HORIZON NUCLEAR POWER

WYLFA NEWYDD

ENERGY WORKING FOR BRITAIN

Wylfa Newydd Project

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Contents

Executive summary

Horizon Nuclear Power Wylfa Limited (Horizon) is planning to develop a new Nuclear Power Station on the Wylfa Newydd Development Area, on Anglesey. This baseline report sets out the key socio-economic characteristics of the area that may be affected by Horizon's new Nuclear Power Station.

The topics covered within the socio-economic assessment will have effects at different scales, but the baseline report largely covers the key socio-economic study area (KSA), the Daily Construction Commuting Zone (DCCZ), and north west Wales.

Overview

Anglesey has the smallest economy in Wales, accounting for just 1.7% of Wales' total economic output, although the economies of north Wales combined account for almost 23% of Wales' economic output.

The economic activity rate rose by 4% over the year to June 2015, in contrast to both north Wales and Wales as a whole, where the economic activity rate declined over the same period.

Population

The resident population on Anglesey in 2011 was around 70,000, 18.5% of the population of the DCCZ. Of the population of Anglesey, 45.6% can speak Welsh which is the second highest rate in Wales.

There has been a small increase in population on Anglesey since 2007, but the latest Welsh Government projections show that the population is expected to decline by 3% by 2039, as net migration is insufficient to make up falls in natural growth. In line with trends across Wales and the UK, the population on Anglesey is expected to age over the period to 2039 with a substantially higher proportion of over 65s.

Population projections produced for the Isle of Anglesey County Council (IACC), which factor in the potential impacts from the Energy Island Programme (EIP), suggest that the population on Anglesey could rise by 9.5% between 2016 and 2035.

Around 61% of Anglesey's population is of working age (16-64), in line with the DCCZ but slightly lower than the Welsh average (63%).

Economy

In terms of gross value added (GVA), Anglesey accounts for around 1.7% of the Welsh economy.

North Wales and Wales as a whole have outperformed the UK in terms of GVA growth, but output growth on Anglesey has been weaker in recent years.

In terms of industry, there are above average shares of output in:

- agriculture, forestry and fishing;
- distribution, transport, accommodation and food; and
- construction.

On Anglesey, there are higher proportions of sole proprietors and partnerships and lower proportions of companies than the Welsh average. This is likely to be a reflection of the high proportion of agricultural units.

In 2015, there were 502 active businesses per 10,000 population on Anglesey, above the Welsh average of 495, but lower than the north Wales figure of 547.

The classification of Anglesey as an enterprise zone for energy is expected to assist with the growth of certain sectors.

Labour market

Rates of economic participation, including the unemployment rate and the rate of economic inactivity on Anglesey are slightly more favourable than in Wales.

Anglesey's employment rate fell below that of Wales and north Wales for 2008, before increasing and exceeding the Welsh average until 2016. The employment rate has recently decreased on Anglesey whereas it has increased in both North Wales and Wales.

In terms of fisheries and aquaculture, Wales contributes just 2% to annual UK landings of fish and shellfish, and there are relatively small levels of employment associated with the sector.

Utilities employment on Anglesey is 4.3%, above the Welsh average (1.7%), reflecting the presence of the existing power station, although the reactors are either in decommissioning or due to close shortly.

The recession has accelerated longer-term structural changes on Anglesey, with a move away from manufacturing as a significant source of employment due to plant closures. Anglesey has been particularly vulnerable to these due to the significance of lower technology activities and the under developed nature of the local economy's service sector.

Part-time employment is slightly higher on Anglesey (22.5%) relative to Wales as a whole (21.2%), although across the DCCZ it is even higher at 24.9%.

Around 10.4% of the population on Anglesey were claiming out of work benefits in May 2016, lower than the Welsh average of 11.4%.

In 2011, nearly 8,900 Anglesey residents travelled to workplaces off the island whilst slightly over 3,100 people travel onto the island for work.

The average distance travelled to work is around 12 miles for residents within the DCCZ, above the Welsh average of 10.4 miles, but below Anglesey's average of 14 miles.

Earnings and income

There was no significant growth in earnings on Anglesey between 2008 and 2014, although earnings rose by almost 8% in 2015 and subsequently fell by almost 3% in 2016. This is in contrast to neighbouring areas (Gwynedd, Denbighshire and Flintshire) which saw earnings increase at a faster rate between 2008 and 2014.

In 2015, average weekly earnings on Anglesey were £469, which is lower than the Welsh average (£498).

In 2014, gross disposable household income (GDHI) per head on Anglesey was £16,238 and was the third highest amongst the 12 NUTS3[1] areas, exceeding the Welsh average (£15,302).

Skills and occupations profile

The skills profile of the Anglesey workforce shows that 24.2% of residents have no formal qualifications compared to 25.9% for the rest of Wales in 2011.

The percentage of the working age population with NVQ Level 4+ is 26.1% compared to a Welsh average of 24.5%.

The analysis of occupation data shows that Anglesey's resident workforce contains a relatively higher proportion of high level skills (standard occupational classification major groups 1 to 3) compared to the rest of Wales.

Housing

There were 58,027 households within the KSA in 2011, of which 30,594 were on Anglesey (53%). Of these Anglesey households, almost half (45%) are located within Anglesey South.

In 2014, median house prices on Anglesey were 7.2 times greater than the median income, compared to ideal ratios of 2.9 for an individual income and 3.5 for a dual income. However, the ratio was higher in Gwynedd at 7.8 and in Conwy at 7.7. This compares to an average of 8.8 across England and Wales.

In 2016-17, 351 affordable housing units are planned to be built across North Wales: 2% more than the previous year. On Anglesey, 94 units are planned to be built during 2016-17.

The number of total new dwellings completed in north Wales increased by 13% since 2008-09, although the number of completions on Anglesey fell by over 60% over the same period and by over 30% in Gwynedd.

The rate of homelessness acceptance per 10,000 households on Anglesey declined significantly in 2015-16 and remains well below the Welsh average.

There are high proportions of single occupied properties on Anglesey, in line with the trend of an ageing population.

[1] Nomenclature for territorial units for statistics 3 (NUTS) is the level at which small regions are analysed.

Public services

Schools and education

Anglesey's education provision consists of 47 primary schools and five secondary schools, which catered for 5,820 and 3,840 pupils respectively in 2016.

There is limited nursery provision across the KSA, with facilities currently oversubscribed. For primary and secondary education, there is capacity in terms of overall levels of provision, although there are some areas where primary schools are oversubscribed (Anglesey West and Menai Mainland in particular).

Overall, there is an excess of places in relation to current pupils across the DCCZ, although there are capacity issues at specific primary schools.

Health and community facilities

Health services baseline information is included here for completeness; however, the assessment of effects on these services is considered within the Health Impact Assessment. The baseline shows that the average ratio of patients to GPs across the KSA is below the English benchmark of 1,800 patients per GP and the Welsh benchmark of 1,600 patients per GP. However, one surgery fails to meet the English benchmark and four other fail to meet the Welsh benchmark.

Recreation and leisure facilities

The number of visits to public libraries on Anglesey in 2014-15 was one of the lowest across Wales at 4,200 per 1,000 population. It was substantially below the Welsh average (5,526).

In 2014/15, there were around 8,400 visits per 1,000 population to local authority sport and leisure centres on Anglesey, slightly below the Welsh average (8,700).

Emergency services

In the year to March 2016, there were 55.71 crimes per 1,000 people recorded across north Wales, compared with a rate of 42.26 on Anglesey and 49.83 in Gwynedd.

Recorded crime was highest for offences classified as 'violence and sexual offences' in north Wales, in Gwynedd and on Anglesey.

In September 2015, 2.4% of all calls made to the Welsh Ambulance Service were made on Anglesey, of which around 36% were immediately life-threatening (category A).

Around 51% of the category A calls on Anglesey were answered within the allotted eight minutes, below the Welsh average of 56%.

Tourism

Overall, tourist expenditure on Anglesey accounted for £279 million in 2015, 7% higher than in the previous year.

In Gwynedd, tourist expenditure accounted for £963.9 million in 2015, a 1.2% decrease from the previous year.

In 2015, over 15,000 jobs were related to tourism in Gwynedd, with a further 4,000 jobs on Anglesey.

On Anglesey, the number of tourist bed spaces decreased between 2008 and 2011, with declines seen across serviced accommodation, self-catering accommodation and camping accommodation.

The number of businesses being quality assured by Visit Wales fell from 204 in 2008 to 116 in 2011.

Community well-being

The population of Anglesey appear to have higher overall life satisfaction, worthwhile and happiness than Wales and the rest of the UK.

Anglesey residents have a high proportion of respondents that class themselves as having low or medium anxiety.

The *Welsh Index of Multiple Deprivation* (WIMD) ranks small areas in Wales in terms of deprivation: just 2% of Anglesey's areas fall in the 10% most deprived areas in Wales, but the majority of its areas are more deprived than the Welsh average.

Land use

The land in the KSA is primarily coastal lowland, with a substantial presence of agricultural land, including small areas of arable farming and pastureland.

Within the KSA, there are 206 Sites of Special Scientific Interest, 29 National Nature Reserves, 52 Conservation Areas and one World Heritage Site.

Around 300ha of land has been identified as either a primary or a secondary development site within the KSA.

The majority of land within the KSA is of moderate to poor quality agricultural land (Grades 3 and 4 of the Agricultural Land Classification). There are small areas of Grade 2 (very good quality) land found in the east and south of the island.

1 Introduction

1.1 Overview

1.1.6 Horizon is currently planning to develop a new Nuclear Power Station on the Wylfa Newydd Development Area, on Anglesey, as identified in the *National Policy Statement for Nuclear Power Generation* (EN-6) [RD1]. The Wylfa Newydd Project will require a number of applications to be made under different legislation to different regulators. As a Nationally Significant Infrastructure Project under the *Planning Act 2008*, the construction and operation must be authorised by a Development Consent Order.

1.1.7 The socio-economic assessment is being undertaken to inform the various applications, assessments and permits that will be submitted for approval to construct and operate the Power Station and Associated Development.

1.1.8 This appendix details the baseline socio-economic assessment to provide an overview of Anglesey and the wider study zone(s) in preparation for completion of the required impact assessments.

1.2 Purpose of baseline appendix

1.2.6 This baseline appendix to chapter C1 sets out the key socio-economic characteristics of the area that may be affected by the Project, and the propensity to change. This report reflects the current baseline position and does not predict the future socio-economic effects associated with development.

1.3 Study areas

1.3.1 Defining the spatial scope for socio-economic assessment can be complex because of the wide range of receptors and the different ways they might be affected. In addition, socio-economic baseline data are often reported over a range of spatial scales (e.g. super output areas, wards and local authority administrative boundaries). The need to assess and compare data at a detailed level but also at a higher (regional/national) level means a range of spatial scopes have been selected, depending on the topic area. The spatial definitions used are defined in paragraph 1.3.8.

1.3.2 Whilst Anglesey itself is likely to be where the majority of effects would occur, reinforced by its island location, the area does have economic linkages with areas of the mainland, particularly those directly across the Menai Straits. These linkages are demonstrated in the Joint Local Development Plan between the Isle of Anglesey County Council and Gwynedd Council [RD2].

1.3.3 The spatial scope for assessing effects is a key requirement for the assessment process, determining the spatial limits within which worker 'daily commuting' is deemed feasible[2]. Any workers participating in the Project and living outside a specified daily commuting limit would be assumed to have a temporary bed space within the area covered by the two Travel to Work Areas (TTWAs) of 'Bangor, Caernarfon and Llangefni' and 'Holyhead'. This is particularly relevant to the construction stage of the Project.

1.3.4 For the purposes of assessment, it is assumed that residents are prepared to travel for 90 minutes, the DCCZ, whilst migrant workers are likely to be prepared to commute for 60 minutes. Justification of this assumption is provided within the accommodation section of the appendix (appendix C1.2.3).

1.3.5 Table 1-1 explains the geographic scope of the study areas used for the purposes of the socio-economic assessment. These areas are also shown on Figure 1-1.

Table 1-1 Study area designations

Sector	Geographic scope
Local Area of Influence (LAI)	Approximately 5km from the centre of the Wylfa Newydd Development Area. Communities falling on the boundary of these zones will be included within the assessment. The 5km zone has been selected to ensure that significant effects on the physical environment (in terms of air, noise and visual assessment) are incorporated in the socio-economic assessment.
KSA	The KSA represents the area most likely to be affected (both beneficially and adversely) by the Project. It is defined by the two the TTWAs of 'Bangor, Caernarfon and Llangefni' and 'Holyhead'. The KSA boundary is defined based on a best-fit selection of 2001 Census of Population administrative wards to the TTWA boundaries. At the time of producing this boundary, the 2011 TTWA boundary was not available. As the 2011 area is slightly smaller than the 2001 TTWA area (since it excludes the Conwy wards), it is considered more appropriate to maintain the use of the 2001 dataset and have these wards included. This area is further disaggregated as defined below.

[2] There are a small proportion of very long distance commutes from beyond a 90-minute travel time contour.

Sector		Geographic scope
Isle of Anglesey	Anglesey North	An area conforming to a subdivision of the Isle of Anglesey, representing communities around Amlwch and most closely located to the Wylfa Newydd Development Area. This subdivision is based on aggregates of 2011 wards defined in the 2011 Census. This subdivision will be used to assess effects at a micro level.
	Anglesey West	An area conforming to a subdivision of the Isle of Anglesey, representing communities on the west side of the Isle of Anglesey including Holyhead. This subdivision is based on aggregates of 2011 wards defined in the 2011 Census. This subdivision will be used to assess effects at a micro level.
	Anglesey South	An area conforming to a subdivision of the Isle of Anglesey, representing communities on the south side of the Isle of Anglesey including Llangefni and the Menai Crossing. This subdivision is based on aggregates of 2011 wards defined in the 2011 Census. This subdivision will be used to assess effects at a micro level.
Mainland	Menai Mainland	Menai Mainland is a subdivision of Gwynedd, representing the communities on the mainland located within the KSA including the main settlements of Bangor and Caernarfon. This area also contains small areas of Conwy. This subdivision will be used to assess effects at a micro level.
Wylfa Newydd Development Area		The indicative areas of land and sea, including the Power Station Site, the Wylfa National Policy Statement Site and the surrounding areas that would be used for the construction and operation of the Power Station. This area is representative of the maximum area extending around the Power Station Site that would be directly affected by the Power Station Main Construction activities and used to form the setting and features of the operational Power Station.
DCCZ		This area is based upon a 90-minute drive time distance from the Wylfa Newydd Development Area defined using Ordnance Survey Open Strategic Shape data. Conclusions drawn from the

Sector	Geographic scope
	'Workforce Mobility and Skills in the UK Construction Sector' [RD3] indicates that 85% of construction workers living within a 90-minute drive time is a reasonable assumption. The definition is based on a best-fit selection of 2011 Census of Population administrative wards. Any ward penetrated wholly or partially by a 90-minute isochrone has been included in the definition. The area represents the one-way travel limit assumed for workers to commute on a daily basis from their permanent residence (these individuals are referred to as home-based workers). It is from this zone that 'local' employment is identified.
North West Wales	This area consists of local authority districts of the Isle of Anglesey, Conwy and Gwynedd. This is consistent with the area definition used in the *North West Wales Local Housing Market Assessment Baseline Report* [RD4]. This area will be used in situations where it is not possible to represent the KSA due to statistical limitations.
North Wales	This area consists of a grouping of local authority districts consisting of the Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire and Wrexham. This area will be used when it is not possible to represent the DCCZ due to statistical data limitations. It is worth noting that this area is more urbanised and industrial (with key developments in certain areas of Flintshire etc.) and has a much larger population than the DCCZ.
National/Other	Standard geographies such as Wales, Great Britain and the UK are also used where appropriate. They are used for comparison purposes and when considering the effects that flow outside the above geographies.

1.3.6 For the purposes of baseline data collection, there are occasions for specific studies to focus on a smaller geographic area. Super output areas (SOAs) were developed by the Office for National Statistics (ONS) to improve the reporting of small area statistics in England and Wales. SOAs are designed to be of a consistent population size and their boundaries do not change over time (unlike electoral wards, which are widely used for presenting local statistical information). There are two layers of SOAs: lower super output areas (LSOAs) and middle super output areas (MSOAs). LSOAs have an average population of around 1,500 whilst MSOAs have an average population of around 7,000. Further details are available on the ONS Geography website [RD5]. SOAs are used in the WIMD and to assess Welsh language abilities within the study area [RD6].

1.4 Key socio-economic terminology

1.4.1 A glossary is provided in section 11 that lists the key terminology that has been used within this socio-economic baseline report.

1.5 Data sources

1.5.1 Key data sources are the Census 2011 data [RD7], information presented in the North Wales Economic Observatory [RD8] [RD9] and the StatsWales website [RD10]. Other data sources are noted where appropriate and listed in the reference section.

Figure 1-1 Socio-economic study area

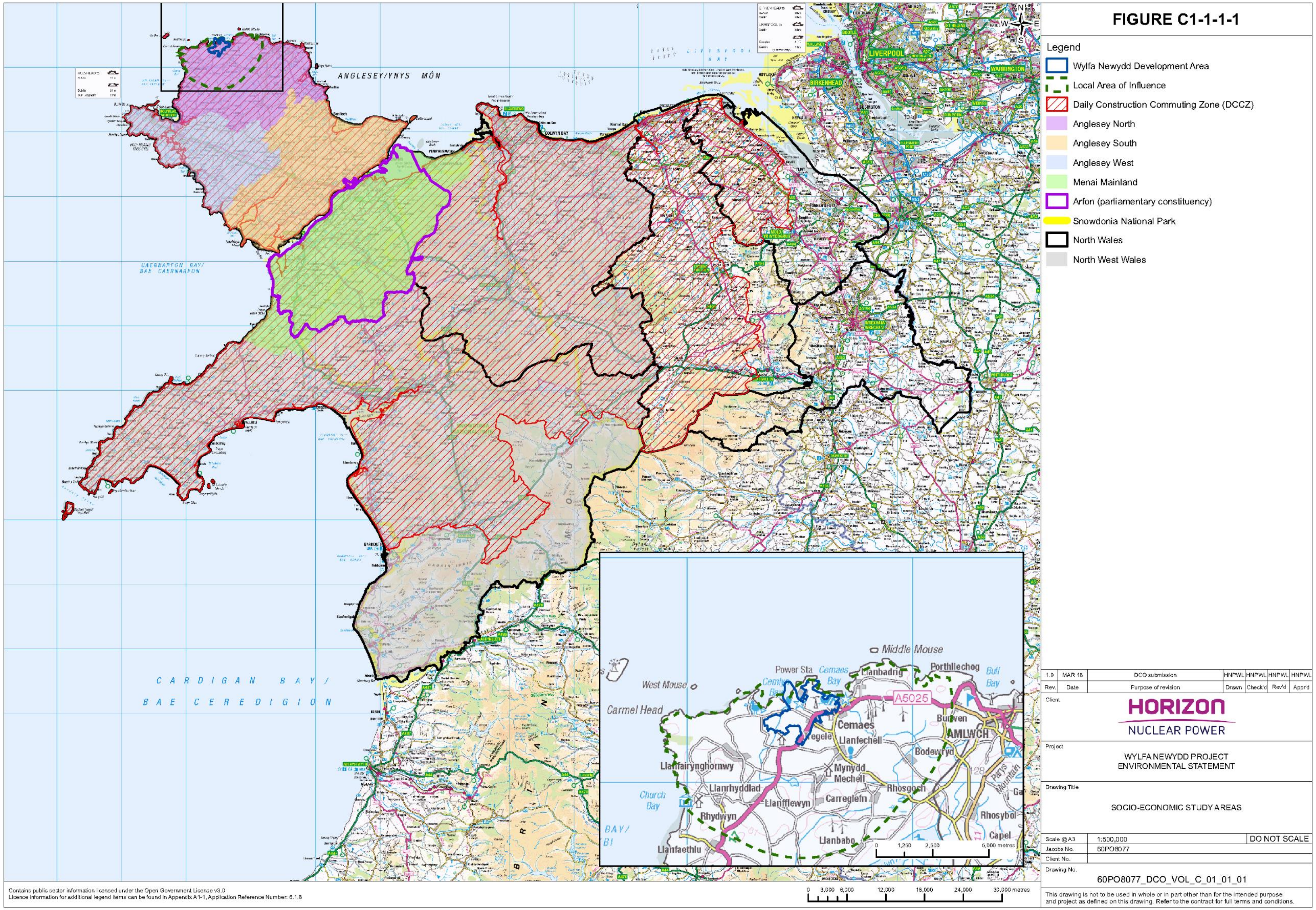
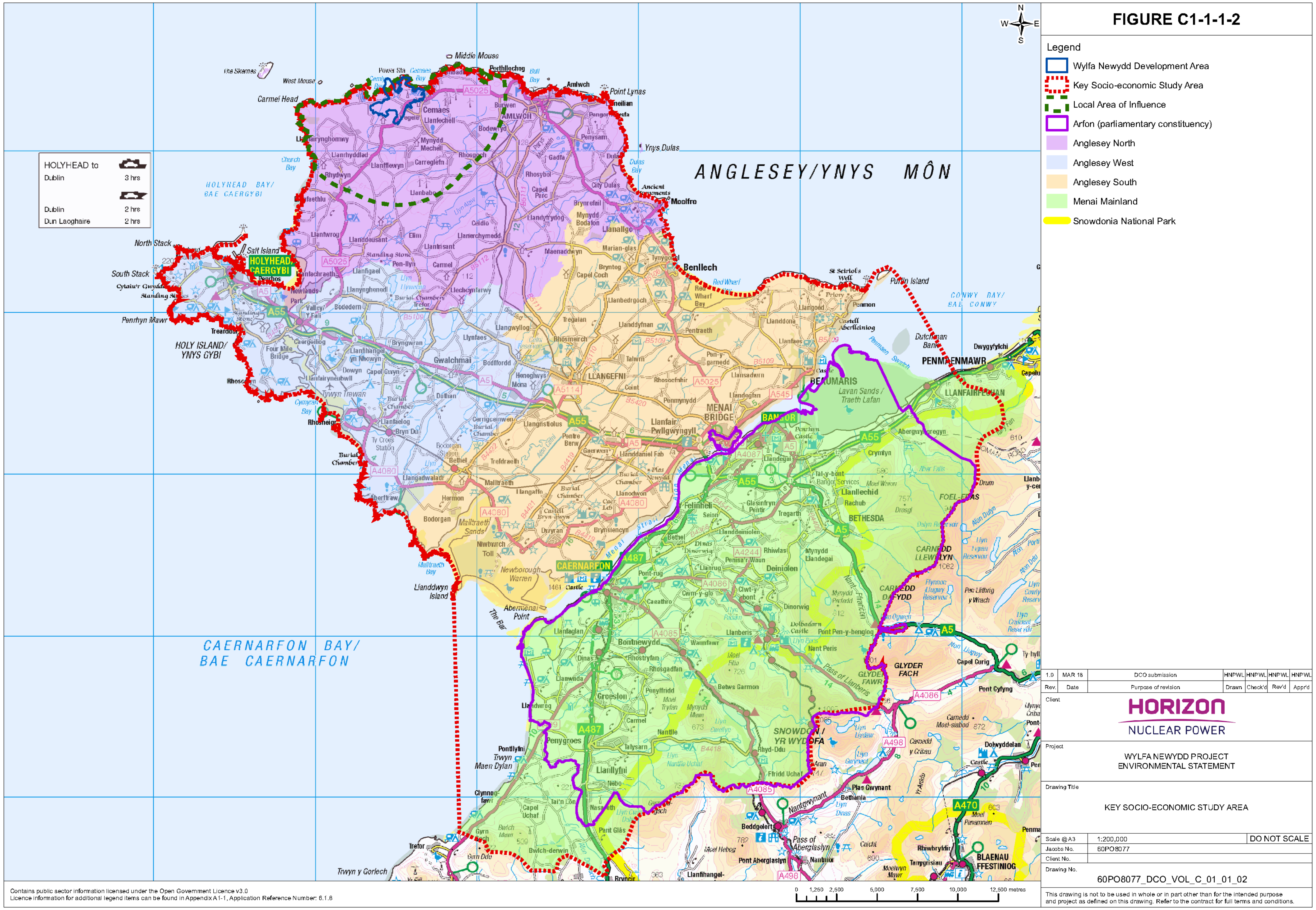


Figure 1-2 Subdivisions within the key socio-economic study area (KSA)



2 Population

2.1 Summary of key points

- In 2011, Anglesey had a population of 69,751, which is an increase of around 3% on the 2001 Census. In 2011, Anglesey accounted for 18.5% of the DCCZ population.
- Approximately 61% of Anglesey's residents are of working age (16-64), in line with the DCCZ but slightly lower than Wales as a whole (63%).
- Anglesey has generally experienced net inward migration since 2001, although there has been a steady out-migration of younger people aged between 15 and 29. This is a similar trend to both north Wales and Wales as a whole.
- Whilst Wales and north Wales are expected to see population growth over the 2015 to 2039 period, Anglesey's population is forecast to decline by 3%.
- Almost 46% of Anglesey's population can speak, read and write in Welsh, substantially higher than the Welsh average of 14.6% and the second highest rate in Wales.

2.2 Population

2.2.1 Population growth and distribution have an effect on the future development of the economy. This section considers:

- population distribution;
- population growth;
- age structure; and
- migration.

Population distribution

2.2.2 Table 2-1 shows the resident population for Anglesey, the KSA, the DCCZ and Wales. In 2011, Anglesey had a resident population of around 70,000, 51% of the KSA population and 19% of the DCCZ population.

2.2.3 The remaining population of the DCCZ is made up of 31% in Conwy, 28% in Gwynedd, 20% in Denbighshire and 3% in Flintshire. The DCCZ, in turn, accounted for 12% of the Welsh population in 2011.

Table 2-1 Total resident population by area[3] (2011)

Area	Resident population (2011)
Isle of Anglesey	69,751
KSA	137,826
DCCZ	376,000
Wales	3,063,456

Population age structure

2.2.4 The working age population, those aged between 16 and 64, is indicative of the capacity of an area to undertake and participate in economic activity. Table 2-2 shows that, in 2011, 61% of the usually resident population in the DCCZ were of working age and 63% of the KSA's resident population were of working age. Anglesey accounted for around 18.5% of the working age population within the DCCZ, in line with its share of the overall population.

Table 2-2 Population distribution by age cohort and area[4] (2011)

Age	Isle of Anglesey		KSA		DCCZ		Wales	
	Number	%	Number	%	Number	%	Number	%
Age 0 to 15	11,861	17	23,962	17	65,114	17	556,296	18
Age 16 to 64	42,244	61	87,088	63	228,719	61	1,944,616	63
Age 65 to 74	8,574	12	14,445	10	43,133	12	300,550	10
Age 75 plus	7,072	10	12,331	9	39,034	10	261,994	9
Total (all usual residents)	69,751	100	137,826	100	376,000	100	3,063,456	100

2.2.5 The age structure of the male population provided in Table 2-3 shows the numbers of working age men on Anglesey, in the KSA, in the DCCZ and in Wales. As the UK construction workforce is predominantly male (87%)[5], the number of working age men available is a material concern for any major construction project recruiting large numbers of operatives.

2.2.6 Table 2-3 shows that Anglesey and the DCCZ are broadly comparable in terms of age structure with the same proportion of working age males but with slightly more males between the ages of 65-74 compared to the DCCZ as a whole. In

[3] [RD7]: Usual resident population (KS101EW)

[4] [RD7]: Age structure (KS102EW)

[5] [RD11]: Workforce jobs by industry [RD12] and sex

the KSA, the proportion of working age males is slightly higher at 64% and there are slightly fewer males aged 75 plus.

Table 2-3 Males – age structure by area[6] (2011)

Males	Isle of Anglesey	KSA	DCCZ	Wales
Age 0 to 15	18%	18%	18%	19%
Age 16 to 64	62%	64%	62%	64%
Age 65 to 74	12%	11%	11%	10%
Age 75 plus	8%	7%	9%	7%
Total (all usual residents)	34,274	66,672	183,824	1,504,228

2.2.7 Table 2-4 shows the female age structure in 2011 for Anglesey, the KSA, the DCCZ and Wales. The female population age structure is the same on Anglesey and across the DCCZ, although the proportion of working age females in the KSA is slightly higher at 62%. The working age population accounts for a higher share of total population for Wales as a whole (63%).

Table 2-4 Females – age structure by area[7] (2011)

Females	Isle of Anglesey	KSA	DCCZ	Wales
Age 0 to 15	16%	17%	16%	17%
Age 16 to 64	60%	62%	60%	63%
Age 65 to 74	12%	10%	12%	10%
Age 75 plus	12%	11%	12%	10%
Total (all usual residents)	35,477	69,128	192,176	1,559,228

Migration

2.2.8 Population migration is relevant to the local economy because the ability to attract (or lose) people can have a bearing on the ultimate size of the local labour supply which the Wylfa Newydd DCO Project would need to draw upon. StatsWales produces annual migration data for local authorities, regions, and Wales as a whole.

[6] [RD7]: Residence type by sex by age (LC1105EW)

[7] [RD7]: Residence type by sex by age (LC1105EW)

2.2.9 Table 2-5 shows the net migration trends for Anglesey. A peak inflow was recorded for 2004-05, before net migration declined and turned negative between 2008 and 2011. Anglesey has, however, consistently seen outmigration of younger people (aged 15-29) throughout the period.

Table 2-5 Isle of Anglesey net population migration by age cohort[8] (2001 to 2015)

Isle of Anglesey	Aged 0 to 14	Aged 15 to 29	Aged 30 to 44	Aged 45 to 64	Aged over 65	All ages
2001-02	80	-280	90	240	0	130
2002-03	130	-200	150	250	20	350
2003-04	140	-330	110	260	40	220
2004-05	170	-90	120	140	50	400
2005-06	80	-80	60	190	-20	230
2006-07	70	-160	80	180	-10	150
2007-08	40	-110	0	110	40	80
2008-09	70	-200	40	70	-10	-20
2009-10	40	-190	20	150	-30	-10
2010-11	-20	-130	-20	140	-30	-60
2011-12	70	-150	60	160	-70	70
2012-13	20	-50	-20	160	-60	50
2013-14	-10	-160	-10	210	-20	10
2014-15	-20	-220	0	170	-50	-110

2.2.10 Table 2-6 shows the net migration trends for north Wales where the peak inflow was seen in 2002-03. Thereafter, net migration declined but remained positive. As is the case for Anglesey, north Wales has consistently seen outmigration of younger people (aged 15-29) throughout the whole period. The net outflow for that age cohort fell between 2009 and 2011 before picking up again to 2014-15.

Table 2-6 North Wales net population migration by age cohort[9] (2001 to 2015)

North Wales	Aged 0 to 14	Aged 15 to 29	Aged 30 to 44	Aged 45 to 64	Aged over 65	All ages
2001-02	990	-1,510	1,090	1,910	450	2,960
2002-03	930	-1,030	1,210	2,050	420	3,600

8 [RD13]: Migration between Local Authorities in Wales and the rest of the UK (POPU5023). Data are independently rounded to the nearest 10 and may not add or subtract exactly

9 Data are independently rounded to the nearest 10 and may not add or subtract exactly

North Wales	Aged 0 to 14	Aged 15 to 29	Aged 30 to 44	Aged 45 to 64	Aged over 65	All ages
2003-04	820	-1,000	1,280	1,890	400	3,400
2004-05	450	-950	790	1,180	230	1,700
2005-06	430	-770	560	1,180	90	1,470
2006-07	610	-790	830	1,400	20	2,070
2007-08	390	-1,020	590	1,100	190	1,250
2008-09	410	-1,030	460	760	10	630
2009-10	230	-660	260	770	-40	570
2010-11	320	-700	290	940	-50	810
2011-12	350	-1,110	200	1,050	80	550
2012-13	220	-1,190	100	880	30	50
2013-14	520	-1,220	400	1,000	90	790
2014-15	260	-1,360	200	1,080	0	180

2.2.11 Table 2-7 shows that, with the exception of 2012-13, Wales has seen positive net migration in each year since 2001-02. Consistent with the trends on Anglesey and in North Wales, the largest net loss has been for younger people (aged 15-29) with positive net migration for those aged between 30 and 64.

Table 2-7 Wales net population migration by age cohort[10] (2001 to 2015)

Wales	Aged 0 to 14	Aged 15 to 29	Aged 30 to 44	Aged 45 to 64	Aged over 65	All ages
2001-02	2,780	-2,780	3,130	5,170	1,430	9,730
2002-03	3,440	-420	4,310	5,690	1,380	14,410
2003-04	3,250	-840	4,320	5,300	1,160	13,200
2004-05	1,730	-1,680	2,750	3,480	660	6,940
2005-06	1,810	-1,370	2,160	3,060	450	6,100
2006-07	1,860	-1,430	2,580	3,710	170	6,890
2007-08	1,400	-2,040	1,880	3,090	470	4,790
2008-09	640	-2,620	680	1,610	20	320
2009-10	560	-510	510	2,050	-80	2,540
2010-11	700	-470	360	2,100	-160	2,530
2011-12	1,000	580	290	2,390	210	4,480

[10] Data are independently rounded to the nearest 10 and may not add or subtract exactly

Wales	Aged 0 to 14	Aged 15 to 29	Aged 30 to 44	Aged 45 to 64	Aged over 65	All ages
2012-13	760	-3,980	110	2,400	40	-670
2013-14	1,010	-3,880	240	2,650	150	170
2014-15	1,160	-3,700	430	2,820	120	840

Population growth

2.2.12 Population growth is a significant factor in determining future economic growth. Whilst no tailored forecasts are available for the DCCZ population, Table 2-8 shows that north Wales is expected to see population growth of around 4% between 2016 and 2036, compared to 5% for Wales as a whole. This strong growth can be contrasted with the forecast for Anglesey, which is expected to see its population decline by 3% between 2016 and 2039.

Table 2-8 Total population forecasts by area[11] (2016 to 2039)

Area	2016	2020	2025	2030	2035	2039	2016-39
Isle of Anglesey	70,170	70,169	70,045	69,607	68,950	68,348	-3%
North Wales	697,122	703,548	711,439	717,258	720,753	722,317	4%
Wales	3,108,054	3,142,024	3,185,467	3,220,698	3,245,614	3,245,614	5%

2.2.13 The IACC commissioned their own population projections which factor in the potential impacts of the EIP on the island [RD14]. These projections suggest that the population on Anglesey will increase by 9.5% between 2016 and 2035 (the latest year of projections), in contrast to the declining trends shown by official statistics.

2.2.14 Population growth is a product of the net difference between births and deaths within an area (natural growth) plus the net movement of people into the area (migration). No specific components of change forecasts are made for the DCCZ; however, Table 2-9 shows that deaths will exceed births for Anglesey throughout the period, and for North Wales towards the end of the period. Net migration is insufficient to make up falls in natural growth for Anglesey.

[11] [RD13]: 2014-based local authority population projections for Wales (POPU5099)

Table 2-9 Components of population change by area[12] (2016 to 2039)

	2016 to 2017	2020 to 2021	2025 to 2026	2030 to 2031	2035 to 2036	2038 to 2039
Isle of Anglesey						
Population at start of period	70,170	70,169	70,045	69,607	68,950	68,502
Births	751	742	706	682	689	698
Deaths	780	784	803	836	870	886
Net UK migrants	12	12	12	12	12	12
Net overseas migrants	22	22	22	22	22	22
Population at end of year	70,176	70,162	69,984	69,488	68,803	68,348
North Wales						
Population at start of period	697,122	703,548	711,439	717,258	720,753	721,993
Births	7,387	7,492	7,426	7,292	7,306	7,366
Deaths	7,211	7,274	7,474	7,840	8,251	8,459
Net UK migrants	555	555	555	555	555	555
Net overseas migrants	862	862	862	862	862	862
Population at end of year	698,716	705,184	712,809	718,128	721,226	722,317
Wales						
Population at start of period	3,108,054	3,142,024	3,185,467	3,220,698	3,245,614	3,256,412
Births	33,714	34,345	34,287	33,616	33,505	33,679
Deaths	30,521	30,672	31,479	32,971	34,730	35,694
Net UK migrants	1,810	1,810	1,810	1,810	1,810	1,810
Net overseas migrants	3,315	3,315	3,315	3,315	3,315	3,315
Population at end of year	3,116,371	3,150,821	3,193,400	3,226,467	3,249,512	3,259,522

[12] [RD13]: Components of population change by Welsh local authorities (POPU5098)

2.3 Ethnicity

2.3.1 The 2011 Census data (National On-line Manpower Information System [RD7]) show the percentage of the population on Anglesey who classed themselves as 'white' has fallen from 99.3% in 2001 to 98.2% in 2011. Between 2001 and 2011, there was an increase of 0.4% in the percentage of people who classed themselves as members of 'Mixed/Multiple ethnic groups' and 'Asian/Asian British', while there was a 0.2% increase in the percentage of people who classed themselves as members of 'Other Ethnic Groups'.

2.3.2 The 2011 Census data show that 96.6% of the population on Anglesey were recorded as being born in the UK and 0.4% of the current population were recorded as being a UK resident for less than two years [RD7]. This gives Anglesey the smallest inward migration of non-UK born residents in the north Wales region, whilst Gwynedd has the largest in the region at 1.5%.

2.3.3 Just 0.5% of the population on Anglesey stated that English and/or Welsh was not the main language of their household. This was also the smallest proportion in north Wales; Wrexham had 2.7% and the Welsh average was 1.7%.

