



Regulation & Economic Development

Isle of Anglesey – County Profile

**Prepared by: Energy Island Programme Management Office
November 2018**

1. Isle of Anglesey - County Profile

1.1 The following presents a brief, high-level, factual portrait of the Isle of Anglesey to provide context and to assist the Examining Authority in considering various issues raised during the Wylfa Newydd DCO Examination. Further detailed analysis is provided, where appropriate and necessary, in subsequent Chapters of this Local Impact Report.

1.2 Anglesey is an island; the largest inhabited island off the coast of Wales and the seventh largest off the coast of the United Kingdom. It has a surface area of 715 square kilometres and a coastline of 201 kilometres in length. The majority of the coastal area (Fig 1), is designated as Area of Outstanding Natural Beauty. The AONB covers 221 square kilometres (some 31% of the island's surface area). 50km (or 25%), of the island's coastline, (lined in black on Fig 1), is designated as Heritage Coast¹.

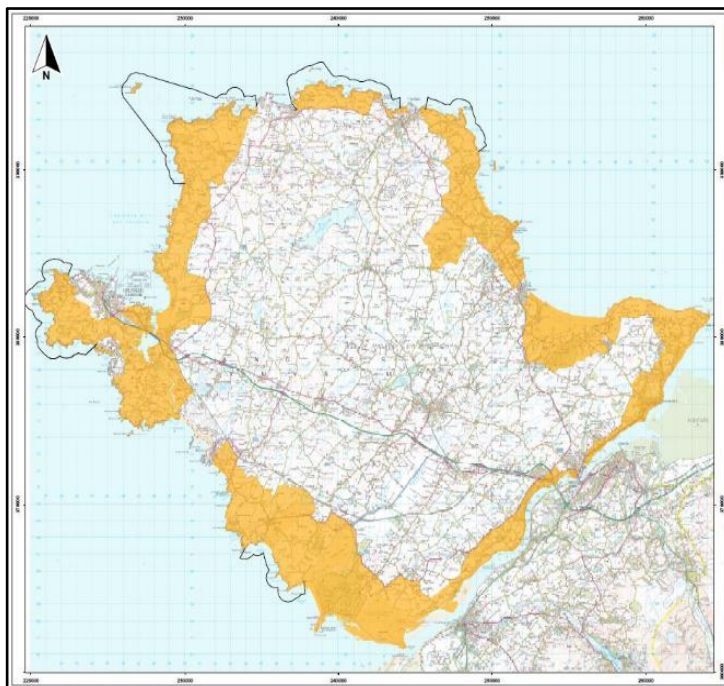


Fig 1: Anglesey AONB & Heritage Coast

1.3 The 2017 ONS Local Authority Population Estimates indicated that Anglesey had a population of 69,800 (34,400 males and 35,400 females) at that time.² Although the Island's population has grown by some 3.1% since the 2001 Census, Welsh Government population projections anticipate that, between 2014 and 2039, an overall net fall of almost 2,000 people or 2.6% of the island's population will occur. The projected fall is considerably more pronounced in younger age groups whilst the number of people aged 75 or over is actually expected to increase (by around some 5,500 people).³ Even today though, Anglesey has a disproportionately lower percentage of people of working age (57.3%), compared to Wales (61.5%) and Great Britain as a whole (62.9%) - Fig 2, overleaf.

¹ Isle of Anglesey AONB Management Plan Review 2015-2020

https://www.anglesey.gov.uk/Journals/w/x/m/Anglesey-AONB-Management-Plan-2015_20.pdf

² Nomis official labour market statistics – labour market profile – Isle of Anglesey. June 2018.

<https://www.nomisweb.co.uk/reports/lmp/la/1946157383/report.aspx>

³ Local Authority Population Projections for Wales. September 2016.

