of households is required and can affect the health of those with lung conditions.

Climate change is already affecting the amount and severity of wildfires. Generally, there is an annual pattern where grass fires and wildfires occur in early spring (March and April). However recently there is also a second peak during the summer months due to heatwaves. It is this second peak which is occurring more often. Changes in farming and land management may affect the number of fires and how they spread. For example, actively encouraging some types of land management (such as fire breaks) can help alleviate the effects of wildfire.

Biodiversity

Internationally important habitats in Pembrokeshire include its rugged coastal cliffs, species-rich heathlands, ancient woodlands and marine habitats. These support iconic species such as puffins, choughs, Atlantic grey seals, otters, bottlenose dolphins, bats and internationally important populations of seabirds. The South West Wales Area Statement, supported by evidence in SoNaRR 2025, identifies biodiversity loss as a major environmental challenge in Pembrokeshire. Coastal habitats, farmland, marine

environments and freshwater systems are all experiencing declining species abundance, habitat degradation and increasing fragmentation. Climate change, pollution, invasive species and land management pressures are reducing ecosystem resilience. Reversing biodiversity decline is described as a core priority, with particular emphasis on habitat restoration and ecological connectivity across landscapes. However, by employing nature-based solutions as referenced in SoNaRR 2025, such as restoring and improving habitat condition, improving connectivity, and integrating climate adaptation into planning, climate risks can be turned into opportunities for building resilient, thriving ecosystems.

In Wales, SoNaRR 2025 and NRW's 2026 Habitat and Species Assessment, show that ecosystem resilience remains low across most habitats, with biodiversity continuing to decline and many habitats in unfavourable condition. These risks are particularly relevant to Pembrokeshire's coast, where sea level rise, coastal erosion and increased storm impacts threaten saltmarsh, sand dune and intertidal habitats. Adaptation measures will need to align with Shoreline Management Plans, to support long-term ecosystem resilience.

In Pembrokeshire, water quality standards in the Eastern and Western Cleddau river have been an issue of concern for some time. In June 2025, Natural Resources Wales published Condition assessments for Welsh European marine sites (EMS), including the Pembrokeshire Marine Special Area of Conservation. The findings showed that elevated nitrogen levels in the water were having an adverse impact on protected species and habitats in the Milford Haven Waterway. The Water Framework Directive (WFD) regulations 2017 established a legal framework for protecting and improving the quality of rivers, lakes, estuaries, coastal waters, and groundwater throughout England and Wales. The latest results from 2024 classified Milford Haven Inner and Outer Waterbodies as Poor for Dissolved Inorganic Nitrogen (DIN) despite an overall WFD classification of Moderate.

High nutrient levels can cause eutrophication, where excess nitrogen and phosphorus from fertilisers, sewage and manure degrade water ecosystems. Widespread macroalgae blooms in the Milford Haven Waterway indicate this problem, smothering mudflats and saltmarshes and creating oxygen-depleted sediments that harm wildlife and habitats. The main causes are nutrient runoff from agriculture and wastewater discharges, while rising sea temperatures, changing rainfall patterns and sea-level rise may worsen these impacts. NRW, alongside the Nutrient Management Board, Local Authorities and others, are working to tackle these issues.

The evidence from NRW showing that the Pembrokeshire Marine Special Area of Conservation (SAC) is in an unfavourable condition due to excessive levels of Dissolved Inorganic Nitrogen (DIN), means that NRW now requires new areas of development to demonstrate nitrogen neutrality before planning permission can be granted. Therefore, Pembrokeshire County Council can currently only approve development where it can

demonstrate there will be no likely significant effect on protected habitats. Housing development is the sector most affected because new homes generate additional wastewater and associated nitrogen loads. Affordable housing delivery is under threat with the potential development of approximately 220 affordable homes affected.

The restrictions could mean considerably slower delivery of affordable housing in the county, increased housing waiting lists and reduced ability to meet local housing need. Economic growth could also be constrained, with potential impacts on jobs, supply chains and investment decisions. Although screening processes have been put in place to exempt some development types, planning backlogs are expected to continue growing until a solution is in place. For Pembrokeshire, the issue is not simply an environmental constraint but is becoming a considerable challenge affecting housing delivery, affordable housing and economic growth.

As of June 2026, 102 planning applications were undetermined because of nitrogen neutrality issues, with many more applications having been refused because neutrality could not be demonstrated. The implications around nitrogen neutrality requirements for planning and development are far-reaching in Pembrokeshire, with significant knock-on effects on development in the County.

The Environment (Principles, Governance and Biodiversity Targets) (Wales) Act 2026 became law in Wales on 27 April 2026. It requires the Welsh Government, Natural Resources Wales, and public authorities to apply core environmental principles, establish legally binding biodiversity targets, and empowers an independent governance body to ensure compliance. The legislation introduces a statutory framework into the Environment (Wales) Act 2016 to drive nature recovery, empowering Welsh Ministers to establish legally binding biodiversity targets to halt and reverse nature decline; requiring monitoring and regular reporting on the progress of these targets to restore ecosystems to resilient levels; and imposing a duty to promote awareness among the public and stakeholders about the importance of biodiversity and the threats it faces. The targets are still in development at the time of writing but are likely to include the '30x30 target' to protect 30% of land and sea by 2030. PCNPA and PCC are already working to understand how best they can contribute to achieving this target. Alongside the Well-being of Future Generations (Wales) Act 2015 and the Environment (Wales) Act 2016, this new Act is intended to support decision making that recognises how outcomes that relate to ecosystems, biodiversity and climate change interact with economic, social and cultural as well as environmental areas, rather than addressing issues in isolation.

Welsh Government's Nature Recovery Action Plan (NRAP) for Wales was published in March 2026 sets out how the Welsh Ministers intend to comply with their duty to seek to

maintain and enhance biodiversity and promote the resilience of ecosystems, providing the national framework that guides how biodiversity loss will be reversed. The NRAP is based around six strategic aims that address the key drivers of biodiversity loss, supported by actions designed to accelerate nature's recovery and strengthen ecosystem resilience. In Pembrokeshire, the Plan is being implemented through a partnership approach by the Pembrokeshire Nature Partnership. Pembrokeshire County Council hosts the Pembrokeshire Nature Partnership, which brings together organisations and individuals involved in nature recovery across Pembrokeshire. Over the last three years, the Partnership has facilitated more than £4.17 million of biodiversity funding, supported over 55 partner projects, provided core funding for 20 projects and helped deliver around 110 Local Places for Nature schemes.

The Sustainable Farming Scheme is Welsh Government's primary mechanism to support farmers, land management and sustainable food production from 2026 onwards. Beginning on 1st January 2026, the scheme is designed to support the production of safe, high-quality food in Wales. The Sustainable Farming Scheme aims to help farmers remain productive while protecting the environment, recognising that food production depends on healthy natural resources. The scheme provides direct advisory support and biodiversity grants to landowners to help them shift toward long-term, nature-friendly land stewardship. As climate change brings more extreme weather, farms must become more resilient. A key focus is improving soil health through actions such as soil testing and increasing organic matter, which helps soils retain water, reduce flooding risk and support productive pasture. By strengthening soils, habitats, livestock, crops and business resilience, farmers can improve sustainability, adapt to changing conditions and secure long-term benefits for their families, businesses and the wider Welsh farming industry. Farmers in Wales can either enter the Sustainable Farming Scheme or remain with the Basic Payment Scheme (BPS), which will be phased out by 2029.

PLANED, PAVS and Pembrokeshire County Council work together to support a dedicated Local Food Partnership for Pembrokeshire. The objectives of the partnership are to build resilience into local food networks through greater coordination of food related activities, create a more sustainable local system and aiming to tackle the root causes of food poverty. The Local Food Partnership have delivered a website hub with practical tools, local knowledge, and useful links to help individuals, organisations, and communities engage with sustainable food across Pembrokeshire. Hywel Dda UHB also have also recently initiated a programme around access to food, called 'Roots of Change'. Pembrokeshire, Carmarthenshire and Ceredigion PSBs, together with others including Local Food Partnerships, came together in March 2026 to agree a shared approach to improving the availability and affordability of healthy and sustainable food across the region. This work is in the initial stages of development but attendees agreed that public sector food procurement should be a joint area of focus for the PSBs moving forward, as improving the

food procurement landscape can have a significant impact on climate, the economy and population health by ensuring healthier, sustainable and affordable food options are available for all.

Decarbonisation and renewable energy

SoNaRR 2025 presents Pembrokeshire as one of Wales' most important counties for the transition to net zero. Its combination of offshore wind potential, existing renewable energy capacity, blue carbon ecosystems, coastal restoration projects, and opportunities for nature-based climate solutions means it is seen as a key location for delivering both decarbonisation and climate resilience, provided renewable energy growth is balanced with protection and restoration of nature. The county is also a major centre of energy consumption. It used just under 11.9 TWh of energy in 2023 accounting for almost a quarter of Wales's industrial energy use, with usage projected to rise to 23.8 TWh by 2035. This underlines the scale of both the decarbonisation challenge and the economic opportunity.

The Celtic Freeport spans Pembrokeshire (Milford Haven and Pembroke Dock) and Neath Port Talbot. Its Five-Year Plan drives a green energy corridor focused on floating offshore wind (FLOW), green hydrogen, sustainable aviation fuels, and carbon capture. Key decarbonisation and renewable energy projects include a green hydrogen facility at RWE Pembroke Power Station and a project which brings together RWE and Dragon LNG, together with Acorn, who provide CO2 capture and storage in Scotland, to develop innovative solutions for reducing carbon emissions at Pembroke Power Station and across South Wales' industrial sector.

Pembrokeshire is identified as a key location for the growth of renewable energy, particularly through the emerging Celtic Sea offshore wind sector. There is potential for more than 4.5 GW of offshore wind generation, making the county strategically important for Wales' net-zero pathway. The county already has some of the highest levels of renewable energy generation in Wales, leading the nation in installed onshore wind capacity. In 2024, Pembrokeshire had approximately 226 MW of installed low carbon electricity capacity, predominantly solar PV, and generated an estimated 340 GWh of renewable energy. Grid reinforcement, port capacity, consenting, environmental assessment and workforce development will be critical to realising the opportunity, whilst local ownership, community benefits and access to skilled employment will be critical to achieving a fair transition.

Waste and Recycling

Living in a society where waste is continually generated increases pressure on the use of our natural resources. Once waste is generated it requires treatment at facilities that require land, consume energy and water and produce emissions into the environment. If waste is not handled and treated properly it can be harmful to ecosystems, biodiversity and the well-being of the population.

Recycling rates in Pembrokeshire have continued to improve over recent years. The recycling rate is defined as the percentage of local authority municipal waste that is reused, recycled or composted and this level has increased considerably over the last two decades, increasing from around 5% in the late 1990s. The overall recycling rate for Wales increased from 66.6% in 2023 to 2024 to 68.4% in 2024 to 2025. The most recent Welsh Government data shows that 12 local authorities met the 2024 to 2025 statutory target of 70%, with Pembrokeshire currently having the highest rate of combined waste reuse, recycling or composting in Wales at 73.5%. The Welsh Government's 'Beyond Recycling' strategy includes a target to reduce the total amount of household waste collected to 761 thousand tonnes by 2050. Data shows that the amount of household waste collected throughout Wales has gradually decreased from 1,572 thousand tonnes in 2006 to 2007 to 1,237 thousand tonnes in 2024 to 2025.

In the future, greater focus needs to be given to reducing waste and prioritising the circular economy from both environmental and economic benefit. Additional focus also needs to be given to reducing the impact of harmful plastics in the environment, including the marine environment, and in sites of national and international importance.

Key points

- Pembrokeshire faces particular risks from rising sea levels, stronger storms, coastal erosion and flooding.
- Sea levels in Wales could rise by up to one metre by 2100, threatening homes, infrastructure and coastal habitats.
- Coastal squeeze is causing loss of important habitats where natural inland movement is blocked by development and sea defences.
- Pembrokeshire's internationally important coastal and marine environments face pressures from recreation and tourism, requiring responsible management to protect wildlife and habitats.
- Flooding incidents are becoming more intense and reflect the increasing volatility of weather patterns linked to climate change, with heavy rainfall, rapid surface-water accumulation and river-related flooding continuing to affect communities across the county.