2.4 Religion

2.4.1 A total of 28 churches have been identified on Anglesey, across the island.

2.4.2 Table 2-10 shows the percentages of affiliations to religious groups for Anglesey and Wales, as reported in the 2011 Census. The majority of the population on Anglesey are Christian, with around one-quarter of the population indicating no religion. Each of the other main religious groups accounts for a negligible amount of the population on Anglesey (less than 0.5% for each). Compared to Wales as a whole, Anglesey has a higher proportion of Christians and a lower proportion of those with no religion.

Table 2-10 Religion (%) by area[13] (2011)

Religion	Isle of Anglesey (%)*	Wales (%)*
Christian	65.1	57.6
Buddhist	0.2	0.3
Hindu	0.1	0.3
Jewish	0.1	0.1
Muslim	0.4	1.5
Sikh	0.1	0.1
Other Religion	0.4	0.4

[13] [RD7]: Religion (KS209EW)

No Religion	25.5	32.1
Religion Not Stated	8.2	7.6

*Columns may not sum due to rounding.

2.5 Welsh language

2.5.1 Anglesey continues to be an area in Wales with a strong Welsh language presence. The 2011 Census showed that 45.6% of the population were multi-skilled in terms of Welsh language (able to speak, read and write in Welsh)[14]. This is the second highest rate in Wales, second only to Gwynedd (56.0%). The overall Welsh average was 14.6%. Not all speakers of Welsh are multi-skilled; therefore, it is important to note that, in terms of Welsh language skills, a higher proportion of the population possess only the ability to speak Welsh: 57.2% of the population of Anglesey and 64% of Gwynedd. In Wales only 19% can speak Welsh, with only 14.6% being multi-skilled in Welsh.

2.5.2 There has been a decline in the number of people who are multi-skilled in Welsh on Anglesey. There has been a 6% decline from 32,672 in 2001 to 30,756 in 2011. However, there are still six LSOAs on Anglesey where the percentage of fluent Welsh speakers remains above 60%. These are areas in close proximity to Llangefni and Llanfairpwll. Holyhead is the area on Anglesey where the lowest proportion of the resident population were multi-skilled in Welsh. The LSOA around Valley in west Anglesey is where the highest percentage of residents reported no skills in Welsh at 55.2%.

2.5.3 The Welsh Language Impact Assessment includes baseline information on the percentage of people that can speak Welsh by ward within the KSA and highlights that the percentage of people who can speak Welsh in each ward varies considerably, from 18.6% in the Menai (Bangor) ward to 87.8% in the Llanrug ward. The total percentage of Welsh speakers across the study area has fallen since 2001 with the majority of these wards located on Anglesey. The largest decrease was experienced in the Garth ward (-15.7%). Only 10 out of 73 wards within the study area experienced an increase in the percentage of Welsh speakers. These wards were Arllechwedd, Cadnant (Gwynedd), Clynnog, Cwm Cadnant, Groeslon, Llanllyfni, Llanrug, Moelfre, Ogwen and Waunfawr. Clynnog ward experienced the largest increase (5.4%) in Welsh speakers.

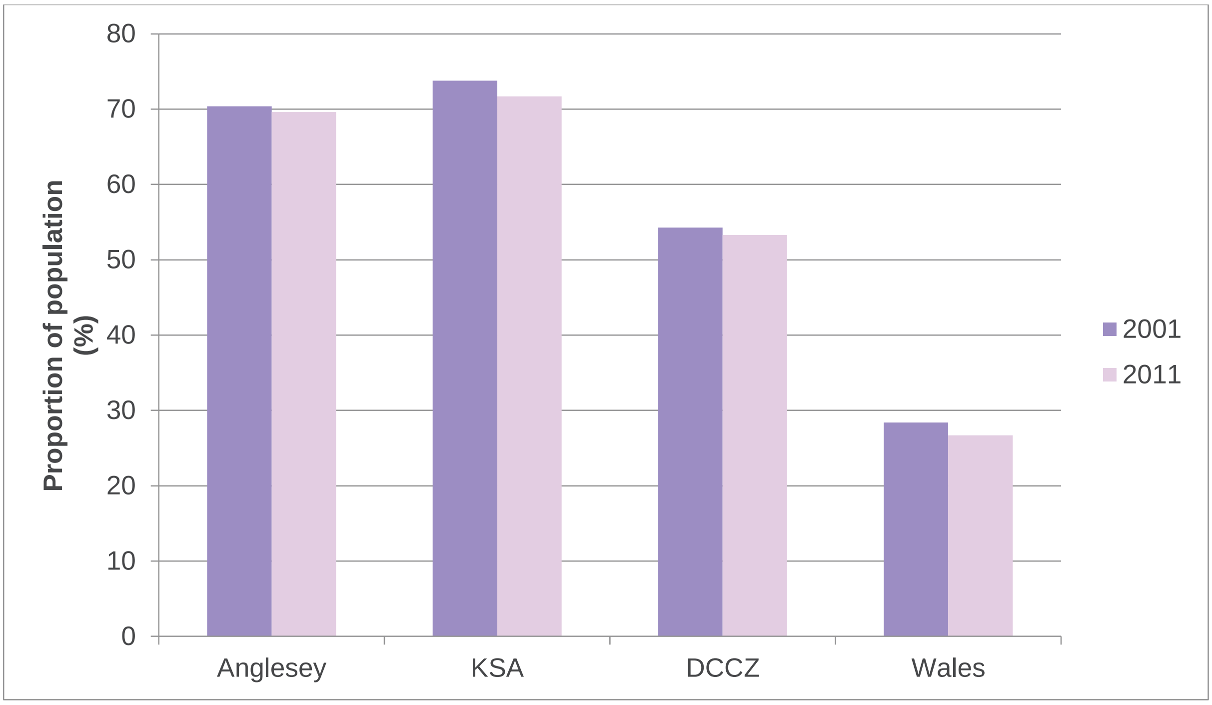
2.5.4 Compared to the older age groups, the younger age groups tend to contain a relatively higher proportion of the population that have one or more skills in Welsh. In 2011, the age group which had the highest percentage of people who had one or more skills in Welsh was the 5-15 age group (89.6%) followed closely by the 16-19 age group (84.4%). This also reflected the trend in 2001. The age group with the lowest percentage of Welsh speakers in 2011 was the 65-74 age group.

[14] [RD7]: Welsh language profile (KS208WA)

2.5.5 Over the past decade, six age groups have experienced an increase in the percentage of people with one or more skills in Welsh. The greatest increase was seen in the 60-64 age group, increasing 30.8% (equivalent to an increase of 745 people). Age groups 5-15, 16-19, 25-39 and 50-59 have experienced a decrease in the percentage of people who have one or more skills in Welsh. The largest decrease was experienced amongst the 5-15 age group, which saw an 11.6% decrease (which is equivalent to 942 people).

2.5.6 Figure 2-1 shows the change in the number and proportion of Welsh speakers between 2001 and 2011 across the socio-economic study areas.

Figure 2-1 Proportion of the population with one or more skills in Welsh[15] by area (2001[16] and 2011[17])



[15] One or more skills in terms of speaking, reading and writing. The figure for one or more skills in Welsh is calculated by deducting the number with no skills in Welsh from the population aged 3 and over.

[16] [RD15]: Knowledge of Welsh (KS025)

[17] [RD7]: Welsh language skills (KS207WA)

3 Economy

3.1 Summary of key points

- Anglesey accounted for 1.7% of Welsh GVA in 2015, the smallest of all the NUTS3[18] areas in Wales. Anglesey's share of Welsh GVA has remained broadly unchanged in recent years.
- Over the 2008 to 2015 period, Anglesey's GVA rose by 5.6%, in contrast to growth of 15.6% for Wales as a whole, partly due to the closure of Anglesey Aluminium in 2010.
- In 2015, GVA per head on Anglesey was £13,411, well below the £18,002 for Wales and the £25,601 for the UK as a whole. This is partly explained by the relatively high level of out-commuting for Anglesey.
- In 2016, the unemployment rate for Anglesey was 5.7%, higher than the figures for Wales (4.8%) and north Wales (4.1%).
- In terms of industry, Anglesey has above Welsh average shares in agriculture, forestry and fishing; wholesale; retail; transport; hotels and food, suggesting a strong dependence on agricultural and tourism-related businesses within Anglesey.
- In contrast, production and public administration activities are relatively less important for Anglesey's economy than elsewhere in Wales.
- Within Anglesey and Gwynedd, there are a higher proportion of sole proprietors and partnerships, and a lower proportion of companies, likely to reflect the high proportion of agricultural units.
- In 2015, there were 502 active businesses per 10,000 population on Anglesey, above the Welsh average of 495, but lower than the 547 for North Wales as a whole.
- The nature of businesses on Anglesey continues to be diverse, illustrating flexibility in supporting the local economy.
- The classification of Anglesey as an enterprise zone for energy is expected to assist with the growth of certain sectors, including production and energy.

[18] Nomenclature of Units for Territorial Statistics (NUTS) is a hierarchical classification of administrative boundaries. NUTS3 refers to an administrative level comprising countries or groups of unitary authorities with a population size ranging 150,000 to 800,000.

3.2 Economic output

3.2.1 GVA is a measure of the size of the economy of an area, and is sourced from regional accounts [RD16]. It is measured at the NUTS3 level, which is a European Union geography representing local economies either as individual authorities or as small groups of local authorities.

3.2.2 Table 3-1 shows GVA for Anglesey, Gwynedd, Conwy and Denbighshire, and Flintshire and Wrexham (the four NUTS3 areas that roughly constitute the DCCZ) along with Wales and the UK.

3.2.3 Anglesey took a 1.7% share of total Welsh GVA in 2015, marginally lower than the 1.8% share in 2008. It is the smallest economy of all the Welsh NUTS3 areas. The economies of Anglesey, Gwynedd, and Conwy and Denbighshire together accounted for 11.9% of Welsh GVA in 2015.

3.2.4 Anglesey's GVA grew over the decade to 2008, before declining by 2.4% in 2009 and 4.6% in 2010, largely due to the closure of the Anglesey Aluminium plant. Growth returned in 2011 and output rose by 13.4% between 2010 and 2015, although GVA declined by 1.9% in 2013. This is in contrast to both the UK and Wales as a whole, which saw sustained GVA growth between 2011 and 2015. Over the 2008 to 2015 period, workplace based GVA in Anglesey has increased from £888 million to £938 million. This is an increase of 5.6% compared with 15.6% in Wales and 17.8% in the UK.

Table 3-1 Workplace based GVA (£million) by area at current basic prices[19] (2008 to 2015)

Year	Isle of Anglesey	Gwynedd	Conwy and Denbighshire	Flintshire and Wrexham	Wales	UK	Anglesey share of Welsh GVA
2008	888	2,063	2,989	4,895	48,261	1,414,107	1.8%
2009	867	1,975	2,866	4,935	47,550	1,382,229	1.8%
2010	827	1,905	2,848	5,143	47,726	1,414,635	1.7%
2011	862	2,027	2,943	5,329	49,808	1,452,075	1.7%
2012	929	2,191	3,126	5,566	51,523	1,495,576	1.8%
2013	911	2,252	3,201	5,993	53,178	1,551,553	1.7%
2014	929	2,227	3,225	6,022	54,164	1,624,276	1.7%
2015	938	2,317	3,370	6,197	55,788	1,666,342	1.7%

3.2.5 GVA can also be considered per head of population as a means of understanding how the overall size of the local economy translates into a measure of wealth generation for each person. Differences in GVA per head

[19] [RD16]: Gross Value Added (Income Approach)

can be explained for the most part through varying rates of productivity, the nature of the economic activity, commuting trends and demographic differences across regions.

3.2.6 The lower levels of GVA per head for Anglesey compared with neighbouring NUTS3 areas, as shown in Table 3-2, are largely explained by a lower GVA per job and a higher level of out-commuting, as recorded in the 2011 Census.

3.2.7 In 2015, GVA per head on Anglesey was £13,411, well below the £18,002 for Wales and the £25,601 for the UK as a whole. This is partly explained by the relatively high level of out-commuting for Anglesey.

Table 3-2 GVA (£) per head by area at current basic prices[20] (2008 to 2015)

Year	Isle of Anglesey	Gwynedd	Conwy and Denbighshire	Flintshire and Wrexham	Wales	UK
2008	12,705	17,231	14,294	17,243	15,949	22,873
2009	12,401	16,409	13,709	17,300	15,647	22,201
2010	11,846	15,724	13,636	17,979	15,648	22,541
2011	12,327	16,678	14,063	18,522	16,257	22,945
2012	13,267	17,939	14,917	19,282	16,760	23,477
2013	12,998	18,469	15,217	20,691	17,252	24,203
2014	13,242	18,214	15,278	20,727	17,517	25,145
2015	13,411	18,855	15,978	21,314	18,002	25,601

3.3 Sectoral/industry overview

3.3.1 There are a number of differences between the economic structure of Anglesey and Wales as a whole. Table 3-3 shows the share of GVA by industry for Anglesey, Gwynedd, Conwy and Denbighshire, and Wales, and shows the following:

3.3.2 The agriculture, forestry and fishing industry on Anglesey is relatively more important than across the other NUTS3 areas, taking a 1.7% share of output in 2015, compared with the sector's 0.7% share of output in Wales.

3.3.3 Anglesey's distribution, transport, accommodation and food sector accounted for 24.5% of total GVA in 2015, compared with a Welsh share of 16.9%; this partly reflects the importance of the tourism industry to Anglesey. The sector in Conwy and Denbighshire (20.0%) and Gwynedd (19.3%) also account for an above-average share of GVA compared to Wales.

[20] [RD16]: Gross Value Added (Income Approach) per head of population

3.3.4 Real estate activities on Anglesey (19.1%) are also relatively more important than in Wales (12.7%) and across the rest of north Wales.

3.3.5 Anglesey has a below-average share of GVA from manufacturing (8.7%) compared with Wales (16.0%). However, this sector's share of total GVA is much lower in Conwy and Denbighshire at 35.7%.

Table 3-3 GVA (£million) by area and industry[21] (2015)

Broad industry group	Isle of Anglesey		Gwynedd		Conwy and Denbighshire		Flintshire and Wrexham		Wales	
	2015	%	2015	%	2015	%	2015	%	2015	%
A: Agriculture, forestry and fishing	16	1.7	26	1.1	33	1.0	33	0.5	373	0.7
BDE: Production (excluding manufacturing)	91	9.7	229	9.9	89	2.6	191	3.1	2,404	4.3
C: Manufacturing	82	8.7	154	6.6	234	6.9	2,214	35.7	8,935	16.0
F: Construction	61	6.5	141	6.1	241	7.2	270	4.4	3,329	6.0
GHI: Distribution, transport, accommodation and food	230	24.5	448	19.3	674	20.0	903	14.6	9,407	16.9
J: Information and communication	9	1.0	48	2.1	55	1.6	246	4.0	1,565	2.8
K: Financial and insurance activities	11	1.2	66	2.8	74	2.2	91	1.5	2,047	3.7
L: Real estate activities	179	19.1	325	14.0	516	15.3	578	9.3	7,086	12.7
MN: Business service activities	47	5.0	111	4.8	263	7.8	428	6.9	4,253	7.6
OPQ: Public administration, education and health	181	19.3	677	29.2	1,059	31.4	1,104	17.8	14,537	26.1

[21] [RD16]: Gross Value Added (Income Approach) by SIC07 industry.

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Broad industry group	Isle of Anglesey		Gwynedd		Conwy and Denbighshire		Flintshire and Wrexham		Wales	
	2015	%	2015	%	2015	%	2015	%	2015	%
RST: Other services and household activities	32	3.4	91	3.9	132	3.9	138	2.2	1,851	3.3
Total*	938		2,317		3,370		6,197		55,788	

** Please note that totals may not sum due to rounding*

3.4 Detailed sectoral analysis

Experian data

3.4.1 Data were purchased in 2015 from Experian covering businesses in the following areas of north Wales [RD17]:

- Anglesey;
- Gwynedd;
- Conwy;
- Denbighshire;
- Wrexham; and
- Flintshire.

3.4.2 These data show that there are 18,578 businesses within north Wales, of which 16,640 can be classified by Standard Industrial Classification (SIC) 2007 code. The remaining 1,938 businesses have no data on SIC.

3.4.3 Table 3-4 shows that, in terms of the number of businesses, the largest sectors in north Wales are wholesale and retail (15.8%), accommodation and food storage (12.9%) and construction (10.5%).

Table 3-4 Number of businesses in north Wales by SIC 2007 code[22] (2015)

Sector	Number of businesses	% of total
A: Agriculture, forestry and fishing	1,168	7.0
B: Mining and quarrying	35	0.2
C: Manufacturing	1,262	7.6
D: Electricity, gas, steam and air conditioning supply	40	0.2

[22] The data in the table exclude businesses which had no SIC code

Sector	Number of businesses	% of total
E: Water supply, sewerage, waste management and remediation activities	79	0.5
F: Construction	1,754	10.5
G: Wholesale and retail trade; repair of motor vehicles and motorcycles	2,637	15.8
H: Transport and storage	496	3.0
I: Accommodation and food storage activities	2,149	12.9
J: Information and communication	617	3.7
K: Financial and insurance activities	201	1.2
L: Real estate activities	318	1.9
M: Professional, scientific and technical activities	1,362	8.2
N: Administrative and support service activities	1,047	6.3
O: Public administration and defence; compulsory social security	57	0.3
P: Education	553	3.3
Q: Human health and social work activities	879	5.3
R: Arts, entertainment and recreation	603	3.6
S: Other service activities	1,272	7.6
T: Activities of households as employers; undifferentiated goods- and service-producing activities of households for own use	90	0.5
U: Activities of extra-territorial organisations and bodies	21	0.1

3.4.4 Table 3-5 shows the number of businesses in the Experian database for North Wales by sub-area. The largest number of businesses is in Flintshire (33%), followed by Conwy (22%). Approximately 13% of businesses are located on Anglesey, with a further 12% in the Menai Mainland.

Table 3-5 Number and proportion (%) of businesses in North Wales by sub-area (2015)

Area	Number of businesses	% of total
Anglesey North	449	2.4
Anglesey South	1,132	6.1
Anglesey West	754	4.1
Menai Mainland	2,201	11.8

Area	Number of businesses	% of total
Elsewhere in Gwynedd	2,000	10.8
Elsewhere in Conwy	4,134	22.3
Denbighshire	1,772	9.5
Flintshire	6,136	33.0
Total	18,578	100.0

Nuclear-related industries

3.4.5 A report by Oxford Economics, *The economic benefits of improving the UK's nuclear supply chain capabilities*, provided a list of nuclear-related industries by SIC code [RD18]. This was produced by matching the Nuclear Information Association's 60 work packages to SIC 2003 codes. The list of new nuclear build related industries by SIC 2003 code was converted to SIC 2007 codes in order to produce a count of relevant businesses in North Wales, using the Experian data. Table A.10 in the Oxford Economics report shows the nuclear new build relevant industries (table 3-6).

Table 3-6 New nuclear build related industries by SIC 2003

Activity category	SIC 2003 industries	Notes
Pre-licensing costs, technical and design	74.2: Architectural and engineering activities and related technical consultancy	Covers management of construction projects
	74.11: Legal activities	Covers legal activities
	74.14/2: Financial management	Covers financial services/advice
	74.3: Technical testing and analysis	Covers safety and testing
	74.20/6: Engineering related scientific and technical consulting activities	Covers engineering design
Regulatory & licensing & public enquiry	74.2: Architectural and engineering activities and related technical consultancy	Covers management of construction projects
	74.11: Legal activities	Covers legal activities
	74.3: Technical testing and analysis	Covers safety and testing
	74.20/6: Engineering related scientific and technical consulting activities	Covers engineering design

Activity category	SIC 2003 industries	Notes
Programme and construction management	74.2: Architectural and engineering activities and related technical consultancy	Covers management of construction projects
Civil construction & electrical/mechanical installation	45: Construction	Covers civil engineering
Nuclear Steam Supply System (NSSS)	28: Manufacture of fabricated metal products, except machinery and equipment 29: Manufacture of machinery and equipment not elsewhere classified	Components of NSSS mostly captured by various detailed industries within SIC28 and SIC29
Balance of Nuclear Island	28: Manufacture of fabricated metal products, except machinery and equipment 29: Manufacture of machinery and equipment not elsewhere classified	Components of Balance of Nuclear Island mostly captured by various detailed industries within SIC28 and SIC29
Non-Nuclear Island	28: Manufacture of fabricated metal products, except machinery and equipment 29: Manufacture of machinery and equipment not elsewhere classified	Components of non-Nuclear Island mostly captured by various detailed industries within SIC28 and SIC29
Instrumentation and control	33.3: Manufacture of industrial process control equipment	-
	72: Computer and related activities	-
Fuel	23.3: Processing of nuclear fuel	-
Infrastructure	45: Construction	-

3.4.6 The information in table 3-6 has been used to understand the potential number of businesses in north Wales which could be classified within new nuclear build related industries, looking at the number of firms in each of the relevant SIC industries. The information in table 3-6 was mapped to the newer SIC codes, SIC 2007, in order to match the information available in the Experian data.

3.4.7 This information is shown in table 3-7. It does not include businesses which could be part of the wider supply chain within the new nuclear build construction process, such as facilities management, catering or training. This is consistent with the approach in the Oxford Economics report.

3.4.8 Table 3-7 shows that there are only two categories of businesses in new nuclear build related industries which are not present in north Wales:

- technical testing and analysis; and
- processing of nuclear fuel.

3.4.9 However, a number of other categories only have a small number of businesses, including:

- financial management;
- manufacture of fabricated metal products, except machinery and equipment;
- manufacture of machinery and equipment not elsewhere classified; and
- manufacture of industrial process control equipment.

3.4.10 This suggests there are a number of activities within the new nuclear build process which are unlikely to be able to be undertaken by businesses located in north Wales.

Table 3-7 The number of businesses that could be classified within new nuclear build related industries in north Wales (2015)

Activity category	SIC 2007 industries	Number of businesses
Pre-licensing costs, technical and design	71: Architectural and engineering activities and related technical consultancy	320
	69: Legal activities	91
	70: Financial management	14
	71.2: Technical testing and analysis	0
	71.12/2: Engineering related scientific and technical consulting activities	41
Regulatory & licensing & public enquiry	71: Architectural and engineering activities and related technical consultancy	320
	69: Legal activities	91
	71.2: Technical testing and analysis	0

Activity category	SIC 2007 industries	Number of businesses
	71.22/2: Engineering related scientific and technical consulting activities	41
Programme and construction management	71: Architectural and engineering activities and related technical consultancy	320
Civil construction & electrical/mechanical installation	41-43: Construction	587
Nuclear Steam Supply System	25: Manufacture of fabricated metal products, except machinery and equipment 28: Manufacture of machinery and equipment not elsewhere classified	13
Balance of Nuclear Island	25: Manufacture of fabricated metal products, except machinery and equipment 28: Manufacture of machinery and equipment not elsewhere classified	13
Non-Nuclear Island	28: Manufacture of fabricated metal products, except machinery and equipment 28: Manufacture of machinery and equipment not elsewhere classified	13
Instrumentation and control	26.51/2 and 26.51/4: Manufacture of industrial process control equipment	1
	62: Computer programming, consultancy and related activities	84
Fuel	24.46: Processing of nuclear fuel	0
Infrastructure	41-43: Construction	587

3.5 Enterprises and local units

3.5.1 The ability of an area to sustain and generate enterprises is an indicator of the general economic vitality of the area.

3.5.2 Table 3-8 considers the stock of active enterprises on Anglesey, in north Wales and Wales. Overall, Anglesey accounts for 2.5% of Welsh enterprises whilst north Wales accounts for 25%. On a sectoral basis, Anglesey has a higher share of enterprises in agriculture, forestry and fishing; accommodation and food; and construction than would be expected by its overall share of Welsh enterprises.

Table 3-8 Stock of active enterprises by sector and area[23] (2016)

Industry group	Isle of Anglesey	North Wales	Wales
A: Agriculture, forestry and fishing	605	3,860	13,850
BDE: Production (excluding manufacturing)	20	170	635
C: Manufacturing	105	1,350	5,665
F: Construction	300	2,950	11,955
GH: Distribution and transport	425	4,660	18,550
I: Accommodation and food service activities	265	2,345	8,475
J: Information and communication	60	905	4,310
K: Financial and insurance activities	15	300	1,635
L: Real estate activities	55	595	2,660
MN: Business service activities	345	4,485	19,360
OPQ: Public administration, education and health	155	1,525	6,045
RST: Other services and household activities	140	1,560	6,710
Total	2,490	24,705	99,850

3.5.3 Table 3-9 uses a different measure of enterprise by expressing the number of active businesses per 10,000 resident population. Anglesey has more active

[23] [RD19]: UK Business Counts – Enterprises by industry.

Please note that totals may not sum due to rounding.

enterprises per 10,000 population than Wales from 2008 to 2015, but north Wales continues to have more active enterprises per 10,000 population than both Wales and Anglesey over the same period.

Table 3-9 Active business enterprises per 10,000 population by area[24] (2008 to 2015)

Year	Isle of Anglesey	North Wales	Wales
2008	485	529	476
2009	483	525	471
2010	495	520	467
2011	476	510	456
2012	479	514	455
2013	481	523	466
2014	493	535	481
2015	502	547	495

3.5.4 Table 3-10 shows the net change in the formation of enterprises in 2015. There was no overall change in the number of firms in a number of sectors on Anglesey (production; information and communication; finance and insurance activities; and education and health). Trends were broadly consistent across Anglesey, north Wales and Wales, although there was an increase in the number of firms in the production; information and communication; finance and insurance; and education and health sectors in north Wales and Wales, in contrast to no change on Anglesey.

Table 3-10 Net change in firm formation by major sector and area[25] (2014-2015)

Broad industry group	Isle of Anglesey	North Wales	Wales
BCDE: Production (including manufacturing)	0	35	265
F: Construction	10	125	610
G: Distribution	-10	-55	-75
H: Transport and storage	5	80	150
I: Accommodation and food	15	5	125
J: Information and communication	0	10	185

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24 [RD10]: Active Business Enterprises per 10,000 population by area and year (Econ0080)

25 [RD10]: Business active enterprises by variable, area and industry (SIC 2007) (Econ0089)

Broad industry group	Isle of Anglesey	North Wales	Wales
K: Finance and insurance activities	0	0	80
L: Real estate activities	5	10	110
MN: Business service activities	5	215	605
PQ: Education and health	0	20	775
RST: Other services and household activities	5	30	85
Total	35	475	2,915

3.5.5 Table 3-11 shows the number of local units by industry. In terms of local units[26], there are some significant differences in the types of businesses that are located on Anglesey and north Wales compared to the Welsh average. These are summarised below.

- A key difference is the relatively high proportion of local business units within the agriculture, forestry and fishing sector on Anglesey (20.4%). The proportion in north Wales (12.9%) is more in line with the Welsh average (11.3%).
- Anglesey (11.1%) and north Wales (9.0%) have higher proportions of local business units in the accommodation and food service activities sector than the Welsh average (8.1%).
- Anglesey (12.9%) has a below average proportion of local business units in the business services activities sectors compared with the Welsh average (17.8%). north Wales (16.6%) is more in line with the Welsh average.
- Anglesey has a slightly higher proportion of local units in the construction sector than north Wales and Wales – 10.6% compared to 10.1%.

Table 3-11 UK business counts – local units by industry and area[27] (2016)

Broad industry group	Isle of Anglesey		North Wales		Wales	
	2016	%	2016	%	2016	%
A: Agriculture, forestry and fishing	625	20.4	3,905	12.9	13,920	11.3

[26] A local unit is an individual site (factory, site, shop etc.) at which an enterprise conducts its business. A single enterprise can have multiple local units.

[27] [RD19]: UK Business Counts – Local Units by Industry

Broad industry group	Isle of Anglesey		North Wales		Wales	
	2016	%	2016	%	2016	%
BDE: Production	20	0.7	285	0.9	1,020	0.8
C: Manufacturing	120	3.9	1,515	5.0	6,195	5.0
F: Construction	325	10.6	3,060	10.1	12,435	10.1
GH: Distribution and transport	550	18.0	6,285	20.8	25,460	20.7
I: Accommodation and food service activities	340	11.1	2,730	9.0	9,985	8.1
J: Information and communication	60	2.0	975	3.2	4,635	3.8
K: Finance and insurance activities	30	1.0	505	1.7	2,560	2.1
L: Real estate activities	70	2.3	720	2.4	3,220	2.6
MN: Business service activities	395	12.9	5,030	16.6	21,850	17.8
OPQ: Public administration, education and health	350	11.4	3,345	11.0	13,145	10.7
RST: Other services and household activities	175	5.7	1,930	6.4	8,395	6.8
Total	3,070		30,275		122,820	

Please note that columns may not sum due to rounding; data are rounded to the nearest 5

3.5.6 Considering local business units by ownership (Table 3-12), the proportion of public sector businesses on Anglesey (6.2%) is slightly higher than in north Wales (5.1%) and in Wales (4.9%).

3.5.7 Within private sector ownership, Anglesey has a much higher proportion of sole proprietors (31.3%) than north Wales (23.2%) and Wales (21.6%). This is likely to be related to the high proportion of agricultural units, which often operate as sole proprietorships.

Table 3-12 UK business counts – local units by ownership and area[28] (2016)

Ownership	Isle of Anglesey		North Wales		Wales	
	2016	%	2016	%	2016	%
Company (including building society)	1,220	39.7	15,425	50.9	66,710	54.3

[28] [RD19]: UK Business Counts – Local Units by Legal Status

Ownership	Isle of Anglesey		North Wales		Wales	
	2016	%	2016	%	2016	%
Sole proprietor	960	31.3	7,020	23.2	26,585	21.6
Partnership	560	18.2	4,795	15.8	17,375	14.1
Non-profit body or mutual association	135	4.4	1,500	5.0	6,105	5.0
Private sector total	2,880	93.8	28,740	94.9	116,775	95.1
Public corporation	5	0.2	45	0.1	160	0.1
Central government	40	1.3	395	1.3	1,345	1.1
Local authority	140	4.6	1,095	3.6	4,545	3.7
Public sector total	190	6.2	1,535	5.1	6,045	4.9
Total	3,070		30,275		122,820	

Please note that columns may not sum due to rounding; data are rounded to the nearest 5

3.5.8 In terms of numbers employed, Anglesey has a slightly higher proportion of 'micro' businesses (85.0%) than either north Wales (83.2%) or Wales (82.9%) as shown in Table 3-13 . This may be indicative of the relatively large proportion of agricultural and tourism focused businesses within these economies.

Table 3-13 UK business counts – local units by number of employees and area[29] (2016)

Number of employees	Isle of Anglesey		North Wales		Wales	
	2016	%	2016	%	2016	%
Micro (0 to 9)	2,610	85.0	25,180	83.2	101,840	82.9
Small (10 to 49)	400	13.0	4,265	14.1	17,220	14.0
Medium-sized (50 to 249)	55	1.8	735	2.4	3,260	2.7
Large (250+)	5	0.2	95	0.3	495	0.4
Total	3,070		30,275		122,820	

Please note that columns may not sum due to rounding; data are rounded to the nearest 5

3.6 Economic strategy

3.6.1 The Welsh Government has created seven Enterprise Zones, set up to attract new business and make the Welsh economy more competitive. Anglesey is one of these zones with a focus on the low carbon energy sector.

[29] [RD19]: UK Business Counts – Local Units by Employment Size Band

3.6.2 The IACC's EIP is part of the Enterprise Island Framework, and is a key driver of the economic future of both Anglesey and north Wales. It is a wide-ranging programme that is seeking to build upon the island's location and key strategic assets to place Anglesey at the leading edge of the low carbon energy sector. The programme is unique due to its scale and the range of energy technologies that are available for development on the island. It is considered a once-in-a-lifetime opportunity to boost the economy on Anglesey and in the wider region by pursuing the following vision:

3.6.3 "*to create a world-renowned centre of excellence of the production, demonstration and servicing of the low carbon energy*" [RD20]

3.6.4 The EIP is seeking to achieve this vision through three objectives.

- Production – low carbon energy production on and close to the island, encompassing large-scale generation from nuclear and offshore through to micro generation and the development of community energy schemes in rural parts of the island.
- Demonstration – establishing world-class facilities to promote Anglesey as a leading location for low carbon energy innovation and demonstration, utilising existing demonstration projects including the Marine Current Turbines Ltd tidal array at The Skerries and the demonstration of smart grids across Anglesey.
- Servicing – local companies taking advantage of opportunities for new energy investment, operation and decommissioning. This will include the provision of accommodation and services for the EIP workforce.

3.6.5 Five key areas of action have been identified by the EIP:

- Skills development – development of a labour force with the skills required to take maximum advantage of the energy production, demonstration and servicing opportunities.
- Infrastructure development – planning and supporting the development of strategic and community level infrastructure to facilitate the Energy Island framework.
- Policy development – identifying areas where policy needs to be developed and changed to support the framework.
- Supply chain development – maximising the supply chain opportunities that can be captured locally.
- Behavioural change & communication – ensuring that programmes and activities are in place to encourage behavioural change and communicate the activities and benefits.

3.6.6 The most significant development within the EIP is the Wylfa Newydd Project.

4 Labour market

4.1 Summary of key points

- At 75.1%, the economic activity rate for the Anglesey is in line with both north Wales (76.3%) and Wales (74.8%).
- In 2016, the unemployment rate for Anglesey was 5.7%, higher than the figures for Wales (4.8%) and north Wales (4.1%).
- The proportion of the working population claiming out of work benefits on Anglesey fell from 14.1% in May 2010 to 10.4% in May 2016, below the 11.4% for Wales as a whole.
- The job density rate – the number of filled jobs divided by the working age population – for Anglesey has improved in recent years, but at 0.63 in 2015, it was still much lower than in Wales (0.74) and north Wales (0.79).
- There was no significant growth in earnings on Anglesey between 2008 and 2014, in contrast to other parts of north Wales. However, in 2016, earnings on Anglesey declined by 2.7% after an increase in 2015. In 2016, median weekly earnings on Anglesey were £469 compared to £439.70 in Gwynedd and a Welsh average of £498.30.
- In 2014, GDHI on Anglesey was £16,238 per head, above the Welsh average (£15,302) and the third highest across Welsh local authorities.
- In 2014, utilities employment on Anglesey was 4.3%, above the Welsh average of 1.7%, which reflected the presence of the Existing Power Station, although it has now ceased operation.
- In 2011, across north Wales 12% of establishments reported that they had a vacancy, and 4% reported a "hard-to-fill" vacancy, compared to 10% and 3%, respectively, for north Wales.
- In 2011, nearly 8,900 Anglesey residents were travelling to workplaces off the island, whilst slightly over 3,100 people were travelling onto the island for work.
- The average distance travelled to work for residents within the DCCZ is around 12 miles, higher than the Welsh average (10.4 miles) but lower than for Anglesey (14 miles).

4.2 Employment rate

4.2.1 Employment rates provide a measure of the extent to which labour resources are being used in a local economy. They offer an insight into the available headroom to accommodate growth and are therefore relevant considerations for the Project. In the short term, these rates are sensitive to the economic cycle, but in the longer term, they are also significantly affected by government policies with regard to higher education and welfare support and by policies that facilitate employment of women.

4.2.2 The employment rate is defined as the percentage of the resident working age population that is in employment.

4.2.3 Anglesey's employment rate fell below that of Wales and north Wales for 2008 (Table 4-1), before increasing and exceeding the Welsh average until 2016. The employment rate on Anglesey increased to 73.8% over 2015, the highest employment rate in this time-period since at least 2004, the earliest year of comparable data. In 2016, the employment rate in Anglesey decreased while it increased in north Wales and Wales.

Table 4-1 Working age employment rate by area[30] (January 2008 to December 2016)

Date	Isle of Anglesey		North Wales		Wales	
	Number	%	Number	%	Number	%
Jan 2008-Dec 2008	28,700	66.7	304,000	71.6	1,316,300	68.7
Jan 2009-Dec 2009	28,800	67.9	300,100	70.7	1,282,900	66.7
Jan 2010-Dec 2010	29,600	69.8	297,100	70.3	1,280,500	66.5
Jan 2011-Dec 2011	29,700	70.3	298,200	70.6	1,287,400	66.8
Jan 2012-Dec 2012	30,000	72.8	299,300	71.5	1,291,900	67.3
Jan 2013-Dec 2013	28,800	70.1	299,300	71.7	1,318,300	68.9
Jan 2014-Dec 2014	29,300	72.2	294,700	71.0	1,326,800	69.5
Jan 2015-Dec 2015	30,200	73.8	300,100	72.3	1,341,700	70.3
Jan 2016-Dec 2016	28,800	70.8	303,000	73.2	1,358,600	71.2

Economically active

4.2.4 The economic activity rate is the percentage of the population, both employed and unemployed, which constitutes the supply of labour within the labour market. The rate is sensitive to how the working age population perceives economic conditions (the supply of potential jobs) as well as policies concerning income support when not in employment. Populations who consider that there are few job opportunities available might decide to withdraw from the labour market altogether (i.e. cease to be economically active at all) in which case the economic activity rate might fall.

4.2.5 Table 4-2 shows that the economic activity rate for Anglesey increased sharply over 2015, before falling slightly over 2016. This was in contrast to north Wales and Wales, which both had relatively stable periods. The economically active

[30] [RD11]: Annual Population Survey – Employment Rate

population of Anglesey was estimated at around 30,600 in 2016. Recent trends in the economic activity rate have mirrored that of the employment rate, albeit at a higher level.

