

GWYNEDD

WELL-BEING ASSESSMENT



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The Well-being of Future Generations (Wales) Act 2015 has established a Public Services Board for every local authority area in Wales in order to ensure that public bodies work together to create a better future for the people of Wales.

For Gwynedd and Anglesey, the two Boards have come together to collaborate, and it's a partnership that includes the region's main agencies.

The Act sets out seven well-being goals (see below) - and seeks to ensure that every Board and public service providers collaborate to improve economic, social, environmental and cultural well-being across Wales.



The act also establishes a sustainable development principle for public bodies and Public Services Boards. This means that when decisions are made that consideration is given to the impact it will have on people living in Wales in the future.

The five factors that public service providers

must consider in order to show that they have implemented the sustainable development principle are:

- The long-term
- Prevention
- Integration
- Collaboration
- Contents

Every five years, the Gwynedd and Anglesey Public Services Board prepare and produce a well-being assessment in consultation with the public and its partners. This is the second Assessment produced by the Board. The first was published in 2017.

How is the Assessment created?

The Gwynedd and Anglesey Public Services Board has divided both counties into 14 smaller areas and has undertaken research to understand and learn more about their well-being. There were eight of these areas in Gwynedd - Bangor, Caernarfon, Llŷn, Porthmadog, Ffestiniog, Dolgellau, Tywyn and Penllyn.

Once the data had been gathered and the research had been completed about the eight areas, individual booklets were produced for each of the areas. The booklets looked at well-being in the context of the four main headings within the Act - namely, Social, Economic, Environmental and Cultural. An additional heading has been added, namely 'Population and Language' as the Board recognises the importance of this specific theme for the area.

Between January and March 2022, a public consultation was held on the individual booklets. It was specifically asked whether the booklets were a fair reflection of the areas and whether there was any missing information. The Board is very grateful to everyone who responded and offered comments. The comments were used to create and strengthen the Gwynedd Well-being Assessment, namely this document.

KEY POINTS FROM THE WELL-BEING ASSESSMENT

POPULATION AND LANGUAGE

It's predicted that there will be more people aged over 75 in the future which means supporting an aging population and ensuring individuals stay healthy for longer in the interests of the economy and health and care services.

Gwynedd is considered a stronghold of the Welsh language but the percentage of speakers has declined over the last decade. Gwynedd's communities are concerned about the impact of migration, tourism, the availability of suitable and affordable housing for young people and families has on the Welsh language.

ENVIRONMENTAL

Gwynedd's diverse natural environment is an important resource. The Coast, lakes and rivers, mountains and swamps and forests have a positive impact on social, cultural and economic well-being.

Climate change is a global challenge that is having an impact on well-being in Gwynedd. It means that some communities are at high risk of flooding, extreme weather conditions and landslides and also putting the area's nature and habitats under increasing pressure.

Protecting nature and biodiversity is important for decarbonisation. In Gwynedd there are various habitats and species that store the carbon that contributes to the level of greenhouse gases.

A greener future is a priority for Gwynedd's communities. Conversations with residents have highlighted an appetite for eco-friendly areas that make the most of its natural resources.

SOCIAL

There is concern about the level of obesity among 4-5 year olds, and Gwynedd has the highest percentage of all counties in the North Wales region. Evidence from England and Scotland suggests that the percentage is likely to rise as a result of the effect of Covid-19 and the lockdown period.

Covid-19 is likely to have a long-term impact on population health. This includes impact on mental and physical health (for example, Long-Covid) and exacerbate many existing health inequalities.

The lack of public transport was highlighted as a huge challenge for rural communities. Frequency of bus services made it difficult for residents to access amenities and services, and likely to have a worse impact on some groups, for example, disabled people, young people and older people.

According to Gwynedd residents, community spirit is one of the area's main assets. This was shown in the willingness of communities to help one another during the Covid-19 period.

Lack of digital connectivity is a barrier to people and businesses in the county. Remote working and education during the Covid-19 period has highlighted the importance of broadband availability.