- Community projects, including a Climate Adaptation Toolkit and interactive climate risk map, are helping improve local resilience.
- Climate change is affecting the amount and severity of wildfires, with an increase in fires during summer months caused by heatwaves which are outside the traditional early spring occurrences.

- Water quality in the Cleddau rivers and Milford Haven Waterway is a significant concern, with high levels of nitrogen and phosphorus which is damaging biodiversity and habitats
- Habitat loss and fragmentation is threatening the functioning of ecosystems which support food production, tourism, fishery and the health and wellbeing of residents and visitors in Pembrokeshire.
- Low water quality is damaging habitats, wildlife and biodiversity and may affect future housing and development through nitrogen neutrality requirements.
- Agriculture is vital to Pembrokeshire's economy, but unsustainable practices can damage soils and water quality.
- Pembrokeshire's internationally important coastal, marine and terrestrial habitats support significant wildlife and underpin tourism, recreation, climate resilience and community well-being, making biodiversity recovery a local priority
- Improving soil health is a key priority to reduce flooding, increase productivity and adapt to climate change.
- Local Food Partnerships and regional initiatives are working to improve access to healthy, affordable and sustainable food.

- Pembrokeshire is a key area for Wales' transition to net zero.
- The county is a major area of energy consumption, with just under 11.9 TWh of energy used in 2023 accounting for almost a quarter of Wales's industrial energy use, and usage projected to rise to 23.8 TWh by 2035.
- The county has significant potential for renewable energy production, including offshore wind, solar, marine energy and green hydrogen projects.
- The Celtic Freeport is supporting major green energy developments focused on floating offshore wind, hydrogen and carbon capture technologies.

- Waste generation places pressure on natural resources and can harm ecosystems if not managed properly.
- Pembrokeshire has achieved the highest recycling, reuse and composting rate in Wales at 73.5%.

Future Trends

Pembrokeshire is likely to experience significant environmental, economic and social change over the coming decades as climate change, nature recovery ambitions and decarbonisation policies increasingly shape land and sea use.

Flood risk is projected to increase as sea levels rise and rainfall becomes more intense. Coastal communities are likely to face increasing erosion and flooding pressures, while low-lying settlements remain vulnerable to river, tidal and surface water flooding. These impacts could affect homes, transport links, tourism and community well-being. Opportunities exist to expand nature-based solutions such as catchment restoration, wetland creation, managed realignment and natural flood management, delivering both climate resilience and biodiversity benefits.

Nature recovery programmes may help reverse declines in species, although climate change, invasive species, development pressures and constrained resources may make targets difficult to achieve.

Water quality and nutrient pollution are expected to remain major challenges within the Cleddau SAC and the Milford Haven Waterway. More frequent heavy rainfall events may increase nutrient runoff from agricultural land, contributing to algal growth and ecological degradation. Conversely, continued investment in catchment management, wastewater treatment upgrades and sustainable farming practices could support ecosystem recovery, improve bathing and shellfish water quality, and reduce development constraints linked to nutrient neutrality requirements.

Agriculture will continue to play a pivotal role in shaping Pembrokeshire's environment. The introduction of the Sustainable Farming Scheme is likely to accelerate a shift towards soil health recovery, habitat creation, carbon storage and natural flood management. Farmers may face challenges from changing regulation, extreme weather, volatile markets and disease pressures, but new opportunities could emerge through environmental payments, regenerative agriculture, woodland creation, renewable energy generation and diversification.

The transition to net zero will also become increasingly significant. Pembrokeshire energy consumption compared to renewable energy generation highlights the scale of the county's decarbonisation challenge. Across Wales, electricity demand is projected to increase by almost two-thirds by 2035, requiring substantial expansion of renewable generation, grid infrastructure, energy storage and system flexibility. Floating offshore wind in the Celtic Sea has the potential to become a major driver of economic and environmental change. Renewable energy development will also need to be carefully

planned alongside biodiversity recovery, marine ecosystem resilience and climate adaptation objectives to maximise long-term well-being benefits for Pembrokeshire.

Engagement feedback

The main environmental concerns identified in survey feedback related to;

- Water quality, in particular protecting rivers, beaches and coastal waters;
- concerns about pollution and sewage discharges into rivers and the sea, and;
- protecting public health and marine ecosystems.
- Waste and recycling, including calls for better recycling facilities and a desire to reduce waste and increase recycling rates.
- Concerns about pollution from traffic, industry and other sources.
- A decline in wildlife and habitats, protecting ecosystems and concerns that some developments may negatively affect biodiversity.
- Climate change was seen as a significant environmental challenge and concerns were raised around climate resilience and protecting communities and infrastructure from extreme weather events.

There was support for farmers and food production alongside a desire for more sustainable and regenerative farming practices and reducing chemical use to improve soil health. Views on renewable energy and sustainable energy use were generally supportive but mixed, with support for renewable energy and reducing fossil fuel dependency but concerns that some solar and wind developments could affect farmland, wildlife and landscapes. Residents valued access to parks, countryside, coastlines and nature and the opportunities they create for walking, cycling and outdoor recreation.

In their survey response, Pembrokeshire Association of Community Transport Organisations (PACTO) suggested that increasing the use of renewable energy is an important part of creating sustainable, resilient and affordable transport and community services for the future.

Respondents to the Easy Read survey noted good water quality as most important to them, followed by good air quality and a good ecosystem and rich biodiversity. Comments included the need to protect what we have now and a desire for ways to protect the environment that are easy to understand.

Feedback from face to face sessions was similar. Participants emphasised the importance of maintaining good water quality, and there was support for sustainable growing methods. There was a desire to promote responsible farming practices that support local farmers and prioritise locally sourced produce. Participants also highlighted how repairing

items and working with local makers and suppliers can reduce waste and support sustainable living.

Respondents to the Young People's survey expressed concerns about environmental quality, climate change, pollution, and protecting natural spaces and wildlife. Young people raised concerns about air pollution and carbon emissions and about water quality and pollution affecting wildlife. There were concerns about climate change affecting the long-term future of the planet, the impact on wildlife and ecosystems and that environmental damage was becoming irreversible and would lead to future generations inheriting a damaged environment. Young people also placed significant value on protecting nature and green spaces and protecting wildlife and generally viewed green energy as a vehicle for tackling climate change and reducing environmental harm.

In the 'What Young People Told Us' report, young people said that they value Pembrokeshire's environment and want it looked after. They talked about climate change, recycling, litter, wildlife, beaches, water quality, sustainable energy, conservation and spending time outdoors. The Young Voices for Choices group raised specific concerns about sewage entering the sea, water leaks, landfill, wildlife and renewable energy.

Young people from Futureworks said that electric cars need to be made cheaper, recycling information should be improved, that organisations should invest in tidal/hydro energy, local food and farmers should be supported, and river pollution reduced.

Health, Care and Support

Overview

Health, care and support are fundamental determinants of overall well-being, extending far beyond the treatment of illness to shape how individuals experience their daily lives. Throughout their lives, people within Pembrokeshire will need access to varying medical services and support at different times. There will be times when some people rely upon support far more than others and it is important that they are able to access the treatment and services they require. Prevention plays an integral role in combating the pressures put on health services and Pembrokeshire, as part of the Hywel Dda Health Board area, is using a social model for health to identify these trends.

Healthy behaviours play a large role in a person's well-being and there is strong evidence to suggest that leading a healthy lifestyle can reduce and mitigate the likelihood of chronic conditions. Examples of healthy behaviours include but are not limited to; not smoking, not engaging in drug and alcohol abuse, exercising regularly and eating a healthy balanced diet. Health-related behaviours are shaped by the social, economic, commercial and environmental conditions in which people live. Income, housing, employment, education, transport, access to affordable healthy food, opportunities to be physically active and exposure to the marketing of health-harming products all influence people's capacity to live healthy lives. Action to improve health therefore needs to combine support for individuals with changes to the wider conditions that shape health and well-being. Given the rural nature of Pembrokeshire, individuals can become isolated due to various issues including lack of public transport, which can hinder their ability to engage in health and wellbeing related activities.

Enabling and supporting people to adopt healthier behaviours, while creating environments that make healthier choices easier and more accessible, can improve population health and help reduce avoidable demand on health and care services. With an aging population, services are already put under pressure to meet the sometimes specialist needs of this demographic and a lack of adequate care can really see a negative impact for people in their later years. Health inequalities are avoidable, unfair, systematic differences in health status, life expectancy, or access to care between different population groups. They are deeply rooted in the social, economic, and environmental conditions in which people are born, grow, live, work, and age. Without addressing the root causes of health inequalities, good health remains an uphill battle for the organisations and services involved in delivering health, care and support services.

Population Needs Assessment

The West Wales Care Partnership is working to produce its next Population Needs Assessment (a requirement under the Social Services and Well-being Act 2014) which provides a high-level strategic analysis of care and support needs, including the support needs of carers, across the region. It assesses the extent to which those needs are currently being met and identifies where further improvement and development is needed to ensure that individuals get the services they need and are supported in living fulfilled lives.

While the Population Needs Assessment meets a separate statutory requirement, it will also be an integral part of the wider agenda of assessing the state of well-being in Pembrokeshire and therefore its findings will be a key consideration for us in our future planning to improve well-being.

Behaviours that can positively impact health and well-being

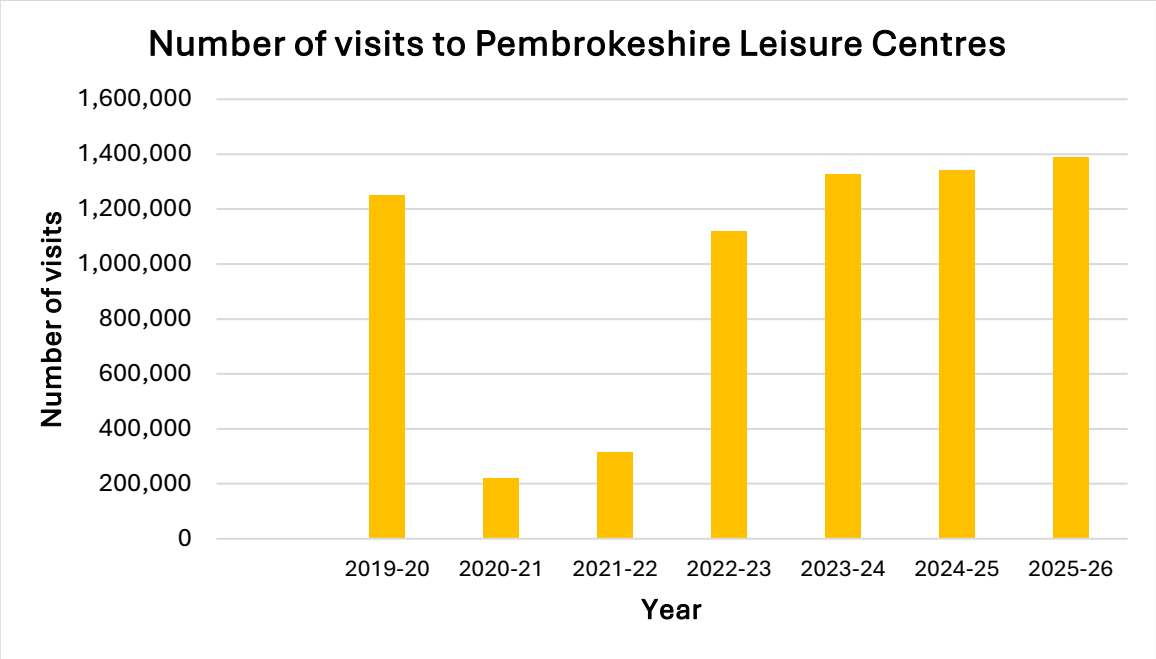
Healthy behaviours are actions that we as individuals can take that have a positive effect on our health and improve our overall well-being, for example maintaining a balanced diet, engaging in physical activity, or getting adequate sleep.

Data from the National Survey for Wales undertaken in 2024-25 found that overall, 94% of people reported two or more healthy behaviours, a similar level to 2022-23. Additionally;

- 36% of people were a healthy weight and 62% were overweight or obese, based on self-reported weight and height.
- 33% of people said they ate 5 or more fruit and vegetable portions the previous day.
- 59% of people said they were active for at least 150 minutes the previous week, which meets weekly activity guidelines.