<https://gov.wales/docs/statistics/2016/160929-local-authority-population-projections-2014-based-en.pdf>

Population aged 16-64 (2017)				
	Isle Of Anglesey (Numbers)	Isle Of Anglesey (%)	Wales (%)	Great Britain (%)
All People Aged 16-64	40,000	57.3	61.5	62.9
Males Aged 16-64	20,000	58.1	62.2	63.6
Females Aged 16-64	20,000	56.5	60.9	62.2

Fig 2: Proportion of Anglesey's population aged 16-64 compared to Wales and Great Britain

- 1.4 As of the 2011 Census, some 20,300 people (29% of the total population), resided in the three main settlements on the island (Fig 3). 11,400 in Holyhead, 5,100 in Llangefni and 3,800 in Amlwch. The remaining 71% lived in smaller, dispersed communities (villages and hamlets), and in isolated dwellings across the island.



Fig 3: Main Settlements.

- 1.5 The use of the Welsh language remains particularly prominent and very much part of everyday day island life (Anglesey being the county with the second largest number of Welsh speakers in Wales). The 2011 Census recorded that some 38,600 Anglesey residents were Welsh speaking (57.2% of the island's population). The language has, however, exhibited a slow but consistent decline with the proportion of Welsh speakers having fallen over the last five decades - down from 75% of the population in 1961.⁴
- 1.6 Economic Activity was higher on the island, and Unemployment lower, during the period June 2017 to June 2018⁵, than for the remainder of Wales or Great Britain. A greater proportion of 16-24 year old's on Anglesey were economically active (79%), compared to Wales (76.3%) and Great Britain (78.4%). Unemployment, for the same period, was also lower at 4% on Anglesey compared to 4.8% for Wales and 4.2% for Great Britain as a whole (Fig 4, overleaf).

⁴ Anglesey Welsh Language Strategic Forum. Welsh Language Strategy 2016-2021.

<https://www.anglesey.gov.uk/Journals/b/t/r/Welsh-Language-Strategy-2016-2021.pdf>

⁵ Nomis official labour market statistics – labour market profile – Isle of Anglesey. June 2018.

<https://www.nomisweb.co.uk/reports/lmp/la/1946157383/report.aspx>

Employment and unemployment (Jul 2017-Jun 2018)				
	Isle Of Anglesey (Numbers)	Isle Of Anglesey (%)	Wales (%)	Great Britain (%)
All People				
Economically Active†	33,700	79.4	76.3	78.4
In Employment†	32,400	76.2	72.6	75.0
Employees†	25,500	62.1	62.6	64.2
Self Employed†	6,400	13.5	9.5	10.6
Unemployed (Model-Based)§	1,400	4.0	4.8	4.2

Fig 4: Economic activity and Unemployment on Anglesey (June 2017 – June 2018)

- 1.7 Educational attainment and skills (at all recognised skills Levels), are also generally higher on Anglesey compared to Wales and Great Britain⁶ (Fig 5 below).