ECONOMIC

Anticipated changes in working sectors and future working patterns. There is a need to ensure accessible opportunities for all in occupations such as science and technology.

Salaries in the Dwyfor Meirionnydd constituency are lower than the whole of Gwynedd and Wales. Securing high value jobs was a priority for the county's communities and residents.

Gwynedd has one of the highest proportions of fuel poverty in Wales. Responses to the draft booklets highlighted a concern for poverty, at a time when living costs of all kinds are rising.

Housing prices and affordability are a major concern amongst local communities across the county and is likely to have a negative impact on the social, cultural, linguistic and economic well-being of areas.

Another concern highlighted by communities is the second / holiday home situation. One indicator is the increase in 'hate crime' reported by the Police.

Tourism contributes to Gwynedd's economy and is an important employment sector, but also an additional challenge for local services and the natural world. Covid-19 has had a negative impact on the country's accommodation and food sector as a result of the restrictions, and this has been more pronounced in tourism-dependent areas.

CULTURAL

The natural environment is a vital resource that contributes to well-being and health, as they enable residents to stay active.

Lack of activities for children and young people is a concern for Gwynedd's communities. There is a feeling that this leads to anti-social behavior and makes the area's young people less keen to stay in the county.

The impact of Covid-19 on cultural and arts events is difficult to assess. It's a data gap that needs attention.

The World Heritage Site offers an opportunity to take pride in the local area and its history, but we must be wary of its impact on tourism and local communities.



FUTURE TRENDS



In this Assessment we have described both the recent trends and suggest how possible future trends may look based on the intelligence available to us currently. The following lists some of the more certain and quantifiable trends particularly relevant to Gwynedd, all of which align with the national drivers of change or 'megatrends' identified in the [Future Trends Wales Report 2021](#). The chapters of the Well-being Assessment will look in more detail at some of these trends.

Population Change

The overall population of Gwynedd is projected to increase slightly over the next 25 years. The impacts of these changes will be far reaching, affecting the economic, social, environmental and cultural well-being of the county. For example, affecting the availability of housing to meet local demands, and the need to protect the strong cultural traditions of the county. As in all local authorities in Wales, it's projected that there will be an increase in the number of people aged 65 and over, so ensuring that people remain healthy for longer can help tackle some of the challenges that an economy faces when supporting an ageing population.

Climate Change

Climate change remains the most critical challenge of our time and for future generations. This Assessment shows the value that local people place on their local environment and the crucial role it plays in their well-being. Coordinated action needs to be taken now to protect the environment and mitigate the impacts on the biodiversity around us.

Language and Culture

Gwynedd is considered a stronghold of the Welsh language. Nevertheless local and national policies will need to reflect the pressure that migration and tourism and the availability of suitable and affordable housing for young people and families will have on the language. Ensuring that everyone has opportunities to live, work, learn and play in Welsh will be essential to expanding its use for future generations.

Inequalities

Prior to the Covid-19 pandemic and the current cost of living crisis, income poverty was decreasing overall in Wales. While increasing employment provides more opportunities for people, it does not necessarily translate into better economic outcomes. Those in employment may still experience poor outcomes if the quality of employment is poor. Children growing up in poverty are more likely to be in poverty in later life, perpetuating the same cycle for future generations.

Future of Work

Working patterns are changing and have been brought to the fore during Covid-19. Flexible working is needed to support the existing workforce and to help others into the workforce in the future. This may include flexible hours, locations of work and greater flexibility around childcare. We know the value and impact of being in employment has on well-being, and these trends may point to ways of creating employment opportunities and fill skills gaps identified in the local economy.

Digital Connectivity

Our reliance on digital communications continues to grow particularly following the Covid-19 pandemic, and these trends are set to continue. This Assessment demonstrates the importance of fast and reliable broadband and mobile services for businesses, communities and individuals alike. Improving digital connectivity in Gwynedd will be essential to provide the infrastructure required for the future.