School Health Research Network data from Public Health Wales shows that in 2023 the percentage of young people aged 11 – 16 who report eating at least one portion of fruit and vegetables every day in Pembrokeshire was 50%. The average in the Hywel Dda UHB as a whole is higher than the Wales average (49.3% compared to 46.5%). In Wales overall, the National Survey (April 2024 to March 2025) found that 33% of people said they ate 5 or more fruit and vegetable portions the previous day. For the Hywel Dda UHB region, 56% of people aged 16 and over said the number of portions of fruit and vegetables eaten the day before was more than one and less than 5, with 41% saying they had eaten 5 or more.

With regard to physical activity, National Survey data for April 2024 to March 2025 found that 59% of people said they were active for at least 150 minutes the previous week, meeting weekly activity guidelines. In Pembrokeshire, visits to Pembrokeshire Leisure Centres have risen steadily in recent years and are now above pre-pandemic levels.



There are also several locations where Parkrun is available in Pembrokeshire; in Haverfordwest; Colby Woodland Gardens near Amroth; and Milford Haven Waterfront. These free weekly events take place on Saturday mornings. Pembrokeshire also has a large network of walking and cycling tracks throughout the county and there are plans for more active travel routes to be put into place over the coming years.

Behaviours that can negatively impact health and well-being

Just as healthy behaviours have a positive impact on our health, other behaviours we engage in and the choices we make can have a negative impact.

Smoking

Smoking is the leading cause of preventable death and disease in the UK. The National Survey for Wales 2024-25 found that 10% of people said they were smokers, compared with 13% in 2022-23. Data from the Office of National Statistics in 2024 shows that the percentage of people using E-cigarettes in the UK is now higher than the number of people that smoke. Smoking prevalence in the Hywel Dda UHB area has decreased significantly in the last two decades from 26% in 2003-05 to 13.4 % in 2021-23. The introduction of legislation in Wales to reduce access to and visibility of tobacco products

and an investment in smoking cessation services by Hywel Dda UHB is likely to have contributed to this reduction.

While smoking prevalence in Hywel Dda UHB has continued to decline the drop has been less marked in specific population groups such as those with mental ill health, Gypsy and traveller groups, the homeless, and in geographical areas of deprivation across the three counties. Such smokers tend to be more heavily addicted and are therefore disproportionally impacted by its harms.

Public Health Wales data for 2020-2022, shows that smoking attributable hospital admissions, (European Age Standardised Rate (EASR)) per 100,000 for persons aged 35+ in the Hywel Dda region was 734, compared to a Wales average of 862.

According to information from ASH Wales, smoking and mental health are closely linked, with many people turning to cigarettes as a way to cope with stress and anxiety. People with mental health challenges are more likely to smoke more heavily, which increases their risk of serious health problems like lung disease, heart disease, and cancer. For this group, smoking is the leading cause of preventable deaths and can shorten life expectancy significantly. Around 33% of adults with mental health challenges smoke, compared to just 13% of the general population.

A recent report 'The Cost of Smoking in Wales' (PHW July 2026) repeatedly identifies deprivation rather than sex or geography as the strongest predictor of smoking-related harm, meaning it is a major driver of health inequalities. Although Hywel Dda smoking-related costs are the lowest per smoker in all of the Welsh Health Boards at £3,350.43 per smoker, smoking still costs £173.1 million per year, related to hospital admissions, outpatient costs, GP costs, prescription costs, social care costs and lost productivity.

Harmful drinking

NICE describes harmful drinking as a pattern of alcohol consumption that causes physical or mental health problems directly related to alcohol. The misuse of alcohol can harm health in a number of ways, leading to chronic health problems, cancers, depression, accidents and poisoning. Like tobacco, those at risk of harm from the misuse of alcohol come from all levels of society, ages and levels of prosperity.

The most up to date alcohol consumption data available for all-Wales, Health Board and Local Authority level published by Public Health Wales show that in 2021-22, 16.2% of adults aged 16+ in Hywel Dda UHB were drinking above the recommended guidelines of 14 units per week, slightly above the all-Wales average (15.7%). Pembrokeshire had the highest rate at 19.7%. Data for the following year, 2022-23, shows an increase in reported

consumption above the guidelines in Wales. The all-Wales figure rises to 17.2% (+1.5%) and the Hywel Dda value increases from 16.2% to 17.5% (+1.3%). Pembrokeshire's rates increased from 19.7% to 21.2%. Whilst the increases may be because of improved recording or a better understanding of the guidelines, the rise is a concern.

Hywel Dda UHB also reports that young people's use of alcohol has decreased significantly since 2017 (48.7%). Self-reported data for 2023-24 shows the Hywel Dda region reported a figure of 39.2% of all adolescents drinking in the past week compared to 35.6% for all-Wales.

Data for alcohol related hospital admissions shows that between 2022/23 and 2023/24, Pembrokeshire experienced a 7% reduction in admissions. All three counties in the Hywel Dda region have also seen a noticeable reduction in alcohol specific deaths since 2018/19. Although data for consumption and hospital related admissions do not seem to correspond, it should be noted that consumption data is self-reported, and hospital admission data reflects the most problematic drinking habits and are only one measure of harm caused by excessive alcohol consumption.

Obesity

The Public Health Wales Health Needs Assessment 2026 explains that obesity is one of the most preventable causes of ill health and early death and is the direct cause of diseases of the heart and circulation as well as some cancers. Its impact on children is most evident in increasing rates of Type 2 diabetes. There are also links to poor mental health and depression. Estimates suggest that being overweight (BMI 25 to less than 30) reduces life expectancy by about three years and being obese (BMI 30+) reduces life expectancy by 10 years.

The causes of obesity are extremely complex encompassing biology and behaviour, but set within a cultural, environmental and social framework. At its simple, people will gain weight if their energy intake is greater than the energy they expend. Food consumption and food production form part of the complex obesity system. The food and drink environment is a major influence on our eating and drinking behaviour. It includes access to and availability of healthy or unhealthy food, its price and marketing. Patterns of shopping and eating have changed beyond recognition in recent decades with a shift towards highly processed convenience food and eating out of the home.

- The latest data from Public Health Wales for children in Hywel Dda UHB aged 4 to 5 who are overweight or obese are the highest in Wales at 30.1%. Compared to Wales at 27.3%, Pembrokeshire's figure is 27.7% (Ceredigion 31.3%, Carmarthenshire 31.1%).

- Self-reported data collected by the School Health Research Network found that 68.1% of children aged 11-16 years in Hywel Dda are of a healthy weight, higher than the Wales average of 64.9%.
- Data from the Public Health Wales Observatory from 2022 shows that the percentage of working age adults of healthy weight in Pembrokeshire is 39.4%, higher than the Wales average of 35.4% (Carmarthenshire 29.9%, Ceredigion 36.3)%

Obesity places additional demand on health and social care services due to its influence on health conditions and diseases, affecting quality of life and in some cases leading to disability and premature death.

Drug misuse

Drug misuse relates to the illegal use of banned or prescription only substances, which have a negative impact on health and can lead to dependence and other harmful behaviours. Long-term use of drugs can also lead to increased tolerance, which can in turn lead to overdose - in some cases this can be fatal.

Public Health Wales reports that hospital admissions relating to illicit drugs have continued to decline across Wales. In 2023-24 there were 3,850 hospital admissions for poisonings involving named illicit drugs, a 10.6% reduction 2022/23. Compared with 2019/20, admissions have fallen by 38.9%. Opioids remain the leading cause of drug-related hospital admissions in Wales with cannabinoids the second most common substance group associated with admissions. The rate of hospital admissions related to illicit drugs in the Hywel Dda region in 2023-24 was 118.4 per 100,000 population and has shown a downward trend over the last 5 years.

Both benzodiazepines and cocaine have played a significant role in a number of poly-drug related deaths across Hywel Dda in recent years, although drug-related deaths linked to illicit drugs have generally been declining across Hywel Dda since the COVID-19 pandemic. In 2023, Pembrokeshire saw a reduction of over 50% in drug-related deaths compared with the previous year, but Public Health Wales reports a small increase in deaths in Pembrokeshire in 2024 compared with 2023. However, there are some emerging trends. There is growing concern about deaths involving prescription and over-the-counter medications across Carmarthenshire, Ceredigion and Pembrokeshire. In Pembrokeshire, this has been linked to a number of completed suicides. There was also an increase in drug-related deaths among women aged over 45 during 2022 and 2023 across the region and emerging evidence that menopause may be a contributing factor to addictive behaviours. Targeted work is underway to support this group as well as work looking into reducing the incidences of suicide.

Public Health Wales reports that victims of non-fatal overdoses in the Hywel Dda region tend to be younger than those involved in drug-related deaths, and women account for a greater proportion of cases. Some overdoses are accidental, while others are intentional acts of self-harm or attempted suicide, often involving prescription or over-the-counter medication alongside illicit drugs. Welsh Ambulance Service does not currently report non-fatal overdoses, meaning the data relies primarily on notifications from Dyfed-Powys Police. This suggests that non-fatal overdoses are therefore significantly under-reported. During 2023, Pembrokeshire recorded 12 non-fatal overdose incidents, with 8 females and 4 males involved. The most common age group was 20–24 years, although cases were spread across a wide age range. Half of all incidents were reported as intentional overdose and a wide variety of substances were reported to have been involved. In 2024, Pembrokeshire recorded 8 cases, with females still accounting for more incidents than males. Pembroke Dock is one of the principal hotspots for non-fatal overdoses in the Hywel Dda region, alongside Llanelli, Carmarthen and Aberystwyth. Targeted work is underway in these locations to engage with people who are not currently accessing support services.

Data from Public Health Wales shows that referrals to drug and alcohol services across Hywel Dda continue to rise, with services receiving around 1,000 referrals per quarter on average. Referral volumes increased by 11.6% compared with the previous 12 months. Since 2020/21, referrals have increased significantly across the region, with Pembrokeshire seeing an increase of 27.5% (240 people), the largest increase in referrals across the three counties. Most referral routes are through self-referrals, which indicates a positive desire for change. Alcohol remains the most common reason people access support, accounting for more than 60% of assessments across the region.

Prevention

The Annual Report of the Director of Public Health for Hywel Dda University Health Board 2024 – 2025 sets out a new "20four7 Prevention Model", arguing that prevention must become the foundation of healthcare delivery to improve population health, reduce inequalities and ensure NHS sustainability.

The model is built around three priorities:

- 20 – A focus on the 20% most socioeconomically deprived communities, where health inequalities are greatest. Healthy life expectancy differs by around 12 years for men and 9 years for women between the most and least deprived areas in Hywel Dda.
- Four – Address the four major behavioural risk factors (SNAP): Smoking, poor Nutrition, Alcohol misuse and Physical inactivity, which drive most preventable disease and premature death.

- 7 – Prioritise seven health areas where prevention can have the biggest impact: cancer, cardiovascular disease, child and maternal health, diabetes, frailty/falls, mental health and substance misuse, and respiratory disease.

The report highlights significant challenges across Hywel Dda, including rising diabetes prevalence, an ageing population, high levels of obesity, smoking-related illness, mental health inequalities and avoidable hospital admissions.

Mental health

A report published by Public Health Wales in February 2026 loneliness, social isolation and social connection as major public health issues in Wales, with significant impacts on physical health, mental wellbeing, economic productivity and demand on public services. It finds that 13% of adults in Wales are lonely and 13% are socially isolated. Evidence shows substantial health impacts; loneliness increases the risk of early death by around 14%, while social isolation increases mortality risk by 32%. Both are linked to cardiovascular disease, diabetes, depression, anxiety, dementia, frailty, poorer educational outcomes and unemployment. In the Hywel Dda region, social isolation can be an issue due to rurality, transport barriers and digital exclusion. The report suggests that strengthening social connection should be viewed as a preventative health intervention, requiring coordinated action across health, local government, transport, housing, education and the voluntary sector.