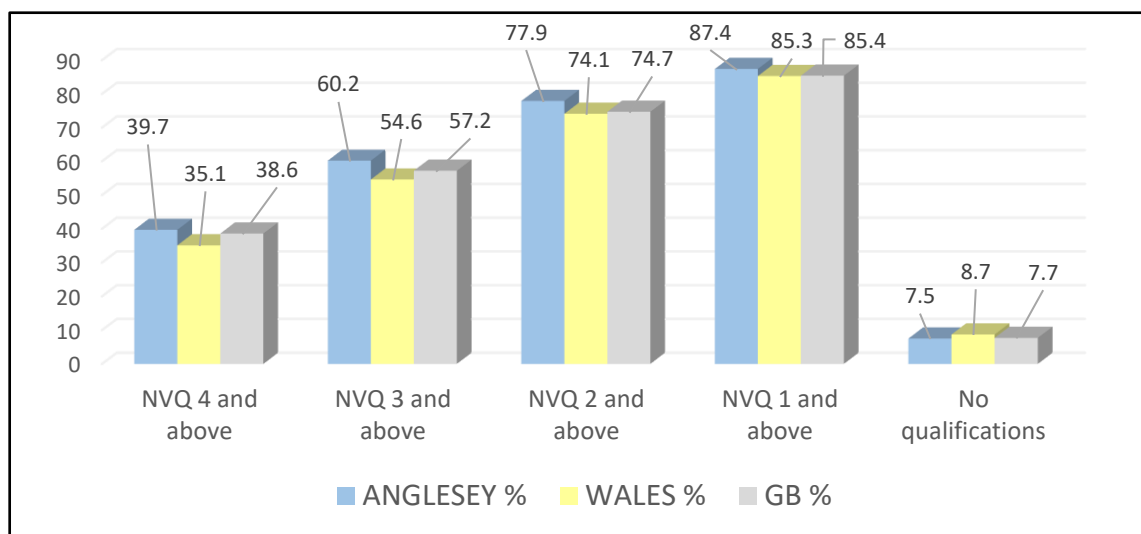


Fig 6: Educational attainment and skills – Anglesey compared to Wales & Great Britain.

- 1.8 Even though Economic Activity is greater and Skills and Educational Attainment Levels are generally higher than the remainder of Wales and Great Britain, Anglesey has always, however, struggled with productivity and earnings. Press headlines in 2014 heralded “Anglesey Worst Performing Part of the UK as its Economy Shrinks”⁷. December 2014 saw Anglesey having the lowest GVA per capita for the whole of the UK. At this time, the figure for Anglesey was £11,368 compared to a Wales average of £16,839 versus a UK average of £23,394.
- 1.9 As a result, wage levels on the island have also been consistently amongst the lowest in Wales and Great Britain. Even though the island’s people are, therefore, ‘busy’ and relatively well educated, they struggle to take home even an ‘average’ gross weekly wage, or an hourly rate, for the work that they perform. In all ‘categories’ of ONS data

⁶ Nomis official labour market statistics – labour market profile – Isle of Anglesey. June 2018.

<https://www.nomisweb.co.uk/reports/lmp/la/1946157383/report.aspx>

⁷ <https://www.dailypost.co.uk/business/business-news/anglesey-worst-performing-part-uk-8263444>

for 'gross weekly pay' or 'hourly rate pay', both for male and for female workers, Anglesey is out-performed by other areas of Wales and Great Britain as a whole⁸ (Fig 7).

Earnings by place of residence (2018)			
	Isle Of Anglesey (Pounds)	Wales (Pounds)	Great Britain (Pounds)
Gross Weekly Pay			
Full-Time Workers	492.9	518.6	571.1
Male Full-Time Workers	510.1	551.9	612.2
Female Full-Time Workers	427.8	474.1	510.0
Hourly Pay - Excluding Overtime			
Full-Time Workers	11.96	13.00	14.36
Male Full-Time Workers	12.88	13.42	14.89
Female Full-Time Workers	11.27	12.32	13.56
Source: ONS annual survey of hours and earnings - resident analysis			
Notes: Median earnings in pounds for employees living in the area.			

Fig 7: Gross weekly pay and hourly pay – Anglesey relative to Wales and Great Britain.

- 1.10 The above is, to a large extent, a reflection of the structure of the island's economy. 'Job Density' - the number of jobs available in a given area for each persons aged 16-64 (if there was 1 job for every individual aged 16-64, the job density figure would be 1), is significantly lower on Anglesey than for Wales and the remainder of Great Britain (Fig 8 below).

Jobs density (2016)				
	Isle Of Anglesey (Jobs)	Isle Of Anglesey (Density)	Wales (Density)	Great Britain (Density)
Jobs Density	27,000	0.67	0.76	0.84
Source: ONS jobs density				
Notes: The density figures represent the ratio of total jobs to population aged 16-64.				
Total jobs includes employees, self-employed, government-supported trainees and HM Forces				

Fig 8: Job density on Anglesey compared to Wales and Great Britain.

- 1.11 There is also a significantly smaller proportion of employees on Anglesey working Full-Time (and a much greater proportion working Part-Time), compared to Wales and Great Britain as a whole⁸ (Fig 9 below).

Employee jobs (2017)				
	Isle Of Anglesey (Employee Jobs)	Isle Of Anglesey (%)	Wales (%)	Great Britain (%)
Total Employee Jobs	19,000	-	-	-
Full-Time	11,000	57.9	65.3	67.5
Part-Time	8,000	42.1	34.7	32.5

Fig 9: Full-Time vs Part-Time employment compared to Wales and Great Britain.