Table 4-2 Economic activity rate by area[31] (January 2008 to December 2016)

Date	Isle of Anglesey		North Wales		Wales	
	Number	%	Number	%	Number	%
Jan 2008-Dec 2008	30,900	71.9	320,200	75.4	1,406,300	73.4
Jan 2009-Dec 2009	31,000	73.2	319,000	75.2	1,400,400	72.9
Jan 2010-Dec 2010	31,100	73.3	318,200	75.3	1,399,200	72.7
Jan 2011-Dec 2011	31,600	75.0	318,900	75.5	1,407,200	73.0
Jan 2012-Dec 2012	31,500	76.6	319,100	76.3	1,411,400	73.6
Jan 2013-Dec 2013	31,500	76.8	320,000	76.7	1,434,600	75.0
Jan 2014-Dec 2014	30,900	76.3	312,400	75.2	1,425,500	74.7
Jan 2015-Dec 2015	32,100	78.4	315,500	76.0	1,429,400	74.9
Jan 2016-Dec 2016	30,600	75.1	316,000	76.3	1,426,400	74.8

Economic inactivity

4.2.6 The economically inactive are defined as people who are not in work, but who do not meet all the criteria for unemployment (wanting a job, seeking in the last four weeks and available to start in the next two). There are many reasons why an individual may be inactive, for example, they might be studying, looking after family or long-term sick.

4.2.7 Table 4-3 shows that the economic activity rate of Anglesey was higher than Wales over 2016, but lower than north Wales. Anglesey had a slightly lower economic inactivity rate than Wales. However, both north Wales (77.2%) and Anglesey (77.0%) do have a higher proportion of the economically inactive who do not want a job compared with 74.2% in Wales.

Table 4-3 Economic activity by type and area[32] (January to December 2016)

Indicator	Isle of Anglesey	North Wales	Wales
Economic activity rate (working age population)	75.1	76.3	74.8
Employment rate (working age population)	70.8	73.2	71.2

[31] [RD11]: Annual Population Survey – Economic Activity Rate

[32] [RD11]: Annual Population Survey

Indicator	Isle of Anglesey	North Wales	Wales
Unemployment rate (working age population)	5.7	4.1	4.8
Percentage who are economically inactive (working age population)	24.9	23.7	25.2
Percentage of the economically inactive who do not want a job	77.0	77.2	74.2

Claimant count

4.2.8 The claimant count for Jobseeker's Allowance (JSA) is a further indicative measure of how well a local economy is using its available labour resources. Those currently unemployed are a potential resource that can be drawn upon to support economic growth.

4.2.9 Table 4-4 looks at the claimant count from 2008 onwards, which marked the onset of the recession. These data show a peak in the JSA claimant count rate in January 2010 with the rate dropping slightly, before rising to near-peak levels in 2012 and 2013 and decreasing rapidly in subsequent years across all areas. These data show the JSA claimant count rate to be higher on Anglesey compared to north Wales and Wales as a whole, although a similar trend is apparent.

4.2.10 Comparable data for the DCCZ have only recently become available; as such, this table also includes north Wales for comparative purposes. In January 2017, there were 3,348 claimants within the DCCZ, of which 809 claimants were registered on Anglesey. Generally, claimant rates have been falling in all areas, although this cannot be verified for the DCCZ due to data discontinuities.

4.2.11 Universal Credit (UC) is a relatively new benefit that is being implemented in phases. Since September 2015, new JSA claims[33] by single people without dependents have been handled through UC. Since June 2015, unemployed UC claimants have been included in the general Claimant Count measure and is separate from the JSA claimant count below in Table 4-4. Due to its short time period, UC has not been included within this baseline research.

[33] People that would have previously claimed Income-based JSA are now directed towards UC, this also occurs for following benefits: Housing benefit, Child Tax Credit, Income support, Working Tax Credit, and Income-related Employment & Support Allowance

Table 4-4 JSA claimant count and rate by area[34] (January 2008 to 2017)

Date	Isle of Anglesey		DCCZ		North Wales		Wales	
	Number	%	Number	%	Number	%	Number	%
January 2008	1,226	2.8	-	-	9,369	2.2	41,353	2.1
January 2009	1,552	3.6	-	-	14,201	3.3	68,319	3.5
January 2010	2,144	5.1	-	-	17,660	4.1	83,174	4.3
January 2011	1,899	4.5	-	-	15,495	3.6	75,163	3.9
January 2012	1,946	4.7	-	-	16,959	4.0	83,131	4.3
January 2013	2,047	4.9	-	-	16,808	4.0	81,329	4.2
January 2014	1,767	4.3	-	-	14,450	3.4	67,513	3.5
January 2015	1,308	3.2	6,032	2.7	10,081	2.4	49,830	2.6
January 2016	1,136	2.8	4,550	2.0	6,931	1.7	37,865	2.0
January 2017	809	1.9	3,348	1.4	5,267	1.2	28,274	1.5

4.2.12 The overall level of claimant activity only gives a partial view of the available labour resource potentially available to the Wylfa Newydd Project. Table 4-5 lists the number of claimants seeking occupations which are more likely to be ‘nuclear relevant’ in terms of the assessment of skills produced by the Construction Skills Network [RD21]. The fact that an individual is seeking a job relevant to the Project does not necessarily imply that the same individual can meet the Project requirements. It does nevertheless differentiate claimants who are more likely to meet requirements compared to those seeking opportunities in retailing, for example.

[34] [RD22]: Jobseeker’s allowance with rates and proportions

Table 4-5 Occupations sought by claimants by area[35] (December 2016)

Occupation	Isle of Anglesey	DCCZ	Wales
5211: Smiths and forge workers	0	0	0
5212: Moulders, core makers, die casters	0	0	0
5213: Sheet metal workers	0	0	0
5214: Metal plate workers, shipwrights, riveters	0	0	5
5215: Welding trades	5	5	35
5216: Pipe fitters	0	0	5
5221: Metal machining setters and setter-operators	0	0	10
5222: Tool makers, tool fitters and markers-out	0	0	0
5223: Metal working production and maintenance fitters	0	0	25
5224: Precision instrument makers and repairers	0	0	0
5231: Motor mechanics, auto engineers	0	5	60
5232: Vehicle body builders and repairers	0	5	10
5233: Auto electricians	0	0	0
5234: Vehicle spray painters	0	0	10
5241: Electricians, electrical fitters	5	10	25
5242: Telecommunications engineers	0	0	0
5243: Lines repairers and cable jointers	0	0	0
5244: TV, video and audio engineers	0	0	0
5245: Computer engineers, installation and maintenance	0	0	25
5249: Electrical/Electronics engineers not elsewhere classified (n.e.c)	0	0	5
5311: Steel erectors	0	0	5
5312: Bricklayers, masons	0	5	30

[35] [RD22]: Claimant Count – Occupations

Occupation	Isle of Anglesey	DCCZ	Wales
5313: Roofers, roof tilers and slaters	5	5	15
5314: Plumbers, heating and ventilating engineers	0	5	25
5315: Carpenters and joiners	5	10	45
5316: Glaziers, window fabricators and fitters	0	0	10
5319: Construction trades n.e.c.	0	10	20
5321: Plasterers	0	5	25
5322: Floorers and wall tilers	0	0	5
5323: Painters and decorators	5	10	75
8133: Routine inspectors and testers	0	0	5
8134: Weighers, graders, sorters	0	0	0
8141: Scaffolders, stagers, riggers	0	0	15
8142: Road construction operatives	0	0	5
8143: Rail construction and maintenance operatives	0	0	5
8149: Construction operatives n.e.c.	5	10	35
8211: Heavy goods vehicle drivers	0	5	40
8212: Van drivers	20	50	300
8221: Crane drivers	0	0	0
8222: Fork-lift truck drivers	0	5	65
8223: Agricultural machinery drivers	0	0	0
8229: Mobile machine drivers and operatives n.e.c.	0	0	10
9121: Labourers in building and woodworking trades	10	45	220
9129: Labourers in other construction trades n.e.c.	10	35	245
9223: Kitchen and catering assistants	5	45	270
9233: Cleaners, domestics	20	75	530
9239: Elementary cleaning occupations n.e.c.	0	0	30

Occupation	Isle of Anglesey	DCCZ	Wales
9241: Security guards and related occupations	5	10	65
9249: Elementary security occupations n.e.c.	0	5	5
3112: Electrical/electronic technicians	0	0	5
3113: Engineering technicians	0	0	0
3114: Building and civil engineering technicians	0	0	5
3115: Quality assurance technicians	0	0	5
3119: Science and engineering technicians n.e.c.	0	0	0
3121: Architectural technologists and town planning technicians	0	0	5
3122: Draughtspersons	0	0	5
3131: IT operations technicians	0	0	25
3132: IT user support technicians	5	5	30
3319: Protective service associate professionals n.e.c.	0	0	0
3531: Estimators, valuers and assessors	0	0	0
3551: Conservation and environmental protection officers	0	5	5
3563: Vocational and industrial trainers and instructors	0	0	5
2121: Civil engineers	0	0	0
2122: Mechanical engineers	0	5	15
2123: Electrical engineers	0	0	5
2124: Electronics engineers	0	0	5
2126: Design and development engineers	0	0	5
2127: Production and process engineers	0	5	10
2128: Planning and quality control engineers	0	0	0

Occupation	Isle of Anglesey	DCCZ	Wales
2129: Engineering professionals n.e.c.	0	0	5
1122: Managers in construction	0	0	10
1123: Managers in mining and energy	0	0	0
1136: Information and communication technology managers	0	0	5
1141: Quality assurance managers	0	0	0
1161: Transport and distribution managers	0	0	5
1162: Storage and warehouse managers	0	5	15
1174: Security managers	0	0	0
Total	105	385	2,485

Underemployment

4.2.13 Whilst unemployment rates are typically used as the key measure of slack in the labour market, there has been a steady increase in the number of people in work who want more work than is available to them. This condition has been termed 'underemployment'. Underemployment is a potential resource for the Project to utilise insofar as those people who are underemployed may be able to increase their hours worked by either getting an additional job or working more hours in their current role. Underemployment may also represent people who are over-skilled for their current role; however, no data on this are available to assess on a consistent basis for local areas.

4.2.14 The main constraining factor is the demand for labour within the economy. The Labour Force Survey is the principle source of data on underemployment. The Labour Force Survey lays down two pre-conditions for underemployment; it includes those who are employed but who wish to work more hours in their current role, or who are looking for an additional job or for a replacement job that offers more hours. They must also be over 16, currently working under 40 hours per week if they are between 16 and 18, and under 48 hours if they are over 18. Finally, they must be able to start working extra hours within the next two weeks. Bell and Blanchflower make the link between these conditions and the rise of part-time working since the recession in the UK [RD23].

4.2.15 Since 2008, the number of full-time employees has fallen by 386,000, while the number of part-time employees has increased by almost 300,000 in the UK. The number of self-employed has increased by almost 60,000 full-timers and, notably, by 253,000 part-timers. Between 2008 and 2012, the number of part-time workers who want full-time jobs increased by 674,000, while those out of the labour force wishing to find a job increased by 130,000.

4.2.16 Among all workers, the proportion looking for a different job increased from 6.3% in 2008, to 7.6% in 2012. Increases in this proportion occurred for full-time employees, part-time employees and the self-employed. Part-timers were most likely to be looking for a new job. Between 2008 and 2012, this share rose from 7.9% to 10.6% of employees. The main reasons given for looking for a different job were unchanged between 2011 and 2012. The major reasons given were that pay was unsatisfactory (19.3%), the present job may end (17.9%) and other aspects of the job (15.8%). Only 8.6% said they wanted longer hours while 2.3% were looking for another job because they wanted shorter hours.

4.2.17 Over time, it is clear that an increasing proportion of the workforce wished to extend their hours. From 2008 to 2012, this share increased from 7.4% to 9.9%. This increase was largely driven by part-timers. In 2012, almost 20% of this group wished to extend their working time. In contrast, only 6.3% of full-timers wanted longer hours.

4.2.18 Part-timers also sought the largest average increase in their working time. In 2012, they wished to extend their hours by an average of 13.8 hours, compared with the average of 9.5 hours sought by full-timers.

4.2.19 Bell and Blanchflower set a method for indexing underemployment and the application of the index to regional Labour Force Survey data is shown in Table 4-6 [RD23].

4.2.20 The data in Table 4-6 show, on average, that in 2012 underemployment rates were 26% greater than the unemployment rate. The data show that Wales shares the second highest rank position in terms of underemployment based on this index.

Table 4-6 Underemployment index trends compared with unemployment by region[36] (2008 to 2012)

Region	Underemployment index			Unemployment rate		
	2008 (%)	2010 (%)	2012 (%)	2008 (%)	2010 (%)	2012 (%)
Northern[37]	7.5	10.3	12.5	7.8	9.5	10.3
Yorkshire & Humberside	6.6	11.1	11.0	6.4	9.3	9.3
East Midlands	6.6	9.4	9.9	5.9	7.7	8.0
East	5.3	8.2	8.3	5.0	6.6	6.7
South East	6.1	9.0	9.4	4.4	6.2	6.4
West Midlands	7.2	10.4	10.6	6.9	8.9	8.7

[36] [RD23]

[37] This refers to Northern England, excluding Yorkshire & Humberside

Region	Underemployment index			Unemployment rate		
	2008 (%)	2010 (%)	2012 (%)	2008 (%)	2010 (%)	2012 (%)
North West	7.7	9.7	11.3	6.9	8.2	9.0
Wales	6.8	10.2	11.3	6.3	8.7	8.6
Scotland	4.9	9.9	10.2	4.8	8.3	8.0
Northern Ireland	4.2	8.5	8.6	4.4	6.9	7.4

4.2.21 Whilst there is no small area equivalent to the index, it is instructive to look at the role of part-time employment as an indication of the likelihood that underemployment is a factor in local labour market dynamics.

4.2.22 Table 4-7 shows the proportion of part-time employment in the workforce.

Table 4-7 Part-time employment (Full-time equivalent (FTE)) by sector and area[38][39] (2015)

Sector	Isle of Anglesey	DCCZ	Wales
	% employed part-time	% employed part-time	% employed part-time
B: Mining and quarrying	5.3	0.6	0.7
C: Manufacturing	4.6	4.2	3.2
D: Electricity, gas, steam and air conditioning	1.7	1.3	5.1
E: Water supply, sewerage, waste management and remediation activities	0.6	3.8	4.3
F: Construction	9.0	7.4	6.9
G: Wholesale and retail trade, repair of motor vehicles and motorcycles	29.2	36.1	33.5
H: Transportation and storage	9.7	8.0	5.5
I: Accommodation and food service activities	42.1	43.8	44.4

[38] Agriculture is missing due to the difference in data collection for the sector.

[39] [RD19]. Based on employees in employment.

Sector	Isle of Anglesey	DCCZ	Wales
	% employed part-time	% employed part-time	% employed part-time
J: Information and communication	8.7	5.4	6.9
K: Financial and insurance activities	20.3	15	10.9
L: Real estate activities	19.9	13.6	12.4
M: Professional, scientific and technical activities	8.4	14.7	11.4
N: Administrative and support service activities	41.6	23.6	19.9
O: Public administration and defence, compulsory social security	14.2	16.9	16.4
P: Education	36.4	37.2	33.0
Q: Human health and social work activities	35.5	28.3	28.5
R: Arts, entertainment and recreation	44.0	42.8	38.2
S: Other service activities	34.2	20.3	20.9
Total: All sectors	22.5	24.9	21.2

4.2.23 Table 4-7 shows that part-time employment plays a significant role in the local economies concerned. Part-time employment is slightly higher on Anglesey relative to Wales as a whole. Across the DCCZ, it is however much higher as a proportion of total FTE employment.

Young People Not in Employment, Education or Training (NEETS)

4.2.24 NEETS constitutes a subset of the economically inactive. NEETS have become a major concern for policy makers as they are indicative of longer-term trends of increased community deprivation. Given the complexities involved in measuring this group, the level of NEETs activity is typically established by using partial data collected on a more frequent basis (Annual Population Survey) or with a greater local basis (Careers Service Wales). It can also be measured by combining a number of different sources of information on a less frequent basis (Statistical First Release of 'Participation of young people in education and the labour market').

4.2.25 The Annual Population Survey is produced on a more frequent basis, but it is based solely on survey data from relatively small sample sizes. This source does, however, have the advantage of recording data for sub-regions and, specifically, north Wales.

4.2.26 Table 4-8 shows the NEETs rate over the last three years is generally falling. The rate in north Wales is relatively low compared to other sub-regions of Wales, with only mid-Wales having a lower rate.

Table 4-8 Young People Not in Education, Employment or Training (NEET) in Wales by sub-region for 16-24 year olds[40] 2012 to 2016

Date	Numbers of people classified as NEETs 16-24 year olds			NEETs as a % of all 16-24 year olds		
Region	**2012Q1-2014Q1**	**2013Q1-2015Q1**	**2014Q1-2016Q1**	**2012Q1-2014Q1**	**2013Q1-2015Q1**	**2014Q1-2016Q1**
North Wales	12,300	12,000	11,400	16.7	16.4	15.8
Mid-Wales	3,300	2,900	2,900	12.3	10.9	11.0
South West Wales	14,400	14,200	13,800	18.3	18.2	17.8
South East Wales	37,000	33,200	31,000	19.9	17.9	16.8
Wales	66,900	62,300	59,100	18.4	17.2	16.4

4.2.27 Careers Wales undertakes an annual survey of all leavers from maintained schools in Wales to obtain their destinations as of the end of October. The results from this survey can be used to provide estimates of NEET rates by local authority for 16 year olds. Table 4-9 shows that Anglesey's NEETs rate in 2015 was substantially below the Welsh average and higher than Gwynedd and Flintshire, but higher in 2016 and on an upward trend from 2014.

Table 4-9 Year 11 leavers for schools in Wales known to be not in education[41] 2011 to 2016

	2011	2012	2013	2014	2015	2016
Wales	4.4	4.2	3.7	3.1	2.8	2.0
Isle of Anglesey	2.7	2.4	3.7	1.7	2.2	2.3
Gwynedd	3.6	3.0	2.4	1.7	1.8	1.1

40 [RD24]

41 [RD25]

	2011	2012	2013	2014	2015	2016
Conwy	4.0	3.4	3.6	1.8	2.4	1.7
Denbighshire	3.6	2.9	4.1	2.1	3.1	1.9
Flintshire	2.7	2.3	3.6	1.3	1.3	1.7
Wrexham	3.4	3.2	3.2	1.8	1.7	1.4
Powys	3.0	2.2	2.7	2.3	2.0	1.9
Ceredigion	3.3	2.3	1.3	1.8	1.4	1.0
Pembrokeshire	3.8	3.1	3.4	3.2	3.8	2.7
Carmarthenshire	2.8	4.3	3.0	3.4	3.5	2.1
Swansea	3.1	3.2	3.9	3.5	2.7	2.1
Neath Port Talbot	4.6	3.1	4.4	3.8	3.6	3.6
Bridgend	4.4	6.4	3.7	3.6	3.2	1.5
The Vale of Glamorgan	4.3	3.9	3.8	2.8	1.7	1.6
Cardiff	7.7	6.7	4.9	4.3	4.5	3.0
Rhondda Cynon Taf	3.9	4.5	4.1	3.9	3.7	1.0
Merthyr Tydfil	5.6	6.2	1.9	2.6	1.6	1.0
Caerphilly	4.5	5.9	4.4	3.5	2.1	1.9
Blaenau Gwent	6.6	4.2	4.6	3.4	2.4	2.5
Torfaen	6.7	5.5	2.5	2.2	1.9	2.0
Monmouthshire	3.8	3.8	2.8	1.7	1.9	2.0
Newport	6.7	4.9	4.9	4.7	3.1	1.7

Out of work benefits

4.2.28 People of working age can withdraw from the labour force for any number of reasons, including disability, bereavement, caring responsibilities and lone parenting. People in these circumstances will often claim a different range of benefits from than Job Seekers Allowance (JSA) because they are not available to take work. It is, nevertheless, the case that such people could return to work given the right conditions (e.g. support mechanisms like enabling a disabled person to work on activities within their assessed capability). These people are therefore a potential resource to support economic growth if longer lead times are anticipated for enabling people to become 'work ready' (e.g. provision of basic skills training, childcare).

4.2.29 The existence of these conditions that stop people fully participating in the workforce has led to the development of measures that consider 'worklessness' on a broader basis. Narrow measures of unemployment based on claimants of JSA tend to understate the problem of people of working age who are without formal employment. The Department for Work and Pensions also provides a more detailed analysis based on adding people classified as neither formally looking for work nor formally employed to JSA claimants to derive a total definition of worklessness for areas. The definition includes those who are without work due to ill health or disability and, therefore, involuntarily out of work. The Department for Work and Pensions provides an analysis of these groups to derive a total claimant figure comprising job seekers, incapacity benefit claimants, lone parents, carers, income related claimants, the disabled and the bereaved.

4.2.30 Table 4-10 shows that in May 2016 around 40,720 people were claiming out of work benefits in north Wales, representing 9.6% of the resident population aged 16-64. On Anglesey, the rate was 10.4%.

4.2.31 A comparison between unemployment measured by JSA claimants (as shown in Table 4-4 and the broader measure of worklessness shows the latter to be much larger, reflecting the larger numbers of working age people receiving other forms of state benefit.

Table 4-10 Out of work benefit claimants by area[42] (2008 to 2016)

Date	Isle of Anglesey		North Wales		Wales	
	Number	% of population	Number	% of population	Number	% of population
May 2008	5,690	13.5	51,735	12.1	275,685	14.2
May 2009	5,960	14.1	57,255	13.4	308,585	15.9
May 2010	6,125	14.5	56,305	13.2	297,615	15.3
May 2011	5,810	13.8	54,435	12.8	290,240	14.9
May 2012	5,680	13.4	53,490	12.5	286,410	14.7
May 2013	5,555	13.1	50,710	11.9	269,480	13.9
May 2014	4,870	11.5	46,495	10.9	251,060	12.2
May 2015	4,790	11.3	43,960	10.3	237,750	12.2
May 2016	4,395	10.4	40,720	9.6	221,395	11.4

Job densities

4.2.32 The jobs density measure is the total number of filled jobs in an area divided by the resident population of working age in that area. It provides an indication

[42] [RD26] DWP based on a count of people who are claiming DWP working-age benefits. Use to analyse the combination of benefits people are claiming (for numbers claiming a particular benefit use the individual benefit dataset instead). Small areas (ward/SOA) only. Percentages of population receiving state benefits have been calculated using populations aged 16-64 for both men and women.

of the adequacy of labour demand in relation to population need. The indicator does, however, need to be read alongside more general trends in jobs and working age population and a consideration of geography. The total number of jobs is a workplace-based measure of jobs, which comprises employees, self-employment jobs, government-supported trainees and HM Forces. The number of jobs in an area is comprised of jobs done by residents (of any age) and jobs done by workers (of any age) who commute into the area.

4.2.33 The working-age population comprises:

- residents of working age who work in the area;
- workers of working age who commute out of the area to work in other areas;
- those who are unemployed or economically inactive of working age; and
- a job density of 1.0 means that there is one job for every resident aged 16-64. It is typically regarded as a measure of labour demand.

4.2.34 Table 4-11 shows that there has been a general improvement in Anglesey's job density (but from a low base) since the recession, whose effect was greatest in 2008 and 2009. The job density rate on Anglesey most recently declined in 2013 and increased again in 2014 and 2015. In contrast, north Wales (including settlements like Bangor and Caernarfon) has a much higher job density. Considered alongside trends in the working population, the improvement of Anglesey's relative position may be attributed to the continued falls in working age population.

Table 4-11 Comparative job densities by area[43] (2008 to 2015)

Date	Isle of Anglesey	North Wales	Wales
2008	0.58	0.72	0.70
2009	0.57	0.71	0.70
2010	0.58	0.71	0.69
2011	0.59	0.73	0.70
2012	0.62	0.75	0.71
2013	0.60	0.77	0.72
2014	0.62	0.77	0.73
2015	0.63	0.79	0.74

[43] [RD19] Job Densities based on the numbers of jobs per resident aged 16-64. The total number of jobs is a workplace-based measure and comprises employees, self-employed, government-supported trainees and HM Forces.

4.3 Earnings

Weekly earnings

4.3.1 The *Annual Survey of Hours and Earnings* provides data on median gross weekly full-time earnings [RD27]. Table 4-12 contains the latest data for Anglesey, relative to the other Welsh local authorities and the Welsh average. These data are based on residents in each local authority for full-time employees only and includes overtime.

4.3.2 These data show no significant growth in earnings on Anglesey between 2008 and 2014, although earnings rose by 7.9% in 2015, before declining by 2.7% in 2016. This is in contrast to Gwynedd, Denbighshire and Flintshire which have seen more significant growth since 2008. In 2016, Anglesey's median weekly earnings were £469, while Gwynedd's was just less than £440. These can be compared to the Welsh average of £498.

Table 4-12 Median weekly earnings (£) of residents by area[44] (2008 to 2016)

Year	Isle of Anglesey (£)	Gwynedd (£)	Conwy (£)	Denbigh-shire (£)	Flintshire (£)	Wrexham (£)	Wales (£)
2008	428.5	383.9	437.7	396.1	439.0	453.0	424.8
2009	436.7	397.7	417.0	429.9	460.3	459.4	444.6
2010	439.5	416.6	452.2	406.2	479.1	459.6	456.2
2011	431.7	451.0	421.7	434.6	470.5	430.5	455.1
2012	453.2	427.7	447.6	429.7	463.1	464.7	454.9
2013	446.7	450.8	476.3	436.0	494.9	492.6	475.3
2014	445.9	445.4	521.9	418.0	510.1	472.7	480.0
2015	481.9	434.0	492.0	429.9	527.1	488.1	487.6
2016	469.0	439.7	485.5	468.9	548.4	499.3	498.3

Occupational level earnings

4.3.3 Occupational earnings data are not available at the local authority level; however, Wales' occupational earnings data are available through the *Annual Survey of Hours and Earnings* [RD27]. Table 4-13 provides weekly wage data for every standard occupational classification 2010 (SOC2010)[45] major group and selected occupations consistent with nuclear relevant skills as identified

[44] [RD27] Annual Survey of Hours and Earnings – Resident Analysis.

[45] SOC2010 is the common classification system for occupations in the UK. Jobs are classified according to their skill level and skill content.

by the Construction Skills Network [RD21]. These skills are those that are most likely to be useful for the Project.

4.3.4 Table 4-13 shows there are significant variations in earnings across the selected occupation groups. In Wales, the highest earnings in 2016 were for engineering professionals (around £708); this was more than double those for security guards (£369). These variations also occur in house prices [RD28] as discussed in section 5.9.

4.3.5 The numbers in table 4-13 are slightly different from those in table 4-12 due to a difference in definition.

Table 4-13 Median weekly pay for selected occupations for Wales[46] (2016)

Occupation	SOC2010 code	Wales median (£)	Wales annual % change	UK median (£)	UK annual % change
Wales – All	-	492.40	2.9	538.70	2.2
Managers, directors and senior officials	1	670.80	4.9	797.60	1.7
Professional occupations	2	704.10	1.0	725.80	1.3
Engineering professionals	212	707.60	-3.7	769.50	0.4
Civil engineers	2121	600.60	-13.8	765.60	2.7
Engineering professionals n.e.c.	2129	679.60	-8.0	758.90	-1.3
Associate professional and technical occupations	3	542.80	1.5	593.70	0.2
Administrative and secretarial occupations	4	390.20	0.6	423.30	2.0
Skilled trades occupations	5	469.10	-1.2	498.00	1.9
Skilled metal, electrical and electronic trades	52	578.90	3.2	565.40	2.6

46 [RD27] Annual Survey of Hours and Earnings: Table 15.1 a Weekly Pay – Gross (£) – for full time employment jobs: United Kingdom, 2016.

Occupation	SOC2010 code	Wales median (£)	Wales annual % change	UK median (£)	UK annual % change
Skilled construction and building trades	53	457.60	1.8	507.00	1.7
Construction and building trades	531	451.70	2.8	498.40	1.8
Roofers, roof tilers and slaters	5313	436.50	4.0	457.70	1.9
Plumbers and heating and ventilating engineers	5314	553.60	0.4	574.40	4.6
Carpenters and joiners	5315	440.90	0.3	498.60	1.6
Glaziers, window fabricators and fitters	5316	328.60	-11.2	404.80	-2.0
Building finishing trades	532	400.00	0.0	454.40	1.0
Painters and decorators	5323	404.70	2.6	449.10	0.9
Construction and building trades supervisors	533	587.90	-3.5	632.80	0.4
Caring, leisure and other service occupations	6	346.40	4.1	352.90	3.4
Sales and customer service occupations	7	344.20	3.3	354.90	3.0
Process, plant and machine operatives	8	435.20	3.4	467.50	3.1
Construction operatives	814	469.10	-0.2	496.90	1.5
Scaffolders, stagers and riggers	8141	-	-	602.10	0.0
Construction operatives n.e.c.	8149	445.20	-1.6	459.10	0.0

Occupation	SOC2010 code	Wales median (£)	Wales annual % change	UK median (£)	UK annual % change
Transport and mobile machine drivers and operatives	82	441.30	1.2	498.50	2.5
Elementary occupations	9	342.60	4.4	356.40	3.4
Elementary construction occupations	912	399.50	6.9	411.00	2.8
Elementary security occupations	924	335.60	-5.8	430.40	2.3
Security guards and related occupations	9241	359.00	-2.1	436.90	1.3

4.4 Gross disposable household income (GDHI)

4.4.1 GDHI is a measure of the amount of money individuals have available for spending or saving. GDHI provides an indicator of living standards across different areas as it is based on where people live rather than where they work. GDHI is sourced from regional accounts, which are produced by the ONS. GDHI is measured at the NUTS3 level.

4.4.2 GDHI figures per head for Welsh local authorities portray a more equitable picture of living standards across the country than is otherwise suggested by the GVA per head figures (table 3-2). Table 4-14 shows GDHI per head for 2008 to 2014 for the NUTS3 areas in north Wales.

4.4.3 In 2014, GDHI per head on Anglesey was £16,238 and was the third highest amongst the 12 NUTS3 areas. It was higher than the Welsh average and the other NUTS3 areas in north Wales.

Table 4-14 Gross disposable household income (£) per head[47] (2008 to 2014)

Year	Isle of Anglesey (£)	Gwynedd (£)	Conwy and Denbighshire (£)	Flintshire and Wrexham (£)	Wales (£)
2008	13,830	13,034	14,447	13,989	13,730
2009	14,436	13,610	14,668	14,187	13,986
2010	15,129	14,192	15,375	14,908	14,605
2011	15,391	14,255	15,732	15,342	14,799
2012	15,970	14,794	16,371	15,853	15,389
2013	15,959	14,644	16,165	15,960	15,310
2014	16,238	14,640	16,004	15,610	15,302

4.5 Economic structure

4.5.1 The character and growth of employment in the local economy is related to the industrial structure. Whilst there are levels of inertia in any local economy, new investment in industries will be driven by relative changes in labour productivity and entrepreneurial activities that encourage such change.

4.5.2 This section considers:

- labour productivity; and
- distribution of employees in employment within the local economy.

Labour productivity

4.5.3 Table 4-15 shows GVA per filled job as a measure of sub-regional labour productivity by removing the distortions caused by commuting in relation to GVA per head. This measure only counts the input of those who are directly employed in the production process (rather than the population as a whole). These data show the relatively poorer performance of Anglesey and Gwynedd in relation to Wales and the UK.

[47] [RD13]: Gross Disposable Household Income by area and measure (Econ0016)

Table 4-15 Nominal GVA (£) per filled job[48] (2008 to 2015)

Year	Isle of Anglesey	Gwynedd	Conwy and Denbighshire	Flintshire and Wrexham	Wales	United Kingdom
2008	35,381	35,432	33,270	38,691	36,405	44,954
2009	35,061	34,064	32,807	38,590	35,993	44,845
2010	35,372	33,937	33,381	39,469	36,599	45,734
2011	36,062	34,585	34,223	40,699	37,583	46,652
2012	36,866	35,452	35,084	41,884	38,535	47,735
2013	37,669	36,198	35,878	43,322	39,458	49,009
2014	37,968	36,585	36,455	44,195	40,047	50,205
2015	37,982	36,691	36,706	44,598	40,316	50,830

4.5.4 GVA per hour worked removes any distortions caused by variations in the number of hours worked, and this is shown in table 4-16. The results show a better performance for Anglesey relative to neighbouring Gwynedd than suggests.

Table 4-16 GVA (£) per hour worked by area (2008 to 2015)[49]

Year	Isle of Anglesey	Gwynedd	Conwy and Denbighshire	Flintshire and Wrexham	Wales	United Kingdom
2008	22.4	22.7	21.9	23.7	23.4	28.3
2009	22.9	21.9	21.7	23.9	23.3	28.4
2010	23.7	22.0	22.1	24.7	23.8	29.1
2011	24.0	22.1	22.4	25.3	24.3	29.5
2012	24.0	22.5	22.7	25.9	24.7	29.9
2013	23.9	22.5	23.1	26.6	25.2	30.5
2014	23.7	22.6	23.4	27.0	25.5	31.1
2015	23.7	22.7	23.7	27.4	25.9	31.8

Employment

4.5.5 Local employment can be represented in a number of ways statistically. One method is to count the number of jobs generated in the economy irrespective

48 [RD27]: Table B3: Nominal (smoothed) GVA per filled job (£): NUTS 2 and NUTS 3 subregions 2002-2014.

49 [RD27]: Table A3: Nominal (smoothed) GVA per hour worked (£): NUTS 2 and NUTS 3 subregions 2004-2015.

of type; another involves differentiating between jobs held by employees as opposed to working proprietors. Employee jobs can also be represented as full-time (over 30 hours) and part-time (under 30 hours) jobs. Scope exists to combine these measures by using the FTE as a measure of how labour resources are used across the different geographies under consideration. Two part-time jobs are the equivalent to one full-time job.

4.5.6 Table 4-17 shows that the DCCZ contained around 112,400 FTE jobs in 2015. For Anglesey, the total number of FTEs in 2015 was 15,400. Between 2014 and 2015, the number of jobs declined by 0.8% on Anglesey, but increased by 4.1% in the DCCZ and by 0.9% in Wales. The reduction in the number of jobs on Anglesey coincided with closures of major employers such as Anglesey Aluminium in September 2009.

Table 4-17 FTEs in employment[50] (2009 and 2015)

Year	Isle of Anglesey		DCCZ		Wales	
	FTEs	% change	FTEs	% change	FTEs	% change
2009	16,400	-	106,800	-	968,400	-
2010	15,300	-6.4	102,600	-3.9	957,800	-1.1
2011	15,700	2.4	103,100	0.5	965,800	0.8
2012	15,800	0.7	106,700	3.5	969,700	0.4
2013	15,400	-2.9	107,200	0.5	977,500	0.8
2014	15,500	0.9	107,900	0.7	1,001,400	2.4
2015	15,400	-0.8	112,400	4.1	1,010,100	0.9

4.5.7 Some employment activities are in proportion to an area's share of either land area or population in relation to population-based services, e.g. public services, leisure and retailing. Other activities are concentrated due to specific 'pull' factors.

4.5.8 Recent changes in employment activity appear to be largely a consolidation of existing activity rather than any substantive diversification of the economic base. Basic processing of agricultural production, activities concerned with the strategic transport role around Holyhead, power production and associated industries plus tourism feature in the list of activities. Some of the notable concentrations of activity such as aluminium production have been removed entirely following rationalisation, whilst Trawsfynydd is in decommissioning and the Existing Power Station ceased generation at the end of 2015. A number of public service activities are also significant, reflecting the need for services that support an ageing population and the inclusion of important

50 [RD29]

service centres. The percentage of employees in each industrial structure is shown in table 4-18 below.

Table 4-18 Industrial structure[51] (percentage of employment) (2015)

Sector	Isle of Anglesey (%)	DCCZ (%)	Wales (%)
A: Agriculture and fishing	3.2	2.0	1.2
B: Mining and quarrying	0.1	0.2	0.1
C: Manufacturing	15.4	8.1	13.8
D: Electricity, gas, steam and air conditioning supply	3.6	1.4	1.0
E: Water supply, sewerage, waste management and remediation	1.6	1.3	1.2
F: Construction	5.9	5.5	4.8
G: Wholesale and retail trade, repair of motor vehicles and motorcycles	16.8	15.9	14.9
H: Transportation and storage	8.8	3.8	3.8
I: Accommodation and food service activities	11.2	10.6	6.3
J: Information and communication	0.4	1.4	1.8
K: Financial and insurance activities	0.8	1.3	2.5
L: Real estate activities	1.2	1.4	1.3
M: Professional, scientific and technical activities	3.9	4.7	5.4
N: Administrative and support service activities	3.2	3.2	6.4
O: Public administration and defence, compulsory social security	4.8	6.5	7.2
P: Education	5.3	9.6	9.2

51 [RD29]

Sector	Isle of Anglesey (%)	DCCZ (%)	Wales (%)
Q: Human health and social work activities	10.6	18.9	15.2
R: Arts, entertainment and recreation	2.1	2.7	2.3
S: Other service activities	1.3	1.5	1.4

4.5.9 Table 4-19 shows the change in percent of employees in each industrial sector between 2009 and 2015. A number of other sectors have seen substantial changes in their share of employment; however, some of these sectors are relatively small, and therefore any changes are magnified in percentage terms.

4.5.10 The main changes on Anglesey include a 42% increase in accommodation and food service activities between 2009 and 2015, in contrast to a more modest increase of 11.6% in the DCCZ and 12.5% in Wales. The manufacturing sector on Anglesey has seen a 0.9% reduction in its share of employment, in contrast to an increase of 14.5% in the DCCZ and a 6.5% increase in Wales. This reflects the closure of the Anglesey Aluminium plant.