In 2024-25, the National Survey for Wales asked people about their mental wellbeing using the Warwick Edinburgh Mental Well-being Scale (WEMWBS), a scale of 14 self-assessed questions with scores ranging from 14 to 70. A higher score (58 to 70) is classified as having high mental wellbeing, 45 to 57 as medium mental wellbeing, and 44 or lower as low mental wellbeing. The average WEMWBS score in 2024-25 was 48.4. 33% of people reported low mental wellbeing, 52% medium mental wellbeing, and 15% high mental wellbeing. On average younger people reported lower mental wellbeing. These figures were similar to those from 2022-23 except for a decrease for those aged 65 and over (the mean wellbeing score for this group in 2022-23 was 50.7 but reduced to 49.7 in 2024-25).

The Mental Health of Babies, Children and Young People in Wales report published in May 2026, concludes that mental health and wellbeing among babies, children and young people (BCYP) in Wales has deteriorated significantly, with emotional difficulties, self-harm and eating disorders showing the greatest increases. Analysis of data identifies key drivers as poverty, academic pressure, sleep difficulties, bullying, loneliness, adverse childhood experiences, parental mental health problems, physical inactivity and problematic social media use. Emotional difficulties show the strongest upward trend, while service demand has outpaced capacity, particularly for anxiety, eating disorders and neurodevelopmental

assessments. These drivers can be particularly important in rural areas such as Hywel Dda, where geography, service accessibility, transport barriers and workforce capacity can compound inequalities and delay access to support. The report therefore places strong emphasis on community-based provision, social prescribing, digital support and early intervention approaches.

The School Health Research Network's (SHRN) Student Health and Well-being Survey in Primary Schools 2024 found that of Primary school children reported their life satisfaction as eight or more, where 0 was "I have the worst possible life") to 10 which was "I have the best possible life". Data from the SHRN survey for Secondary Schools found that 82% of pupils in Pembrokeshire reported being satisfied with their life in 2023, compared to 79.4% in 2021 and 80.5% in 2019.

Mind's Big Mental Health Report 2025 also highlights worsening mental health across Wales, particularly among young people, those living in poverty, and people facing unemployment or financial insecurity. Survey findings showed that many people faced barriers to accessing help, with long waits for GP appointments often worsening their condition. While most respondents reported positive experiences with GPs and voluntary organisations, many felt services lacked time and continuity. Declining public understanding of mental health was also identified as a concern.

Data from Stats Wales shows that in March 2026, 490 people in the Hywel Dda region had been referred to local Primary Mental Health Support Services. During the same month, 260 people had been waiting up to 28 days for an appointment. However, these figures are only indicative of those who have been identified as requiring support and therefore the true figures are likely to be higher.

Social Care

Pembrokeshire County Council's Director of Social Services Annual Reports for 2024-25 and 2025-26 indicate that demand for services in Pembrokeshire remains high, with increasing numbers of children, families and adults presenting with complex needs.

Data on adult service provision from the Director of Social Services Annual Report 2024-25 showed that Adult Services received 14,575 contacts during the year, with 6,225 people receiving advice and assistance. Figures for 2025-26 show a decrease in contacts to 13,427 and a further decrease in the amount of people receiving advice and assistance to 3884. The number of new adult assessments completed in 2024-25 was 1,705 which was slightly lower than the previous year 2023/24 when 1,804 were completed. Provisional data for 2025-26 shows that this has reduced again to 1,699. There has been a focus on reducing the number of people waiting for an assessment. The Welsh average for the number of

people per 100,000 population waiting for an assessment in March 2025 was 115 whereas the comparable figure for Pembrokeshire was 308. By August 2025 this figure had been reduced to 136.

In 2024-25, Pembrokeshire Children's Services received 6,579 child contacts, up from 4,476 the previous year, largely driven by an increase in police referrals (3,572 compared with 2,080 in 2023-24). Data for 2025-26 shows that the total number of contacts has further increased to 7,213 with contacts received from Police increasing again to 4,101 in 2025-26. Children's Services are continuing to work closely with Dyfed-Powys Police and other safeguarding partners to better understand the factors contributing to this increase and to promote a consistent understanding of safeguarding thresholds, information sharing and referral responsibilities. This work aims to ensure that concerns are identified and escalated appropriately, enabling resources to be focused on children and families who require the most urgent support and protection.

Although contact rates per 100,000 population were generally below the Welsh average in 2024-25, Pembrokeshire conducted more child protection enquiries than the Welsh average. An academic study how the Child Care Assessment Team responds to new referrals was therefore commissioned. Data from this study has provided valuable insight into how the child protection system responds to increasing demand. In some areas, increases in demand has led to a greater emphasis on process and intervention than is always necessary to achieve positive outcomes. The evidence from the study will inform future learning and ensure that resources are focused where they can have the greatest impact.

Adult Social Care has continued to support an increase in people across Nursing Care, Residential Care, Supported Living Services (SLS) and Homecare, with the increase in demand and complexity continuing to grow in 2024/25. Adult Services are receiving higher levels of eligible need alongside more complex packages of care. There has also been a significant rise in people requiring Mental Health and Learning Disabilities focussed support.

Social Care workforce vacancy rates in 2024-25 were below 10%, showing improvement from previous years. However, recruitment remains challenging in children's social work and adult mental health roles.

Carers

Census data from 2021 shows that a larger proportion of people provided unpaid care in Wales (10.5%) than in England (8.9%) and in Wales, a larger proportion of people provided 50 or more hours of unpaid care a week (3.6%, compared with 2.7% in England).

Age-standardised proportions were used to provide data for carers for the Census 2021, which enable comparisons between populations over time and across geographies, and account for differences in the population size and age structure.

In Pembrokeshire, 4.9% of residents (aged five years and over) reported providing up to 19 hours of unpaid care each week. This figure decreased from 7.6% in 2011. Just under 1 in 40 people (2.3%) reported providing between 20 and 49 hours of unpaid care each week, compared with 1.8% in 2011. The proportion of Pembrokeshire residents (aged five years and over) that provided at least 50 hours of weekly unpaid care increased from 3.4% to 3.5%.

The decrease in the proportion of people (aged five years and over) providing up to 19 hours of weekly unpaid care in Pembrokeshire (2.7 percentage points) was similar to the decrease in Carmarthenshire, where the proportion fell from 7.6% in 2011 to 4.9% in 2021, while across Wales, the proportion fell from 7.4% to 4.7%.

The 2021 Census was undertaken during the coronavirus (COVID-19) pandemic, which may have influenced how people perceived the provision of unpaid care, and therefore may have affected how people chose to respond.

Pembrokeshire County Council's Social Care team strengthened support for carers in 2024-25 through the issue of 844 adult and 54 young carer recognition cards, alongside 47 individual grants to help carers maintain their caring roles. Events during Carers Week and Carers Rights Day helped celebrate carers and promote available services.

During 2024/25, significant progress was made in raising awareness of support available to unpaid carers. Adult carer contacts to statutory social services increased to 218, with 475 carers' assessments completed and 203 carers supported through care plans, compared with 114 the previous year. Young and young adult carer contacts also increased to 225, including 85 new referrals.

Pembrokeshire County Council continued to strengthen support for unpaid carers during 2025/26 through assessment, financial assistance, respite opportunities, awareness raising and service development. There were 190 contacts from unpaid adult carers to statutory social services during the year, slightly lower than the previous year's total of 218. A total of 604 carers' needs assessments were completed for adult carers and the number of unpaid adult carers with a support plan increased significantly from 114 in March 2024 to 288 in March 2025, indicating greater levels of support being provided.

A new contract for the Young Carers Service was commissioned during 2025/26. The service specification was co-produced with young carers to ensure their views shaped

future provision. Media Academy Cymru was appointed as the new provider for a three-year period from April 2026. Contacts to the Young Carers Service increased to 240 in 2025-26, up from 225 the previous year.

The West Wales Strategic Plan for Unpaid Carers 2025-30 was launched in October 2025, with the aim of ensuring that carers are visible and valued and that they receive the right type and level of support at the right time.

The role of an unpaid carer can be rewarding, providing individuals with a sense of purpose, providing opportunity to develop new skills and ensuring the voice of the cared-for person is heard. However, the demands and responsibility of the role can have a negative impact on the individual's own health and well-being as well as on their education and employment prospects. Therefore, it is important that those who provide unpaid care have opportunity to access support which will enable them to continue in their caring role alongside maintaining or improving their health and well-being.

Within Wales, Unpaid Carers provide £10.63 billion worth of care and support to cared-for persons per annum. Within Pembrokeshire, based on the number of Unpaid Carers recorded in the 2021 census, this suggests a local figure in excess of £400 million per year.

Key points

- Health and wellbeing are influenced by much more than healthcare services alone, including lifestyle, environment, social circumstances and access to support.
- Pembrokeshire has an ageing population which is increasing pressure on health and care services.
- Health inequalities remain a significant challenge and are linked to social, economic and environmental factors. They remain a major challenge, particularly in more deprived communities.
- Prevention and encouraging healthy behaviours are central to improving outcomes and reducing demand on services and offer the best opportunity to improve population health.
- Mental health, increases in chronic disease due to an ageing population, obesity, alcohol misuse and social isolation are growing concerns.
- Demand for health, social care and carer support services is increasing, highlighting the need for continued investment in prevention, community support and early intervention.

Future trends

- Pembrokeshire's ageing population is expected to place growing pressure on health, social care and support services. The complexity of care needs is expected to rise, increasing demand for residential care, homecare, mental health support and learning disability services.

- The combination of an ageing population, obesity and lifestyle-related risk factors suggests increasing rates of chronic conditions such as diabetes, cardiovascular disease, respiratory illness and frailty.

- Demand for mental health support is likely to continue rising, particularly among children and young people, due to increases in emotional difficulties, self-harm, eating disorders, loneliness and anxiety.

- Although some drug-related harms and alcohol-related admissions have reduced, referrals to substance misuse services continue to rise, and emerging concerns include prescription medication misuse, non-fatal overdoses, and increasing risks among older women.

- With increasing care needs and an ageing population, reliance on unpaid carers is likely to grow.

Engagement feedback

The highest-ranked priorities overall for those who responded to the Well-being Survey were good physical health and mental health, and concerns about access to healthcare services, including GPs, dentists, hospitals and mental health support, either due to a lack of transport options or because services were not available in their local area.

Other feedback related to;

Support for ageing well and for an ageing population.
Accessible services for older people.
Better support for disabled people and carers.

In their response, PACTO said that they regularly meet older people who want to remain independent, active and connected to their communities, but many face barriers including limited transport options, social isolation, mobility issues, declining health and reduced access to local services. A common theme was that people do not necessarily need

intensive support but need practical assistance that enables them to continue living independently.

Those who responded to the Easy Read survey rated good mental health as the most important priority followed by good physical health, and had concerns about social isolation and access to healthcare.

Those participating in face to face sessions were concerned about timely assessments of carers' needs and access to healthcare. The importance of prevention was emphasised, including providing early access to local activities, leisure centres, and education about healthy eating for everyone.

Young people who responded to the survey also saw physical and mental health as the highest priority, recognising the importance of physical health for overall well-being and linking physical health to mental health, body image, nutrition and self-esteem. Having friends was also important to young people with respondents describing friendships as essential for emotional support, reducing loneliness and isolation, to feel included and valued and to support mental well-being. Young people also wanted better access to emotional and mental health support.

In the 'What Young People Told Us' report, mental health was one of the strongest issues across the different sessions. Young people talked about anxiety, stress, loneliness and isolation, and about how difficult it can sometimes be to get support. For young people participating in Futureworks, health priorities included cheaper healthy food, better sleep support, mental health support for over-18s, and drug-related prevention/enforcement.

Poverty and Inequalities

Overview

Poverty is a significant issue affecting well-being in Pembrokeshire, influencing a variety of areas such as health, education, employment and social inclusion across communities. While poverty is often associated purely with low income, it is a much broader issue that affects an individuals' ability to access opportunities, maintain a good standard of living and participate fully in society. Poverty can limit choices, reduce quality of life and create long term disadvantages that impact both physical and mental wellbeing. In rural counties such as Pembrokeshire, the effects of poverty can sometimes be less visible than in urban areas, but they remain deeply significant.