METHODOLOGY

In order to produce a Well-being Assessment that reflected Gwynedd, there was a need to:

- Gather reliable data that measures the economic, environmental, social and cultural well-being of the area.
- Hold conversations with residents and communities to identify well-being priorities locally.

Collecting the Data

Gwynedd Council's Research and Information Team lead the work of collecting a broad range of data on a local, regional and national level. In collaboration with members of the Public Services Board, useful data gathered by each organisation was examined in order to ensure that we understand the context, the challenges and priorities to consider as part of analysing the current state of the area.

The [National Well-being Indicators](#) were also used, which help to tell the story about the progress against more than one of the well-being goals on a national level and, when appropriate to do so, we have drawn attention to these in the Well-being Assessment.

It's important to note that the research has highlighted some data gaps and that some figures are based on the 2011 Census, which is now over 10 years old. There are some measures only available on a county or regional level, where local data is lacking. As a Board, we acknowledge that it's important to reflect the difference between areas such as Bangor and Penllyn and, therefore, we have relied on qualitative information to reinforce the quantitative analysis.

Gathering reliable data in rapidly developing fields is also a challenge. One of the key messages highlighted during the the consultation on the draft booklets was that we had not included sufficient data about poverty and fuel poverty. We acknowledge that this is a national data gap and a significant challenge and we have had to rely on alternative data, such as the percentage of those receiving free school meals, in order to assess the impact on our communities.

Whilst the Assessment offers a snapshot of the area's well-being, the data is not static and our intention is to update information in this booklet on a regular basis in order to capture the key messages that have been conveyed about the state of well-being in our communities. This will allow us to also review the new Well-being Plan from year to year.

To support this, we will continue to collaborate on a regional basis with the Public Services Boards of Conwy and Denbighshire, and Wrexham and Flintshire in order to identify themes and research fields that are relevant across the North Wales region.

Engagement

The Board was eager for the Well-being Plan to reflect the voice and aspirations of Gwynedd residents therefore community engagement was essential. However, we also knew that Anglesey and Gwynedd communities were 'fed up' with receiving requests to contribute towards surveys and engagement sessions. "Consultation fatigue" was identified as a concern and, therefore, the Board decided to use the engagement exercises that had already been undertaken or planned during 2021/22. The Board would then look at ways of filling in the gaps if required.

Our Area 2035

In Gwynedd, the main piece of work was 'Our Area 2035', namely the engagement exercise linked to the Regeneration Framework project. The purpose of the exercise was to collaborate with residents, groups and organisations to identify those priorities that would need to be addressed over the next 10-15 year. Gwynedd Council would then work with those communities to create regeneration schemes. For this work, Gwynedd was split into 13 smaller 'regeneration areas' in order to hold the conversations on a very local level.

This exercise was undertaken in two parts:

1. **September - December 2021:** The project team held interviews over the phone or in virtual meetings via Microsoft Teams with 157 community groups and initiatives, Councillors, Community, Town and City Councils. The

purpose of this was to gather qualitative data and initial ideas on what was important for Gwynedd communities.

- 2. February - June 2022:** Wider engagement with Gwynedd residents, with over 2,000 participants across the county up until April 2022. The engagement was undertaken via an online dashboard using the Engagement HQ, a software that offers innovative engagement methods and tools. The Gwynedd Residents Panel, which includes over 800 people who reflect the demographic profile of the county, were also invited to participate. This work will add value to the first part by giving a quantitative value to the main messages that have already been gathered.



Key messages from the 'Our Area 2035' exercise

The responses for each area will be published in full at the end of the engagement, however, below is a taster of what the county's residents have told us so far. The qualitative data will be used throughout the Well-being Assessment in order to capture the reflections of the groups that took part.

What is good about the area?

- Environment and proximity to natural attractions
- Community spirit and friendliness
- The Welsh language and culture
- Amenities and facilities such as shops, cafés, restaurants
- Organisations, charities, enterprises and operational groups
- A safe and secure area
- History and heritage
- Education and good schools

What is not so good about the area?