Table 4-19 Change in industrial structure[52] (percentage of employment) (2009 to 2015)

Sector	Isle of Anglesey (%)	DCCZ (%)	Wales (%)
A: Agriculture and fishing	-2.1	-1.8	-3.9
B: Mining and quarrying	-62.7	-23.3	-8.3
C: Manufacturing	-0.9	14.5	6.5
D: Electricity, gas, steam and air conditioning supply	-14.9	46.7	75.0
E: Water supply, sewerage, waste management and remediation	46.4	54.2	54.2
F: Construction	-20.6	-1.8	-15.0
G: Wholesale and retail trade, repair of motor vehicles and motorcycles	1.5	6.9	6.2
H: Transportation and storage	9.4	13.9	3.0
I: Accommodation and food service activities	42.0	11.6	12.5

52 [RD29]

Sector	Isle of Anglesey (%)	DCCZ (%)	Wales (%)
J: Information and communication	-40.3	-15.7	-16.9
K: Financial and insurance activities	-22.0	-12.9	-8.7
L: Real estate activities	28.9	54.3	36.9
M: Professional, scientific and technical activities	-30.3	16.7	27.5
N: Administrative and support service activities	-21.1	-12.4	7.6
O: Public administration and defence, compulsory social security	-33.4	-12.1	-10.8
P: Education	-44.4	-3.5	-0.6
Q: Human health and social work activities	1.0	7.4	6.7
R: Arts, entertainment and recreation	37.1	8.5	16.4
S: Other service activities	-11.3	-1.3	-6.5

Employment by sector

4.5.11 In considering the economic structure of the KSA, a number of sources have been drawn upon including the latest official statistics on employment structure. This section also draws upon and comments in relation to the work commissioned for the *North West Wales Labour Market Study* [RD30]. It remains the most recent published source of projections concerning the study area economy encompassing the wider sub-region. The commentary presented for each sector is supported by other referenced material where appropriate.

Agriculture

4.5.12 Agriculture is a dominant land use across the DCCZ and north Wales more generally, creating income for the local economy mainly from the rearing of livestock. Due to differences with the collection of data on employment in agriculture, the frequency and descriptions used are different to other sectors of the local economy. In 2013, the Welsh Government's *Agricultural small area* *statistics*[53] recorded 7,059 active farms across north Wales employing 4,907 full-time principal farmers, 5,823 part-time principal farmers, 1,916 regular workers and 1,865 casuals [RD31].

4.5.13 Overall, employment on farms grew over the period 2002 to 2013[54]; however, the mix of employment changed. The numbers of full and part-time farmers fell at a time when the number of active farms also fell (by 0.8%) whilst the number of “regular workers” and “casuals” experienced growth of 9.2% and 35% respectively. The decrease in farmers is intuitive given the decrease in active farms and the larger increase in “casual” workers reflects a wider trend in the UK labour market where flexible working has become more popular.

4.5.14 On Anglesey, there were 1,230 active farms with 725 full-time principal farmers, 1,036 part-time principal farmers, 268 regular workers and 258 casuals.

4.5.15 The *North West Wales Labour Market Study* expected overall employment in agriculture to continue to decline but possibly at a slower rate [RD30]. This reflects the closure of smaller farms and the substitution of machines for labour in larger farms and diversification to other activities in the rural economy. Many who used to work in farming may continue working in the same place, but in different activities. As in other sectors, the process of internationalisation/globalisation has resulted in intense competition from countries with cheaper production costs. Productivity growth is expected to continue to outpace output growth; hence, employment is expected to fall.

Commercial fisheries and aquaculture

4.5.16 Overall, Wales contributes just 2% to the annual UK landings of fish and shellfish, with nearly 80% comprising shellfish, although the local commercial fisheries have been in decline over the past few years [RD32]. Landings of fish and shellfish into Wales were almost 13,000 tonnes in 2009, worth £16.6 million at first sale. The vast majority of this was of shellfish. In order of economic importance, the leading species were scallops, whelks, lobsters, megrim, monkfish and crab, all having over £1 million worth of landings each. The whitefish species are caught largely outside Welsh waters by UK-registered but foreign-owned trawlers landing into Milford Haven.

4.5.17 Overall for Wales, around 150 FTEs were recorded for fishing and aquaculture in 2015 a decrease of 42% on 2012[55]. This bias towards shellfish is especially true for Gwynedd and Anglesey where finfish landings may be intermittent, of variable quality and quantity and often of species with low UK market demand.

[53] The Welsh Government’s *Agricultural small area statistics* record employment in a different way from the Business Register and Employment Statistics (BRES). Agricultural small area statistics have been used as a basis for apportioning Welsh-level BRES agricultural labour statistics to maintain consistency.

[54] Results are presented from the annual June surveys

[55] [RD29]: BRES

Shellfish accounts for 77% of all landings into Wales of which 3,354 tonnes are whelks – for which there is no UK market and the main processor in Gwynedd has ceased trading. Holyhead is still recognised as the main fish landing port in north Wales and may be used as a representative guide to the general status of the study area capture fishery. Based on 2006 figures, aquaculture accounts for 52% of the total Welsh fisheries output. However, farmed production has increased by another 500 to 700 tonnes with the additional output from Anglesey Aquaculture Ltd (formerly Selonda UK). As the majority of Welsh aquaculture is located in the study area, it is by far the most valuable in terms of both volume and value.

4.5.18 The Monthly UK Sea Fisheries Statistics published by the Marine Management Organisation provide some more recent context for the fishing industry in Wales [RD33]. Data are available by port, and the following six ports are relevant for this report: Amlwch (Anglesey), Conwy (Conwy), Holyhead (Anglesey), Penrhyn (Gwynedd), Rhoscolyn (Anglesey) and Rhosneigr (Anglesey).

4.5.19 In 2015, reported landings at the six ports in Anglesey, Conwy and Gwynedd were 3,435 tonnes, 10% lower than in 2014. However, the total value of reported landings in 2015 was £3.5m, 10.6% higher than in 2015.

4.5.20 In Wales as a whole, reported landings during 2015 were 12,145 tonnes, 9.1% lower than in 2014, but the value of the reported landings was up 56% at £21.5m. For Wales as a whole, the increase in the value of the landings reflected a higher value for the demersal[56] fish catch.

4.5.21 Levels of employment in the sector are relatively small, and small absolute changes show as relatively high rates of growth.

Utilities

4.5.22 Overall, utilities (electricity, gas and water) employ a relative small proportion of the total workforce in Wales at 1.7%. Anglesey has a much higher share of employment at 4.3% including electricity, gas, water and sewerage. This is attributable to the presence of the Existing Power Station.

4.5.23 The Existing Power Station was a significant source of employment, although it ceased generating electricity in December 2015 [RD34]. The Existing Power Station employed people with high skills levels, with 47% of the workforce employed at either level 3 (technical) or level 4/5 (professional/senior managerial). The nuclear workforce in Wales has a higher proportion (53%) of level 2/3 (skilled and semi-skilled) employees, compared to the UK workforce (30%) and the civil nuclear workforce (27%).

[56] Demersal fish live on or near the bottom of the sea, and include bass, bream, brill, cod, plaice, sharks, whiting and turbot.

Manufacturing

4.5.24 Manufacturing accounted for 8% of employment across the DCCZ in 2014 (table 4-18), but was relatively more important on Anglesey and in Wales (around 14%). However, employment in the manufacturing sector on Anglesey contracted significantly over the period 2009 to 2014, with an 8% reduction (table 4-19) in FTEs, whilst there was an 11% increase in the DCCZ and a 9% increase in Wales. Historically, manufacturing employment has performed reasonably well on Anglesey having attracted inward investors both in high value and in more traditional manufacturing sectors such as food processing. The ease of access to markets in Ireland has been seen as an advantage.

4.5.25 The *North West Wales Labour Market Study* noted that the recession accelerated longer-term structural changes, moving away from manufacturing as a significant source of employment on Anglesey [RD30]. It is estimated that something in the order of 15% of manufacturing jobs have been lost over the period 2008 to 2010, as shown in Table 4-17.

4.5.26 Anglesey has been especially exposed due to the significance of manufacturing there, therefore the recession has resulted in plant closures because of the prevalence significance of lower technology activities and especially food processing.

4.5.27 For many manufacturing sub-sectors, output is either projected to decline (e.g. textiles, which has been exposed to competition from low-cost countries over a long period), or at best increase fairly modestly (e.g. food, metals, wood, pulp and paper), which in combination with continued productivity improvements results in continued employment decline albeit at a much more modest pace post-recession.

Construction

4.5.28 Table 4-18 showed that the construction sector's share of the overall workforce in 2014 was 7% for Anglesey, 6% for the DCCZ and 5.3% for Wales. Around 6,600 FTE construction workers have been identified as working in workplaces within the DCCZ, of which around 1,100 (17%) are associated with workplaces located on Anglesey.

4.5.29 Table 4-20 provides a breakdown of the workforce into sub categories of construction activity, with the relative share of workers within general construction on Anglesey (36%) higher than that of Wales as a whole (30%), whilst building completion and finishing trades are underrepresented. The DCCZ has a lower proportion of its construction workforce engaged in civil engineering including site preparation activities.

Table 4-20 FTEs in construction by sub category and area[57] (2015)

Sub category	Isle of Anglesey (%)	DCCZ (%)	Wales (%)
General construction	36	37	30
Civil engineering including site preparation	20	21	23
Building completion and finishing trades	37	37	41
Other[58]	8	4	7
Total (number)	900	6,300	46,600

4.5.30 Based on table 4-20, the absolute size of the construction workforce with civil engineering experience is of the order of 6,300 across the DCCZ with around 900 on Anglesey. Civil engineering may also be able to draw upon workers in the 'other category'. It is noted that the former assessment conducted for the Central Electricity Generating Board to support a Pressurized Water Reactor estimated that civil engineering activities accounted for around 400 jobs[59] within the old county authority of Gwynedd [RD35]. The same study also noted that a number of major civil engineering type projects, like the aluminium smelter, the Dinorwig "Electric Mountain" pumped storage project and the A55, seemed to be able to attract significant amounts of local labour in excess of the apparent workforce based on sector classifications.

4.5.31 Prior to the announcement of the Project, projections supporting the *North West Wales Labour Market Study* expected that employment in construction would not return to pre-recession levels until 2020 [RD30]. Infrastructure and public non-residential construction have benefited to some degree from public sector investment, but housing has suffered significantly as a result of the downturn. In the medium term, the sector is being affected by the projected reductions in public spending; bearing in mind the public sector (housing and non-housing) and infrastructure work made up around 26% of output in 2006 and remain key to its prospects. Productivity has improved steadily; however, it has most recently stagnated, possibly in part reflecting the use of large numbers of relatively low-skilled migrant workers.

Services

4.5.32 The service sector has come to dominate most developed economies to a greater or lesser degree both in terms of jobs and value added. Table 4-18 shows that the DCCZ has most of its employed workforce deployed in service

57 [RD29]: BRES Analysis

58 Roofing activities and other specialised construction activities

59 Based on a count of jobs not full time equivalents

activities (both public and private), representing around 78% of the FTE based workforce. The proportion of FTEs engaged in an equivalent definition of services falls to 68% for Anglesey itself with the Welsh average being 75%.

Wholesale and retailing

4.5.33 Within the services sector, FTEs engaged in wholesale and retailing accounted for around 16% of all employment within the DCCZ (table 4-18). Within the DCCZ, this sector provides approximately 18,000 jobs in services in support of the local population and the tourist visitor, counting full- and part-time employees together. The percentage is higher for Anglesey itself.

4.5.34 Despite the hopes attached to this sector within the *North West Wales Labour Market Study*, the period 2009 to 2014 has seen a 16.2% fall in employment for Anglesey and an 11.4% decline in the DCCZ (see table 4-19) [RD30]. A decline in employment within the sector has also been seen for Wales as a whole.

Accommodation and food service activities

4.5.35 Table 4-18 shows that the accommodation and food service activities sector accounts for approximately 11% of FTEs in the DCCZ and for Anglesey. In both cases, the proportion of the workforce accounted for by this sector is significantly higher than the Welsh average at 6%. Between 2009 and 2015, this sector has grown by almost 42% for Anglesey, 12% for DCCZ and 13% for Wales (see table 4-19).

4.5.36 The *North West Wales Labour Market Study* made the point that this sector is part of a cluster of activities that support tourism, which is itself subject to seasonality, fashion and currency movements [RD30].

4.5.37 Hotels and restaurants are particularly well represented, given the significance of tourism to the economy centred on Snowdonia National Park plus key heritage assets such as Caernarfon and Conwy Castles and an extensive coastline. Visitors from the north-west of England and West Midlands account for the majority (around 56%) of trips to north Wales. In the period up to the recession, employment growth had been strong in part-time jobs especially, although this was offset by some reduction in full-time employment.

Transport and storage

4.5.38 Within this sector, sea transport, cargo handling and harbour operation is especially important on Anglesey given the presence of Holyhead port. The sector accounted for 8.8% of employment on Anglesey in 2015, compared to 3.8% and 4% for the DCCZ and Wales respectively. This reflects the significance of Holyhead and transport/economic links to Ireland for this sector.

4.5.39 Stena Line, northern Europe's biggest ferry company, operates from the port, as do Irish Ferries. Ferry services run routes to Dublin and Dún Laoghaire in Ireland; this forms the principal link for surface transport from central and northern England and Wales to Ireland. There has been significant investment in Holyhead, which handles about 2.3 million passenger movements each year, and has seen significant growth in roll-on/roll-off (ro-ro) freight traffic, which was recorded as 3.6 million tonnes in 2014 [RD36]. Direct port employment in Holyhead is estimated to be in the order of 900.

4.5.40 Infrastructure investments such as the Celtic Gateway bridge link (opened October 2006) between the ferry terminal and the town centre are considered to offer opportunities to maximise the wider economic benefits from ferry traffic in future, further underpinning growth in the retail sector within the sub-region. There is also potential for Holyhead to serve as a gateway location for cruise ship passengers, although this requires investment in a new cruise terminal facility.

4.5.41 The investment in Holyhead is expected to drive employment growth in the sector overall in line with UK levels, although again increases are forecast to be relatively modest.

Market services

4.5.42 The development of market services is typically regarded as an indicator of a robust local economy. In 2014, market services representing the combined employment of professional; information and communications; real estate; financial and administrative services sectors accounted for 12% of employment across the DCCZ compared to 9.5% for Anglesey alone (based on the summation of these individual categories as found in table 4-18). Both Anglesey and the DCCZ had a significantly lower share of employment in market services compared to Wales as a whole (17.4%).

4.5.43 Table 4-21 shows individual sub-sectors within the ‘market services’ definition. Only real estate activities showed growth between 2009 and 2015 on Anglesey with all the other sub-sectors declining. The DCCZ showed growth in real estate activities. Wales as a whole had a broader base to its growth performance in market services by only showing a marginal decline in finance and insurance activities and information and communication.

Table 4-21 Sub sectors within market services by area[60] (% change 2009 to 2015)

Sub sectors	Isle of Anglesey (%)	DCCZ (%)	Wales (%)
Information and communication	-40.3	-15.7	-16.9
Financial and insurance activities	-22.0	-12.9	-8.7
Real estate activities	28.9	54.3	36.9

[60] [RD29]: BRES analysis

Sub sectors	Isle of Anglesey (%)	DCCZ (%)	Wales (%)
Professional, scientific and technical activities	-30.3	16.7	27.5
Administrative and support service activities	-21.1	-12.4	7.6

4.5.44 The trends and prospects within the sector are relatively divergent. The *North West Wales Economic Futures Study* observed that productivity growth and offshoring might limit the opportunities for growth in financial and insurance-based services [RD37]. Professional services were expected to be affected by similar trends but to be capable of generating some employment growth over the period. The recession will have inevitably weakened growth prospects in these activities.

Non-market services

4.5.45 The term 'non-market services' refers to public administration, education and social and health care services that are provided through public taxation. Since the recession, an over-reliance on non-market services has been regarded as an indicator of economic vulnerability. The scale of these services tends to be linked to the size of the population receiving these services, alongside levels of services considered appropriate in the light of expectations and public finances.

4.5.46 Around 36% of all employment within the DCCZ is accounted for by non-market services, due to the presence of public institutions like universities, hospitals and administrative facilities. Anglesey has a much lower proportion of its employment in these sectors at 24.5%. Whilst Anglesey does have a high proportion of its workforce in non-market services, many of its residents commute off the island for work in locations where public services predominate, such as those located in major service centres like Bangor.

4.5.47 The *North West Wales Labour Market Study* highlights the continued importance of public sector service employment in the sub-region but against a backdrop of financial cutbacks [RD30]. An ageing population was seen as a constraining issue in sustaining future demand for education jobs before the effects of the recession. The same factors were seen as driving increased demand for health and social work related employment.

Tourism sector

4.5.48 North Wales as a whole is a well-established tourist destination, and currently efforts are being made to promote the development of the tourist industry on Anglesey. In particular, short-stay holidays are regarded as an important element in the growth of tourism. In addition to the formal attractions on the island, e.g. Beaumaris Castle, Anglesey Sea Zoo, Plas Newydd Country House and Gardens, and Pili Palas, Anglesey offers sandy beaches, low-lying farmlands and historic remains. In 1967, much of the Anglesey coastline was designated an Area of Outstanding Natural Beauty (AONB) and as a Heritage Coast.

4.5.49 The accommodation and food service activities sector is not the sole basis of tourism employment, although these sectors are likely to derive most of their employment from visitors. Tourism is not a discrete industrial activity; rather, it is a source of demand derived from visitors spread across a range of sectors, and therefore it is difficult to statistically represent tourism. The Scarborough Tourism Economic Activity Monitor (STEAM)[61] modelling tool provides a method of assessment of the effects of tourism activity, using locally derived data from a variety of sources to produce estimates of the number of visitors, visitor days, employment supported by tourism and revenue generated. Further outputs from the STEAM modelling approach for tourism are included in section 1.

4.5.50 Table 4-22 shows the revenue from different accommodation types for 2014 and 2015 for Anglesey and Gwynedd. Overall, tourist expenditure on Anglesey accounted for £279 million in 2015 (based on the STEAM data), which was 7.1% higher than in the previous year. In Gwynedd, tourism accounted for £963.9 million in 2015, representing an annual decline in revenues of 1.2%.

Table 4-22 Tourism revenue (£million) by area[62] (2014 and 2015)

Accommodation type	Isle of Anglesey			Gwynedd		
	2014	2015	% change	2014	2015	% change
Serviced accommodation	41.0	41.9	2.2	82.0	89.6	9.3
Non-serviced accommodation	183.3	199.7	9.0	726.3	702.9	-3.2
Staying with friends and relatives (SFR)	8.1	8.2	1.2	14.0	14.2	1.4
Day visitors	28.1	29.2	3.9	152.9	157.2	2.8
Total [63]	260.4	279.0	7.1	975.3	963.9	-1.2

4.5.51 Table 4-23 shows employment across a variety of sectors based on the expenditure boost created by tourist visitors in 2014 and 2015 for Anglesey and Gwynedd. Around 15,000 jobs are related to tourism in Gwynedd with a

61 [RD38]

62 [RD36]

63 Please note that columns may not sum due to rounding. Percentage changes were calculated from numbers that were not rounded.

further 4,000 jobs on Anglesey. There was significant growth (7.7%) in overall employment supported by tourism on Anglesey, with particularly strong increases for the food and drink, shopping and transport sectors. The increase was smaller for Gwynedd at 1.5%, but employment supported by tourism rose across all sectors, with the exception of the recreation sector.

Table 4-23 Employment supported (FTEs) by area[64] (2014 and 2015)

Employment Sector	Isle of Anglesey			Gwynedd		
	2014	2015	% change	2014	2015	% change
Direct employment	2,981	3,201	7.4	12,317	12,520	1.6
accommodation	1,062	1,075	1.2	4,573	4,636	1.4
food and drink	788	874	10.9	3,212	3,298	2.7
recreation	262	283	8.0	1,013	954	-5.8
shopping	742	824	11.1	3,002	3,101	3.3
transport	128	146	14.1	516	530	2.7
Indirect employment	722	789	9.3	2,705	2,723	0.7
Employment supported - total[65]	3,704	3,990	7.7	15,022	15,243	1.5

4.5.52 Seasonality of the tourism industry within Gwynedd and Anglesey is still a major issue, with the peaks associated with the summer months and school holidays. The high seasonality reflects the relative importance of family holidays, many of which are governed by school holiday periods, as well as a preference for warmer weather for camping/caravanning and for water-based activities.

4.6 Skills and occupations profile

4.6.1 The ability of the local economy to supply people with the relevant skills to work on the Project will be a critical determinant of the degree to which the local economy benefits from the Project. The likelihood that workers will be drawn into work on the Project from outside the local economy increases if the skills are absent.

4.6.2 The Project is part of a wider nuclear power engineering programme across the UK and beyond. As the programme acquires momentum, demand for craft labour skills are likely to accumulate across the technological spectrum

64 [RD36]

65 Please note that columns may not sum due to rounding. Percentage changes were calculated from numbers that were not rounded.

involved in this type of engineering project. Other engineering projects such as HS2 will also draw upon the same types of skills. Pressure for workers to be mobile will probably mean local economies will experience a greater likelihood of persons with relevant skills being willing to travel to the next new project.

Skills

4.6.3 The reporting of skills availability is a function of objective measures such as qualifications attainment and current occupation, but also an ability to meet specific employer-defined workplace competencies that are often the product of experience or company specific approaches to working. The former are measured statistically (Table 4-24) whilst the latter tend to be surveyed through perception based survey work.

4.6.4 A report by Cogent, *Power People: The Civil Nuclear Workforce 2009-2025*, suggests that approximately 5% of the nuclear workforce is due to retire each year [RD39]. Therefore, by 2025, over half of the workers in the nuclear sector will have left through natural attrition. The greatest attrition is likely to be from the higher and more mature skill levels, so that up to two-thirds of the professional and manager/senior manager skills pool, occupational levels 4 and 5, will have retired by 2025.

4.6.5 This suggests that there may be skills mismatches after 2025.

Qualifications

4.6.6 Table 4-24 shows the qualifications profile of the DCCZ in 2011, where nearly one-quarter of residents have no formal qualifications compared to around 26% for Wales as a whole. The proportion of Anglesey residents with no formal qualifications (24.2%) is broadly in line with the rest of the DCCZ and below the Welsh average.

4.6.7 The percentage of the working age population of Anglesey with an NVQ Level 4+ is 26.1% compared to a Welsh average of 24.5%. The proportion for the DCCZ as a whole is 25.3%, slightly lower than Anglesey, but above the Welsh average.

4.6.8 The proportion of the workforce with NVQ Level 3 qualifications is broadly similar across Anglesey (11.9%), the DCCZ (12.5%) and Wales (12.3%).

Table 4-24 Qualifications profile by area (2011)

Qualifications	Isle of Anglesey		DCCZ		Wales	
	Number	%	Number	%	Number	%
No qualifications	13,991	24.2	76,739	24.7	650,517	25.9
Highest level of qualification:	9,406	16.2	50,428	16.2	393,819	15.7

Qualifications	Isle of Anglesey		DCCZ		Wales	
	Number	%	Number	%	Number	%
Level 2 qualifications						
Highest level of qualification: Level 3 qualifications	6,887	11.9	38,764	12.5	308,171	12.3
Highest level of qualification: Apprentice	2,739	4.7	12,575	4	98,843	3.9
Highest level of qualification: Level 4 qualifications and above	15,098	26.1	78,784	25.3	614,116	24.5

Occupation of residents

4.6.9 The analysis of occupation data (table 4-25) shows that Anglesey's resident workforce has a higher proportion of skilled trade occupations (16.7%) compared to the DCCZ (15.3%) and Wales (13.4%). Anglesey and the DCCZ have a smaller proportion of residents within administrative and secretarial occupations, and sales and customer service occupations than Wales.

Table 4-25 Occupation of residents by area (2011)

Occupation	Isle of Anglesey	DCCZ	Wales
	%	%	%
1: Managers and senior officials	9.8	10.3	9.2
2: Professional occupations	15.3	15.7	15.8
3: Associate professional & technical occupations	10.2	10.0	10.8
4: Administrative and secretarial occupations	9.9	9.7	11.1
5: Skilled trades occupations	16.7	15.3	13.4
6: Personal service occupations	11.6	12.2	10.5
7: Sales and customer service occupations	7.8	8.2	9.0

Occupation	Isle of Anglesey	DCCZ	Wales
	%	%	%
8: Process, plant and machine operatives	7.5	6.9	8.1
9: Elementary occupations	11.1	11.5	11.9

4.6.10 Table 4-26 shows the occupational comparisons for selected minor occupational groups for resident workers on Anglesey, in the DCCZ and in Wales. The minor groups selected represent nuclear-relevant occupations based on the terminology developed by the Construction Skills Network, who have attempted to codify nuclear-relevant skills in terms of generally accepted classification systems for occupational data [RD21].

4.6.11 Considering the occupational profile in table 4-26, both Anglesey and the DCCZ have a higher proportion of workers in the construction and building trades than in Wales as a whole. Anglesey also has a higher proportion of senior officers in protective services. In contrast, Anglesey and the DCCZ have a lower proportion of information technology and telecommunications professionals and business, finance and related associate professionals than Wales.

Table 4-26 Occupational profile by area (minor groups) (2011)

Occupation	Isle of Anglesey		DCCZ		Wales	
	Number	%	Number	%	Number	%
All categories: Occupation	30,431	.	164,343		1,363,615	.
116: Managers and directors in transport and logistics	112	0.4	616	0.4	5,475	0.4
117: Senior officers in protective services	195	0.6	373	0.2	2,186	0.2
212: Engineering professionals	414	1.4	1,782	1.1	16,939	1.2
213: Information technology and telecommunications professionals	223	0.7	1,410	0.9	16,263	1.2
214: Conservation and environment professionals	85	0.3	453	0.3	2,305	0.2

Occupation	Isle of Anglesey		DCCZ		Wales	
	Number	%	Number	%	Number	%
243: Architects, town planners and surveyors	164	0.5	920	0.6	8,670	0.6
246: Quality and regulatory professionals	79	0.3	392	0.2	3,767	0.3
311: Science, engineering and production technicians	408	1.3	1,507	0.9	13,748	1.0
312: Draughtspersons and related architectural technicians	26	0.1	159	0.1	1,680	0.1
313: Information technology technicians	94	0.3	572	0.3	5,910	0.4
331: Protective service occupations	574	1.9	2,460	1.5	19,757	1.4
342: Design occupations	54	0.2	373	0.2	3,648	0.3
351: Transport associate professionals	138	0.5	306	0.2	1,176	0.1
353: Business, finance and related associate professionals	252	0.8	1,698	1.0	19,296	1.4
355: Conservation/environmental associate professionals	13	0.0	75	0.0	542	0.0
511: Agricultural and related trades	980	3.2	4,992	3.0	27,468	2.0
521: Metal forming, welding and related trades	133	0.4	502	0.3	6,263	0.5

Occupation	Isle of Anglesey		DCCZ		Wales	
	Number	%	Number	%	Number	%
522: Metal machining, fitting and instrument making	361	1.2	1,550	0.9	16,436	1.2
523: Vehicle trades	527	1.7	2,157	1.3	16,903	1.2
524: Electrical and electronic trades	447	1.5	2,249	1.4	19,279	1.4
525: Skilled metal, electrical and electronic trades	71	0.2	259	0.2	2,844	0.2
531: Construction and building trades	1,255	4.1	6,274	3.8	45,341	3.3
532: Building finishing trades	313	1.0	1,679	1.0	11,420	0.8
533: Construction and building trades supervisors	47	0.2	326	0.2	2,553	0.2
543: Food preparation and hospitality trades	811	2.7	4,187	2.5	26,332	1.9
544: Other skilled trades	101	0.3	620	0.4	4,270	0.3
623: Housekeeping and related services	164	0.5	971	0.6	6,389	0.5
624: Cleaning/housekeeping managers/supervisors	73	0.2	457	0.3	3,011	0.2
814: Construction operatives	272	0.9	1,404	0.9	10,193	0.7
821: Road transport drivers	738	2.4	4,613	2.8	40,447	3.0
822: Mobile machine drivers and operatives	160	0.5	857	0.5	8,730	0.6

Occupation	Isle of Anglesey		DCCZ		Wales	
	Number	%	Number	%	Number	%
823: Other drivers and transport operatives	236	0.8	546	0.3	3,444	0.3
912: Elementary construction occupations	251	0.8	1,153	0.7	9,265	0.7
923: Elementary cleaning occupations	794	2.6	4,824	2.9	36,579	2.7
924: Elementary security occupations	306	1.0	1,324	0.8	13,876	1.0

4.7 Vacancies

4.7.6 Based on the findings of the *Welsh Skills Survey 2011*, 12% of establishments reported vacancies, with 4% of establishments reporting 'hard-to-fill' vacancies in Wales [RD40]. This represents a significant change from 15% in 2003 and 10% in 2005. However, this percentage of 'hard-to-fill' vacancies is equivalent to 8,500 vacancies or one-third of all vacancies.

4.7.7 The highest density of vacancies in Wales was in the electricity, gas and water sector, with a vacancy rate of 4.5 per 100 employees. Employers also reported particular difficulty with the machine operative and associate professional roles, with 71% and 51%, respectively, of these vacancies being hard to fill. In these cases, it is the lack of skills that prevents the roles being filled. This reason is often cited as a main cause of skills shortages, as well as remote locations and poor public transport services.

4.7.8 In the wider north Wales area, 10% of establishments reported they had a vacancy and 3% of establishments reported that they had a 'hard-to-fill' vacancy. In North Wales, the vacancy density was 1.7%, the lowest across Wales, whilst the vacancy density was particularly high in mid Wales at 4.5%. The average density across the UK is 2.3%, above the figure for North Wales.

4.8 Commuting patterns

4.8.1 Commuting patterns offer a valuable insight into the relative mobility of labour and the role played by certain areas in supporting economic activity across a wider hinterland than that suggested by their administrative borders.

4.8.2 The 2011 Census produced an analysis of journey to work movements [RD7].

4.8.3 Table 4-27 shows that, in 2011, nearly 8,900 Anglesey residents were travelling to workplaces off the island. Of those, 6,616 residents travelled into

Gwynedd to work in 2011, representing 74% of all outflowing workers. The outflow to Gwynedd has increased by 32% compared to 2001[66]. Slightly over 3,100 people were travelling on to the island for work, the majority coming from Gwynedd.

Table 4-27 Analysis of journey to work movements[67] (2011)

Location of usual residence	Location of work place							
	Isle of Anglesey	Gwynedd	Conwy	Denbighshire	Flintshire	Wrexham	Rest of Wales	Rest of UK
Isle of Anglesey	14,939	6,616	761	157	58	37	299	960
Gwynedd	2,011	33,538	1,520	544	194	128	1,160	1,631
Conwy	417	2,373	27,307	5,407	1,048	349	159	2,350
Denbighshire	46	322	3,332	21,409	3,353	1,423	99	2,773
Flintshire	39	121	790	2,879	37,036	4,568	110	17,036
Wrexham	21	59	269	1,322	4,242	37,698	258	10,456
Rest of Wales	134	867	141	153	163	347	821,658	20,492,209
Rest of UK	459	899	595	1,265	14,759	7,152	19,976	23,075,934

4.8.4 In terms of the distance that people travel to work, residents within the DCCZ travel on average 19.6km (approximately 12 miles) to work. This is higher than the Welsh average of 16.7km (around 10.4 miles) but lower than for an Anglesey resident, which stands at 22.5km (or 14 miles)[68].

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[66] [RD39]: 2001 Census – UK travel flows (local authority)

[67] [RD7]: Location of usual residence and place of work by sex (WU01UK)

[68] [RD7]: Distance travelled to work (QS702EW)

5 Housing

5.1 Summary of key points

- In 2011, there were 58,027 households within the KSA, of which 53% were on Anglesey.
- Owner occupation remains the dominant tenure in the housing stock, with Anglesey South having the highest share of owner occupation and Anglesey West the lowest on Anglesey.
- The median house price on Anglesey was £160,000 as of April 2016, higher than neighbouring local authorities and the Welsh average of £145,000.
- There are a relatively high proportion of second homes within the KSA; in terms of non-residents with a second address within the local authority, Gwynedd ranked 4th and Anglesey 9th across England and Wales.
- There were 699 empty properties on Anglesey in 2012, but this had increased to 855 by 2014.
- The number of additional affordable housing units provided on Anglesey fell to just 35 units in 2015-16, with 94 units planning to be built in 2016-17.
- The number of new homes being built on Anglesey fell by over 60% between 2008-09 and 2015-16, a significantly larger decline than across Wales as a whole (3.1%). In contrast, the number being built in Conwy rose by 48% over the same period.

5.2 Drivers of demand for accommodation

5.2.1 The ONS, in collaboration with the Welsh Government, regularly produces county-level population forecasts. The latest available set of forecasts (see Table 5-1 below) show that the populations for Anglesey, Gwynedd and Conwy are expected to change by -3%, +8% and -1%, respectively, between 2016 and 2039 (a key period for delivery of the Wylfa Newydd Project). Over the same period, population growth is expected to be 5% for Wales as a whole whilst the north West Wales sub-region is expected see an increase of 3%.

Table 5-1 Population forecasts[69] (2016 to 2039)

Area	2016	2022	2039	2016 to 2022	2016 to 2039
Isle of Anglesey	70,170	70,149	68,348	0%	-3%
Gwynedd	122,948	125,265	132,585	2%	8%
Conwy	116,561	117,585	118,222	1%	1%
North West Wales	309,679	312,999	319,155	1%	3%
Wales	3,108,054	3,159,716	3,259,522	2%	5%

5.2.2 Demand for the use of the various types of accommodation is determined by the population growth and the demographic components of change including, most importantly, the capacity to form additional households. These factors reflect underlying socio-economic factors such as growth, sector diversity and so forth.

5.2.3 County-level household projections show household growth for Anglesey, although there is a decline between 2022 and 2036. Anglesey, Gwynedd and Conwy are expected to grow by 1%, 10% and 2% respectively over the same period of time (see Table 5-2 below). Over this period, household growth is expected to be 11% for Wales whilst the North West Wales sub-region is expected to grow by 5%.

Table 5-2 Household growth projections[70] (2016 to 2036)

Area	2016	2022	2036	2016 to 2022	2016 to 2036
Isle of Anglesey	31,107	31,468	31,269	1%	1%
Gwynedd	53,657	55,520	58,985	3%	10%
Conwy	52,042	52,809	53,082	1%	2%
North West Wales	136,806	139,797	143,336	2%	5%
Wales	1,349,045	1,403,151	1,494,188	4%	11%

5.2.4 EIP could lead to a higher growth in the number of households on Anglesey of 12% between 2016 and 2035 based on household projections produced for the IACC [RD14].

5.2.5 Within the overall growth in the number of households, the trend varies by type of household, which is shown in Table 5-3. Across all local authorities in north

[69] [RD13]: 2014-based local authority population projections for Wales, 2011 to 2039 (POPU5099)

[70] [RD13]: Household projection by local authority and year (HOUS0113)

West Wales and in Wales as a whole, double-digit growth is expected in the number of single person households between 2016 and 2036. These trends are indicative of an ageing population, with more single-person households surviving the death or separation of a partner.

5.2.6 For multiple person households, the number of three- and four-person households is expected to fall across north West Wales between 2016 and 2036. This is driven by declines on Anglesey and in Conwy, with some growth expected for four-person households in Gwynedd. The number of two-person households is projected to increase in both Gwynedd and Conwy. Similar trends are expected for Wales.

Table 5-3 Household structure by area[71] (2016 to 2036)

Area	Household structure	2016	2022	2036	2016 to 2022	2016 to 2036
Isle of Anglesey	All households	31,107	31,468	31,269	1.2%	0.5%
	1 person	10,436	11,046	12,112	5.8%	16.1%
	2 person	11,062	10,987	10,393	-0.7%	-6.0%
	3 person	4,276	4,130	3,785	-3.4%	-11.5%
	4 person	3,505	3,470	3,226	-1.0%	-8.0%
	5 person	1,828	1,837	1,754	0.5%	-4.0%
Gwynedd	All households	53,657	55,520	58,985	3.5%	9.9%
	1 person	19,623	21,126	24,052	7.7%	22.6%
	2 person	17,594	17,986	17,979	2.2%	2.2%
	3 person	6,796	6,712	6,598	-1.2%	-2.9%
	4 person	5,851	5,792	6,031	-1.0%	3.1%
	5 person	3,793	3,904	4,326	2.9%	14.1%
Conwy	All households	52,042	52,809	53,082	1.5%	2.0%
	1 person	17,939	18,620	19,843	3.8%	10.6%
	2 person	19,082	19,382	19,313	1.6%	1.2%
	3 person	6,805	6,670	6,193	-2.0%	-9.0%
	4 person	5,479	5,449	5,267	-0.5%	-3.9%
	5 person	2,736	2,687	2,467	-1.8%	-9.8%

71 [RD13}: 2014-based local authority population projections for Wales, 2011 to 2039 (POPU5099)

Area	Household structure	2016	2022	2036	2016 to 2022	2016 to 2036
North West Wales	All households	136,806	139,797	143,336	2.2%	4.8%
	1 Person	47,998	50,792	56,007	5.8%	16.7%
	2 Person	47,738	48,355	47,685	1.3%	-0.1%
	3 Person	17,877	17,512	16,576	-2.0%	-7.3%
	4 Person	14,835	14,711	14,524	-0.8%	-2.1%
	5 Person	8,357	8,428	8,547	0.8%	2.3%
Wales	All households	1,349,045	1,403,151	1,494,188	4.0%	10.8%
	1 Person	427,745	462,436	534,344	8.1%	24.9%
	2 Person	472,565	491,170	513,251	3.9%	8.6%
	3 Person	204,326	203,855	199,322	-0.2%	-2.4%
	4 Person	164,062	164,867	166,113	0.5%	1.3%
	5 Person	80,346	80,823	81,157	0.6%	1.0%

5.2.7 The trends shown in Table 5-3 are reflected in the forecast for a falling average household size (see Table 5-4).

Table 5-4 Forecast change in average household size by area[72] (2016 to 2036)

Area	Household structure	2016	2022	2036
Isle of Anglesey	All households	31,107	31,468	31,269
	Average household size	2.256	2.229	2.200
Gwynedd	All households	53,657	55,520	58,985
	Average household size	2.291	2.256	2.228
Conwy	All households	52,042	52,809	53,082

[72] [RD13]: Household projection by local authority and year (HOUS0113)

Area	Household structure	2016	2022	2036
	Average household size	2.240	2.227	2.232
North West Wales	All households	136,806	139,797	143,336
	Average household size	2.264	2.239	2.223
Wales	All households	1,349,045	1,403,151	1,494,188
	Average household size	2.304	2.252	2.175

5.3 Supply of accommodation

5.3.1 The stock of dwellings[73] shows an annual growth rate of less than 1% for Anglesey, Gwynedd and Conwy between 2000-2001 and 2012-2013. Details concerning the composition of the accommodation sector can be drawn from the 2011 Census, as shown in Table 5-5.