In the context of Pembrokeshire, poverty is shaped by a combination of rural isolation, seasonal employment patterns and inequal access to services. Although the county benefits from strong tourism, agriculture and energy sectors, employment can often be low paid, insecure or seasonal. This creates financial instability for many households, particularly during periods when work is limited. Rural poverty can also be intensified by higher transport costs and limited public transport, reducing access to essential services such as healthcare and education and limiting employment opportunities. For individuals living in smaller towns or isolated communities, these additional costs and barriers can place considerable strain on household finances and overall well-being.

Child poverty remains a major concern within Pembrokeshire and has far reaching consequences for both current and future well-being. Children growing up in poverty are more likely to experience poorer health outcomes and lower educational attainment, affecting opportunities later in life. Financial hardship can affect nutrition, access to extracurricular activities and participation in social experiences that are important for development and confidence. The emotional impact of poverty on children can also be significant, contributing towards stress, anxiety and feelings of exclusion.

In schools across Pembrokeshire, support systems such as free school meals and targeted family programmes play an important role in reducing some of these pressures. However, children and young people living in financially disadvantaged households may face barriers such as limited access to digital connectivity, quiet study places or reliable transport to educational settings. These challenges can reduce engagement with learning and contribute to achievement gaps. In turn, this can affect future employment opportunities and perpetuate cycles of disadvantage within communities. Supporting educational access and early intervention is therefore closely linked to improving well-being and reducing long term poverty.

In-work poverty has become an increasingly ingrained issue in Pembrokeshire. Employment does not always guarantee financial security, particularly where wages are low or working hours are inconsistent. Individuals may be in employment but can still struggle to afford housing, energy bills, transport and every-day living costs. Sectors such as tourism, hospitality and retail, which are important to the local economy, can involve temporary or seasonal contracts that create uncertainty. Rising living costs have further increased pressure on working households, meaning that even full-time employment may not be sufficient to maintain a stable standard of living.

The mental health impacts of poverty are substantial. Financial insecurity can lead to ongoing stress, anxiety and reduced self-esteem, affecting family relationships and social participation. Individuals experiencing poverty may feel isolated or unable to engage in community activities due to financial constraints. This can weaken social connections and contribute to loneliness, particularly in rural communities where opportunities for support may be less accessible.

Rising property prices and rental costs in the private sector have created affordability challenges for many local residents, particularly younger people and low-income households. Demand for second homes and holiday accommodation in some parts of the county has reduced the availability of affordable housing, placing additional pressure on local communities. Poor quality or insecure housing can further impact well-being by increasing the risk of health problems, fuel poverty and housing instability. For some households, a significant proportion of income is spent on rent, mortgage payments or energy costs, leaving less available for food, transport and other essentials.

Fuel poverty is also a particular concern in rural areas, where older housing may be less energy efficient and heating costs can be higher. Living in cold or damp conditions can negatively affect both physical and mental health, while rising energy costs continue to place pressure on vulnerable households. The combination of housing insecurity, financial stress and limited access to services can create complex challenges that affect overall quality of life.

Poverty in Wales

In a recent report, the Bevan Foundation notes that in the last 20 years, the percentage of children living in poverty in Wales has remained at around 30 percent. Child poverty is a symptom of broader societal issues which are varied and ever-changing, and can be caused by problems such as unemployment, low incomes working households, under-employment, families with caring responsibilities or health issues, housing costs (social and privately rented), and the availability of childcare.

In the UK, a person can be said to be living in relative income poverty if they live in a household where the total household income from all sources is less than 60% of the average UK household income, after housing costs such as rent/mortgage, water rates and any structural house insurance has been paid. Housing costs are widely considered to be the single largest outgoing that pushes families into relative poverty in the UK, reducing disposable income for other essentials.

Data for Wales for the financial years ending 2023 to 2025 shows that;

- 32% of children were living in relative income poverty
- 21% of working-age adults in Wales were in relative income poverty, above that seen for England (19%), Scotland (18%) and Northern Ireland (13%)
- 11% of pensioners in Wales were living in relative income poverty

In Pembrokeshire, the latest data shows that 27.7% of children aged under 16 live in relative low-income families.

The cost of living crisis continues to have an impact on household income. Since 2021, the percentage of children in Wales who are living in relative income poverty in households where all adults are in work has continued to increase, from 30% in the financial years ending 2021 to 2023, to 45% in the financial years ending 2023 to 2025. Although living in a household with people who work reduces the likelihood of poverty, most working-age adults in poverty lived in working households. 63% of working aged adults in poverty lived in households where some or all adults worked in the period ending FYE 2025, which has increased from 52% in the period ending FYE 2023.

Food support

The Trussell Trust community in Wales provided 154,000 emergency food parcels between 1st January 2025 and 31st December 2025. Although this figure represents a decrease from the previous two years, the level of food provision provided by the Trussell community is still well above pre-pandemic levels.

In Pembrokeshire, there is a range of food support available. As well as the Trussell community, PATCH (Pembrokeshire Action To Combat Hardship), which is the largest foodbank in the county, provided 137,000 meals in 2024-25, an increase of 18% from the previous year. There is also a community fridge in Merlins Bridge, Haverfordwest.

The number of children in Pembrokeshire eligible for free school meals (eFSM) has remained fairly stable for the last two financial years (2023-24 and 2024-25). In Wales,

transitional protection for free school meals is a safeguard that was introduced when Universal Credit eligibility rules changed in 2019, designed to ensure that children who were already receiving free school meals did not suddenly lose entitlement if their family's circumstances changed slightly during the rollout of Universal Credit. For children who were eligible on or before 31 December 2023, protection continues until the end of their current phase of education (for example, until the end of primary school or the end of secondary school). Children who became newly eligible from 1 January 2024 onwards are generally not covered by transitional protection, so their eligibility can be reassessed if their circumstances change. This means that fewer children will be in receipt of eFSM as this transitional protection is phased out.

Data shows that those eligible for eFSM have lower educational attainment and that socio-economic disadvantage has more of an impact on attainment than issues such as home environment, access to resources, health, and parental support. The phasing out of transitional protection may therefore put some children at a further disadvantage.

Fuel Poverty

Welsh Government information explains that a household is regarded as being in fuel poverty if they are unable to keep their home warm at a reasonable cost. In Wales, the full income fuel poverty definition states that a household is considered to be in fuel poverty if it needs to spend more than 10% of its income (including housing related benefits and net of council tax) on all household fuel use in order to maintain a satisfactory heating regime. A household needing to spend between 8 and 10% is classed as being at risk of fuel poverty (i.e. they are susceptible to relatively small changes in income or energy costs) and any household having to spend more than 20% is defined as being in severe fuel poverty.

Data published by Welsh Government in October 2024 estimated that;

- Around 340,000 households (25%) in Wales were in fuel poverty, including 63,000 (5%) in severe fuel poverty and 215,000 (16%) at risk of fuel poverty. This equates to approximately 25% of the country, or 1 in 4 households
- Around 304,000 vulnerable households (26%) were in fuel poverty, with 46,000 (4%) in severe fuel poverty and 198,000 (17%) at risk of fuel poverty. Vulnerable households are defined as those with a person aged 60 years or over, a dependent child or children under the age of 16 years, a single person under 25 and/or a person living with a long-term illness or who is disabled.
- Around 195,000 lower income households (83%) were in fuel poverty, 56,000 (24%) in severe fuel poverty, and 28,000 (12%) at risk of fuel poverty. A lower income household is defined as one whose income is less than 60% of the median household income in the UK before housing costs

They also found that;

- Households living in the private rented sector were more likely to be fuel poor with 30% of these households living in fuel poverty compared with 24% of owner occupiers and 22% of those in social housing.
- Single pensioner households without children were more likely to be fuel poor with 43% of households living in fuel poverty, whilst 8% of households with two adults and children were in fuel poverty.
- Households where the Household reference person (HRP) is unemployed or on means tested benefits are more likely to be in fuel poverty than those who are not.
- Households where the age of the HRP person is aged 75 and over were more likely to be fuel poor with 44% of households living in fuel poverty, whilst 10% of households with the respondent age 35 to 44 were in fuel poverty.

Many homes in Pembrokeshire were constructed pre-1919 and are likely to be poorly insulated. The challenge of fuel poverty linked to poor energy efficiency and heating costs impacts on both the health and welfare of individuals. Being unable to afford to heat a home to an adequate standard, or living in a home with inadequate insulation or heating, can cause or exacerbate respiratory conditions, especially amongst children and the elderly. Fuel poverty can also cause significant mental distress to individuals who may already be in energy debt and who isolate themselves due to embarrassment at being unable to heat their homes or to save money to try and pay for heating.

National energy action published a report in June 2026 highlighting that fuel poverty is structurally driven, not seasonally driven. The report notes that even when heating use decreases, households who struggle with costs in colder months continue to face unaffordable energy costs, with standing charges, debt repayments, and the need to power essential appliances meaning that bills remain high relative to income. At the same time, homes remain energy inefficient with challenges such as poor ventilation and overheating.

Housing and homelessness

As of the end of April 2026, Pembrokeshire was among the local authorities reporting the highest number of individuals sleeping rough. Pembrokeshire was the third highest with 16 rough sleepers, after Cardiff (46) and Ceredigion (17). However, rough sleepers in Pembrokeshire decreased from January (22), February (20) and March (17) 2026. Pembrokeshire has experienced outward migration of local households and very significant increases in the levels of homelessness in recent years. The ongoing cost of living crisis and high interest rates create risks around the ability of households to cover housing costs, increasing the risk of homelessness.

One of the key housing challenges facing Pembrokeshire is the lack of affordable housing to meet the needs of local residents, both currently and into the future. The issue is exacerbated by Pembrokeshire's attractiveness as a tourist destination, which has led to significant numbers of residential properties being purchased as second homes or to support the tourism trade, taking them away from residential occupation by local households. The county has also seen significant inward migration of affluent, older households from other parts of the UK, which has placed additional pressure on house prices to a point where they are unaffordable for the vast majority of local households. The private rented sector is unable to meet the local demand as private landlords have moved away from residential lettings due to increased government-imposed regulation and the more favourable financial returns offered by moving towards AirBnB and the short-term holiday lettings market. Demand for social housing has decreased over recent years but still remains high, particularly for 1 bedroom properties.

Income maximisation

At the end of 2024, discussions took place between members of the PSB's Poverty Working Group and Policy In Practice, an organisation that has developed an income-maximisation tool to assist local authorities in targeting specific identified cohorts of low income people/families in order to get them to take up benefits that are currently laying unclaimed.

The Low Income Family Tracker (LIFT) platform combines multiple data sets, including from DWP and Housing and Council Tax benefit data held by Pembrokeshire County Council to identify cohorts of people entitled to specific benefits that they are not claiming.
It was estimated that in the region of £30 million pounds in benefits was unclaimed in Pembrokeshire, a figure which would bring benefits to the wider economy of the county and to individuals, with the potential to lift some out of poverty. As one example, it was estimated that a targeted approach to pension benefit might see an additional £362,000 claimed by the county's pensioners in the first year of using the platform, with the potential of reducing the costs of care provided by the local authority and reducing debt for the individuals identified.

As of July 2026, LIFT has already delivered an immediate annual value of over £300k in Pembrokeshire, which Policy in Practice estimates at over £2m in lifetime value. However, this is just the tip of the iceberg, as access to passporting benefits unlocks additional support, and savings go beyond what is visible in the benefits data. In addition, based on claims to date, for every £1 that has been invested in LIFT during the pilot period approximately £10 was generated in immediate financial gains for local families.
Alongside this work, People PWR is a hugely successful welfare rights project in Pembrokeshire that has been in place for 3 years and is delivered by partners from Citizens

Advice. The project takes a holistic approach to supporting families affected by, or at risk of, poverty and focuses on engaging with communities via school settings, with the aim of creating greater financial stability for households, addressing inequalities and improving financial capability and practical numeracy skills.

In 25/26 the PWR team supported 340 families and achieved £892,003.28 of financial gains by supporting them to access unclaimed financial assistance which they were eligible to receive. Over the course of three years, over £1.4 million pounds has been realised in financial gains for local families, with the average gain for benefitting families at £5,600 Increasing the household income of some of our most vulnerable residents creates pathways out of poverty and raises the standard of living for many children, young people and their families across the County.