- A lack of high salary / full-time jobs
- Lack of affordable housing for local people
- Public transport / insufficient bus network
- The number of second homes and holiday homes in the area
- Concerns about health provision
- Lack of provision for young people
- Poor local economy, e.g. state of high street
- Concerns about traffic / road conditions
- Concerns about unsustainable tourism
- Appearance - Litter and untidiness
- Problems concerning parking

Imagine that you are living in your ideal place in 2035. What would have changed in order for this to happen?

- Schemes to ensure suitable housing for the needs of local people
- A greener area and schemes to save the environment
- Create high value work and jobs
- Public transport - accessible, integrated and suitable for local needs
- More health, care and well-being resources
- Sustainable tourism in order to maximise economic benefit for the area
- Maintain and develop cycling and walking paths and green areas
- More encouragement and activities to allow the Welsh language / culture to thrive
- An increased provision for young people
- Support for businesses to thrive locally

Other engagement exercises by partners ...

Snowdonia National Park has closely collaborated and consulted on a broad level with communities in the area in order to draw up Cynllun Eryri. Cynllun Eryri is an innovative plan that details strategies to protect, enhance and celebrate what makes Snowdonia National Park such a special place. The engagement has highlighted messages and the priorities of people who live in, work in and visit Snowdonia.

Natural Resources Wales engaged in order to draw up "Area Statements". This included 10 workshops facilitated across north-west Wales and engagement with more than 250 stakeholders in different locations, using different techniques. This is in addition to attending established groups such as Local Access Forums, Farmers' Unions Meetings, Snowdonia National Park Board.

Adra held a series of 'doorstep chats' across the county in order to gather feedback from tenants from different areas. They also held sessions in schools. Feedback about the Service was requested but the key messages about the community or the local area were also highlighted.

Inclusivity



It's important that the Gwynedd and Anglesey Public Services Board engages and collaborates with those groups of people that are seldom heard, groups with protected characteristics and people who experience socio-economic disadvantage.

Of course, the Covid-19 period has presented additional challenges when engaging with these groups as it was not possible to 'go out' and set up stalls or hold face-to-face events.

To respond to this challenge, the Board has contributed to regional discussions with