5.3.2 In 2011, there were 58,027 households within the KSA, of which 30,594 households were recorded on Anglesey (53%). Of these Anglesey properties, around 45% of all the households are located within Anglesey South. Owner occupation remains the dominant tenure followed by the private rented sector (PRS) (including those living rent free) and the social rented sector. On Anglesey, Anglesey South has the highest share of owner occupation, whilst Anglesey West has the lowest. Within the PRS, Anglesey West and the Menai Mainland have the highest shares, with Anglesey North having the lowest. Since the 2011 Census, most social housing has been transferred from local housing authority management to registered social landlords with the exception of the IACC which remains the main provider of social housing.

Table 5-5 Stock tenure by household by KSA subdivision[74] (2011)

Tenure	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
All categories: Tenure	5,941	13,771	10,882	27,433	58,027

[73] [RD40]

[74] [RD7]: Tenure, Households (QS405EW)

Tenure	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Owned outright	2,586	5,956	3,902	9,224	21,668
Owned with a mortgage or loan	1,614	3,936	2,977	8,109	16,636
Shared ownership (part owned and part rented)	10	31	22	83	146
Rented from council (local authority)	744	1,443	1,712	2,714	6,613
Other social rented	69	233	286	2,416	3,004
Private landlord or letting agency	654	1,593	1,452	3,761	7,460
Private rented: Employer of a household member	4	24	76	54	158
Private rented: Relative or friend of household member	88	180	142	375	785
Private rented: Other	18	23	70	71	182
Living rent free	154	352	243	626	1,375

5.3.3 Table 5-6 shows the percentage distribution of tenure types. Table 5-6 shows a high percentage of those on Anglesey West in accommodation rented from the council or another social landlord. At 18.3%, this is 6% higher than Anglesey South.

Table 5-6 Percentage distribution of tenure types by KSA subdivision[75] (2011)

Tenure	Anglesey North (%)	Anglesey South (%)	Anglesey West (%)	Menai Mainland (%)	KSA (%)
Owned outright	43.5	43.3	35.9	33.6	37.3
Owned with a mortgage or loan	27.2	28.6	27.4	29.6	28.7
Shared ownership (part owned and part rented)	0.2	0.2	0.2	0.3	0.3
Rented from council (local authority)	12.5	10.5	15.7	9.9	11.4
Other social rented	1.2	1.7	2.6	8.8	5.2
Private landlord or letting agency	11.0	11.6	13.3	13.7	12.9
Private rented: Employer of a household member	0.1	0.2	0.7	0.2	0.3
Private rented: Relative or friend of	1.5	1.3	1.3	1.4	1.4

[75] [RD7]: Tenure, Households (QS405EW)

Tenure	Anglesey North (%)	Anglesey South (%)	Anglesey West (%)	Menai Mainland (%)	KSA (%)
household member					
Private rented: Other	0.3	0.2	0.6	0.3	0.3
Living rent free	2.6	2.6	2.2	2.3	2.4

5.4 Private rented sector (PRS) accommodation

5.4.1 The PRS is generally considered accommodation that is privately owned (i.e. not owned by a local authority or housing association) and that is being rented out by a landlord. It is a very diverse sector and accommodation can range from executive housing through to bedsits. Similarly, tenants can range from wealthy professionals through to unemployed people in receipt of benefits or very low incomes. Landlords can also be quite diverse with differing requirements concerning whom they wish to have as tenants, ranging from large property companies managing hundreds or even thousands of properties to a person renting out just one flat.

5.4.2 Census data for 2011 allow an estimate of the number of potential bed spaces from PRS accommodation data, assuming a single bed space is equivalent to a bedroom. Estimation of bed spaces for sub-areas within the wider KSA, and based on ward-level data, is provided in Table 5-7.

Table 5-7 Bedroom analysis by KSA subdivision[76] (2011)

	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
PRS - Households[77]	654	1,593	1,452	3,761	7,460
PRS – Estimated bedrooms	1,910	4,660	4,110	11,017	21,697

5.4.3 As presented above, this analysis suggests that 21,697 bedrooms might be contained within the 7,460 accessible PRS units identified in 2011.

[76] [RD7]: Tenure, Households (QS405EW)

[77] This total omits various forms of private rented accommodation that are unlikely to be available to construction workers

5.4.4 Whilst stock available through private landlords and letting agents may be the most likely to be available to workers, it is possible that workers might experience other barriers in accessing this accommodation. Landlords may have a specific preference for a type of tenant that does not fit the construction worker profile. Certain landlords may have a preference for 'young professionals' or operate in niches such as a preference for tenants on housing benefit (localised data are not available). Certain landlords may not find construction workers as an attractive prospect because they may not meet their business objectives. For example, landlords offering accommodation to workers to enable them to carry out a specific type of job (e.g. an agricultural worker's dwelling) may be unlikely to be willing to let such a property to construction workers. Similarly, some accommodation will be let on an informal, rent-free basis to friends and relatives for non-economic reasons. Both cases highlight circumstances where accommodation classed as 'private rented' would not be available to non-home-based workers.

5.4.5 From a supply side, the size of the PRS is usually linked to the fortunes of the owner occupied sector. Poor conditions in the owner occupied sector can, for example, encourage owners to retain their properties and wait for better times. In the interim, an owner faced with this situation may wish to rent out such a property until conditions in the owner occupied sector become more favourable. Innovations in financial products can also influence supply such as the development of 'buy to let' mortgage products.

5.4.6 Table 5-7 shows that there are more PRS units in the southern part of the KSA, particularly either side of the Menai crossings, which may, in part, reflect the presence of a substantial number of students, especially associated with Bangor University.

5.4.7 PRS includes 'houses in multiple occupation' which are defined as houses where at least three tenants live, forming more than one household[78] and where toilet, bathroom or kitchen facilities are shared with other tenants. A large house in multiple occupation would be at least three storeys high and have at least five tenants. Across the counties comprising the KSA, there are an estimated 2,960 houses in multiple occupation.

5.5 Tourist accommodation

5.5.1 There is a substantial local supply of tourist accommodation in the KSA with an estimated 61,400 bed spaces available within the KSA.

5.5.2 Table 5-8 shows that around 70% of estimated bed spaces fall within the category 'caravans and camping', with Anglesey South dominating this type of

[78] A household is either a single person or members of the same family who live together. A family includes people who are married or living together, including people in same-sex relationships, relatives or half-relatives, e.g. grandparents, aunts, uncles, siblings, step-parents and step-children

accommodation. The majority of caravan parks have invested in central facilities and landscaping and therefore offer a quality tourism product[79]. However, there remain many lower quality sites that require significant investment to meet future market requirements. Work on the emergent local plan for Anglesey and Gwynedd highlights restrictions that exist on the expansion of existing sites especially those with static caravans[80]. It is likely that there will be restrictions on year-round occupancy on many sites preventing certain types of workers from using these sites. Some sites may also close for a period of either one or two month's duration. Therefore, the actual level of bed spaces may be much lower.

5.5.3 Other areas on Anglesey have a greater percentage of the other accommodation types available than Anglesey North.

Table 5-8 Estimates of tourist bed-space distribution by type by KSA subdivision[81] (2013)

Accommodation	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Hotels, guest houses and B&Bs	215	1,241	1,327	4,164	6,947
Self-catering	453	1,157	2,062	2,740	6,411
Caravans & camping	6,962	13,761	6,345	18,360	45,428
Other e.g. hostels	0	106	0	2,544	2,650
Total	7,630	16,265	9,733	27,808	61,436

5.6 Owner occupied accommodation

5.6.1 As mentioned in 5.4.5, owner occupied market is linked to the rental markets with changes in level of supply in one type affecting the other [RD43].

5.6.2 Table 5-6 shows the percentage distribution of tenure types. Around two thirds of all households either own their home outright or have a mortgage or loan on

79 [RD41]

80 [RD41]

81 [RD42]

it. Within this tenure, there is a range of housing types measured in terms of bedroom capacity, as shown in Table 5-9 below.

Table 5-9 Owner occupied unit – bedroom capacity by KSA subdivision[82] (2011)

Capacity	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
1 bedroom	74	66	155	373	668
2 bedrooms	752	1,247	2,045	3,652	7,696
3 bedrooms	2,295	3,965	4,839	9,082	20,181
4 or more bedrooms	1,089	1,623	2,884	4,309	9,905

5.7 Second homes and vacant household spaces

5.7.1 Second homes can be held for a variety of reasons other than private recreation and include:

- holiday homes owned as a commercial venture;
- those needed for job or educational reasons by a member of the household;
- other personal reasons within the household, like marital problems;
- as an initial step in the household's move to or from the area; and
- inherited from another family member and the inheritor does not want to sell for sentimental reasons.

5.7.2 It is important to note that second homes can easily switch from being a source of private recreation to something else such as PRS units that may be accessible to workers [RD44].

5.7.3 Table 5-10 reviews a new measure introduced in the 2011 Census, which is based on identifying persons normally resident outside a local authority with a second address within the local authority who occupy the second property for more than 30 days. Based on this measure, Gwynedd is ranked fourth highest among all the local authorities in England and Wales. Anglesey is ranked ninth.

[82] [RD7]

Table 5-10 Usual residents of England and Wales with second addresses in the local authority (top 20)[83] (2011)

Rank	Local authority	2011 usual residents	Usual residents elsewhere, with a second address in this local authority	People with a second address per 1,000 usual residents
1	City of London	7,375	1,366	185
2	Isles of Scilly Unitary Authority	2,203	266	121
3	Richmondshire	51,965	5,129	99
4	Gwynedd	121,874	12,012	99
5	South Hams	83,140	7,672	92
6	South Lakeland	103,658	8,628	83
7	Purbeck	44,973	3,713	83
8	North Norfolk	101,499	7,939	78
9	Isle of Anglesey	69,751	5,088	73
10	Cotswold	82,881	5,898	71
11	Pembrokeshire	122,439	8,458	69
12	West Somerset	34,675	2,387	69
13	West Dorset	99,264	6,699	67
14	Eden	52,564	3,522	67
15	Ceredigion	75,922	5,084	67
16	Chichester	113,794	7,549	66
17	Suffolk Coastal	124,298	7,819	63
18	East Lindsey	136,401	8,443	62
19	Scarborough	108,793	6,723	62
20	Westminster	219,396	13,415	61

5.7.4 The 2011 Census also records household space, which is described as accommodation used or available for use by an individual household. Household spaces are identified separately in census results as those with at least one usual resident, and those that do not have any usual residents. A

[83] Usual residents of England and Wales with second addresses in the local authority [RD45]

household space with no usual residents may still be used by short-term residents, visitors who were present on census night or a combination of short-term residents and visitors. However, vacant household spaces and household spaces that are used as second addresses are also classified in census results as household spaces with no usual residents. As such, the distribution of vacant household spaces can indicate the possible distribution of second homes and this is shown in Table 5-11.

Table 5-11 Distribution of vacant household spaces by KSA subdivision[84] (2011)

Category	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Household spaces with no usual residents	793	1,426	1,370	2,177	5,766

5.7.5 As identified above, a vacant household space includes units that are unoccupied for a variety of reasons including use as a second home. Unfortunately, the separation of second home use is only possible by using 2001 Census data, which found that 3.7% of homes were classified as second or holiday residences on Anglesey compared to 1.2% for Wales as a whole. This was the third highest after Gwynedd and Pembrokeshire. The average does however disguise localised effects, with Aberffraw having 18% of stock classified as second homes and Moelfre having 15% classified as second homes [RD46].

5.8 Empty properties

5.8.1 The opportunities presented by non-home-based workers may encourage property owners to bring forward previously empty properties for occupation. The Population and Housing topic paper [RD47], produced to support the Anglesey and Gwynedd Joint Local Development Plan [RD2], provides estimates of empty properties on Anglesey and in Gwynedd for 2013 and 2014. Table 5-12 shows the number of empty properties on Anglesey for 2013, 2014 and 2016. There are no 2014 data available for Menai Bridge and data were not available for 2015.

[84] [RD7]: Household spaces (QS417EW)

Table 5-12 Empty properties on Anglesey by community council area[85] (2013, 2014 and 2016)

Community council area	Number of empty properties, 2013	Number of empty properties, 2014	Number of empty properties, 2016[86]
Holyhead	151	130	118
Amlwch	76	85	38
Llangefni	47	52	69
Menai Bridge	28	-	23

5.8.1 In April 2012, there were 699 empty properties on Anglesey based on the evidence base report. This had risen to 855 by April 2014 and decreased to 784 in 2016 [RD47].

5.8.2 Data from the Gwynedd Council's Private Housing Sector Service note that there were 1,078 long-term empty properties in Gwynedd in 2013/14[87].

5.9 House prices

5.9.1 In recent years, the effects of the recession have affected the average house price on Anglesey, as is the case across Wales and the UK. Data from the ONS show that the average house price on Anglesey increased by 5.4% between the first quarter of 2008 to the first quarter of 2016. The rates of house price declined over the same period in Gwynedd (1.6%), Conwy (0.4%) and Wrexham (1.8%), but increased in Denbighshire (3.3%) and Flintshire (3.0%). In contrast, Wales has almost the same house price inflation in 2016 as it did in 2008, with a small decrease of 0.1%.

5.9.2 The median sale price on Anglesey in the three months to March 2016 was £160,000, which is higher than in Gwynedd (£146,000), Conwy (£149,000) and Denbighshire (£136,000), and above the Welsh average (£145,000). Property values are highest for detached houses, with the average price differential largest in Gwynedd, where average house prices are £146,000 and the average price for a detached house is £212,250.

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[85] [RD45]

[86] Data provided directly by IACC

[87] [RD46]

Table 5-13 Annual median house price inflation by area[88] (Q1 2008 to Q1 2016)

Year	Isle of Anglesey	Gwynedd	Conwy	Denbighshire	Flintshire	Wrexham	Wales
Q1 2008	1.3%	5.9%	1.4%	5.5%	2.5%	4.4%	3.7%
Q1 2009	-5.8%	-7.1%	-3.4%	-3.7%	-3.5%	-3.5%	-5.0%
Q1 2010	2.7%	-0.2%	-3.4%	-4.2%	-1.5%	-5.8%	-0.8%
Q1 2011	0.0%	-0.7%	5.7%	4.4%	0.0%	0.0%	1.9%
Q1 2012	-5.0%	-1.1%	-3.4%	-3.8%	1.9%	1.7%	-1.8%
Q1 2013	3.7%	0.0%	-2.1%	0.0%	0.4%	1.3%	0.3%
Q1 2014	-1.9%	0.0%	3.6%	0.0%	0.7%	-3.0%	1.9%
Q1 2015	3.4%	3.7%	1.7%	0.0%	4.3%	5.0%	3.7%
Q1 2016	6.7%	4.3%	1.0%	8.8%	5.5%	2.6%	3.6%

5.9.3 Figure 5-1 below shows the median house prices for Anglesey, Gwynedd, Conwy, Denbighshire and Wales.

88 [RD28]

Figure 5-1 Median house prices by area[89] (Q1 2004 to Q1 2016)

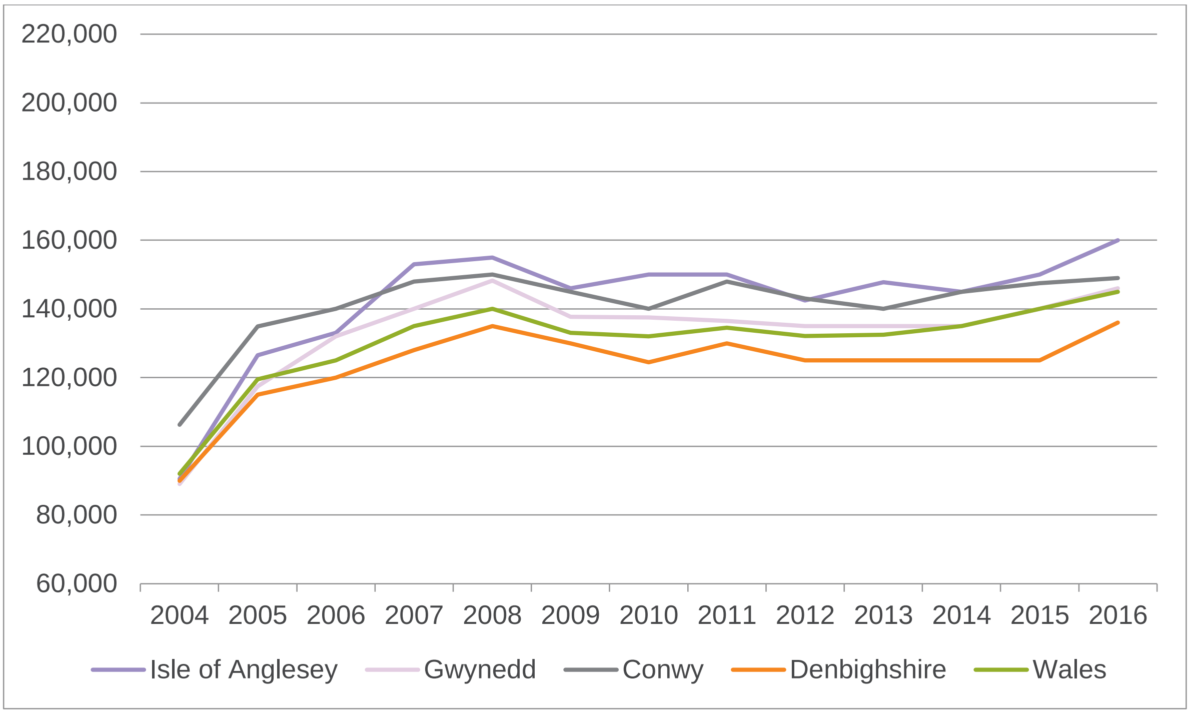
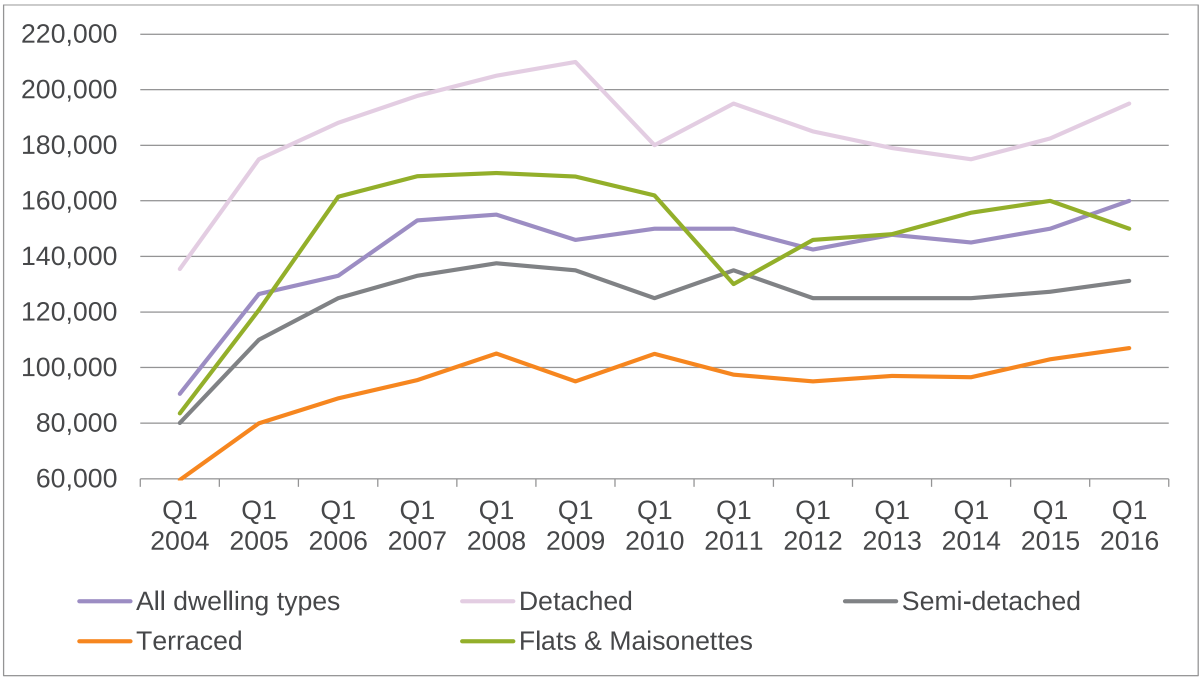


Figure 5-2 Average house price by type of dwelling on Anglesey[90] (Q1 2004 to Q1 2016)



89 [RD28]

90 [RD28]

5.9.4 In 2016, median house prices on Anglesey were 6.83 times greater than the median income, compared to ratios of England, 7.58, and Wales, 5.73 [RD48]. However, the ratio was higher in Gwynedd at 6.62 and in Conwy at 5.92.

5.10 Affordable housing provision

5.10.1 Affordable housing is not just social housing for rent, but includes low-cost home ownership (such as housing provided through the Welsh Government's Homebuy scheme [RD49]), shared ownership and, increasingly, intermediate rent – where rents are set at up to 80% of market levels, which is significantly higher than levels found in traditional social housing [RD50]. This definition has been extended to mean affordable access to private sector provision. A number of social lettings agencies have been established in Wales to facilitate access for people in housing need to available provision.

5.10.2 A key source of evidence on the need for affordable housing comes through the local housing market assessment process managed by the local housing authorities. In the case of the KSA, a local housing market assessment has been conducted for the north West Wales authorities (Anglesey, Gwynedd and Conwy). The findings of the *North West Wales Local Housing Market Assessment*, presented in the 2013 Population and Housing topic paper for the Anglesey and Gwynedd Joint Local Development Plan, remain the principle source of evidence on annual affordable housing needs in the KSA [RD2]. At the time of the assessment, the following ranges of affordable housing need have been agreed by local partners:

- Anglesey – 249 to 304 units per annum;
- Gwynedd – 664 to 828 units per annum; and
- Conwy – 331 units per annum [RD50].

5.10.3 A key driver of housing need is the relationship between incomes and house prices (typically the median). In the supporting evidence base for the Anglesey and Gwynedd Join Local Development Plan, median house price to income ratio in Gwynedd was 5.67 in 2011 [RD43]. On Anglesey, this figure was 5.66. The technical evidence report noted that these are higher than the ideal ratio, which is 2.9 for an individual income and 3.5 for dual incomes. A more recent calculation suggests that the median annual income of residents of Anglesey is £23,517 (compared with £26,562 in Conwy [RD51]; Gwynedd's figure has been supressed due to statistical unreliability) and the average property price is £150,000. This gives a home price to income ratio of 6.3.

5.10.4 The creation of additional affordable housing can offer a means of tackling housing need. Table 5-14 shows the level of affordable housing built in the three local authorities, north Wales, and Wales.

5.10.5 The relative performance in the delivery of affordable housing is typically measured by expressing delivery in terms of the underlying household base, per 10,000 households. Affordable housing units are defined in the Welsh

Government's Planning Department's *Technical Advice Note 2: Planning and Affordable Housing* [RD52].

5.10.6 The rate of additional affordable housing provision on Anglesey fell in 2014-15 and increased in 2015-16, being the fourth lowest of all 22 local authorities in Wales [RD53]. Following a decrease in 2011-12, the rate of additional affordable housing provision in Gwynedd increased in 2012-13. It increased significantly in 2014-15 but fell again in 2015-16 and was the second lowest of all 22 local authorities. In 2015-16, the rate of additional affordable housing provision in Conwy slightly increased from the 2014-15 rate but still ranked below the Wales average.

Table 5-14 Affordable housing units delivered[91] by area (2007-08 to 2017-18)

Year	Isle of Anglesey	Gwynedd	Conwy	North Wales	Wales
2007-08	77	85	26	400	1,692
2008-09	116	93	49	476	2,543
2009-10	79	53	60	344	2,370
2010-11	85	110	76	623	2,486
2011-12	49	37	32	344	2,432
2012-13	110	66	45	354	2,042
2013-14	31	65	158	540	2,416
2014-15	37	182	78	523	2,218
2015-16	35	54	85	343	2,400
2016-17[92]	94	50	75	351	2,792
2017-18[93]	94	40	111	532	3,351

5.11 New house building activity

5.11.1 The opportunities created by the Wylfa Newydd Project may act as a stimulus to build new houses for sale to workers, especially those likely to stay for an extended period. Table 5-15 shows recent trends in new house building activity in the three authorities located closest to the Wylfa Newydd Project site, north Wales and Wales. With the exception of Conwy and North Wales as a whole, all areas have experienced a fall in the number of new build housing completions since 2008-9.

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[91] [RD13]: Additional affordable housing provision by location and year (HOUS0311)

[92] Planned: These figures are estimates and may be subject to change in future years.

[93] Proposed: These figures are estimates and may be subject to change in future years.

Table 5-15 New dwelling completions[94] by area (2008-09 to 2015-16)

Year	Isle of Anglesey	Gwynedd	Conwy	North Wales	Wales
2008-09	159	206	152	1,112	7,121
2009-10	154	148	197	951	6,174
2010-11	112	169	131	1,147	5,505
2011-12	74	123	116	1,083	5,575
2012-13	131	160	158	1,018	5,451
2013-14	79	131	260	1,190	5,843
2014-15	80	189	182	1,235	6,170
2015-16	61	141	225	1,261	6,900
% change 2008-09 to 2015-16	-61.6%	-31.6%	48.0%	13.4%	-3.1%

5.12 Homelessness

5.12.1 Homelessness is an indicator of housing stress and can highlight problems with the supply and demand of accommodation as well as specific concerns with social housing if insufficient capacity exists to manage people becoming homeless. Whilst the Wylfa Newydd Project would not directly affect homelessness, any effects that cause difficulty for existing residents in locating accommodation may be reflected in changes in the homelessness rate.

5.12.2 The term 'homelessness' has a meaning in statute and regulation and becoming homeless requires the local housing authority to accept that a person falls within the accepted definition of being homeless. No specific statistics on homelessness exist for the KSA; however, data are collected on the rate of homelessness acceptances for each of the local authorities that are included within the KSA, either wholly or partially.

5.12.3 The term 'homelessness acceptances' is applied to those persons considered eligible for assistance, unintentionally homeless and in priority need (as defined by homelessness legislation). Local housing authorities have a main duty of care to address homelessness; the main duty is to secure suitable accommodation for the applicant and their household [RD54].

5.12.4 Data on homelessness acceptances are collected from local housing authorities on a regular basis. The Welsh Government includes the rate of homelessness acceptances in their statistical reporting for individual local

[94] [RD13]: New dwellings completed by area, dwelling type and number of bedrooms (HOUS0702)

authority areas, including those in the KSA area. The distribution of homelessness acceptances shows notable variations by county area.

5.12.5 Table 5-16 shows the rate of homelessness acceptances per 10,000 households from 2008-09. These data show a general fall in the rate of homelessness acceptances over the period for all housing authorities, across North West Wales and, more recently, in Wales as a whole.

Table 5-16 Rate of homelessness acceptances per 10,000 households by area[95] (2008-09 to 2014-15)

Year	Isle of Anglesey	Gwynedd	Conwy	North West Wales	Wales
2008-09	48	53	29	43	46
2009-10	44	47	27	39	43
2010-11	41	44	36	40	48
2011-12	23	44	49	41	50
2012-13	21	32	36	31	44
2013-14	19	34	29	29	39
2014-15	15	27	37	28	38

5.12.6 Over the period 2001-02 to 2009-10, the rate of homelessness acceptances on Anglesey remained broadly in line with the Welsh average. The rate of homelessness acceptances dropped significantly in 2011-12 and has remained well below the Welsh average and that of North West Wales.

5.12.7 Between 2001-02 and 2004-05, the rate of homelessness acceptances in Gwynedd remained below the Wales average. The rate fell generally between 2005-06 and 2014-15 but remained above the Wales average up to 2009-10. The rate was below the Wales average from 2010-11 until 2014-15.

5.12.8 Over the period 2001-02 to 2012-13, the rate of homelessness acceptances in Conwy remained well below the Wales average with the exception of 2005-06 and 2011-12. In 2013-14, it continued to fall and was the seventh lowest rate amongst local authorities in Wales. However, the rate of homelessness acceptances in Conwy rose again in 2014-15, in contrast to north West Wales and Wales as a whole.

5.12.9 Overall, the rate of homelessness acceptances for the area covered by the KSA has tended to fall, and the acceptance rate is lower than for Wales as a whole.

[95] [RD13]: Households accepted as homeless by local authority area (HOUS0404), Households by Local Authority and Year (HOUS0206)

6 Public services

6.1 Summary of key points

- There is limited nursery provision across the KSA, with facilities currently oversubscribed. For primary and secondary education, there is capacity in terms of overall levels of provision, although there are some areas that are oversubscribed for primary school places (Anglesey West and Menai Mainland in particular).
- Health services baseline is included here for completeness. However, the effects on these services are considered within the Health Impact Assessment. The baseline shows that the average ratio of patients to GPs across the KSA is below the English benchmark of 1,800 patients per GP and the Welsh benchmark of 1,600 patients per GP. However, one surgery fails to meet the English benchmark and four others fail to meet the Welsh benchmark.
- There are a number of leisure and recreation facilities in the KSA, including 10 libraries and five leisure centres on Anglesey.
- There is the provision of emergency services throughout the KSA, with four police stations and 21 fire stations on Anglesey and in Gwynedd.

6.2 Overview of public service provision on Anglesey and Menai Mainland

Holyhead

6.2.1 Holyhead is the largest town on Anglesey, and the main retail and service centre. Holyhead is also home to many community facilities, including seven primary schools, a secondary school, a college, a community hospital, five GP surgeries and a leisure centre. The town has a rich built environment with a number of listed buildings and is surrounded by a high quality natural environment.

6.2.2 Holyhead has very good national and international transport connections to the rest of Anglesey and the mainland via the A5 and A55 and via the North Wales Coast railway line. The ferry port, which is the busiest in Wales, provides a gateway to Ireland. In addition, air transport is provided between the nearby Anglesey Airport and Cardiff Airport.

6.2.3 Despite these advantages in access to services and links to other areas, the Holyhead area also has high unemployment and suffers from relative deprivation across almost all deprivation indicators.

Llangefni

6.2.4 Llangefni is Anglesey's second largest settlement, and benefits from a range of community facilities such as primary schools, a secondary school, a college, a leisure centre, a GP surgery and a hospital. Llangefni is an historic old town with a mix of listed buildings and business and industrial zones. The town is mostly set amidst land of high agricultural grade, and a local nature reserve borders the north-west edge of the town.

6.2.5 There is high potential for future business growth in the town, with development of new industrial zones being a key future priority. However, despite being an area of high employment on the island, areas in the town are recorded as being of relatively high deprivation.

Amlwch

6.2.6 Amlwch, the most northerly town in Wales, is the main centre for both employment and services in the north of the island. The town contains several important facilities, including a primary school, a secondary school, two GP surgeries and a leisure centre.

6.2.7 The town, and the surrounding area, consist of a rich and sensitive environment and considerable industrial-cultural heritage. To the north of the town, the coastline is part of the Anglesey AONB. The town, particularly the Port Amlwch area, and the area around the nearby Parys Mountain have considerable industrial heritage and are sites of tourist attractions.

6.2.8 However, Amlwch has high unemployment levels and deprivation issues, particularly in the employment, education and access to services indicators. The town also has a very high rate of out-commuting, with residents travelling elsewhere for employment.

Cemaes

6.2.9 Cemaes is located to the east of the Wylfa Newydd Development Area. The village has a primary school, a GP surgery, library and retail areas providing services not just to local residents but also to surrounding communities in north Anglesey.

Tregele

6.2.10 Tregele is a small village located to the south of the Wylfa Newydd Development Area. The town does not have any key community services, instead relying on Cemaes and other villages along the A5025 to access services.

6.2.11 The local area has both locally and internationally recognised areas for nature conservation, and the coastline is part of the Anglesey AONB.

Rhosgoch

6.2.12 Rhosgoch is a small village set amidst agricultural land. It has tourist accommodation available for visitors but does not have any key local services. The village's residents rely on services located at Cemaes, Amlwch and other larger towns.

6.2.13 To the north of Rhosgoch, a decommissioned water treatment site has been identified as the Rhosgoch Enterprise Zone. Business support will be offered within the area to business development or new businesses that fit the vision of the Welsh Government and the IACC for the area.

Bangor

6.2.14 Bangor is the largest city in Gwynedd and home to Bangor University and Coleg Menai. As such, students make up over half of the city's population. Bangor has a range of community facilities and public services including both primary and secondary schools, four GP surgeries and a hospital (Ysbyty Gwynedd), which is expected for a community of this size.

Caernarfon

6.2.15 The town of Caernarfon is the administrative centre for Gwynedd. In addition, its rich historic setting makes it a popular tourist centre, with a thriving market and marina.

6.2.16 Services in the town include four primary schools, one secondary school that serves the town and the surrounding area, two GP surgeries and a local campus for Coleg Menai.

6.3 Schools and education services

Nursery care

6.3.1 Seventy-seven of the 88 primary schools in the Anglesey and Arfon area have capacity and provision for nursery education: 39 of these are on Anglesey and 38 are in Arfon. This nursery provision has a combined capacity for 1,302 nursery pupils: 604 on Anglesey and 698 in Arfon. The total number of nursery pupils is 1,231, of which 615 are on Anglesey and 616 are in Arfon. Thus, there is only spare capacity for 71 additional pupils (5% headroom). Several primary schools were reported to have no spare nursery capacity or were oversubscribed.

6.3.2 According to 2015 data, public sector nursery provision, provided at 39 primary school locations on Anglesey, is largely oversubscribed. However, due to the mix of spare capacity and over-capacity locations, the provision is only oversubscribed in total by 11 places. The most constrained services areas are in Holyhead, Llangefni and Menai Bridge, whilst the spare capacity is largely available in the north and east.

6.3.3 In Holyhead, four of the seven primary schools offering nursery provision are oversubscribed, with a total deficit of 21 places. The remaining three primary schools were reported to have spare capacity for only seven additional pupils in total.

6.3.4 Within Menai Mainland, the 38 primary schools offering nursery provision have a total capacity for 698 children currently with 82 spare places (approximately 12% headroom); however, the average number of spare places per nursery is only two. Most of the current spare capacity in this area is found in Bangor.

6.3.5 There are also a number of private nurseries on the island and within Menai Mainland. The closest of these to the Wylfa Newydd Development Area are located to the south of the A55 in Llanfihangel-yn-Nhowyn and on Holyhead. Across Anglesey, there are 111 people or organisations registered as child day care providers, including the 39 primary schools. The total or spare capacity of these 72 people or facilities is not known.

Primary schools

6.3.6 There are 66 primary schools in the study area: 47 on Anglesey and 19 in Menai Mainland. These schools cater for approximately 10,285 pupils (5,735 and 4,550 respectively). The capacity of the existing primary schools is 11,941 (6,427 and 5,514 respectively). Across the KSA, there is an excess capacity of approximately 1,650 places as of 2016.

6.3.7 With an average of 35 spare places in each primary school across the study area, the majority have spare capacity. However, there are 17 primary schools that are oversubscribed by approximately 200 places: 14 on Anglesey (by 172 places) and three in Menai Mainland (by 25 places).

6.3.8 Table 6-1 below presents the capacity by sub-area within the KSA.

Table 6-1 Primary school capacity by sub-area[96] (2016)

Category	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Number of pupils registered	935	2,297	2,504	4,548	10,285
Capacity	1,124	2,650	2,653	5,514	11,941
Difference	+189	+353	+149	+966	+1,657
Number of schools oversubscribed	1	5	8	3	17

[96] [RD55], [RD56]

Category	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Number of places oversubscribed[97]	1	90	81	25	197

6.3.9 It should be recognised that a school modernisation programme is planned which will reduce excess capacity in some areas. The Isle of Anglesey County Council (IACC) provided an updated forecast (below in Table 6-2) that takes into consideration this plan until 2021[98] and predicts a decrease in surplus capacity.

Table 6-2 IACC forecast of primary school places on Anglesey

	2016	2017	2018	2019	2020	2021
Projected number of surplus places	630	484	262	279	294	288
% surplus places	11%	8%	5%	5%	5%	5%

Secondary schools

6.3.10 There are 10 secondary schools within the study area: five on Anglesey and five in Menai Mainland. They provide for approximately 8,030 pupils (3,840 and 4,190 respectively). The capacity of these secondary schools is approximately 10,560 (5,170 and 5,390 respectively). Across the KSA, there is excess capacity of approximately 2,511 places.