Key points

- Child poverty remains a significant concern, affecting health, educational attainment, social participation and long-term life chances.
- In Pembrokeshire, 27.7% of children under 16 live in relative low-income families.
- Across Wales, 32% of children were living in relative income poverty in the period ending 2025.
- Children experiencing poverty often face barriers including limited digital access, lack of study space and transport difficulties.
- Housing costs are a major factor pushing households into poverty.
- Employment no longer guarantees financial security, with many working households struggling to meet housing, energy and everyday living costs.
- The proportion of children in poverty living in working households increased from 30% to 45% between the periods ending 2023 and 2025.
- The Trussell Trust network in Wales distributed 154,000 emergency food parcels in 2025, remaining significantly above pre-pandemic levels.
- PATCH, Pembrokeshire's largest foodbank, provided 137,000 meals in 2024-25, an 18% increase on the previous year.
- Free school meal eligibility remains stable locally, but the phasing out of transitional protection may reduce eligibility for some children and increase disadvantage.
- Fuel poverty is a major issue, particularly in older, less energy-efficient homes common in Pembrokeshire.
- Fuel poverty disproportionately affects lower-income households, pensioners, renters and those on benefits.
- Poor heating and insulation contribute to physical health problems, particularly respiratory conditions, as well as mental health impacts.

- Affordable housing shortages are one of Pembrokeshire's most significant challenges. High property prices, second homes, holiday lets and inward migration have reduced housing affordability for local residents.
- Poverty is associated with increased stress, anxiety, low self-esteem, social isolation and loneliness. Financial hardship can weaken family relationships and reduce participation in community life.

Future Trends

Persistent cost-of-living pressures seem likely to continue, particularly around housing, energy and everyday household expenses. Fuel poverty also remains a long-term challenge, especially in older, energy-inefficient housing stock common in Pembrokeshire, with fuel poverty structurally driven, not seasonally driven. Demand for affordable housing is expected to continue exceeding supply, driven by high property prices, second homes, holiday lets and inward migration.

Poverty is also likely to contribute significantly to ongoing health and well-being impacts, including mental health pressures, social isolation, respiratory illness linked to poor housing conditions, and wider inequalities in educational attainment and life opportunities.

Engagement feedback

Income, affordability and the cost of living were frequently mentioned in survey responses. Respondents were concerned about rising living costs reducing their well-being and feelings of security, as well as concerns about income, fuel costs and general affordability of everyday items. Many residents were also concerned about financial pressures on households and the impact of the cost-of-living crisis on things such as social participation or being able to participate in sports and leisure activities. Accessing benefits and financial support was also mentioned.

Respondents to the Easy Read survey commented that help to access financial support was important to them, as was being able to meet basic needs and pay bills.

In their face to face engagement session, Pembrokeshire Carers Providers said that easy access to benefits, such as attendance allowance, would support their financial well-being. They also noted that ensuring access to pension credit can boost carers' mental health and their overall well-being.

A significant concern of young people responding to the survey was having enough money. Young people expressed worries about the cost of living, affording food and basic necessities and housing costs, as well as their future financial stability and independence.

In face to face sessions, young people raised concerns about the cost of living generally and also said that having enough money affects whether they can take part in activities, travel, learn to drive, continue in education or take up other opportunities.

SAFE, RESOURCEFUL AND COHESIVE COMMUNITIES

Overview

An individual's perception of whether they live in a safe community, and feel safe in that community, has a significant impact on their feelings of general well-being. People's feelings of safety are affected by their experiences and perceptions of crime and this in turn has an impact upon how cohesive or connected that community feels to them. Alongside this, the resilience of a community, and its ability to deal with challenges that affect the lives of its residents, can affect feelings of well-being. Being an active member of a vibrant community, for example through being a member of a local group or through volunteering, can enhance feelings of well-being and belonging, so that individuals feel more connected to their community and invested in its future.

Feeling safe within neighbourhoods, public spaces, schools and workplaces allows people to participate fully in community life and maintain positive mental well-being. When people feel unsafe, levels of stress, anxiety and social withdrawal can increase, reducing confidence and limiting social interaction. In Pembrokeshire, maintaining safe communities is particularly important in supporting vulnerable groups such as older residents, young people and those living in isolated rural areas. Safer town centres help to contribute to economic wellbeing and community participation.

Crime, disorder and antisocial behaviour can have a significant impact on both individuals and wider communities, even when overall crime levels remain relatively low. Issues such as vandalism, substance misuse, aggressive behaviour or public disorder can create fear and damage trust within communities. The effects are often psychological as well as physical, with persistent concerns about safety reducing trust in public spaces and preventing people from participating in community activities. In smaller communities, the effects of crime and antisocial behaviour can feel especially visible, potentially undermining social cohesion and local confidence.

Road safety is particularly important in a largely rural county such as Pembrokeshire. Many residents rely heavily on cars due to limited public transport options and rural roads can present additional hazards due to the narrow lanes, high speeds and seasonal traffic increases with limited road awareness or understanding. Road accidents have devastating impacts on individuals, families and communities, therefore improving road safety through education, infrastructure and awareness campaigns helps protect residents whilst also increasing confidence in road use.

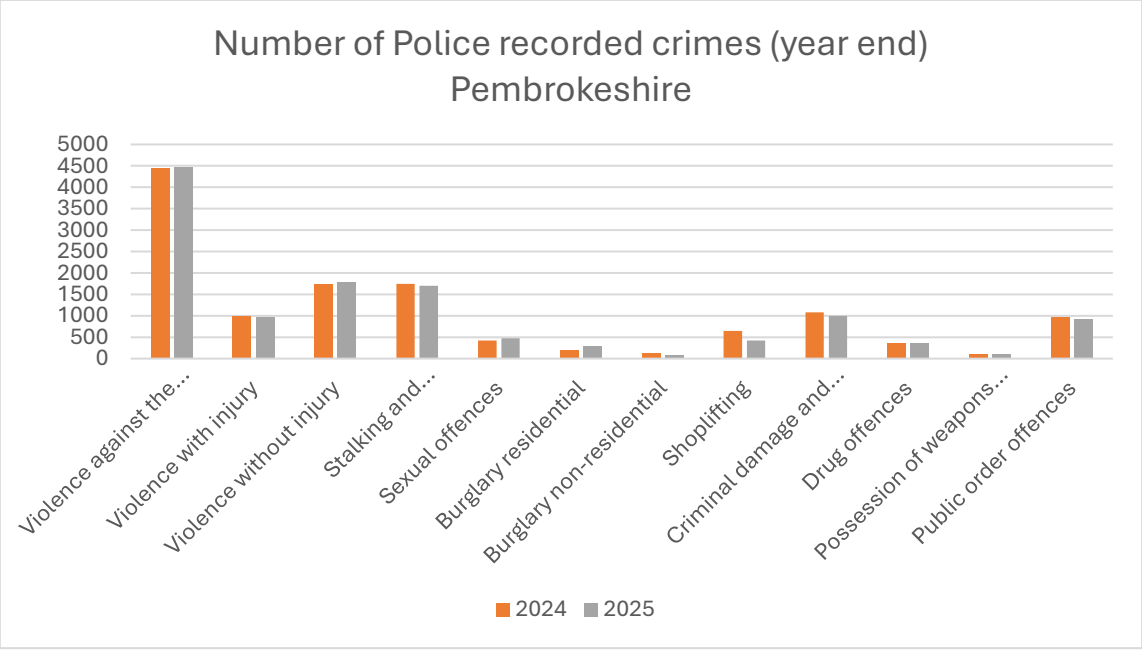
Community cohesion refers to the strength of relationships and the sense of trust and belonging between individuals and groups within a community. Cohesive communities are

generally healthier, more supportive and more resilient during periods or change and challenge. In Pembrokeshire, community cohesion is often strengthened through local organisations, volunteering, schools, sports clubs, cultural events and shared spaces. Strong social connections can reduce loneliness, improve mental health and encourage people to participate actively in local life. They also help create environments where residents feel valued and supported.

Community resilience has become increasingly important in the face of economic uncertainty, climate change and public health challenges. Resilient communities are able to adapt, recover and support one another during difficult circumstances. In Pembrokeshire, examples of resilience can be seen in local responses to flooding, server weather and periods of economic pressure. Community groups, charities and volunteers all play important roles in helping communities respond to crises and protect vulnerable residents. Rural isolation can create barriers for some residents, particularly older people or those without access to transport. Strengthening local services and encouraging community led initiatives can therefore have a direct positive impact on well-being. Digital exclusion, whether due to access or ability or other circumstances, can also cause people to be severely disadvantaged, cutting them off from essential services like online banking and healthcare, increasing social isolation, and restricting access to digital-only discounts

Crime, disorder and anti-social behaviour

Total levels of recorded crime for Pembrokeshire for the year ending December 2025 were 12,562. The graph below shows comparisons of crime volumes and offence types in Pembrokeshire for the last two years;



According to data gathered through the National Survey for Wales in 2024-25, just over 79% of people reported feeling fairly safe or very safe walking alone in their local area after dark, an increase from just over 75% in 2021-22. Just under 77% felt fairly or very safe using public transport after dark in 2024-25, a similar figure to that recorded for 2021-22. There is a trend towards a decrease in feelings of safety as deprivation in an area increases, with 74% of people who live in the least deprived areas feeling safe in all situations compared with 57% of people who live in the most deprived areas. There is also a marked difference by sex, with men feeling safer (82%) than women (56%).

Safer Pembrokeshire is the Community Safety Partnership for Pembrokeshire. Their aim is to work together to reduce crime and disorder, fear of crime, anti-social behaviour and substance misuse in the local area. The partnership is made up of representatives from Pembrokeshire County Council, Dyfed Powys Police, Hywel Dda University Health Board and Mid and West Wales Fire and Rescue Service as well as Wales Community Rehabilitation Company, the National Probation Service, Youth Offending and Prevention Service and Pembrokeshire Coast National Park Authority. These authorities have a duty to consider crime and disorder in all of their daily functions, and to do all that they reasonably can to prevent crime and disorder in their local area. This includes a duty to work towards reducing and preventing anti-social behaviour and substance misuse in the County. The Partnership works towards the following priorities;

- Providing an effective and coordinated response to antisocial behaviour, focusing on prevention and early intervention
- Reducing the harm caused by substance misuse
- Protecting every individual's right to be safe
- Reducing the impact of reoffending within our communities
- Preventing violent extremism

Anti-social behaviour

Anti-social behaviour (ASB) is any behaviour that causes any person harassment, alarm or distress and is a high profile issue. The majority of incidents reported in Pembrokeshire are rowdy and nuisance behaviour, often from neighbours. This behaviour can have a significant impact on the quality of life and cohesiveness of our communities. Depending on the kind of anti-social behaviour being reported, and to who, the matter may be quickly resolved, or it may need further investigation to effectively address the situation.

Dyfed Powys Police – key regional priorities

Evidence consistently shows that when the threats to communities are assessed on the risk and harm that they cause to victims and wider communities, the following cause the most harm;

- Domestic Abuse
- Sexual Offences including stalking
- Illicit Drugs (trafficking and possession)
- Road Traffic Collisions (Fatal and Serious injured)

Engagement with communities has shown that their biggest concerns are around road safety, drugs and anti-social behaviour.

In communities, especially rural areas, isolation can make it harder to seek help. Under reporting of crimes means many victims suffer in silence, yet crime and ASB can quickly erode trust in local services. Rural towns can feel the impacts of crime more sharply due to limited support and infrastructure.

Serious Violence and Organised Crime (SVOC)

The response to serious violence across the Dyfed-Powys area is being strengthened through improved partnership working, commissioning, data sharing and evaluation. It follows a workshop and interviews with partners from policing, health, local authorities, youth justice, safeguarding and other agencies in early 2026 which identified three priority areas for future activity:

- Online threats, particularly improving awareness and resilience among children, young people, parents and teachers.
- Preventative approaches, focusing on reducing adverse childhood experiences (ACEs), substance misuse and poor mental health.
- Violence Against Women, Domestic Abuse and Sexual Violence (VAWDASV), with a focus on education, prevention, reporting and improved information sharing.

A significant amount of work which contributes to violence prevention is already taking place but is often not recognised as part of the Serious Violence Duty, a legal requirement whereby local public services including the police, councils, health boards, and fire services, must work together to prevent and tackle serious violent crime. Challenges including fragmented data systems, limited analytical capacity, short-term funding, difficulties in recruiting specialist staff, and a lack of evaluation evidence have hindered progress to date.