⁸ Nomis official labour market statistics – labour market profile – Isle of Anglesey. June 2018.
<https://www.nomisweb.co.uk/reports/lmp/la/1946157383/report.aspx>

1.12 Furthermore, jobs in sectors which do not generally have high remuneration rates tend to be over-represented in Anglesey's economy compared to Wales and Great Britain. There is also under-representation in certain key sectors where pay is generally higher.⁹ Of particular note (Fig 9, below), is 'Accommodation and food services' which has over twice the proportion of employees, by industry sector, on the island compared to Wales and Great Britain as a whole. This reflects the predominance of the tourism sector on the island which is by far the biggest contributor to the economy, providing 4,102 full time equivalent jobs and contributing £304 million per annum to its economy¹⁰.

1.11 The corollary to the above is, however, under representation on the island (Fig 10, below), of employees involved in higher value sectors such as:-

- Information and communications;
- Financial and insurance related activities;
- Professional, scientific and technical activities;
- Administration and support services; and
- Education.

Employee Jobs By Industry				
B : Mining And Quarrying	15	0.1	0.1	0.2
C : Manufacturing	2,000	10.5	11.2	8.2
D : Electricity, Gas, Steam And Air Conditioning Supply	400	2.1	0.6	0.5
E : Water Supply; Sewerage, Waste Management And Remediation Activities	100	0.5	1.0	0.7
F : Construction	1,000	5.3	4.2	4.8
G : Wholesale And Retail Trade; Repair Of Motor Vehicles And Motorcycles	3,000	15.8	14.0	15.2
H : Transportation And Storage	900	4.7	3.3	4.7
I : Accommodation And Food Service Activities	3,000	15.8	7.7	7.5
J : Information And Communication	250	1.3	4.2	4.4
K : Financial And Insurance Activities	100	0.5	2.4	3.5
L : Real Estate Activities	200	1.1	1.2	1.7
M : Professional, Scientific And Technical Activities	700	3.7	5.3	8.4
N : Administrative And Support Service Activities	1,000	5.3	6.8	9.1
O : Public Administration And Defence; Compulsory Social Security	1,000	5.3	7.1	4.3
P : Education	1,500	7.9	9.9	8.9
Q : Human Health And Social Work Activities	2,500	13.2	16.1	13.3
R : Arts, Entertainment And Recreation	500	2.6	2.7	2.6
S : Other Service Activities	400	2.1	2.0	2.0

Fig 10: Employee Jobs by Industry on Anglesey

Over-represented sectors compared to Wales & GB highlighted in red.

Under-represented sectors compared to Wales & GB highlighted in blue.

⁹ Nomis official labour market statistics – labour market profile – Isle of Anglesey. June 2018.

<https://www.nomisweb.co.uk/reports/lmp/la/1946157383/report.aspx>

¹⁰ STEAM Summary 2017. Isle of Anglesey County Council

- 1.12 In terms of the proportion of 'Enterprises' of varying sizes on the island (micro, small, medium and large), Anglesey is not dissimilar to Wales as a whole (Fig 11).

UK Business Counts (2018)				
	Isle Of Anglesey (Numbers)	Isle Of Anglesey (%)	Wales (Numbers)	Wales (%)
Enterprises				
Micro (0 To 9)	2,245	89.8	92,235	89.1
Small (10 To 49)	225	9.0	9,550	9.2
Medium (50 To 249)	25	1.0	1,430	1.4
Large (250+)	5	0.2	315	0.3
Total	2,500	-	103,530	-

Fig 11: Numbers of Enterprises, by size and proportion, on Anglesey relative also to Wales as a whole

- 1.13 As a result of the above, the Examining Authority will see, as a consistent theme across the Isle of Anglesey County Council's submissions to the Wylfa Newydd DCO Examination, that IACC's support for the proposed development does not come at any costs. The IACC's support is very much predicated on the proposals currently being brought forward by Horizon Nuclear Power bringing significant improvements to structural weaknesses in the Island's economy, such as those exemplified above. This, however, cannot happen without proper control over, and mitigation and compensation for, any potential detrimental impacts upon the Island's unique and special environment and society.