6.3.11 Secondary school capacity is therefore significantly greater than the current number of registered pupils. The average spare capacity in each secondary school is 251, although this ranges from approximately 100 to 520.

6.3.12 Table 6-3 presents the capacity by sub-area within the KSA. None of these schools are oversubscribed.

Table 6-3 Secondary school capacity by area[99] (2016)

	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Number of pupils registered	510	1,842	1,507	4,194	8,030
Capacity	971	2,179	2,021	5,393	10,564

[97] This is the number of places by which the above mentioned “oversubscribed schools” are oversubscribed by.

[98] Projects associated with the modernisation programme have only been confirmed until 2018/19,

[99] [RD55], [RD56]

	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Difference	+461	+337	+514	+1,199	+2,511

College and university

6.3.13 Coleg Menai is a further education college, with the primary campus located in Bangor. Secondary campuses are located in Llangefni, Caernarfon, Holyhead and Parc Menai. Coleg Menai's enrolment in 2010 was 6,000. The further education college is part of the Grŵp Llandrillo Menai, which combines Coleg Menai with Coleg Llandrillo, and has a combined capacity of 27,000 students.

6.3.14 Bangor University is located in Bangor, Gwynedd. Student enrolment in 2014/15 was 10,765. The university draws its student population from around the UK and abroad.

6.4 Health related services

6.4.1 While effects on health related services are considered as part of the Health Impact Assessment, not the socio-economic assessment, a baseline for the service provision is presented below for completeness.

General Practice (GP) surgeries

6.4.2 There are 23 GP surgeries in the KSA: 11 on Anglesey and 12 in Menai Mainland. Table 6-4 shows the GP surgeries in the study area and their capacity. These surgeries have 102 GPs, split almost equally on and off Anglesey. They serve 132,945 registered patients, again almost evenly split on and off Anglesey.

6.4.3 The ratio of patients to GPs is an average of 1,333 across all GP surgeries in the KSA, and each surgery has an average of four GPs.

6.4.4 This is considered below both the English benchmark of 1,800 patients per GP and the Welsh average of almost 1,600 patients per GP. There is not a Welsh patient to GP benchmark ratio and therefore the English benchmark and the current average for Wales are used to provide some context.

6.4.5 Table 6-4 shows how these surgeries are distributed around the KSA by sub-area. This table shows that in Anglesey North the ratios are already exceeding the Welsh average, while in Anglesey North they are very close to exceedance.

Table 6-4 GP capacity by sub-area[100] (2014)

	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Practice list size	10,214	33,189	22,545	66,997	132,945

[100] [RD56]

	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Number of GPs	6	27	15	54	102
Average patient/GP ratio	1,702	1,229	1,503	1,241	1,303

6.4.6 Whilst only one GP surgery fails to meet the English benchmark ratio, four others exceed the Welsh average. These surgeries are all located on Anglesey:

- Dolwenith in Penygroes (2,176 patients per GP);
- Cambria Surgery in Holyhead (1,767 patients per GP);
- Glanrafon Surgery in Amlwch (1,702 patients per GP);
- The Health Centre in Llanfairpwll (1,648 patients per GP); and
- Parc Glas Surgery in Bodorgan (1,601 patients per GP).

6.4.7 The other two surgeries in Holyhead, Longford House Surgery and Meddygfa Victoria, which are close to exceeding the Welsh average have patient to GP ratios of 1,571 and 1,459 respectively.

6.4.8 There are also a number of GP surgeries that are well below the Welsh average ratio of patients per GP. On Anglesey these are:

- Beaumaris Health Centre (958 patients per GP); and
- Meddygfa Star Surgery in Gaerwen (621 patients per GP).

6.4.9 In Menai Mainland they are:

- the surgery in Llanberis (980 patients per GP); and
- Llys Meddyg in Penygroes (787 patients per GP).

6.4.10 The number of registered patients is greater than the actual resident population in the study area. This discrepancy may be a result of administrative differences between GP registrations and population count recorded by the 2011 Census. It should be noted that data showing the location of registered patients are not currently available so it is not possible to determine where GP registered patients are travelling from.

Pharmacies

6.4.11 There are 23 pharmacies in the study area: 13 on Anglesey and 10 in Arfon. The pharmacies are predominantly located in areas of higher population density, such as Bangor, Caernarfon, Holyhead and Menai Bridge.

Hospitals

6.4.12 Hospital services for KSA residents are provided by Ysbyty Gwynedd in Bangor. Information provided by the Betsi Cadwaladr University Health Board

(BCUHB) summarises the number of hospital visits to Ysbyty Gwynedd by residents registered to GPs located within Anglesey and Menai Mainland.

6.4.13 Over 172,000 outpatient attendances were recorded at Ysbyty Gwynedd for individuals registered at GPs, accounting for an estimated 0.78 attendances per GP registration in the study area or 1,279 outpatient attendances per 1,000 GP registrations. Across Wales, a total of 1,011 outpatient attendances per head of population were recorded in 2011-12. While this may be considered significantly lower than the benchmark for Ysbyty Gwynedd, this may be explained by slight difference in definitions, as one is 'rate per GP registration' while the other is 'rate per head of population'.

6.4.14 Approximately 34,000 A&E attendances at Ysbyty Gwynedd were generated by patients registered within the KSA, representing a total of 0.25 attendances per GP registration or 252 A&E attendances per 1,000 GP appointments. Across Wales, 345 A&E attendances per 1,000 population were recorded in 2011-12. Again, statistical variations in definitions used for the datasets, mean they are not directly comparable.

6.4.15 The BCUHB area had a total of 2,300 beds available in 2015/16; the vast majority of which were in acute care. Bed occupancy is highest within geriatrics and acute wards (92 and 82 occupied respectively).

6.4.16 In the year July 2013 to June 2014, the BCUHB received on average 18,200 accident and emergency attendances per month. On average, the time from arrival until admission, transfer or discharge was less than four hours for 81% of patients[101].

6.4.17 Table 6-5 shows the proportion of adults in the local authorities in north Wales and in BCUHB who reported using selected health services in 2015 (Welsh Government, 2016). The results from the Welsh Health Survey are similar for Anglesey and for the BCUHB as a whole.

Table 6-5 Adults who reported using selected health services[102] (2015)

Service	Isle of Anglesey (%)	Gwynedd (%)	Conwy (%)	Denbigh-shire (%)	Flintshire (%)	BCUHB (%)	Wales (%)
In the past 2 weeks:							
- Talked to family doctor (GP)	16	15	16	16	16	16	17
In the past 12 months:							

[101] [RD57]

[102] [RD58]

Service	Isle of Anglesey (%)	Gwynedd (%)	Conwy (%)	Denbigh-shire (%)	Flintshire (%)	BCUHB (%)	Wales (%)
- Attended casualty department	13	12	15	16	17	15	17
- Outpatient department	29	28	31	35	34	32	32
- In hospital as an inpatient	8	9	8	10	8	9	9
- Pharmacist	63	64	69	69	70	67	69
- Dentist	77	70	74	73	71	72	70
- Optician	46	47	48	46	50	48	51

6.4.18 Non-welsh resident admissions to BCUHB hospitals in 2015/16 accounted for 3.5% (6,492 people) of all admissions [RD58].

6.4.19 It has been reported that by using the Department of Health guidance on occupancy rates, all speciality groups with the exception of maternity bed spaces within the hospital are either at capacity or over capacity. The overall occupancy rate for the BCUHB suggests there is currently a shortage of bed spaces within the region.

6.4.20 In addition to Ysbyty Gwynedd located in Bangor, health requirements within the KSA are also served by facilities located in adjacent counties. Major A&E services can be provided by Glan Clwyd Hospital in Denbighshire and Wrexham Maelor Hospital in Wrexham. Minor Injuries Units are available at Bryn Beryl Hospital in Pwllheli, Denbigh Community Hospital, Dolgellau and Barmouth District Hospital, Holywell Community Hospital, Llandudno General Hospital, Mold Community Hospital, Tywyn Memorial Hospital, Ysbyty Alltwen in Tremadog and Ysbyty Penrhos Stanley in Holyhead [RD59].

Dentists

6.4.21 Based upon the estimated waiting list times reported by dentists, existing dentist practices within the KSA are oversubscribed.

6.4.22 Based on data on the dental industry in Wales [RD60], the Health Board area has a patient to dentist ratio of 2,358, while Wales has a ratio of 2,222 and the UK has a ratio of 2,380. This indicates that dental provision in the region is more constrained than in Wales as a whole but on par with the UK provision.

6.4.23 There are 20 dentists in the KSA providing services to NHS patients (12 on Anglesey and eight in Menai Mainland). These practices have a total of 31 dentists. Patient enrolment waiting lists are between one month and two years. Dentist practices are predominantly located in areas of higher population density, such as Bangor, Caernarfon, Holyhead, Llangefni and Menai Bridge.

6.5 Recreation and leisure facilities

Libraries

6.5.1 There are 10 libraries on Anglesey, providing a range of services including:

- books in Welsh and English;
- large print books;
- books on tape;
- exhibitions;
- various information services;
- fax services; and
- free internet access.

6.5.2 In addition, there is a library and information service provided for the housebound on Anglesey. It is provided on a monthly basis and there are currently around 230 registered users of the service. There is also a mobile community library service provided for those who live in an area not directly served by a static library service.

6.5.3 There are approximately 1.5 libraries per 10,000 population on Anglesey, although there is variation across sub-areas:

- Anglesey North – 2.4 libraries;
- Anglesey South – 1.7 libraries; and
- Anglesey West – 0.8 libraries.

6.5.4 The number of visits to public libraries on Anglesey in 2014/15 was just under 4,200 per 1,000 population; one of the lowest rates among all 22 local authorities and substantially lower than the Welsh average (5,526). The number of visits to public libraries in Gwynedd was similar to that on Anglesey, but Conwy (5,100) and Denbighshire (5,800) had more visits per thousand population.

Leisure centres

6.5.5 There are four local authority-run leisure centres on Anglesey and a further five in the Menai Mainland:

- Anglesey North – one (Amlwch);
- Anglesey South – two (Menai Bridge, Llangefni);
- Anglesey West – one (Holyhead); and
- Menai Mainland – five (Caernarfon (two), Bangor, Bethesda and Penygroes).

6.5.6 The leisure centres provide a range of facilities including sports halls, swimming pools, multi-purpose rooms and squash courts, as summarised in table 6-6. Participant numbers are the visits per year to these facilities.

Table 6-6 Public sector sports centres [RD61] and [RD62]

Name of facility	Provider	Facilities and service offer	Participant numbers	Area
Amlwch Leisure Centre	Public	Fitness centre, 25m swimming pool, artificial sports pitch, five-a-side football, multi-purpose sports hall, tennis, badminton, basketball, netball, volleyball.	158,821	Anglesey North
David Hughes Leisure Centre	Public	Fitness centre, five-a-side football, multi-purpose sports hall, tennis, badminton, basketball, netball, spinning, dance studio, cricket.	33,173	Anglesey South
Holyhead Leisure Centre	Public	Fitness centre, 25m swimming pool, multi-purpose sports hall, table tennis, badminton, basketball, netball, volleyball, squash.	150,991	Anglesey West
Plas Arthur Leisure Centre	Public	Fitness centre, 25m swimming pool, sports pitch, artificial pitch, seven-a-side football, hockey pitch, multi-purpose sports hall, badminton, basketball, netball, squash, skate park.	210,754	Anglesey South
Arfon Leisure Centre	Public	Fitness centre, 25m swimming pool, five-a-side football, multi-purpose sports hall, tennis, badminton, basketball, netball, squash.	163,153	Arfon (Menai Mainland)

Name of facility	Provider	Facilities and service offer	Participant numbers	Area
Arfon Tennis Centre	Public	Fitness centre, tennis, multi-purpose sports hall, climbing wall.	55,809	Arfon (Menai Mainland)
Bangor Swimming Pool	Public	Fitness centre, 25m swimming pool, five-a-side football.	122,765	Arfon (Menai Mainland)
Plas Ffrancon Leisure Centre Bethesda	Public	Fitness centre, football pitch, badminton.	56,740	Arfon (Menai Mainland)
Plas Silyn Leisure Centre	Public	Fitness centre, football pitch, five-a-side football, badminton, squash.	61,061	Arfon (Menai Mainland)

6.5.7 The percentage of adults who regularly participated in sport and active recreation on Anglesey was 44% in 2008-09, in line with the Welsh average. The percentage in Gwynedd was slightly higher at 48%.

6.5.8 On Anglesey, there were around 8,400 visits per thousand population to local authority sport and leisure centres in 2014-15, slightly below the Welsh average (8,700). It was, however, much lower than in neighbouring Gwynedd (13,800). It is not possible to obtain information on usage for individual leisure centres.

Post office

6.5.9 There are 48 post offices in the study area: 30 on Anglesey and 18 in Arfon. There are more in areas with higher population densities, such as Bangor (three), Caernarfon (four) and Holyhead (three). The benchmark criteria for service accessibility of post offices are for "*95% of the total rural population across the UK to be within three miles of their nearest Post Office outlet*" [RD63]. Within the study area, all the major centres of population are within a three-mile radius of a post office. This only shows the post offices within the study area; on the mainland, coverage would be improved if post offices outside of the study area were included. Small gaps in service provision exist within close proximity to the Brynteg and Newborough Forest areas of Anglesey.

6.6 Emergency services

6.6.1 Further information is being compiled on the emergency services, including information that has been requested from the North Wales Police force.

Police

6.6.2 The North Wales Police force has 10 police stations within the KSA, located in Llangefni, Amlwch, Benllech, Holyhead, Menai Bridge, Caernarfon, Bangor, Bethesda, Llanberis and Penygroes. It should be noted that not all these police stations have public front counters, and those that do are only open for a restricted number of hours per week. Data suggest that the force has an estimated total of over 1,800 FTE staff. Almost 1,000 of the staff have a Police Constable role.

6.6.3 Table 6-7 shows that overall staffing levels of the North Wales Police service increased between 2012 and 2015, despite a recent reduction in Police Community Support Officers.

Table 6-7 Full-time equivalent staffing of North Wales Police

Rank	March 2012	March 2013 (Year-on-year change)	March 2014 (Year-on-year change)	March 2015 (Year-on-year change)
Officers	1,454	1,483 (+2.0%)	1,464 (-1.3%)	1,487 (+1.6%)
Police Community Support Officers	219	262 (+19.6%)	267 (+1.9%)	243 (-9.0%)
Police staff	806	873 (+8.3%)	881 (+0.9%)	885 (+0.5%)
Total	2,479	2,618 (+5.6%)	2,613 (-0.2%)	2,615 (+0.1%)

6.6.4 An assessment of police staffing resource within the North Wales Police force per 1,000 people is presented in Table 6-8.

Table 6-8 Full-time equivalent staffing per rank in the North Wales Police (2015)

Rank	Number of staff per 1,000 People
Police Constable	1.44
Police Community Support Officer	0.38
Police Sergeant	0.27
Detective Constable	0.22
Detective Superintendent	0.06
Force Communications Centre – staff	0.23
Force Communications Centre – officers	0.05
Crime Scene Investigator	0.04

6.6.5 In total, there were 55.71 crimes per 1,000 people recorded across North Wales in the year to March 2016 (table 6-9). This rate was much higher than the rates recorded in both Anglesey and Gwynedd of 42.26 per 1,000 population and 49.83 per 1,000 population, respectively. Recorded crime was highest for offences categorised as 'violence and sexual offences'.

Table 6-9 Recorded crime per 1,000 population in the year to March 2016

Crime type	Isle of Anglesey	Gwynedd	North Wales Constabulary	Wales
All crime	42.26	49.83	55.71	61.2
Bicycle theft	0.21	0.39	0.80	1.0
Burglary	2.54	3.66	5.09	5.5
Criminal damage and arson	8.48	9.40	10.66	10.2
Drugs	1.85	2.09	2.05	3.1
Other crime	1.10	0.97	1.01	1.2
Other theft	4.59	5.58	6.07	6.8
Possession of weapons	0.23	0.36	0.32	0.3
Public order	1.50	2.69	2.14	3.5
Robbery	0.17	0.13	0.22	0.2
Shoplifting	3.68	5.19	5.55	5.6
Theft from the person	0.21	0.20	0.29	0.6
Vehicle crime	1.71	2.09	2.96	4.7
Violence and sexual offences	15.99	17.09	18.56	18.5

Fire service

6.6.6 The North Wales Fire and Rescue Service has 44 stations covering an area of 2,400 square miles across North Wales. There are 21 fire stations located within North Wales, seven stations on Anglesey and 14 stations in Gwynedd, three of which are located in the Arfon area. The service employs around 850 staff in operational and support roles across the North Wales region.

6.6.7 Within the KSA, fire service staff are primarily located in Holyhead, Caernarfon and Bangor which have staffed stations with full fire crews employed. The remaining stations are all unmanned for the most part with crew only attending the fire station when they receive an emergency callout.

6.6.8 The numbers of staff at each station are variable depending on the number of hours of cover provided and are subject to change due to ongoing recruitment.

6.6.9 The North Wales Fire and Rescue Service has a transport fleet of around 54 fire appliances, one incident command unit and 31 'special' vehicles (all-terrain and foam carriers) across North Wales. All fire stations on Anglesey and Gwynedd have at least one rescue pump fire engine with the main stations at Holyhead on Anglesey, and Caernarfon and Bangor in Gwynedd, accommodating two rescue pumps with additional facilities including an environmental protection unit, technical rescue unit, aerial ladder platform, incident response unit and water incident unit.

6.6.10 Smaller stations at Llangefni and Amlwch on Anglesey, and Porthmadog, Blaenau Ffestiniog and Dolgellau in Gwynedd also accommodate additional narrow access appliances. These can be utilised across North Wales as and when required. The remaining stations accommodate just one rescue pump fire engine.

Ambulance service

6.6.11 The Welsh Ambulance Service is the provider of emergency and urgent care services alongside patient transport services to planned hospital appointments and outpatient clinics. The service also provides a health courier service that provides clinical logistics services across all health boards in Wales and operates the NHS Direct Wales service. The service is therefore complex in nature and provides a number of different functions.

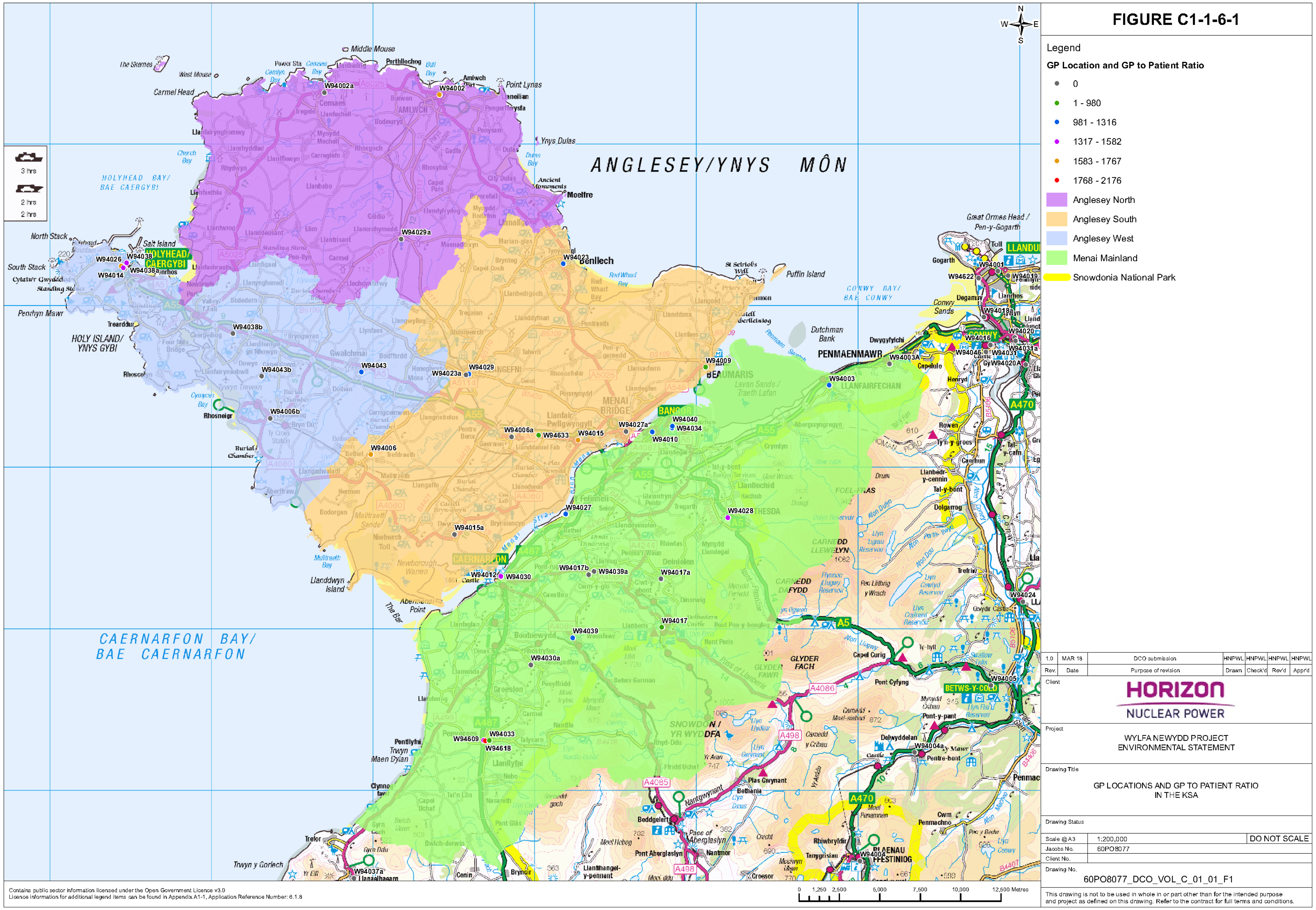
6.6.12 The Welsh Ambulance Service is responsible for all ambulance services in Wales including emergency and urgent care services alongside patient transport services to planned hospital appointments and outpatient clinics. The service dealt with 432,300 calls across Wales in 2014. Of these, 7% or 29,700 were from Anglesey and Gwynedd. Comparing these figures against the population, there were approximately 0.16 calls per head of population on Anglesey and in Gwynedd and 0.14 calls per head of population in Wales as a whole.

6.6.13 In September 2015, there were 872[103] calls made from Anglesey to the Welsh Ambulance Service, equivalent to 2.4% of total calls made in Wales. Of these, around 36% were category A (immediately life-threatening). Only around 51% of the category A calls made on Anglesey are currently answered within the allotted eight minutes, below the Welsh average of 56%.

6.6.14 Around 299,100 calls were made to NHS Direct Wales in 2014. A geographic breakdown of the calls made is not available, but this equates to an average of 0.16 calls per head of population within the service area. Based on the population of Anglesey and Gwynedd, an estimated 29,700 calls were made from those two local authority areas.

[103] [RD13]: Hlth1305

Figure 6-1 GP surgeries in the KSA and the GP to patient ratio



7 Tourism

7.1 Summary of key points

- In 2015, the total economic effect of tourism on Anglesey was estimated to be around £279 million, a 7.1% increase on 2014, with the total number of visitor days increasing to 5.54 million.
- Around 4,000 jobs on Anglesey are related to tourism, largely in accommodation, food and drink and retail, with a further 15,200 in Gwynedd.
- The tourism bed stock on Anglesey decreased by almost 9% between 2008 and 2011, with falls in self-catering accommodation and camping accommodation.
- The number of businesses that are quality assured by Visit Wales has fallen from 204 in 2008 to 116 in 2011.

7.2 North Wales tourism

7.2.1 Wales attracted 86.5 million visitors during 2015 with a total economic impact of £7.7 billion [RD38]. Visitors to North Wales were one third of the total for Wales (29.1 million), and around 37% of the total economic effect of tourism was recorded in North Wales (£2.9 billion).

7.2.2 The North Wales Economic Observatory [RD8] [RD9] includes information on tourism for the North Wales region (information within the following section is presented from this source unless stated otherwise).

Apprenticeships

7.2.3 The number of leisure, sport and travel apprenticeships on Anglesey (and throughout North Wales and Wales as a whole) has dwindled since 2006-07. Apprenticeships in the North Wales region are shown in Table 7-1.

Table 7-1 Number of leisure, sport and travel work-based learning programme apprenticeships by area (2006-07 to 2014-15)

Area	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Isle of Anglesey	25	10	5	5	10	5	-	-	-
Gwynedd	65	45	15	-	5	-	-	10	15
Conwy	75	65	50	50	45	25	35	35	35
Denbighshire	40	35	30	25	25	25	30	35	40
Flintshire	80	70	60	45	50	55	45	45	30
Wrexham	70	20	10	10	15	20	25	50	55

Area	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Wales	1,210	810	695	1,090	1,185	820	905	1,045	920

7.2.4 The number of hospitality work-based learning programmes has also dwindled since 2006/7, with levels on Anglesey now at half what they were; the loss in North Wales and Wales as a whole is less substantial.

Table 7-2 Number of hospitality work-based learning programmes by area (2006-07 to 2014-15)

Area	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Isle of Anglesey	115	100	85	85	90	55	40	60	60
Gwynedd	130	95	75	100	160	190	90	105	85
Conwy	220	195	190	155	160	140	155	165	135
Denbighshire	145	140	105	90	95	60	65	130	110
Flintshire	70	70	75	55	55	65	70	105	100
Wrexham	85	95	95	95	80	70	65	85	75
Wales	3,320	2,675	2,150	1,920	2,120	2,120	2,380	2,825	2,305

Tourism businesses

7.2.5 Table 7-3 outlines the businesses within the accommodation and food sector along with percentages in the entertainment, recreation and other service businesses. The data demonstrate that Anglesey is broadly similar to Wales as a whole but has a slightly lower percentage of accommodation businesses compared to Gwynedd and Conwy.

Table 7-3 Tourism-related businesses by area[104] (percentage of total businesses) (March 2015)

Area	Percentage of accommodation and food service businesses (%)	Percentage of arts, entertainment, recreation and other service businesses (%)
Isle of Anglesey	10.6	5.7
Gwynedd	11.2	6.4
Conwy	11.6	7.1
Denbighshire	8.6	6.3
Flintshire	6.3	5.9

104 [RD9]

Area	Percentage of accommodation and food service businesses (%)	Percentage of arts, entertainment, recreation and other service businesses (%)
Wrexham	6.3	7.6
Wales	8.2	6.9

Employers

7.2.6 Stena Line is a major employer on Anglesey associated with operations at the port. Recent years have seen a number of news reports describing a need to compete with low-price competitors. In February 2015 the fast ferry service from Holyhead to Ireland was discontinued against claims that passenger numbers had fallen by 90%. In December 2014, Stena Line announced a larger vessel (offering an increase in passenger numbers from 400 to 1,200 per trip).

7.2.7 In 2014, ferry passengers from Holyhead to Ireland (Dublin and Dun Laoghaire) increased by 3% to just over two million [RD64].

STEAM data; expenditure, employment and visitor days

7.2.8 The STEAM model uses locally derived data from a variety of sources including tourist information centres, visitor attractions and events, accommodation bed stocks and occupancy rates. Data are analysed to produce estimates of the number of visitors, visitor days, employment supported by tourism and revenue generated.

7.2.9 Table 7-4 includes an overview of tourist economic activity including revenue and expenditure. The table highlights that shopping and accommodation are major sources of expenditure associated with tourism and that non-serviced accommodation is a significant contributor in terms of revenue generation on Anglesey (proportional to serviced accommodation). Expenditure represents monies spent by visitors, while revenue is an alternative way of looking at those monies from the viewpoint of the businesses (in terms of the revenue they make from visitors).

Table 7-4 STEAM assessment: tourism expenditure and revenue (£million)[105] (2015)

Issue (£million)	Isle of Anglesey	Gwynedd	Conwy	Denbighshire	Flintshire	Wrexham
Total expenditure	279.0	963.9	819.8	458.4	238.7	112.0
Direct expenditure	172.9	597.4	514.5	286.7	150.0	70.3
• accommodation	43.6	119.1	113.0	55.9	21.1	11.9
• food & drink	40.2	151.6	119.1	81.1	45.3	19.7

105 [RD38]

Issue (£million)	Isle of Anglesey	Gwynedd	Conwy	Denbighshire	Flintshire	Wrexham
• recreation	15.9	53.6	37.4	23.5	12.9	6.2
• shopping	53.5	201.3	188.1	92.8	54.3	25.3
• transport	19.7	71.8	57.0	33.3	16.3	7.2
Indirect expenditure	71.6	247.1	202.3	114.4	58.8	27.6
Revenue	279.0	963.9	819.8	458.4	238.7	112.0
• serviced accommodation	41.9	89.6	193.4	93.2	37.6	25.2
• non-serviced accommodation	199.7	702.9	317.6	198.5	82.4	15.0
• SFR	8.2	14.2	13.5	14.7	23.9	21.2
• day visitors	29.2	157.2	295.3	152.0	94.8	50.5

Please note that columns may not sum due to rounding

7.2.10 Table 7-5 shows the employment generated by tourism activities, which highlights that the greatest proportion of employment on Anglesey is attributable to accommodation.

Table 7-5 STEAM assessment: employment supported (FTE jobs)[106] (2015)

FTE	Isle of Anglesey	Gwynedd	Conwy	Denbighshire	Flintshire	Wrexham
Direct employment	3,201	12,520	9,830	4,854	2,515	1,334
• accommodation	1,075	4,636	3,255	995	343	353
• food & drink	874	3,298	2,591	1,764	986	428
• recreation	283	954	667	419	230	111
• shopping	824	3,101	2,897	1,429	837	390
• transport	146	530	421	246	120	53
Indirect employment	789	2,723	2,230	1,261	648	304
Employment supported - total	3,990	15,243	12,060	6,114	3,163	1,639

Please note that columns may not sum due to rounding

106 [RD38]

7.2.11 The number of tourist days is shown in Table 7-6 and highlights that Gwynedd has the most significant number, with Anglesey having a comparatively high proportion of tourist days attributed to non-serviced accommodation.

Table 7-6 STEAM assessment: tourist days and tourist numbers (thousands) (2015)[107]

(Thousands)	Isle of Anglesey	Gwynedd	Conwy	Denbighshire	Flintshire	Wrexham
Tourist days	5,538	21,190	17,144	11,131	6,301	2,570
• serviced accommodation	364	941	2,113	782	304	218
• non-serviced accommodation	4,253	16,227	7,893	5,598	2,685	385
• SFR	258	450	428	349	566	503
• day visitors	663	3,573	6,710	4,403	2,746	1,464
Tourist numbers	1,634	6,879	9,288	5,856	3,561	1,863
• serviced accommodation	209	538	1,198	442	173	128
• non-serviced accommodation	653	2,579	1,200	863	404	60
• SFR	108	189	180	146	238	211
• day visitors	663	3,573	6,710	4,403	2,746	1,464

Please note that columns may not sum due to rounding

7.3 Anglesey tourism

7.3.1 Current efforts are being made to promote the tourist industry on Anglesey. In particular, short-stay holidays are regarded as an important element in the growth of the tourism sector. Formal attractions on the island include Beaumaris Castle, Anglesey Sea Zoo, Plas Newydd Country House and Gardens and Pili Palas. Anglesey also offers sandy beaches, low-lying farmlands and historic remains. In 1967, much of the Anglesey coastline was designated as an AONB.

7.3.2 The seasonality of the tourism industry within Anglesey is a major issue with peaks associated with summer months and school holidays.

Visitor accommodation provision

7.3.3 There is a substantial supply of tourist accommodation in the KSA, with an estimated 61,400 bed spaces in total. The Menai Mainland has the largest

107 [RD38]

proportion (45%), followed by Anglesey South (26%), Anglesey West (16%) and Anglesey North (12%).

7.3.4 Table 7-7 shows the breakdown by type of accommodation across the four subdivisions of the KSA.

Table 7-7 Estimates of tourist bed-space distribution by KSA subdivision[108] (2013)

Accommodation type	Anglesey North	Anglesey South	Anglesey West	Menai Mainland	KSA
Hotels, guest houses and B&Bs	215	1,241	1,327	4,164	6,947
Self-catering	453	1,157	2,062	2,740	6,411
Caravans & camping	6,962	13,761	6,345	18,360	45,428
Other e.g. hostels	0	106	0	2,544	2,650
Total	7,630	16,265	9,733	27,808	61,436

Occupancy

7.3.5 Average bed occupancy for Wales in 2013 was 45%, with 61% for room occupancy [RD65]. The average room occupancy for all types of property in North Wales was 56% per annum with lower levels of accommodation room occupancy evident in smaller rurally located properties. Generally, in Wales, accommodation in more remote locations that is graded at two stars or below (priced at around £45.00 per night) with 10 rooms or less achieves the lowest occupancy (45-53%).

7.3.6 This is the case on Anglesey and in Gwynedd where the limited range of branded quality accommodation is evident. Bedroom stock is predominantly independent and small scale located in the two to three-star quality range. Volumes are low and extremely seasonal.

Key attractions

7.3.7 The main tourist attractions within the KSA according to Visit Anglesey [RD66] are:

- Caernarfon Castle;
- National Slate Museum;
- Holyhead Breakwater Country Park;
- Plas Newydd Country House and Gardens;

108 [RD65]

- Oriel Ynys Môn;
- Penrhyn Castle;
- Greenwood Forest Park, Y Felinheli;
- Anglesey Sea Zoo;
- Foel Farm Park;
- RibRide Adventure Boat Tours;
- Anglesey Model Village and Gardens;
- Anglesey Riding Centre;
- Amlwch Copper Kingdom;
- Beaumaris Castle;
- Pili Palas Nature World;
- South Stack lighthouse;
- Holyhead Maritime Museum;
- Anglesey Motor Racing Circuit; and
- Anglesey Showground.

7.3.8 With the exception of Amlwch Copper Kingdom, these attractions are located a distance (more than 5km) from the Wylfa Newydd Development Area, with further attractions located within North West Wales.

7.3.9 Table 7-8 shows the number of visitors to tourism attractions within the KSA for 2013, 2014 and 2015. The three attractions on Anglesey with the highest number of visits in 2015 were Holyhead Breakwater Country Park, the National Slate Museum and Plas Newydd, all receiving over 100,000 visits.

Table 7-8 Tourism attractions within the KSA and total visits (2013 to 2015)

Attraction	2013 total visits	2014 total visits	2015 total visits	% change 2014 to 2015
Amlwch Copper Kingdom	NP	5,496	7,897	44
Amlwch Heritage Centre*	NP	6,700	-	-
Beaumaris Castle	83,823	86,84	82,368	-5
Beaumaris Court House*	NP	3,915	-	-
Beaumaris Gaol*	NP	8,543	-	-
Dingle Local Nature Reserve	68,256	60,000	60,000	0

Attraction	2013 total visits	2014 total visits	2015 total visits	% change 2014 to 2015
Holyhead Breakwater Country Park	116,593	120,000	120,000	2.9
Llynnon Mill*	NP	5,472	-	-
Moelfre Seawatch*	35,616	40,000	-	-
National Slate Museum	144,462	154,608	140,828	-9
Oriel Ynys Môn*	188,138	80,065	-	-
Plas Newydd Country House and Gardens	92,752	113,061	128,536	14
South Stack Lighthouse	19,478	14,039	15,024	7
South Stack Nature Reserve	-	113,849	113,950	0

* Did not take part in the Wales Visitor Attraction Survey 2015

NP – not provided

STEAM assessment data; expenditure, employment and visitor days

7.3.10 STEAM assessment data for Anglesey for 2014 and 2015 are provided in the following sections. Table 7-9 presents a summary of the most recent STEAM data published for Anglesey. The data show that the number of day visitors to Anglesey increased in 2015 by 5.5%.

Table 7-9 Summary STEAM tourism statistics for Anglesey (2014 and 2015)

STEAM data	2014 (million)	2015 (million)	% change
Total economic impact (direct and indirect expenditure)	£260.5	£279.0	7.1
Visitor days	5.25	5.54	5.5
Staying visitor days	4.61	4.88	5.9
Number of visitors	1.58	1.63	3.2
Number of staying visitors	0.93	0.97	4.3
Number of day visitors	0.65	0.66	1.5

7.3.11 Table 7-10 shows the expenditure and revenue associated with the tourism sectors. The greatest increase in expenditure has been for recreation with a 12.7% increase. In terms of revenue, the largest increase has been from non-serviced accommodation (9%), which is the greatest contributor to the revenue.

Table 7-10 STEAM assessment: expenditure and revenue by type (£million) (2014 and 2015)

Sector	2014 (million)	2015 (million)	% change
Total expenditure	260.4	279.0	7.1
Direct expenditure	161.2	172.9	7.2
accommodation	41.5	43.6	5.1
food and drink	37.4	40.2	7.4
recreation	14.1	15.9	12.7
shopping	50.2	53.5	6.5
transport	18.0	19.7	9.5
Indirect expenditure	67.0	71.6	6.8
Revenue	260.4	279.0	7.1
serviced accommodation	41.0	41.9	2.3
non-serviced accommodation	183.3	199.7	9.0
SFR	8.1	8.2	0.7
day visitors	28.1	29.2	3.8

Please note that columns may not sum due to rounding

7.3.12 The STEAM data for 2015 show that 3,990 FTE jobs are supported by tourism spend on Anglesey. This has decreased by 0.3% since 2014, as shown in Table 7-11.