The workshop has led to a more coordinated, evidence-led approach, with stronger collaboration between agencies, greater involvement of children and young people, and a focus on scaling up interventions that have already been successful on a smaller scale across the region.

Within Pembrokeshire Youth Justice, strong prevention work is taking place, including programmes such as Crucial Crew and Crime Time. A pilot project addressing misogyny and online harms among young males has been successful and is due to be expanded. Online harm was also described as a rapidly evolving issue requiring a coordinated multi-agency response and there is a need to better describe and coordinate the existing prevention offer for young people across Pembrokeshire over the coming years.

A regional action plan has been developed which recognises the current issues with delivery of the Serious Violence Duty and lays out the steps required to deliver action on the three priority areas identified.

Youth Justice

The Pembrokeshire Youth Justice Team supports children and young people to lead crime-free lives through a 'Child First' approach that balances safeguarding, rehabilitation and public protection. The Business Plan for 2026-27 highlights strong partnership working across education, children's services, police, probation, health and community organisations, supported by an independent Youth Justice Management Board.

During 2025-26, the team made significant progress in strengthening out-of-court disposal arrangements, improving management oversight, expanding victim support, enhancing staff skills, increasing digital and communication support, and embedding feedback from young people and families. First Time Entrants to the youth justice system have continued to fall, reoffending has reduced slightly, and custody levels remain among the lowest in England and Wales.

The main risks facing the service are funding uncertainty, changes to youth justice governance and increasing complexity among young people presenting with serious violence and safeguarding concerns.

Key priorities for 2026-27 include:

- Implementing the new Knife Crime Duty and reducing youth violence and anti-social behaviour.
- Expanding prevention and early intervention services.
- Strengthening parenting and family support.

- Improving education engagement and alternative learning opportunities.
- Enhancing workforce skills, including trauma-informed practice and pre-sentence report writing.
- Improving data analysis to better target resources and interventions.
- Developing restorative justice and victim services.
- Strengthening responses to exploitation, contextual safeguarding and serious violence.

Early intervention helps to reduce inequality and supports young people to become active participants in their communities, improving long-term economic and social wellbeing.

Substance misuse

Drug related crime has a significant impact upon society, and drug and alcohol misuse can have a range of adverse effects on outcomes for individuals and the communities in which they live. Drug related and drug-enabled activities are key drivers of both new and traditional crime. These include possession of illicit substances; crimes committed to fund drug dependence and the production and supply of harmful substances. Many of these crimes are perpetrated by serious and organised criminals alongside drug market violence associated with human trafficking and modern slavery. Drugs can also play a part in facilitating child exploitation and abuse and the illicit use of drugs in prisons is a driver of rising violence, self-harm and suicide.

Illicit drug supply has been identified as one of the factors linked to levels of serious violence, particularly in relation to competition for the control of drug supply markets. The largest threat has been the volume of county supply lines in Dyfed-Powys. It is estimated that there are more than 2,000 unique deal lines in the UK.

Alcohol related incidents are also a significant driver of violence particularly in coastal and student areas, with seasonal variation in demand enhancing the challenge by driving demand on health, policing and local authorities. This also impacts the perception of safety in otherwise low crime rural communities.

Substance misuse is both a cause and a consequence of inequality and requires coordinated action to address health inequalities, poverty and social exclusion. It should be trauma informed and aim to improve community wellbeing.

Reducing reoffending

People who leave prison are less likely to reoffend if they have strong foundations in place, such as a stable home, a strong connection to family and community, a steady job, and

good health free from substance misuse. The HM Prison and Probation Service Business Strategy 2026 - 2029 HMPPS strategy outlines how the organisation will improve performance, reduce reoffending, and protect the public through safer, more effective and resilient services.

The Dyfed-Powys Diversion Scheme, operated by Codi, aims to deal with criminal behaviour much sooner during an individual's offending journey by tackling the root causes of crime and related health and community issues. Its aim is to reduce the number of victims of crime by offering a four-month program of interventions to eligible offenders rather than prosecuting them. The scheme has an engagement rate of 88%, with 85% of service users reporting that they feel enabled to make more positive choices following their exit from the scheme. Research undertaken in 2021 demonstrated that 84% of individual completing the scheme were not arrested in the year following completion. The Reachable Moments project, a pilot scheme to support young people in custody and help break the cycle of crime, was launched across the Dyfed-Powys Police area in January 2026. The project aims to ensure young people who have been brought into custody receive the right support at the right time, engaging with them through a project worker, and guiding them towards positive life choices.

VAWDASV

Violence against women, domestic abuse and sexual violence (VAWDASV) has far-reaching consequences for families, children, and communities as a whole.

The Mid and West Wales VAWDASV Strategy aims to embed Violence against Women, Domestic Abuse and Sexual Violence as "everyone's business" within work and day-to-day life. Violence against Women, Domestic Abuse and Sexual Violence is a cross-cutting theme that requires all areas of public policy to address and to shape and improve the delivery of services for those affected. The current strategy (2023-2027) is informed by the needs and experiences of survivors and stakeholders in Mid and West Wales and reflects the priorities of the region and aims to deliver improvements for individual, families and communities.

Domestic abuse impacts upon all age groups. It not only affects younger people and can be prevalent in older people's relationships. Signs of abuse in older people's relationships may be difficult to identify, as abusive behaviour may be deeply embedded over a long period of time, and older people themselves may not recognise themselves as being in an abusive relationship. The Older Person's Commissioner for Wales has identified financial and economic abuse as issues affecting older people. Consideration should therefore be given to how domestic abuse is recognised and responded to across all age ranges and domestic situations and how people are targeted in terms of messaging and

signposting towards support services. Rural isolation can also increase hidden harm and under reporting.

Data shows that the number of domestic abuse related crime in Dyfed Powys has increased year on year since 2021, however the rate of increase has slowed over recent years.

Work will soon start on the next Regional VAWDASV Strategy for the region, with a focus on developing a regional data model which will enable stakeholders and practitioners to look at local data within Mid and West Wales, enabling support to be targeted according to location and need.

Community Cohesion

Community cohesion is important in providing a sense of feeling safe in a community. National Survey of Wales results for 2024-25 showed that just under 58% of people felt a sense of belonging to their local area were more likely to feel safe in that local area, compared with just under 65% of people in 2021-22.

In Pembrokeshire, there is continued concern amongst professionals regarding misinformation and online narratives, particularly around migration, identity and international events, and the impact these can have on local community relations. In view of this, training around hate crime awareness and reporting, including work to improve understanding amongst professionals and communities, and to support victims of hate incidents, is ongoing. Work to support integration and inclusion of minority communities, including refugees, asylum seekers, Gypsy, Roma and Traveller communities, faith communities and LGBTQ+ residents is also taking place.

Working with communities is an important element of community cohesion. This includes work to build community resilience and reduce social isolation, particularly through locally led community projects delivered in Pembrokeshire via the Community Cohesion Small Grants Programme. Promoting positive community relations through cultural engagement and shared community events is also important, for example, Haverfordwest AFC's "Kicking Off Conversations" project brought together over 200 primary school pupils from different schools and backgrounds to explore diversity and challenge stereotypes. Another example is Pobl Ti Môr CIC's Pride & Tide project, which used surfing and beach activities to bring LGBTQ+ people and the wider community together, helping to reduce isolation and promote understanding and inclusion.

Early identification and management of community tensions is vital and is supported through weekly multi-agency tension monitoring meetings and partnership structures involving Community Safety and other strategic groups.

Road Safety

Pembrokeshire CSP received an update on Road Casualties in the Dyfed Powys area between 2020-2024 at their meeting in June 2026. The highest number of casualties in the Dyfed Powys Police area fell in the 26-35 year age bracket, making up 16.4% of all casualties in 2024. This was followed by the 16-20 year old age bracket which made up 14.9% of casualties in 2024. Out of a total of 1452 casualties recorded in 2024, 1011 were car occupants, making up 69.6% of all casualties. The second highest number of casualties in 2024 were motorcycles over 500cc, which make up 101 casualties, 6.95%. The third highest number of casualties in 2024 were pedestrians, with 92 pedestrian casualties in 2024 out of a total of 1452 casualties, making up 6.3%.

Car occupant casualties have been continually increasing from 838 in 2021, to 1011 in 2025. Motorcycles over 500cc have also seen an increase in casualties from 73 in 2021 to 101 in 2024. The total amount of casualties for motorcycles of all sizes in 2024 were 170, with provisional figures for 2025 showing a further increase to 209. Although pedestrian casualties saw a decline in 2024 (112 casualties in 2023 reducing to 92 in 2024), provisional data for 2025 shows an increase in pedestrian casualties from 2024 to 100 pedestrian casualties in 2025.

Data from Stats Wales shows that there was an increase in police reported road traffic collisions and associated severity for fatalities and serious injuries in Pembrokeshire between 2023 and 2025. The largest increase in casualties was in the 16-24, 25-44 and 70+ age groups.

The Fire Service attends an average of 115 RTCs annually in the Mid and West Wales area. 13% these require the Fire service to extricate casualties, an indication of the severity of these incidents. While extrication incidents represent only around 13% of all RTCs attended, they are disproportionately resource-intensive, often involving multiple appliances, prolonged scene times, and high levels of multi-agency cooperation. Fast rural A roads produce the most severe RTCs and MAWW Fire Service data supports this, with incidents involving extrications occurring mainly on rural A roads. In Pembrokeshire these are focused on the A40, A487, A477, A4076 and A4075. Additionally, in Pembrokeshire there is a high level of extrication incidents occurring on the county's B roads, especially in the Haverfordwest area, leading west to the coast.

A Pembrokeshire Road Safety Board has recently been established to compliment road safety work taking place in the Dyfed Powys area. The purpose of this Board will be to

consider road safety data and information for the county and to support the development of funding bids to undertake work related to increased road safety and awareness.

Fire Safety

On average, there are 72 dwelling fires in Pembrokeshire per year. The main cause of fires is cooking related or caused by other electrical appliances within the home. Dwelling fires are more common in homes occupied by the elderly, those living alone and in areas of high deprivation. Fire Service data has found that following a dwelling fire, those involved may have needed additional support beforehand, such as mental health support.

The Fire Service aims to reduce dwelling fires by visiting at risk households to carry out a safe and well visit and install smoke alarms at vulnerable households. Working smoke alarms are vital for warning occupants of the occurrence of fire and can lessen the harm caused and prevent fire deaths. Much of this work depends on partnership working, so that contact details of vulnerable households can be provided and the Fire Service can target Safe and Well visits effectively.

In terms of trends, an aging population means an increase in the number of vulnerable households would requiring a greater number of interventions. Increasing economic deprivation can also lead to an increase in vulnerable households. Increasing Mental Health issues and isolation are additional factors that make persons vulnerable to fires in the home. An additional concern is the rising use of lithium batteries in e-bikes/scooters and e-cigarettes/vapes increasing the potential risk of fires. This is a new trend that is emerging nationally.

Community Resilience

A community with a strong volunteer presence and community network is likely to be more resilient to challenges and better placed to respond to them, whether these challenges are due to environmental issues or where residents require help to access services, for example.

In late March 2020 the Pembrokeshire Community Hub was established as a partnership between Pembrokeshire County Council, Pembrokeshire Association of Voluntary Services (PAVS), Hywel Dda University Health Board, and Delta Wellbeing. The Hub provided a single point of access for people who were shielding or self-isolating during the pandemic, or those experiencing other issues who needed some additional support with shopping or collecting prescriptions, for example. The Hub received and responded to around 8,300 telephone calls over the initial lockdown period and it was subsequently agreed to

establish the Pembrokeshire Community Hub as a permanent element of community infrastructure.

In 2025-2026, the Pembrokeshire Community Hub dealt with 6,094 enquiries which represents a marked increase from 4,863 in the previous year. The main reasons given for making contact were to request support or information about; accessing activities and groups (18%); food (14%); living independently at home (14%); and social connections e.g. social isolation, befriending etc. (14%). Demand has steadily increased from 2023 through to 2025, which was anticipated given that the Hub was launched in its current format in 2022 and has naturally become a more recognised source of information and support for communities over time.