Table 7-11 STEAM assessment: sectors in which employment is supported (FTE jobs) (2014 and 2015)

Sectors in which employment is supported	2014	2015	% change
Direct employment	3,161	3,201	1.3
• accommodation	1,062	1,075	1.2
• food and drink	726	874	20.4
• recreation	331	283	-14.5
• shopping	887	824	-7.1

Sectors in which employment is supported	2014	2015	% change
• transport	156	146	-6.4
Indirect employment	839	789	-6.0
Total	4,000	3,990	-0.3

Please note that columns may not sum due to rounding

7.3.13 Table 7-12 shows the number of tourist days and the number of tourists per accommodation type, demonstrating an increase of 5.5% between 2014 and 2015. The number of tourist days and the number of tourists for day visitors and those staying in serviced accommodation increased by 2.8% and 6.7% respectively over the same period.

Table 7-12 STEAM assessment: tourist days and tourist numbers (thousands) (2014 and 2015)

Category	2014 (thousands)	2015 (thousands)	% change
Tourist days	5,250	5,538	5.5
• serviced accommodation	361	364	0.8
• non-serviced accommodation	3,986	4,253	6.7
• SFR	258	258	0.0
• day visitors	645	663	2.8
Tourist numbers	1,579	1,634	3.5
• serviced accommodation	208	209	0.7
• non-serviced accommodation	618	653	5.7
• SFR	108	108	-0.2
• day visitors	645	663	2.8

Please note that columns may not sum due to rounding

7.4 Wider trends

7.4.1 International tourist arrivals (overnight visitors) reached a record breaking 1.13 billion worldwide and generated 9% of global Gross Domestic Product in 2014. Europe was at the forefront of this growth, contributing a total of 582 million arrivals [RD67]. In 2015, growth was expected to continue at a sustained level of 3-4% worldwide. The advance release of the United Nations World Tourism Organisation (UNWTO) World Tourism Barometer found that the number of international tourist arrivals grew by 4.4% in 2015 to reach a total of 1.18 billion worldwide [RD68].

7.4.2 The 2015 State and Outlook on the European Environment Report confirms that tourism is one of the fastest growing economic sectors in the last few decades, despite the recent worldwide financial crises. Five member states of Europe (France, Spain, Italy, the UK and Germany) are among the world's top 10 destinations for tourists. As a result, this industry has become a key sector of the European economy. In the immediate post-Brexit climate, this is unlikely to change, with the UK and Wales experiencing growth in domestic and international tourism. This is the result of the lower value of Sterling, encouraging international visitors and discouraging UK residents from holidaying overseas. Furthermore, security fears among UK tourists with respect to a number of traditional destinations in addition to concerns about migrant routes and the wider UK economy has helped to fuel a demand for 'staycations'.

7.4.3 According to a recent EU-28 survey, 30% of respondents mentioned 'nature' as one of their main reasons for visiting and 46% said that the natural features of a holiday destination would persuade them to return to the same place [RD69]. This identifies that there is a clear relationship between tourism and the environment.

7.4.4 Tourism is currently worth around £127 billion to Great Britain's economy. A large proportion of this is domestic; however, tourism is Great Britain's seventh largest export industry with inbound tourism (from overseas visitors) currently valued at £26.2 billion [RD70].

7.4.5 In 2014, Wales attracted 10 million overnight visitors from elsewhere in the UK, generating £1.7 billion in expenditure. A further 932,000 international visitors came to Wales, which contributed £368 million to the Welsh economy [RD71]. At a regional level, tourism is vitally important to the North Wales economy. It brings in £1.8 billion of income to the region each year and supports 37,000 direct jobs [RD72].

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8 Community well-being

8.1 Summary of key points

- The survey of personal well-being shows that Anglesey residents, on average, have a higher overall life satisfaction than across Wales and the rest of the UK.
- The WIMD shows that 2% of Anglesey's areas fall in the 10% most deprived areas in Wales, compared to 10% of areas across Wales [RD6].

8.2 Personal well-being

8.2.1 The ONS undertakes annual surveys into personal well-being estimates based on data from the Annual Population Survey that includes responses from around 165,000 people. This provides a large representative sample of adults aged 16 and over living in residential households in the UK. In 2015-16, the average ratings for each of the four measures of personal well-being are:

- 7.66 points out of 10 for life satisfaction (up 0.01 points on the previous year);
- 7.84 points out of 10 for feeling that what one does in life is worthwhile (unchanged from the previous year);
- 7.48 points out of 10 for happiness yesterday (up 0.02 points on the previous year); and
- 2.90 points out of 10 for anxiety yesterday (up 0.01 points on the previous year).

8.2.2 People are asked to give their answers on a scale of 0 to 10, where 0 is 'not at all' and 10 is 'completely'. These questions allow people to make an assessment of their life overall, as well as providing an indication of their day-to-day emotions. Although 'yesterday' may not be a typical day for an individual, the large sample means that these differences 'average out' and provide a reliable assessment of the self-reported anxiety and happiness of the adult population in the UK over the year.

8.2.3 It is important to remember that the findings presented are based on survey estimates and are subject to a degree of uncertainty. They should therefore be interpreted as providing a good estimate, rather than an exact measure of personal well-being in the UK.

8.2.4 Table 8-1 presents the averages for the 2015-16 survey and shows preferable scores for Anglesey for all indicators compared to the UK average.

Table 8-1 Personal well-being indicators[109] (2015-16)

Indicator	Isle of Anglesey	UK average	Difference
Life satisfaction	7.83 out of 10	7.65 out of 10	+0.18
Worthwhile	8.00 out of 10	7.84 out of 10	+0.16
Happiness	7.67 out of 10	7.48 out of 10	+0.19
Anxiety	2.57 out of 10	2.87 out of 10	-0.3

8.2.5 Rhys noted the rankings of personal well-being experienced by Anglesey [RD74]:

8.2.6 *"The findings showed that Anglesey and Gwynedd had the highest levels of wellbeing in Wales, with more than a third of people on Anglesey rating their satisfaction with life and their happiness as nine or 10"*[110].

8.3 General health

8.3.1 The 2011 Census included a question asking people to describe their general health as 'Very Good Health', 'Good Health', 'Fair Health', 'Bad Health' or 'Very Bad Health' [RD7]. Self-assessed health draws together an individual's perception of all aspects of their health and well-being and is a useful indicator of general well-being and health-related quality of life. Table 8-2 includes the results for Anglesey compared to Gwynedd and Wales (2011 data). It highlights that a significant proportion (48%) of people within Anglesey have defined themselves as having 'Very Good Health', which is greater than the Welsh average, while Gwynedd has a slightly higher proportion (50.4%).

Table 8-2 General health (%) (2011)

	Isle of Anglesey (%)	Gwynedd (%)	Wales (%)
Very Good Health	48.0	50.4	46.6
Good Health	30.6	30.7	31.1
Fair Health	15.1	13.6	14.6
Bad Health	4.9	4.1	5.8
Very Bad Health	1.4	1.2	1.8

8.4 Life expectancy

8.4.1 The population of Anglesey and Gwynedd is living longer, in line with the Welsh life expectancy average. Life expectancy for men as of 2012 is 78 and 82 for

[109] [RD73]

[110] [RD74]

women [RD75]. However, those living in the most deprived areas are predicted to live about seven years less than those living in the most affluent areas.

8.5 Lifestyle factors

8.5.1 The summary of lifestyle factors in the following sections provides background information and context for the assessment of impacts on communities.

Obesity and nutrition

8.5.2 Being overweight or obese (Body Mass Index (BMI) of 25 or over) significantly increases an individual's risk of cardiovascular disease, diabetes mellitus, stroke and some cancers including endometrial, breast and colon. Maternal obesity is a particular issue.

8.5.3 Table 8-3 shows the percentage of adults in Wales who are overweight or obese with rates rising from 57% in 2008-09 to 58% in 2014-15. These figures are taken from the Welsh Government's Welsh Health Surveys (undertaken annually). The figures reveal that whilst the Welsh figures as a whole are increasing, those for Anglesey were decreasing up to 2011-12 before increasing between 2012 and 2014. The figures for Anglesey decreased again in 2014-15.

Table 8-3 Obesity levels in Wales by area (%)[111] (2008-09 to 2014-15)

Area	2008-09 (%)	2009-10 (%)	2010-11 (%)	2011-12 (%)	2012-13 (%)	2013-14 (%)	2014-15 (%)
Isle of Anglesey	57	55	55	55	58	59	58
Gwynedd	58	57	54	55	55	53	52
Conwy	53	52	54	56	56	54	57
Denbighshire	54	55	56	55	57	58	61
Flintshire	56	57	58	58	57	58	60
Wrexham	52	54	56	58	60	59	58
BCUHB	55	55	55	56	57	57	58
Wales	57	57	57	58	58	58	58

8.5.4 A healthy balanced diet is important for good health; it is also an essential requisite for healthy growth and development in children and adolescents.

8.5.5 Table 8-4 shows that in 2014-15, 32% of the population in Wales self-report eating the recommended levels of fruit and vegetables daily (five portions a day). The percentage of adults who reported eating five or more portions of fruit and vegetables decreased on Anglesey and Gwynedd from 2008-09 to

111 [RD58]

2011-12, before increasing slightly for Anglesey over 2012-13 and again over 2014-15; Wales, however, has slightly declined on average.

Table 8-4 Population eating recommended level of fruit and vegetables by area (%)[112] (2008-09 to 2014-15)

Area	2008-09 (%)	2009-10 (%)	2010-11 (%)	2011-12 (%)	2012-13 (%)	2013-14 (%)	2014-15 (%)
Isle of Anglesey	39	38	36	36	37	36	37
Gwynedd	42	41	39	39	38	35	35
Conwy	37	35	35	35	37	36	33
Denbighshire	37	36	37	35	36	34	32
Flintshire	37	35	32	31	33	34	33
Wrexham	31	32	36	37	33	35	33
BCHUHB	37	36	36	36	36	35	34
Wales	36	35	34	33	33	33	32

Physical activity

8.5.6 People who have a physically active lifestyle have approximately 50% less risk of developing coronary heart disease, stroke and type 2 diabetes mellitus compared to those who have a sedentary lifestyle and can reduce their risk of premature death by about 20% to 30%.

8.5.7 The Welsh Health Survey shows the percentage of adults in the BCUHB who are currently meeting physical activity guidelines (those adults who do at least 30 minutes of moderate intensity physical activity on five or more days a week) in Table 8-5. For Anglesey, the percentage of adults who reported being physically active on five or more days a week stood at 38%, 7% higher than the Wales average in 2014-15.

Table 8-5 Adults who reported being physically active on five or more days in the past week by area (%)[113] (2008-09 to 2014-15)

Area	2008-09 (%)	2009-10 (%)	2010-11 (%)	2011-12 (%)	2012-13 (%)	2013-14 (%)	2014-15 (%)
Isle of Anglesey	29	32	32	32	32	35	38
Gwynedd	34	32	32	34	33	35	37
Conwy	32	31	32	31	30	32	33
Denbighshire	33	34	34	32	30	33	35
Flintshire	29	30	30	28	32	33	33

[112] [RD58]

[113] [RD58]

Area	2008-09 (%)	2009-10 (%)	2010-11 (%)	2011-12 (%)	2012-13 (%)	2013-14 (%)	2014-15 (%)
Wrexham	28	29	32	30	27	30	33
BCUHB	31	31	32	31	30	33	34
Wales	29	29	29	29	29	30	31

Alcohol

8.5.8 Alcohol is a major preventable cause of death and illness in Wales. Around 1,000 deaths are due to alcohol per year in Wales. Table 8-6 below shows the percentage of adults who self-reported drinking above guidelines (21 units per week for men and 14 units per week for women). Anglesey has one of the lowest levels of excess alcohol consumption of the six Unitary Authorities and a lower level than the average for Wales.

8.5.9 The Welsh Health Survey shows the percentage of adults who self-reported drinking above guidelines (in the week prior to when the survey was conducted) on Anglesey was 38% in 2014-15, 2% lower than Wales as a whole. This level has fallen from 42% in 2008-09.

Table 8-6 Adults who reported drinking above guidelines on at least one day in the past week by area (%)[114] (2008-09 to 2014-15)

Area	2008-09 (%)	2009-10 (%)	2010-11 (%)	2011-12 (%)	2012-13 (%)	2013-14 (%)	2014-15 (%)
Isle of Anglesey	42	43	42	40	40	38	38
Gwynedd	47	44	43	43	42	42	40
Conwy	42	43	44	45	42	39	38
Denbighshire	43	44	42	40	42	42	41
Flintshire	46	46	45	44	44	44	42
Wrexham	43	43	42	42	43	41	38
BCUHB	44	44	43	43	43	41	40
Wales	44	44	44	43	42	41	40

Binge drinking is defined for men as drinking more than eight units and for women as drinking more than six units of alcohol on any one day.

8.5.10 Table 8-7 below shows the percentage of adults who reported binge drinking on at least one day in the past week when asked. Binge drinking has declined over the last few years in young adults aged 16-24 years in the UK.

8.5.11 Anglesey and Gwynedd have experienced declines in the percentage of adults who reported binge drinking in the past week (prior to the Welsh Health Survey being conducted) between 2008-09 and 2014-15.

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114 [RD58]

Table 8-7 Adults who reported binge drinking on at least one day in the past week by area (%)[115] (2008-09 to 2014-15)

Area	2008-09 (%)	2009-10 (%)	2010-11 (%)	2011-12 (%)	2012-13 (%)	2013-14 (%)	2014-15 (%)
Isle of Anglesey	27	27	25	23	23	23	24
Gwynedd	29	27	27	27	26	25	24
Conwy	25	26	26	28	25	21	20
Denbighshire	28	27	24	22	23	25	25
Flintshire	27	27	29	28	29	28	26
Wrexham	27	27	25	26	25	23	22
BCUHB	27	27	26	26	26	25	24
Wales	27	27	27	27	26	25	24

Illicit drugs

8.5.12 The rate of drug misuse per 100,000 population on Anglesey fell below that of Wales in 2012-13 and has remained below the Welsh average until 2014-15. In 2015-16, it increased exceeding the Welsh average. A similar pattern has been seen elsewhere in North Wales, although the rate of drug misuse per 100,000 population in Denbighshire and Flintshire rose sharply above the Welsh average in 2014-15, with Flintshire exceeding the Welsh average in 2015-16.

Table 8-8 Rate of drug misuse per 100,000 population by area[116] (2011-12 to 2015-16)

Area	2011-12	2012-13	2013-14	2014-15	2015-16
Isle of Anglesey	353	237	234	185	226
Gwynedd	335	208	214	193	237
Conwy	369	218	165	195	170
Denbighshire	398	241	205	237	194
Flintshire	265	159	181	243	219
Wrexham	480	306	292	374	328
Wales	256	252	246	225	215

[115] [RD58]

[116] [RD76]

Health[117]

8.5.13 Teenage conception rates have generally been falling on Anglesey and Gwynedd over recent years. However, in 2011, the number of conceptions in young women between 15-17 years old on Anglesey was 37.8 per 1000 women and 37.0 in Gwynedd, higher than the Welsh average of 34.2.

8.5.14 Chlamydia is the most common sexually transmitted infection diagnosed in Wales, whose rates continue to decrease following the peak in 2008. The incidence of gonorrhoea has also decreased after a peak in 2009. Sexually transmitted infection rates are highest amongst those aged under 24.

8.5.15 The percentage of the population who reported having health problems or disabilities that limited their ability to carry out activities was 20.5% for Gwynedd and 23.1% for Anglesey. This compares to 22.7% in Wales as a whole.

Health care

8.5.16 The number of people who provide unpaid care in Gwynedd has increased from 11,247 in 2001 to 12,443 in 2011 (+1,192 persons or 10.6%), which is equivalent to 10.3% of the population. Anglesey has also seen an increase in those providing unpaid care from 7,220 in 2001 to 8,042 in 2011 (+822 persons or 11.4%), which is equivalent to 11.5% of the population.

8.5.17 For Wales, 12.1% of the population provides unpaid care of between one and 50 hours in 2011. It is anticipated that there will be a 12% increase in the number of unpaid carers in Wales aged 65+ during the next five years; in addition, there is likely to be an increase in the number of ageing carers who will not be able to continue to care. This will mean an increase in the number of people who will need support and help from formal (i.e. paid) carers.

Mental illness

8.5.18 In 2014, 19% of adults in Wales reported currently being treated for a mental illness. Nine percent of adults reported currently being treated for depression, 8% for anxiety and 2% for another mental illness. The percentage of adults who reported being treated for a mental illness increased towards middle age before decreasing in retirement age. A higher percentage of women (15%) than men (9%) reported being treated for a mental illness.

8.5.19 The 2014 Welsh Health Survey reported 1,486 patients resident in mental health hospitals and units in Wales with a mental illness [RD78]. This figure has shown a gradual decline year on year from 1,821 in 2010.

8.5.20 In 2014, there were a total of 10,294 admissions to mental health facilities in Wales. Of these, 1,692 were formal admissions (detained under a section of the *Mental Health Act 1983* or other legislation) and 8,602 were admitted to hospital when they were unwell without the use of compulsory powers.

[117] [RD75], [RD76] and [RD77]

8.6 Deprivation

8.6.1 The WIMD is the Welsh Government's official measure of relative deprivation for small areas in Wales [RD6] [RD79]. The WIMD is currently made up of eight separate domains of deprivation with each domain compiled from a range of different indicators:

- income;
- employment;
- health;
- education;
- access to services;
- community safety;
- physical environment; and
- housing.

Overall

8.6.2 The WIMD ranks small areas in Wales in terms of deprivation. Around 2% of Anglesey's areas fall in the 10% most deprived areas in Wales but the majority of its areas are more deprived than the Welsh average [RD6].

8.6.3 Overall, over 50% of LSOAs are within the top half of the WIMD and there are not many LSOAs in the bottom deciles (Figure 8-1). This indicates that most areas of Anglesey and Gwynedd do not have overall deprivation issues. However, the different domains may highlight particular issues.

WIMD by domain

8.6.4 The income domain (shown in Figure 8-2) considers the proportion of people in an area with an income below a defined level.

8.6.5 Figure 8-3 shows that over 50% of LSOAs are within the top half of the employment domain, and that there are not many areas in the bottom deciles.

8.6.6 The health domain (figure 8-4) measures premature death and the impairment of quality of life by poor health. It considers both physical and mental health. Anglesey and Gwynedd are not particularly deprived in this measure with less than 30% of LSOAs in the bottom half of the index.

8.6.7 The education domain captures the extent of deprivation in education, skills and training in an area. This includes both the education of children and young people and adult skills. Over 50% of LSOAs are within the top half of the education domain, and there are not many LSOAs in the bottom deciles (as shown in Figure 8-5).

8.6.8 The access to services domain measures the physical and financial accessibility of key local services. This primarily considers 'geographical barriers' which relate to the physical proximity of local services. Both Anglesey and Gwynedd are highly deprived according to this measure (Figure 8-6), with

50% of LSOAs in both Anglesey and Gwynedd in the bottom 20%. The study area is likely to be sensitive to both positive and negative effects upon this domain.

8.6.9 The community safety domain covers actual experience of crime and fire, as well as perceptions of safety whilst out in the local area. Over 50% of LSOAs are within the top half of the community safety domain, and there are not many LSOAs in the bottom deciles (Figure 8-7).

8.6.10 The physical environment domain (Figure 8-8) measures factors in the local area that may affect the well-being or quality of life of those living in an area and includes consideration of flood risk, air quality and proximity to industrial or waste sites. It shows that over 50% of LSOAs are within the top half of the physical environment domain and that there are not many LSOAs in the bottom deciles.

8.6.11 The housing domain aims to capture deprivation through lack of adequate housing, in terms of physical condition, living conditions and availability. Both Anglesey and Gwynedd have areas that are deprived by this measure, with this being a particularly acute issue in Gwynedd (Figure 8-9). It is likely that the area will be sensitive to any development that puts pressure on the supply or condition of housing stock.

Figure 8-1 WIMD overall deprived LSOAs for North Wales (2014)

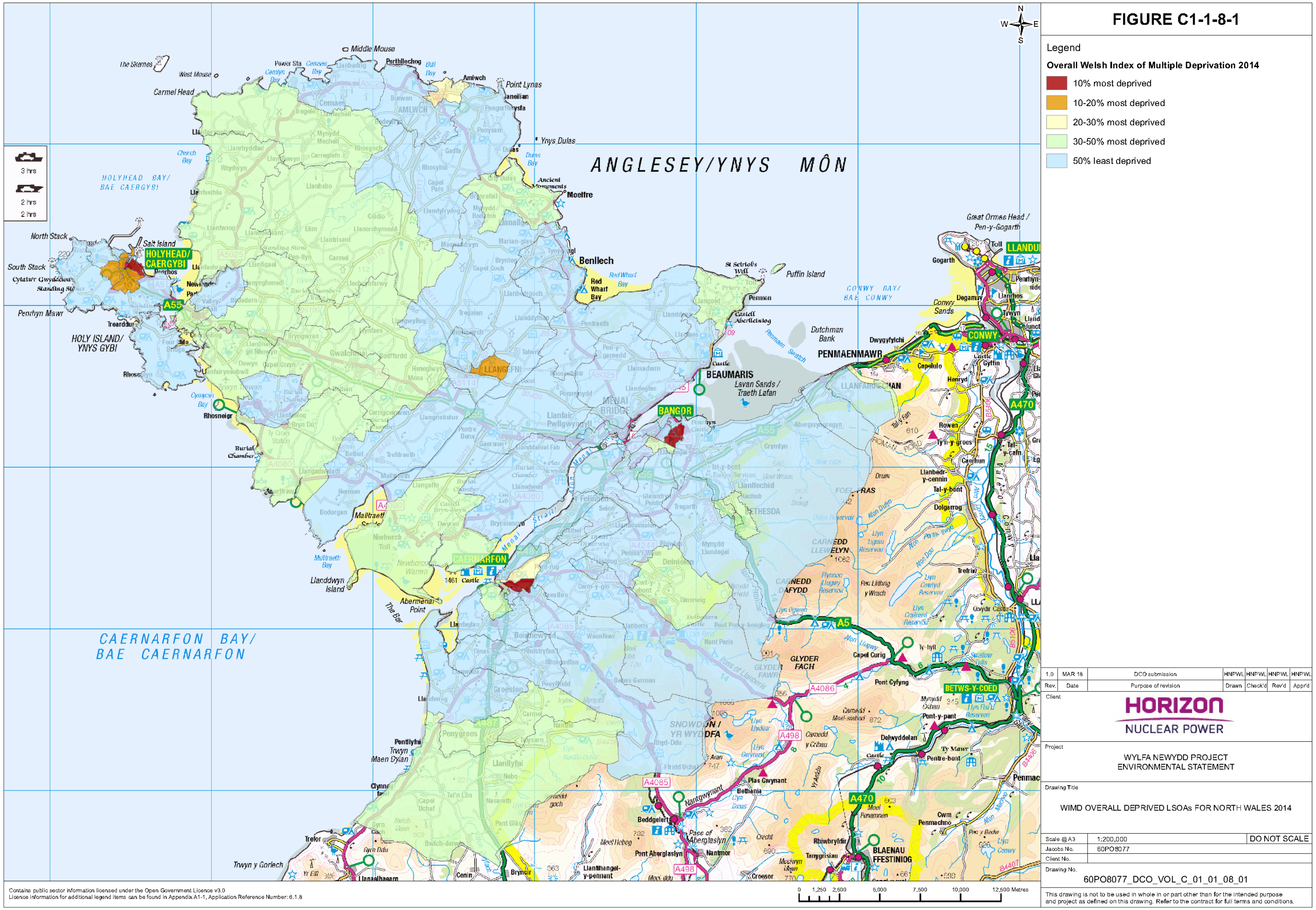


Figure 8-2 Income deprivation (2014)

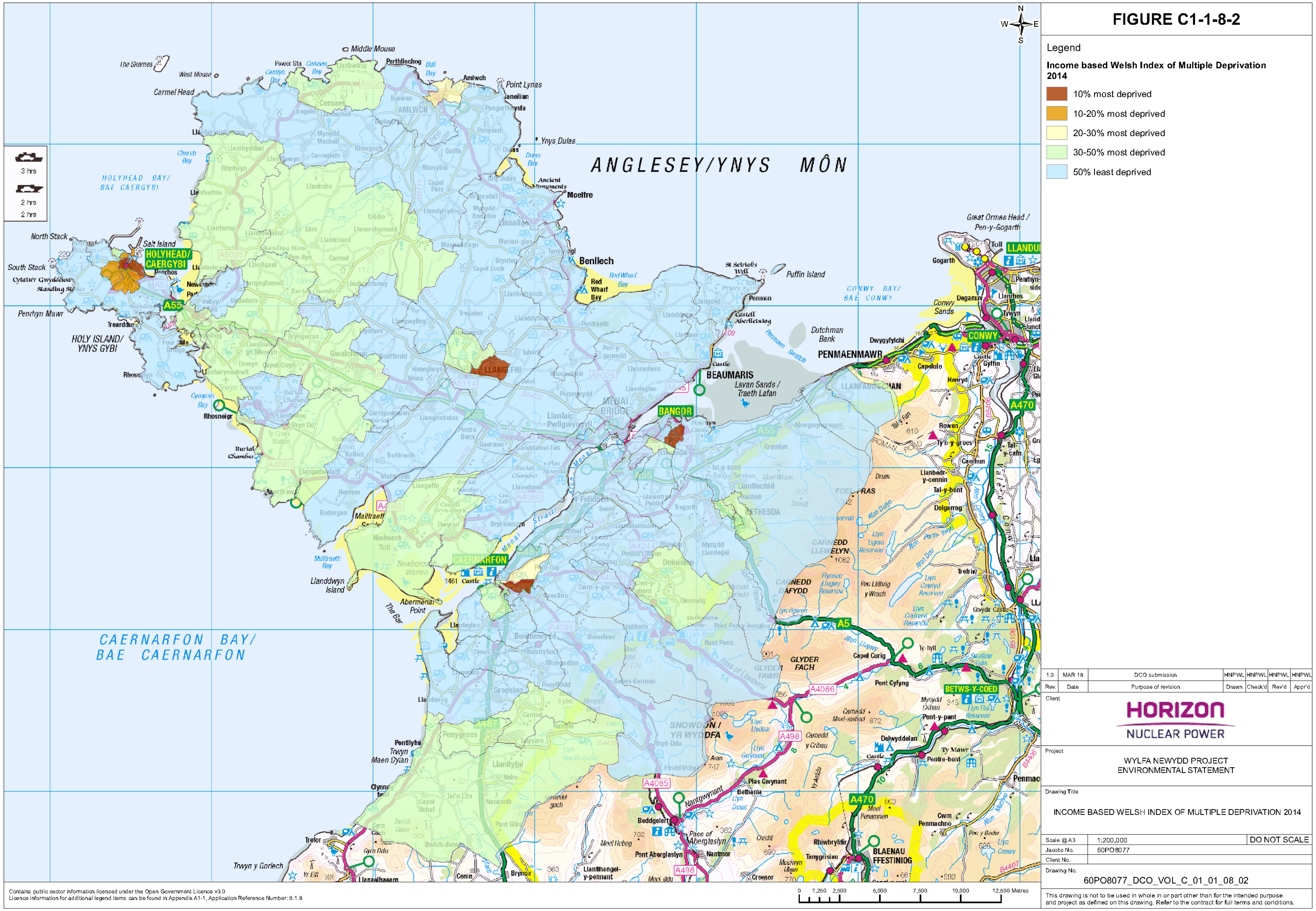


Figure 8-3 Employment deprivation (2014)

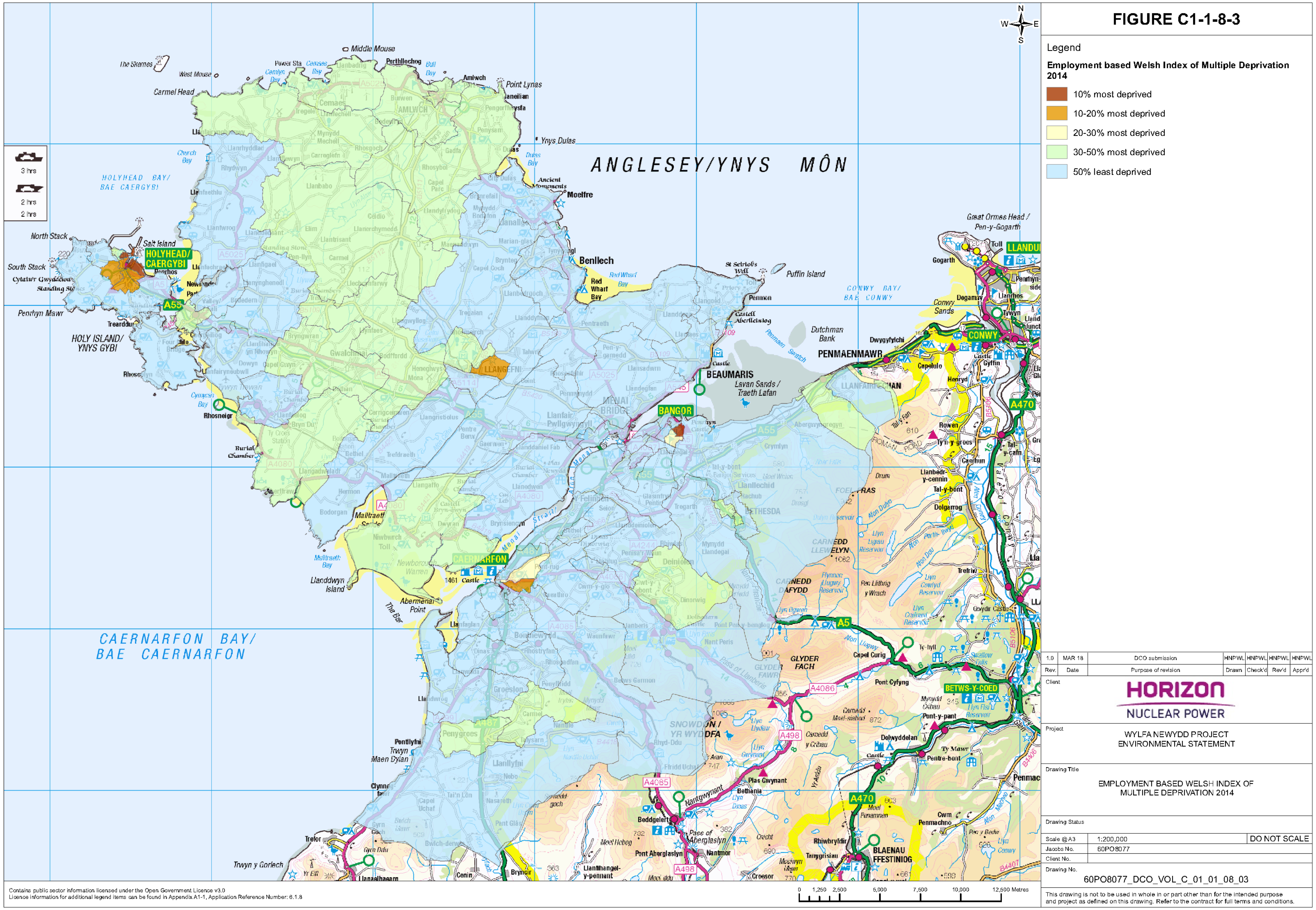


Figure 8-4 Health deprivation (2014)

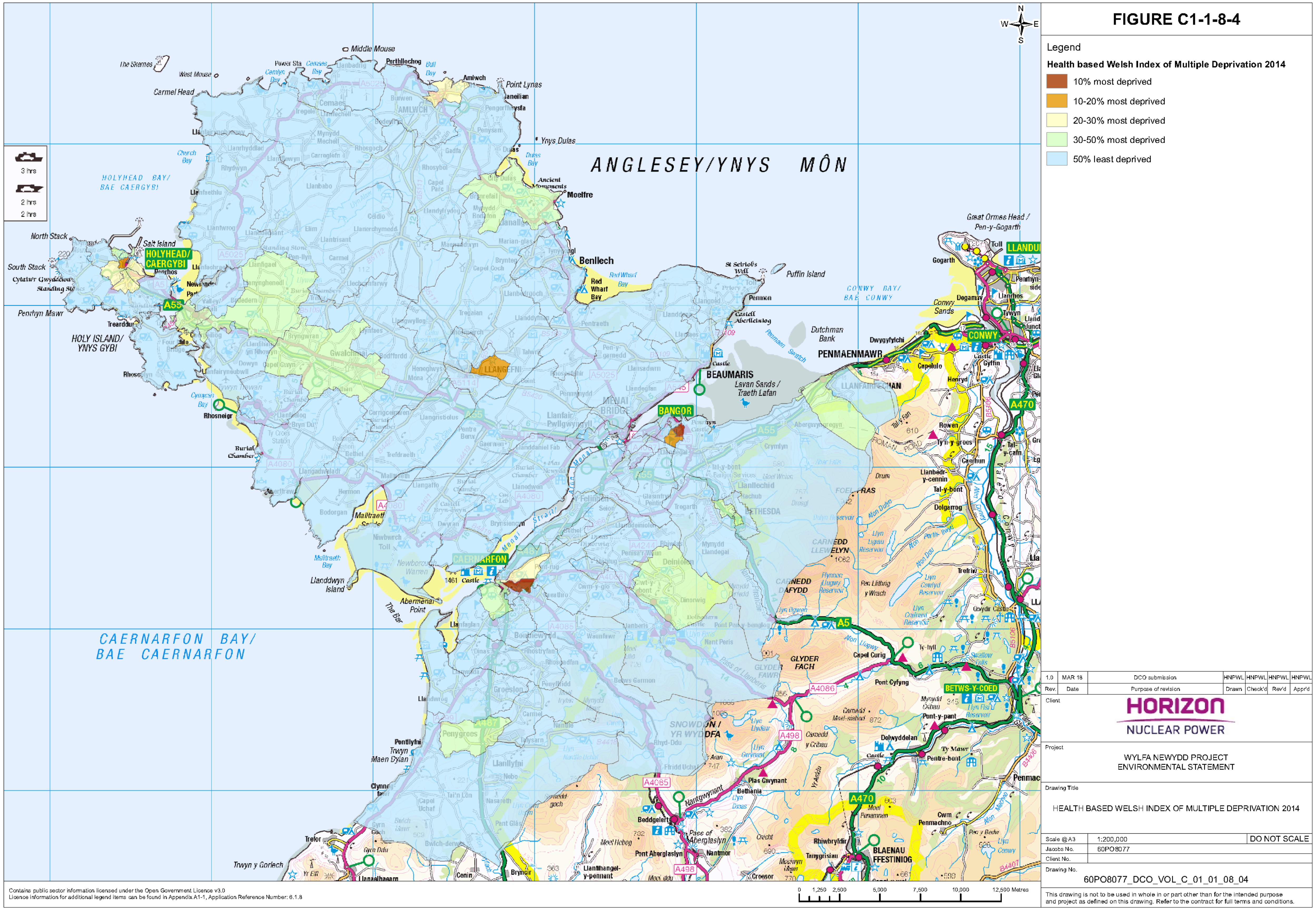


Figure 8-5 Education deprivation (2014)

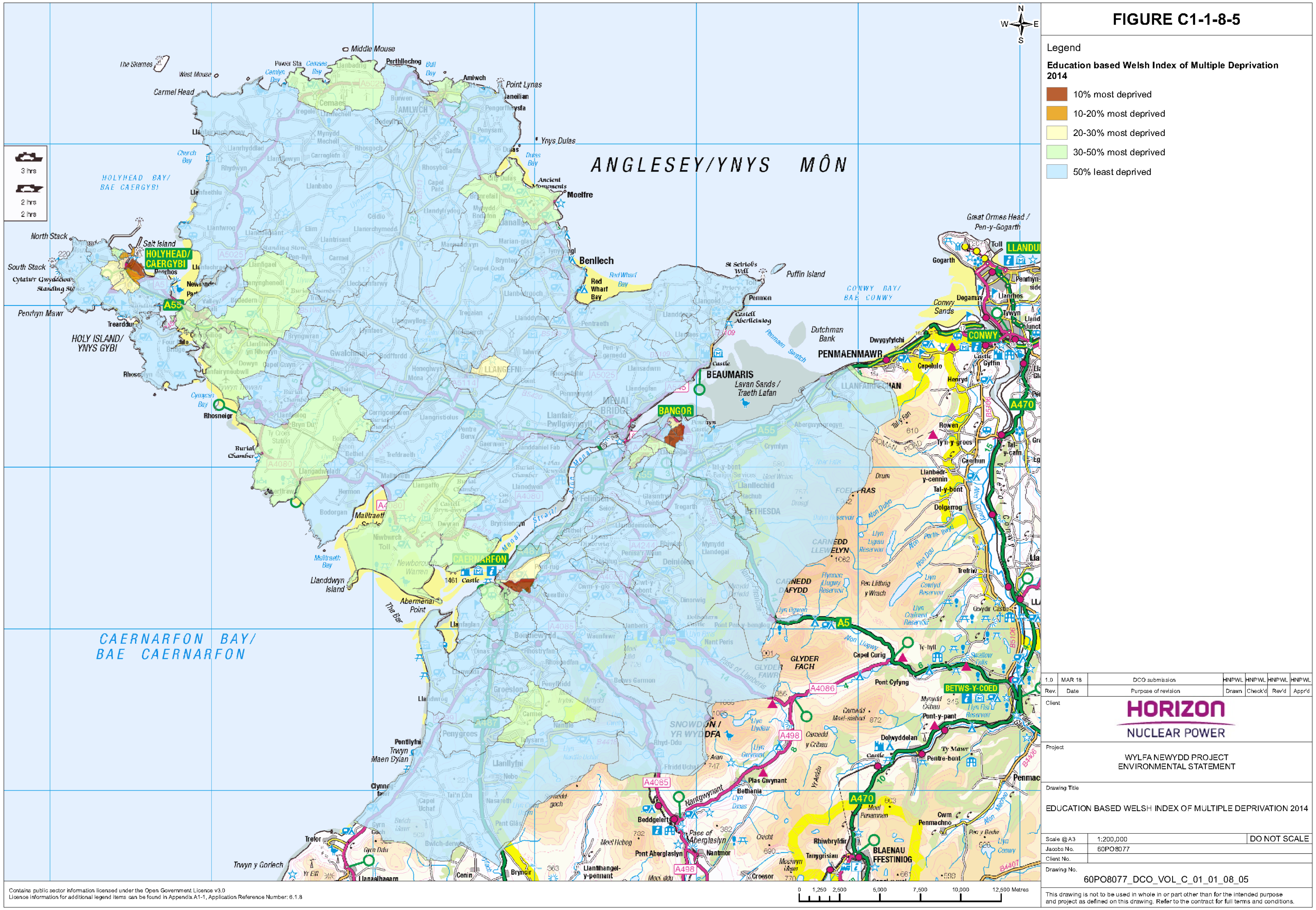


Figure 8-6 Access to services deprivation (2014)

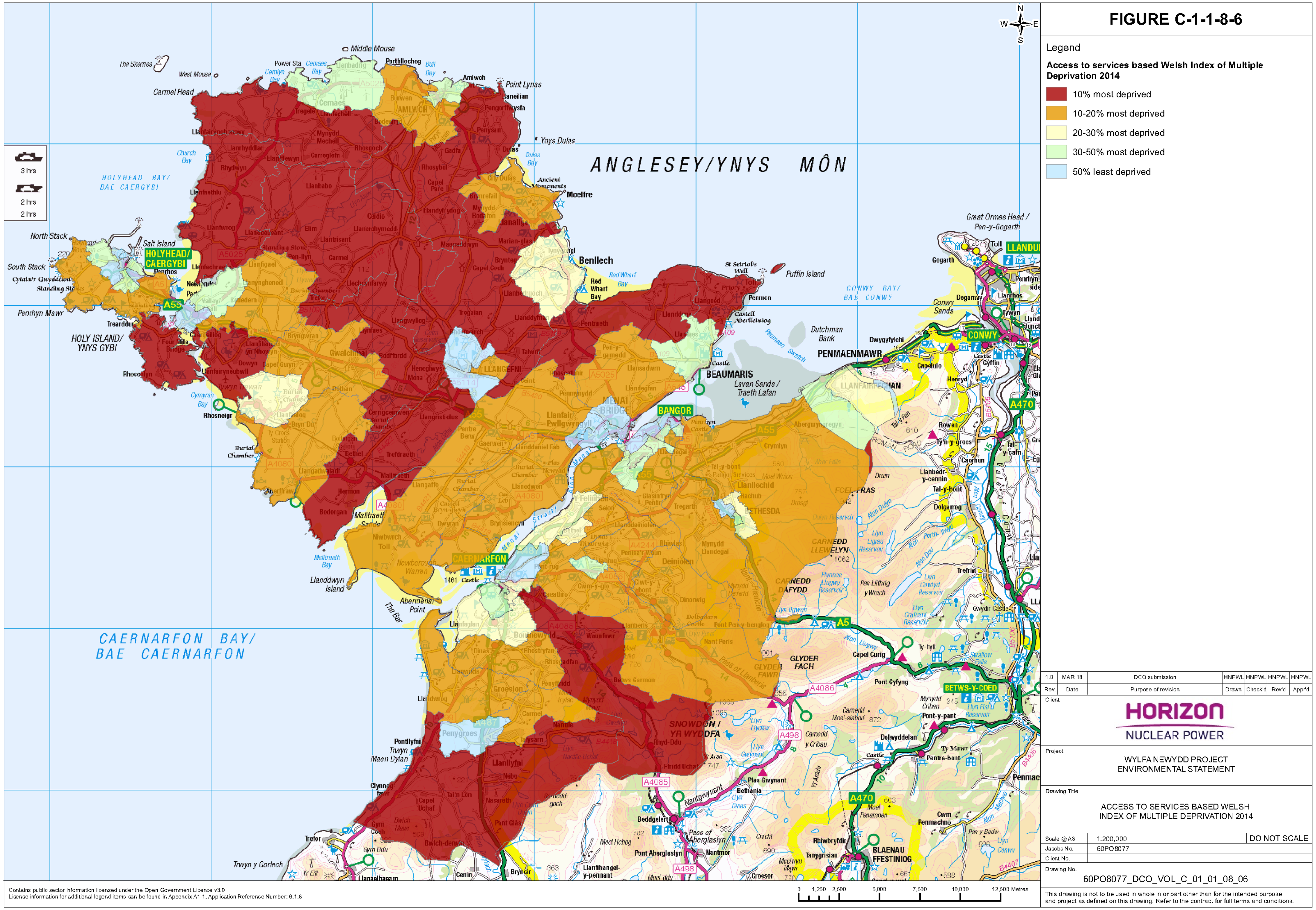


Figure 8-7 Community safety deprivation (2014)

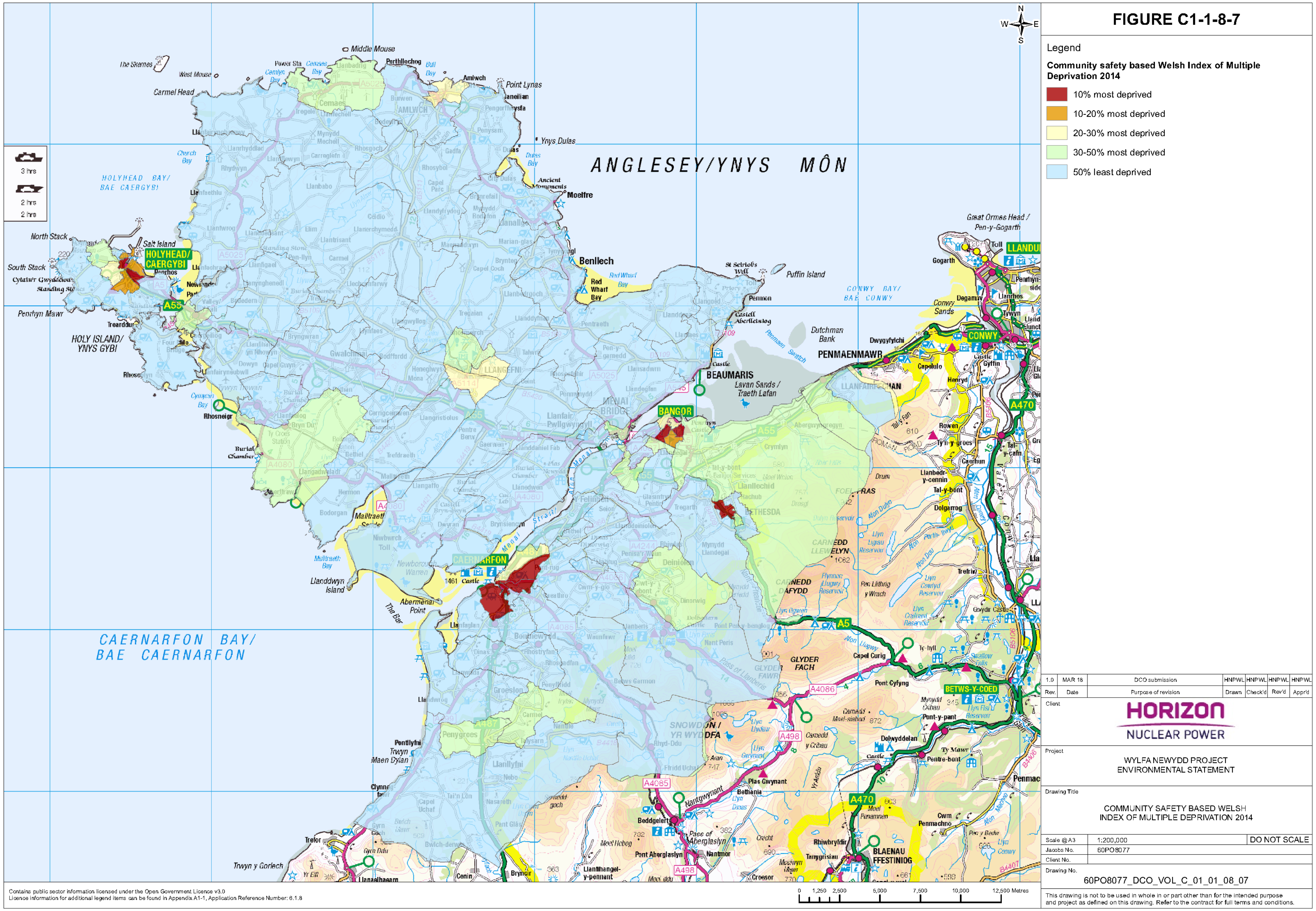


Figure 8-8 Physical environment deprivation (2014)

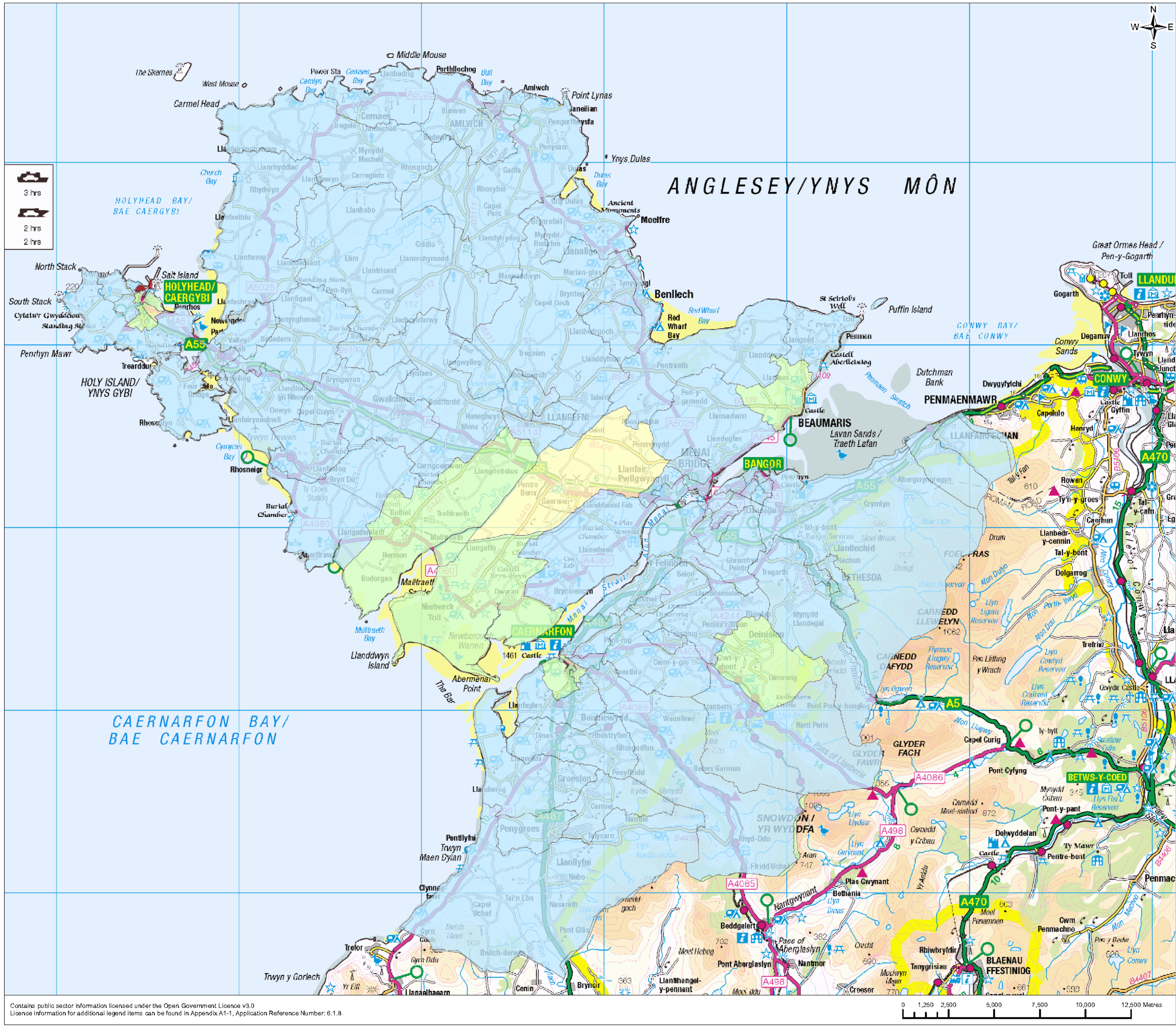


FIGURE C1-1-8-8

Legend

Physical environment based Welsh Index of Multiple Deprivation 2014

- 10% most deprived
- 10-20% most deprived
- 20-30% most deprived
- 30-50% most deprived
- 50% least deprived

Rev.	Date	Purpose of revision	Drawn	Check'd	Rev'd	Appr'd
1.0	MAR 18	DCO submission	HNPWL	HNPWL	HNPWL	HNPWL

Client: HORIZON NUCLEAR POWER

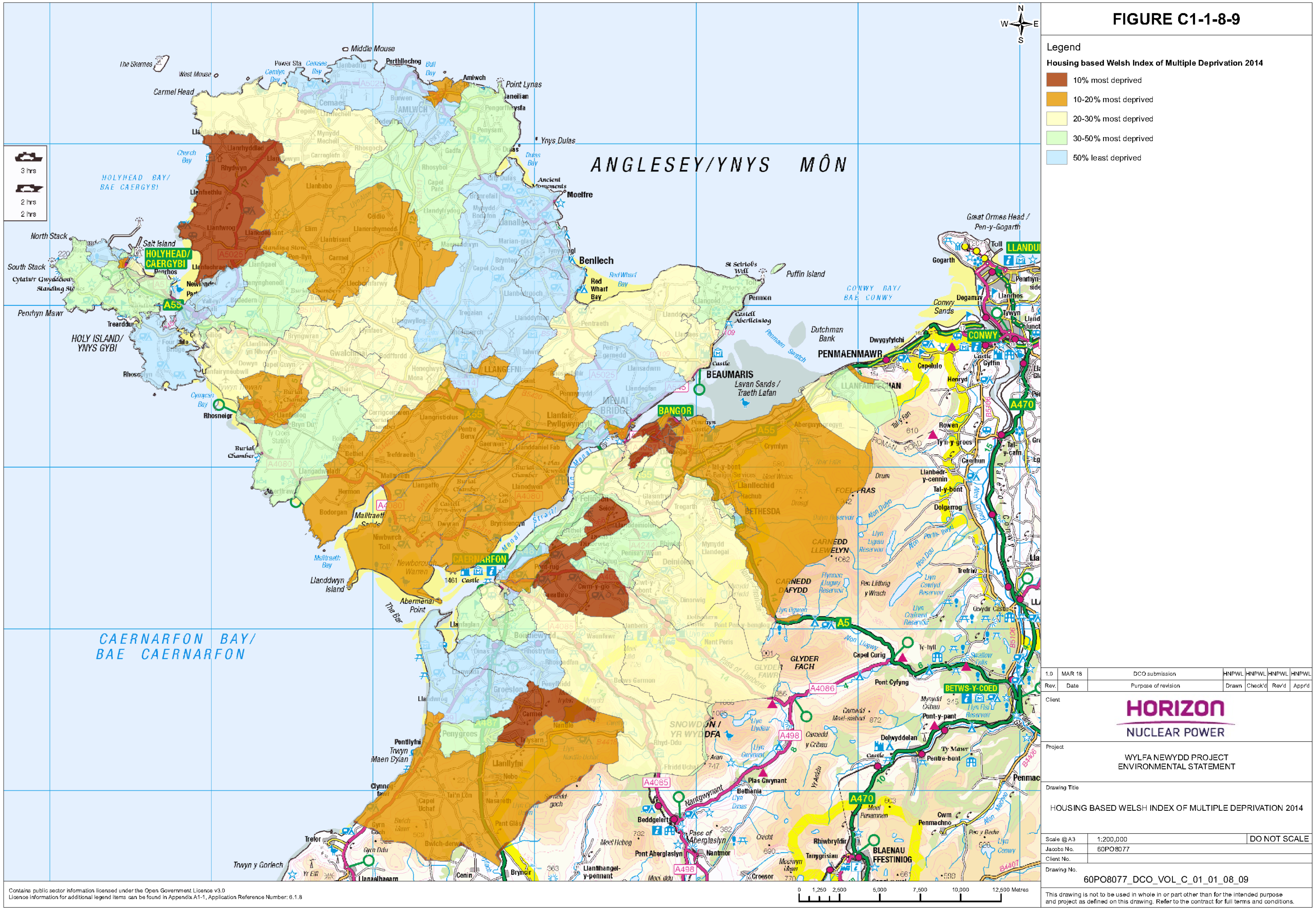
Project: WYLFA NEWYDD PROJECT ENVIRONMENTAL STATEMENT

Drawing Title: PHYSICAL ENVIRONMENT BASED WELSH INDEX OF MULTIPLE DEPRIVATION 2014

Scale @A3	1:200,000	DO NOT SCALE
Jacobs No.	60PO8077	
Client No.		
Drawing No.	60PO8077_DCO_VOL_C_01_01_08_08	

This drawing is not to be used in whole or in part other than for the intended purpose and project as defined on this drawing. Refer to the contract for full terms and conditions.

Figure 8-9 Housing deprivation (2014)



9 Land use

9.1 Summary of key points

- The majority of the land in the KSA is coastal lowland with a substantial presence of agricultural land including small areas of arable farming and pastureland.
- There are a number of designated areas within the KSA, including 206 Sites of Special Scientific Interest and 29 National Nature Reserves. There are also 52 Conservation Areas and one World Heritage Site.
- A number of strategic development sites have been identified in the Anglesey and Gwynedd Joint Local Development Plan linked to the EIP for Anglesey [RD2]. Around 300ha of land has been identified as either a primary or a secondary development site within the KSA.

9.2 Land use overview

9.2.1 The majority of the KSA is coastal lowland, bordered to the south by the mountainous area of Snowdonia National Park. The landscape is dominated by human influence as evidenced by the number of listed buildings, ancient monuments and conservation areas. These features, in addition to the environmental assets, contribute to the area's draw as a tourist destination.

9.2.2 The larger settlements are located along the coast with smaller towns and individual residences scattered throughout. Bangor, with a population of just under 14,000, is the only city. Outside the more developed coastal areas, the area is mainly rural with agriculture being the main land use. There are two airfields (RAF Valley and RAF Mona) and a small number of dedicated commercial/industrial areas.

9.3 Settlements

9.3.1 Anglesey has a population of around 70,000 primarily centred in the two largest settlements, Holyhead and Llangefni. There are eight towns on the island with a population of 100-2,500 and an additional 42 villages with a population of <100. The town of Cemaes and the villages Tregele and Llanfechell are located a short distance (<2 miles) from the Wylfa Newydd Development Area. Outside these settlement areas, there are numerous residences scattered across the island most of which are associated with adjoining farmland.

9.3.2 Within the broader KSA, there are key areas of settlement around the Menai Strait including the city of Bangor and Caernarfon town.

9.4 Commercial and industrial land

9.4.1 In addition to the commercial businesses and light industry located within settlements, there are a small number of commercial and industrial parks located within the KSA. The largest of these are as follows.

- Anglesey:
  Parc Cybi on Holyhead (110ha); and
  Bryn Cefni Industrial Estate (59ha).
- Gwynedd:
  Parc Bryn Cegin (36ha); and
  Llandygai Industrial Estate (28ha).
- Bangor:
  Parc Menai (33ha).
- Caernarfon:
  Cibyn Industrial Estate.

9.4.2 These areas, as well as several smaller sites, are designated within the Joint Local Development Plan (Anglesey and Gwynedd) for the safeguarding of employment/business enterprises [RD2]. However, there is currently poor accessibility by public transport to these major employment sites from the deeper rural areas.

9.4.3 Additional areas zoned for future industrial/commercial development are discussed in the 'other land allocations' section.

9.5 Development land

9.5.1 The Joint Local Development Plan (Anglesey and Gwynedd) Deposit Plan (2017) identifies a number of strategic employment sites to enhance economic growth [RD2]. Particular reference is made to the IACC's EIP, which seeks to capitalise on the significant employment opportunities created by the Wylfa Newydd Project. These sites are organised according to the following hierarchy.

- Primary sites – sites that are likely to be more attractive to the market and are likely to be developed in the short term.
- Secondary sites – sites that are not in the most attractive location as regards to access and market presence in comparison to the primary sites. However, they offer important opportunities which address local demand as well as the potential demand arising from Anglesey EIP/Enterprise Island.
- Reserve sites – sites that have the potential to meet the demand resulting from the Wylfa Newydd Project as well as the rest of the Anglesey EIP/Enterprise Island.
- Strategic regional sites – sites of regional importance with a critical role in achieving regional, and contributing to national, economic development objectives, supporting key sector development.

9.5.2 The Welsh Government has designated seven Enterprise Zones, which are geographical areas that support new and expanding businesses by providing business infrastructure (information technology communications, power, water and transportation), along with further support and incentives. Anglesey is a designated Enterprise Zone that, in combination with the EIP, is intended to bring high skilled jobs to the area.

9.5.3 There are a number of committed sites/projects within the Anglesey Enterprise Zone that are identified to provide supply chain opportunities to local businesses. These include the following:

- the Wylfa Newydd Power scheme on Anglesey;
- the decommissioning of the Existing Power Station;
- Conygar projects in Holyhead;
- SeaGen Wales' proposed tidal array between The Skerries and Camel Head;
- Lateral Power's proposed biomass/eco park;
- Land and Lakes' 800 unit mixed use development in Holyhead;
- Royal Air Force at Valley; and
- Stena Line at Holyhead Port, offering a strategic international gateway.

9.5.4 Table 9-1 below summarises the key primary and secondary employment sites within the KSA and whether these sites are also earmarked as an Enterprise Zone site.

9.5.5 There is a total of 161ha of development land identified as primary sites for employment within the KSA and an additional 144ha of land identified as secondary sites.

Table 9-1 Development land for employment

Site	Vacant area (ha)	Enterprise Zone site	Regional plan status
Primary sites – Isle of Anglesey			
Parc Bryn Cegin, Bangor	36.0	No	Strategic regional site
Llandygai Industrial Estate, Bangor	4.0	No	Not applicable
Parc Menai, Bangor	13.2	No	Strategic sub-regional site
Cibyn Industrial Estate	7.3	No	Strategic sub-regional site
Adwy'r Hafan, Pwllheli	1.5	No	Not applicable
Primary sites – Gwynedd			
Parc Cybi	53.0	Yes	Strategic regional site

Site	Vacant area (ha)	Enterprise Zone site	Regional plan status
Penrhos Industrial Estate	2.7	Yes	Strategic sub-regional site
Bryn Cefni Industrial Estate	18.0	Yes	Not applicable
Lledwigan farm, Llangefni	20.3	Yes	Strategic regional site
Anglesey Creamery	4.9	Yes	Strategic regional site
Secondary sites – Isle of Anglesey			
Former Shell land, Amlwch	7.0	No	Not applicable
Llwyn Onn Industrial Estate, Amlwch	3.2	No	Not applicable
Anglesey Aluminium land, Holyhead	81.7	Yes	Strategic regional site
Former site of Eaton Electrical, Holyhead	2.0	No	Not applicable
Kingsland site, Holyhead	0.8	No	Not applicable
Gaerwen Industrial Estate	25.2	Yes	Strategic regional site
Secondary sites – Gwynedd			
Hirael Bay, Bangor	6.7	No	Not applicable
Felin Fawr, Bethesda	0.4	No	Not applicable
Peblig, Caernarfon	2.2	No	Not applicable
Former site of Friction Dynamex, Caernarfon	7.4	No	Not applicable
Glyn Rhonwy, Llanberis	3.3	No	Not applicable
Penygroes Industrial Estate	4.3	No	Not applicable

9.5.6 There are a select number of committed or reasonably foreseeable developments identified at these sites, namely:

- a biomass fuelled power station on the former Anglesey Aluminium site, Holyhead;
- a biomass combined heat and power plant at Bryn Cefni Industrial Estate; and
- a mixed use development comprising distribution and warehousing space at Parc Cybi.

9.5.7 This still leaves approximately 90ha of primary development land and over 60ha of secondary development land in the KSA available.

9.6 Agriculture

9.6.1 The majority of land in the KSA is agricultural, comprising pastureland and small areas of arable farming.

9.6.2 The Agricultural Land Classification System [RD80] uses a grading system, with Grades 1, 2 and Subgrade 3a being considered Best and Most Versatile Land, Subgrade 3b being considered moderate quality land and Grades 4 and 5 considered poor and very poor quality, respectively.

9.6.3 The Agricultural Land Classification data show that the majority of agricultural land within the KSA falls within Grades 3 and 4, with a smaller proportion in Grade 5. There is no Grade 1 land on Anglesey, and only small areas of Grade 2 land found in the east and south of the island (see Figure 9-1). In the absence of more detailed information, it is assumed that all of the Grade 3 land in the KSA is Subgrade 3a (i.e. Best and Most Versatile land). This assumption will be refined through soil sampling and other on-site surveys to support the assessment as and when required.

9.7 Woodland

9.7.1 There are small areas of woodland on Anglesey, some of which are designated as 'ancient' or 'semi-natural' woodland. The two largest areas, Newborough and Pentraeth Forests, are situated east of Llangefni, approximately 24km from the Wylfa Newydd Development Area. Both of these areas are part of the Welsh Government Woodland Estate and are managed by Natural Resources Wales. Newborough Forest is a key site for the preservation of red squirrel and according to the *Newborough Forest Management Plan 2010-2015* attracts 170,000 visits per annum [RD81].

9.8 Other land allocations

9.8.1 Designations such as flood risk areas, national and international conservation areas, AONBs, etc. can constrain development.

9.8.2 Within the KSA, there are 206 Sites of Special Scientific Interest, 29 National Nature Reserves, 20 Special Areas of Conservation and eight Special Protection Areas. Much of the coastline (138km) is a designated Heritage

Coast and 37,000ha is designated as an AONB. There are 52 Conservation Areas and one World Heritage Site, which includes Caernarfon Castle, town walls and Beaumaris Castle. In addition, the whole of Anglesey is a designated European Geopark, recognising its particular geological heritage.

9.9 Current planning applications

9.9.1 A list of relevant projects will be included in the cumulative impacts assessments of the relevant Town and Country Planning Applications and the Development Consent Order applications relating to the Wylfa Newydd Project.

9.10 Tourism-related land use

9.10.1 Tourism is of significant importance to the local economy as shown in Table 3-3. The environmental resources on Anglesey and around the Menai Strait are a large part of the tourist draw to the area. Tourism is not a land use in and of itself, but rather falls under the other categories of community land, commercial land, etc. In addition to the information on key attractions provided in paragraph 7.3.9, further information on tourism-related land use within the KSA is provided below.

Beaches

9.10.2 One of Anglesey's greatest assets is its coastline, which includes 27 sandy beaches, six of which are Blue Flag beaches:

- Benllech;
- Church Bay;
- Llanddona;
- Llanddwyn;
- Porth Dafarch; and
- Trearddur Bay.

9.10.3 All of these Blue Flag beaches are located a distance (more than 5km) from the Wylfa Newydd Development Area.

Camping and caravan sites

9.10.4 There are numerous camping and caravan sites scattered across Anglesey and north west Wales primarily focused in the coastal areas. The majority of these are close to Moelfre and Benllech on the north-east coast, and Holyhead and Rhosneigr on the south coast.

National Trust land

9.10.5 The National Trust has several land holdings within the study area, which incorporate historic buildings and gardens, beauty spots and large stretches of coastline. The most significant of these in terms of tourism are the Vaynol Estate, Plas Newydd Country House and Gardens, and Penrhyn Castle, which are all located on or near the Menai Strait, some distance (more than 20km) from the Wylfa Newydd Development Area.

Golf courses

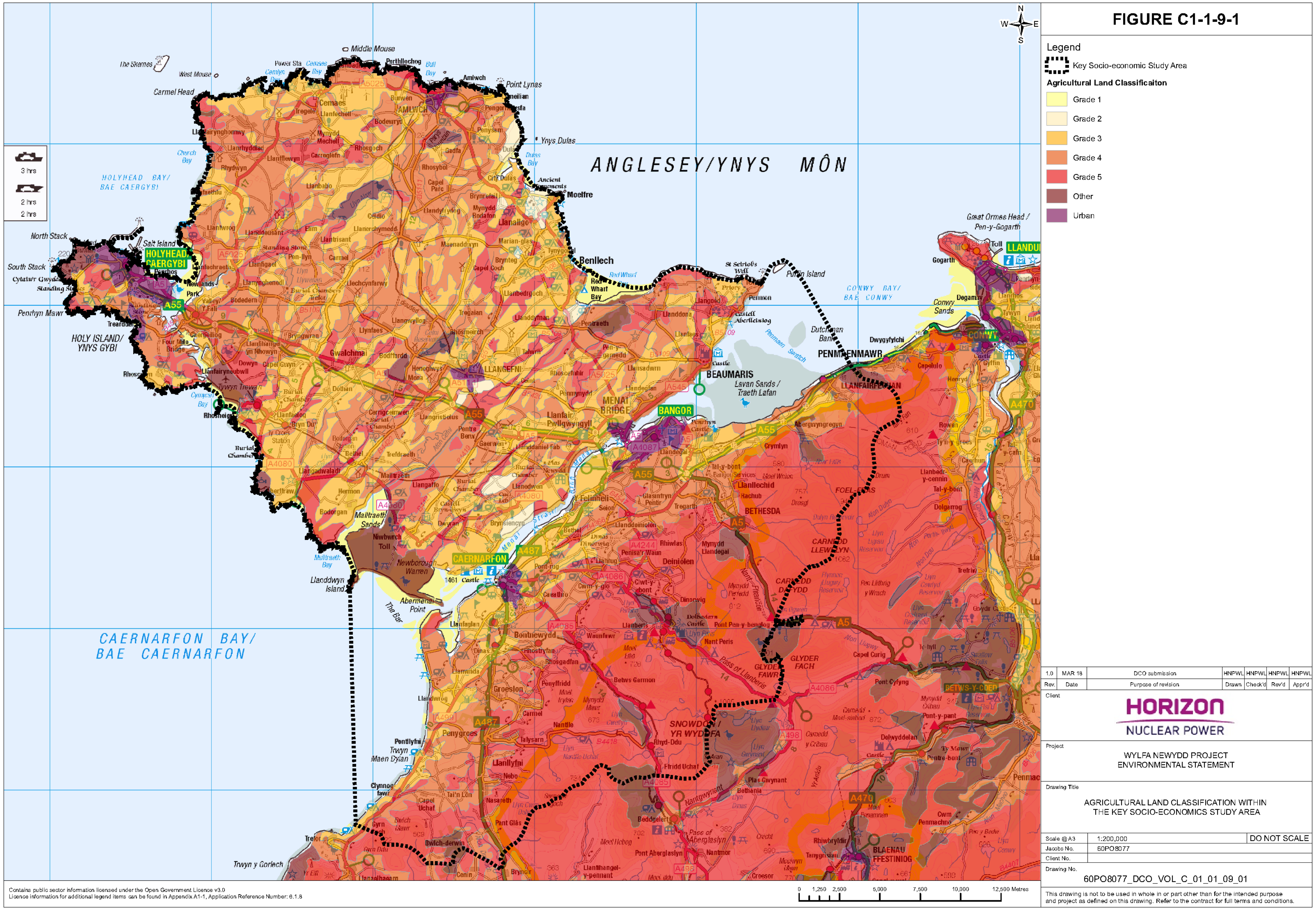
9.10.6 There are 11 golf courses and driving ranges within the study area. Although golf courses are private businesses, they are a key recreational resource, attracting both visitors and local residents. The following are present in the KSA:

- Bull Bay Golf Club, Amlwch;
- Anglesey Golf Club, Rhosneigr;
- Llangefni Golf Course;
- Holyhead Golf Club, Holyhead;
- Caernarfon Royal Town Golf Club, Gwynedd;
- Henllys Golf Club, Beaumaris;
- Baron Hill Golf Club, Beaumaris;
- Llanfairfechan Golf Club, Llanfairfechan;
- Saint Deiniol Golf Club, Bangor;
- Tyddyn Mawr Golf Club, Caernarfon; and
- Treborth Driving Range, Bangor.

Other land use

9.10.7 There are two airfields on Anglesey, RAF Valley and RAF Mona. Anglesey Airport is located to the south-west of the island at RAF Valley, around two miles from the A55 expressway. The airport is owned by the IACC and operates daily flights to Cardiff.

Figure 9-1 Agricultural land classification



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11 Glossary

Full title	Acronym	Description
Agricultural Land Classification	ALC	A system to categorise agricultural land according to versatility and suitability for growing crops. The top three grades, Grades 1, 2 and Subgrade 3a, are referred to as 'Best and Most Versatile' land.
Annual Population Survey	-	A residence-based labour market survey encompassing population, economic activity (employment and unemployment), economic inactivity and qualifications. These are broken down where possible by gender, age, ethnicity, industry and occupation. Available at Local Authority level and above. Updated quarterly.
Area of Outstanding Natural Beauty	AONB	Areas designated under the *Countryside and Rights of Way Act 2000* for the purpose of conserving and enhancing the natural beauty of the designated area.
Cumulative Impact (or effect)	-	Impacts that result from incremental changes caused by other past, present or reasonably foreseeable actions together with this Project.
Daily Construction Commuting Zone	DCCZ	This area is based upon a 90-minute drive time distance from the Wylfa Newydd Development Area defined using Ordnance Survey Open Strategic Shape data. Conclusions drawn from the 'Workforce Mobility and Skills in the UK Construction Sector' (IFF Research/University of Warwick, 2005) indicates that 85% of construction workers living within a 90-minute drive time is a reasonable assumption. The definition is based on a best-fit selection of 2011 Census of Population administrative wards. Any ward penetrated wholly or partially by a 90-minute isochrone has been included in the definition. The area represents the one-way travel limit assumed for workers to commute on a daily basis from their permanent residence (these individuals are referred to as home-based workers). It is from this zone that 'local' employment is identified.

Full title	Acronym	Description
Economic Activity Rate	-	The percentage of the population, both employed and unemployed, which constitutes the manpower supply of the labour market regardless of their current labour status.
Enterprise Zone	EZ	Enterprise Zones are designated areas where specific incentives are offered to attract new businesses and industry to that location.
Existing Power Station	-	The existing Magnox nuclear power station at Wylfa. This is situated near to the proposed Power Station Site. Wylfa A has two Magnox nuclear reactors that were built from 1963 and became operational in 1971. Reactor 2 was retired in 2012 and Reactor 1 were licensed to operate until 31 December 2015
Full-Time Equivalent	FTE	Full-time equivalent employment is calculated by converting all employees' hours in to full-time employees' equivalent – i.e. an employee who works half the hours of a full-time employee is equivalent to 0.5 FTE. This is based on converting part-time employees' hours into a full-time employees' equivalent
Gross Household Disposable Income	GDHI	The amount of money that all of the individuals in the household sector have available for spending or saving after income distribution measures (for example, taxes, social contributions and benefits) have taken effect.
Gross Value Added	GVA	It measures the contribution to the economy of each individual producer, industry or sector in the UK. Nominal GVA is GVA in current prices, i.e. not adjusted to take account of price inflation.
Household	-	Either a single person or members of the same family who live together. A family includes people who are married or living together - including people in same-sex relationships, relatives or half-relatives, e.g. grandparents, aunts, uncles, siblings step-parents and step-children.
Key socio-economic study area	KSA	The KSA represents the area most likely to be affected (both beneficially and adversely) by the Project. It is defined by the two Travel to

Full title	Acronym	Description
		Work Areas (TTWAs) of Bangor and Holyhead. The KSA boundary is defined based on a best-fit selection of 2001 Census of Population administrative wards to the TTWA boundaries.
Language Impact Assessment	LIA	The systematic, criteria-based assessment of the likely impacts of a development or project on language and culture.
Local Unit	-	A local unit is an individual site (factory, site, shop etc.) at which an enterprise conducts its business. A single enterprise can have multiple local units.
Nomenclature of Units for Territorial Statistics	NUTS	A hierarchical classification of administrative boundaries. NUTS3 refers to an administrative level comprising countries or groups of unitary authorities with a population size ranging 150,000 to 800,000.
Private Rented Sector	PRS	Accommodation let through private sector landlord or agencies.
Standard Industrial Classification	SIC	A classification system for use in classifying business establishments and other statistical units by the type of economic activity in which they are engaged.
Standard Occupational Classification	SOC	A common classification of occupational information. Within the context of the classification, jobs are classified in terms of their skill level and skill content.
STEAM	-	The Scarborough Tourism Economic Activity Model produces data estimating the number of visitors, visitor days, employment supported by tourism and the revenue generated within a geographic area.
Super Output Area	SOA	Super output areas were designed to improve the reporting of small area statistics and are built up from groups of output areas. Statistics for lower layer super output areas (LSOA) and middle layer super output areas (MSOA) were originally released in 2004 for Wales. LSOA areas have a maximum population of 3,000 persons and MSOA have

Full title	Acronym	Description
		a maximum of 15,000 persons. LSOA in Wales in the 2011 census totalled 1,909.
Travel to Work Areas	TTWA	Travel to Work Areas for the Wylfa Newydd Power Station are considered to be Bangor and Holyhead with particular focus upon the communities present within proximity of the existing A5025.
Welsh Index of Multiple Deprivation	WIMD	The official measure of relative deprivation for small areas in Wales. It covers eight different types of deprivation: income; employment; health; education; access to services; community safety; physical environment and housing.