In 2025-2026, the Community Connectors supported 1,171 individuals with a range of issues from social connections, transport, carer support and financial support. Community Connectors are local outreach workers who work closely with the Pembrokeshire Community Hub to help people access community services, acting as a face-to-face support team to signpost and refer people to services or initiatives when they need help. Of those individuals supported in 2025-26, 38% live alone, 21% were in receipt of care or support and 18% had unpaid caring responsibilities. The service has also reported an increase in the level of need that people are presenting with, requiring greater levels of support and expertise from the team.

The Community Hub and Connectors now have a daily presence with the Adult Social Care intake team in Pembrokeshire County Council to ensure that people contacting the council looking for support are provided with information and community solutions in line with their needs and what will best support them to live independently at home.

Pembrokeshire's latest Age-Friendly Community Strategy for Pembrokeshire was endorsed by PCC Cabinet in June 2026. The strategy aims to enable older people to remain in their homes and communities for longer, promoting dignity, inclusion, and independence. Demographic trends in Pembrokeshire which points to an aging population underscores the need for inclusive planning and services. Key strategic priorities identified include:

- Improving access to transportation and mobility options.
- Supporting housing adaptations to enable independence.
- Increasing opportunities for social connection and reducing loneliness.
- Enhancing access to information and digital inclusion.
- Strengthening community-based health and wellbeing support.

Community engagement activities took place to inform and develop the strategy. Common themes included concerns about transportation, access to health services, and the need for better communication and information dissemination.

The strategy will be supported by a partnership action plan for the next 3 to 10 years. Pembrokeshire aims to join the World Health Organisation's Age-Friendly Communities network, which will involve sharing good practices and annual updates on progress.

Responses to the National Survey for Wales shows that the number of people who volunteer, both formally and informally, has increased steadily over recent years, from just over 26% in 2019-20 to just over 32% in 2024-25.

A Volunteering Strategy for Pembrokeshire (2025-2030) was launched in June 2025. The strategy development was led by PAVS and aims to support and inspire everyone - individuals, organisations, the public sector and businesses - to engage in meaningful volunteer activities that benefit volunteers, the volunteering ecosystem and the wider community. The strategy sets out eight goals including making volunteering more inclusive, raising awareness, and recognising the invaluable contributions volunteers make every day. The focus of the document is on the need to create volunteering opportunities for young people and families, outdoor and environmental volunteering, digital and remote volunteering, flexible and short-term volunteering, as well as employer supported volunteering.

Broadband and digital access

Increasingly, access to digital services and infrastructure is required so that people can carry out day-to-day tasks such as paying bills, applying for jobs or booking appointments. For those without access to the internet or who do not have the skills or confidence to access services in this way, carrying out these day-to-day tasks can be difficult.

Historically Pembrokeshire was one of the first Local Authorities in Wales to commit to a broadband infrastructure support programme in 2019. At that time gigabit capable fibre broadband coverage stood at 4.9% for the county.

The programme has since moved through several phases including:

- Demand stimulation – surveying and then making it clear to fibre infrastructure builders that there was significant demand for fibre from residents and businesses in Pembrokeshire

- Competition promotion – encouraging providers other than Openreach (who in real terms held a monopoly), to build fibre infrastructure in Pembrokeshire. These other providers are known as Altnets (Alternative Networks). In Pembrokeshire significant build has been undertaken by Ogi. Other builds have been undertaken, including by Voneus and Dragon WiFi.
- Work with Mobile Network Operators to expand the footprint of coverage for 4G and 5G across the county
- Support, in conjunction with Openreach, for Fibre Community Partnerships across 7 communities in Pembrokeshire. Fibre Community Partnerships are co-funded schemes used to bring Full Fibre broadband to rural or hard-to-reach areas that are not included in commercial rollout plans. To date 5330 customers have signed up and are ready for a fibre broadband service and without this intervention there were no plans for delivery to these customers within 3 years. Fibre Community Partnerships are a positive example of the importance of facilitation and support for communities to access a time limited funding resource or lose the opportunity.

As of August 2026, the gigabit fibre broadband coverage for Pembrokeshire stands at 79%. This increase is significant considering the challenges of rurality, lack of existing infrastructure and geographical remoteness of the county as a whole.

Work is also continuing with Mobile Network Operators to support improvements in mobile connectivity across Pembrokeshire. Improving digital and mobile connectivity remains a strategic objective for the Council and is recognised as an important enabler for residents, businesses, visitors, emergency services, and the wider local economy. The Local Authority's Broadband Programme team is exploring so called 'Open Access Agreements' that would allow operators to utilise Council-owned assets, including street lighting columns, for the deployment of small cell infrastructure. These small cells can significantly improve mobile coverage capacity and density in areas where demand is high or peaks seasonally.

5G geographic coverage in Pembrokeshire from at least 1 network has increased from 0% to 77% in the period 2020 to Jan 2026. As of January 2026, 4G geographic coverage in Pembrokeshire, from at least 1 network, stands at 99%. 4G geographic coverage in Pembrokeshire from all networks is 86%.

There is a commitment from Pembrokeshire County Council via the Broadband Team to continue to support both broadband and mobile connectivity going forward.
An Audit Wales report on digital inclusion published in 2023 found that 7% of adults are digitally excluded, meaning they had not used the internet in the previous three months. Older people, social housing tenants and those with long-term illnesses are more likely to be excluded. The report stressed that digital inclusion is about more than internet access,

with key barriers including affordability, lack of digital skills or confidence, accessibility needs, concerns about online safety and personal preference for face-to-face services. As more public services move online, there is a risk that digitally excluded people could become disadvantaged. The report also found that while internet access has improved significantly across Wales, data gaps make it difficult to fully understand people's experiences. Coverage remains uneven, particularly in some rural areas.

A report published by the Older Person's Commissioner for Wales in 2025 explored digital ageism, when older people are excluded, overlooked or unfairly treated because of assumptions about their ability to use technology. It found that digital ageism is common across many areas of life, including healthcare, employment, public services, social activities and online learning. Some groups face additional barriers, including older women, disabled people, people from ethnic minority communities, those on lower incomes, and people living in rural areas. These barriers can lead to poorer access to jobs, healthcare, social connections and learning opportunities. Many digital services are also designed with younger users in mind, which can make them harder for older people to use and the report concludes that digital ageism is a widespread issue.

Key Points

- Communities report concerns about drug misuse, road safety and anti-social behaviour.
- Domestic abuse, sexual offences, stalking and drug-related crime are identified as the highest-harm crimes across the region.

- There are growing concerns around online threats and harms, particularly affecting children and young people. Misogyny and online harms have emerged as developing issues requiring preventative work.

- Drug and alcohol misuse continue to drive crime, violence, exploitation and poor health outcomes.
- Alcohol-related incidents contribute to violence and negatively affect perceptions of safety, particularly in coastal areas.

- Violence Against Women, Domestic Abuse and Sexual Violence (VAWDASV) remains a major concern, with domestic abuse-related crimes increasing since 2021.

- There are ongoing concerns about misinformation and online narratives, particularly around migration, identity and international events, affecting local community relations.

- Road safety is one of the most significant concerns for residents and partner organisations. Rural roads, high speeds, seasonal traffic and limited transport alternatives increase risk in Pembrokeshire.

- Fire risk is greatest among older people, those living alone and residents in deprived areas. Mental health issues, social isolation and increasing deprivation are identified as factors increasing vulnerability to dwelling fires.
- The growing use of lithium batteries in e-bikes, e-scooters and vapes is highlighted as an emerging fire risk.

- Demand for support through the Pembrokeshire Community Hub continues to rise, indicating increasing need within communities.
- Economic pressures, climate change and public health challenges are placing greater demands on community resilience.

- Loneliness and social isolation are recurring concerns, particularly among older residents and people living alone. Rural isolation can limit access to support, services and social opportunities.
- An ageing population is increasing demand for transport, housing adaptations, health support and social connection.

- Despite improvements in broadband coverage, some residents remain digitally excluded.
- Older people, those with long-term illnesses, social housing tenants and people in rural areas face the greatest barriers.
- Affordability, lack of digital skills, confidence and accessibility concerns are preventing some residents from accessing increasingly digital public services.

Future Trends

The growing demand for support from the Pembrokeshire Community Hub and Community Connectors, alongside an increase in the complexity of people's needs suggests continued pressure on community support, advice, and social care services in future years.

One of the most significant long-term trends identified relates to Pembrokeshire's ageing population. This is expected to:

- Increase demand for transport and mobility support.
- Increase need for housing adaptations.

- Increase pressure on health and wellbeing services.
- Increase efforts to address loneliness and social isolation.
- Create greater demand for community-based support and age-friendly services.

In addition, whilst broadband and mobile connectivity continue to improve, concerns remain that some groups could become increasingly disadvantaged as services move online, particularly older people, but also rural residents and those on low incomes.

Online threats are identified as a priority area for future action, particularly affecting children and young people. Online harm is a rapidly evolving issue requiring coordinated multi-agency responses, increased awareness and improved prevention programmes.

Within communities, climate change and public health challenges are factors that will continue to test resilience. Communities are expected to play an increasingly important role in responding to flooding, severe weather, and supporting vulnerable residents. Volunteering rates have increased in recent years indicating a growing reliance, and desire, to utilise community participation to strengthen resilience. Concerns about misinformation and online narratives relating to migration and identity suggest a continuing need for work around inclusion, hate crime awareness, integration and community relations.

The growing use of lithium batteries in e-bikes, e-scooters and vapes as an emerging national fire safety risk. Combined with an ageing population, rising deprivation and increasing social isolation, this is expected to require additional prevention work.

Engagement feedback

The main issues raised in the survey were around;

- Community safety and belonging, with residents placing significant importance on feeling safe within, and part of, their community.
- Community connection - maintaining strong social connections and reducing isolation, particularly for older people, with a lack of transport seen as a barrier for disabled people, older people and those living in rural communities.
- Housing and affordability was also raised, with respondents worried about the lack of affordable and suitable homes, shortages of long-term rentals, and the impact of second homes, holiday lets and Airbnb properties on local communities.
- Digital Infrastructure was a significant concern, particularly in rural areas.
- Concerns about loneliness and isolation, particularly among older people and those living alone, were raised repeatedly, with calls for more community spaces, events, volunteering opportunities and better intergenerational connections.

In face to face sessions, Pembrokeshire Older People's Network said they felt that housing in Wales as a whole is not suitable to meet the needs of future generations, especially in terms of accessibility. Older people also spoke about needing a wider variety of communication methods from organisations, as many individuals struggle with using online services. They felt that although social media was convenient and low cost, it can leave people without digital skills unaware of helpful services and community events that could help prevent isolation.

The need to promote flexible volunteering opportunities and increase support for volunteers was also seen as important.

Safety was a significant concern for young people responding to the survey, who mentioned bullying, feeling unsafe in their communities, being worried about going out alone, particularly at night and wanting safer neighbourhoods and public spaces in their responses. Some comments reflected personal experiences of growing up in unsafe home environments and of fear of crime and antisocial behaviour.

Identity, confidence and acceptance were also major themes, including feeling accepted for who they are and around respect and inclusion within their communities. Young people also identified the importance of their opinions and beliefs being respected and having opportunities to express their views. Several respondents were already involved in volunteering and community activities and viewed these positively.

In face to face sessions, young people said that they want to feel safe in their communities. They raised concerns about antisocial behaviour, bullying, harassment, fighting, drugs and alcohol, intimidating behaviour and some public spaces feeling unsafe. Young people were also very aware that not everybody has the same opportunities. Barriers were identified for disabled young people, young people with ALN, neurodivergent young people, young carers, care-experienced young people, LGBTQ+ young people, those living in poverty and those living in rural communities.

Next Steps

This Well-being Assessment provides the evidence base for us to work with people in Pembrokeshire – people and communities, front-line staff who are at the forefront of service delivery, partners and key stakeholders - to identify the PSB's priorities for the next 5 years, and to ensure we work collaboratively to improve well-being now and in the future.

These priorities, and the actions we will take to achieve them, will be outlined in the next Well-being Plan, which we will publish by May 2028. We will work together using an integrated partnership approach to develop innovative and co-produced solutions to achieve outcomes which contribute to the national Well-being Goals and to meet our requirements under the Well-being of Future Generations Act.