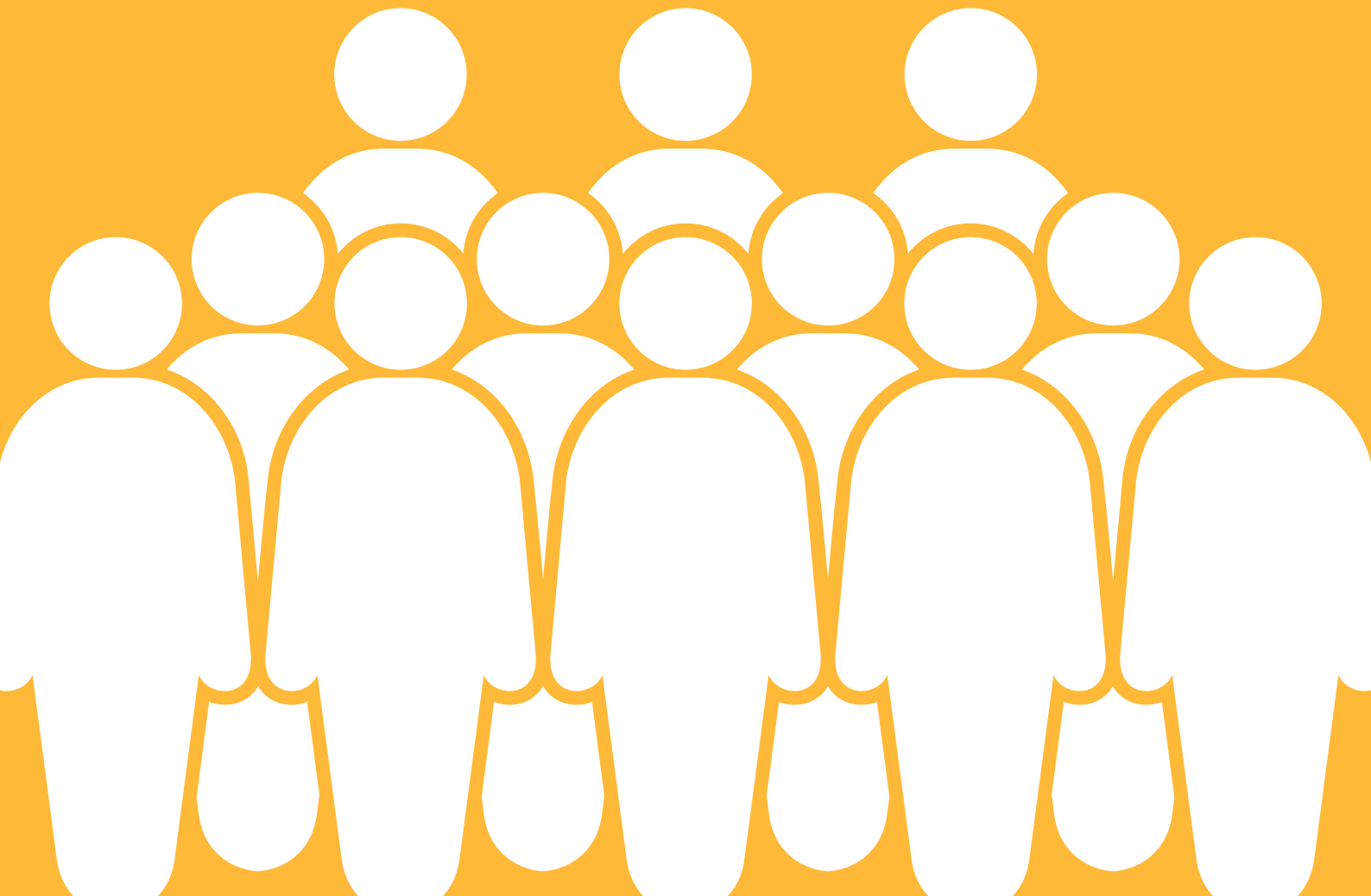
representatives and employees who support groups with equality characteristics. An initial workshop was held with assistance from the Co-production Network for Wales during autumn 2021, with the focus on discussing how we can create an equal and inclusive dialogue with the various communities of north Wales.

Here are some of the main messages of the workshop, and lessons to learn as we examine future engagement with groups:

- Engagement opportunities need to be more inclusive for people who work, live in rural communities, or who may feel intimidated by attending online session due social or language barriers. In essence, we need to go to the communities rather than asking them to come to us to ensure that we hear their stories.
- There has been diminished community interaction since Covid-19, where by some communities may feel even more isolated than before the pandemic.
- A positive message from many participants was that this is just the start of the journey of Co-production and they are very much looking forward to the next steps.
- The need to celebrate and raise awareness of the things we have in common as a range of diverse communities.
- The importance of building trust and continuity.
- The lack of community inclusion for some communities, in the fact they have no social contact outside of their communities.
- The need to collectively work together to address the fact that "hatred is based on misconceptions and ignorance".
- We need to look at ways to take advantage of the sports, arts, culture and the environment to celebrate the diversity in Wales.
- The value of volunteers in supporting with building confidence and language skills.

When looking to the future, the Gwynedd and Anglesey Public Services Board will continue to work on a regional and local level to engage and include groups and communities that are seldom heard.

POPULATION AND LANGUAGE



Who are the people of Gwynedd?

The mid-year population estimate of the Office for National Statistics for 2020 notes that **125,171** people live in Gwynedd. The population of Gwynedd is expected to grow over the coming years. The Welsh Government's population projection figures suggest that approximately **132,200** people will be living in Gwynedd by 2043, an increase of 6% since 2019. It's estimated that the population of Wales will increase by 3% for the same period.

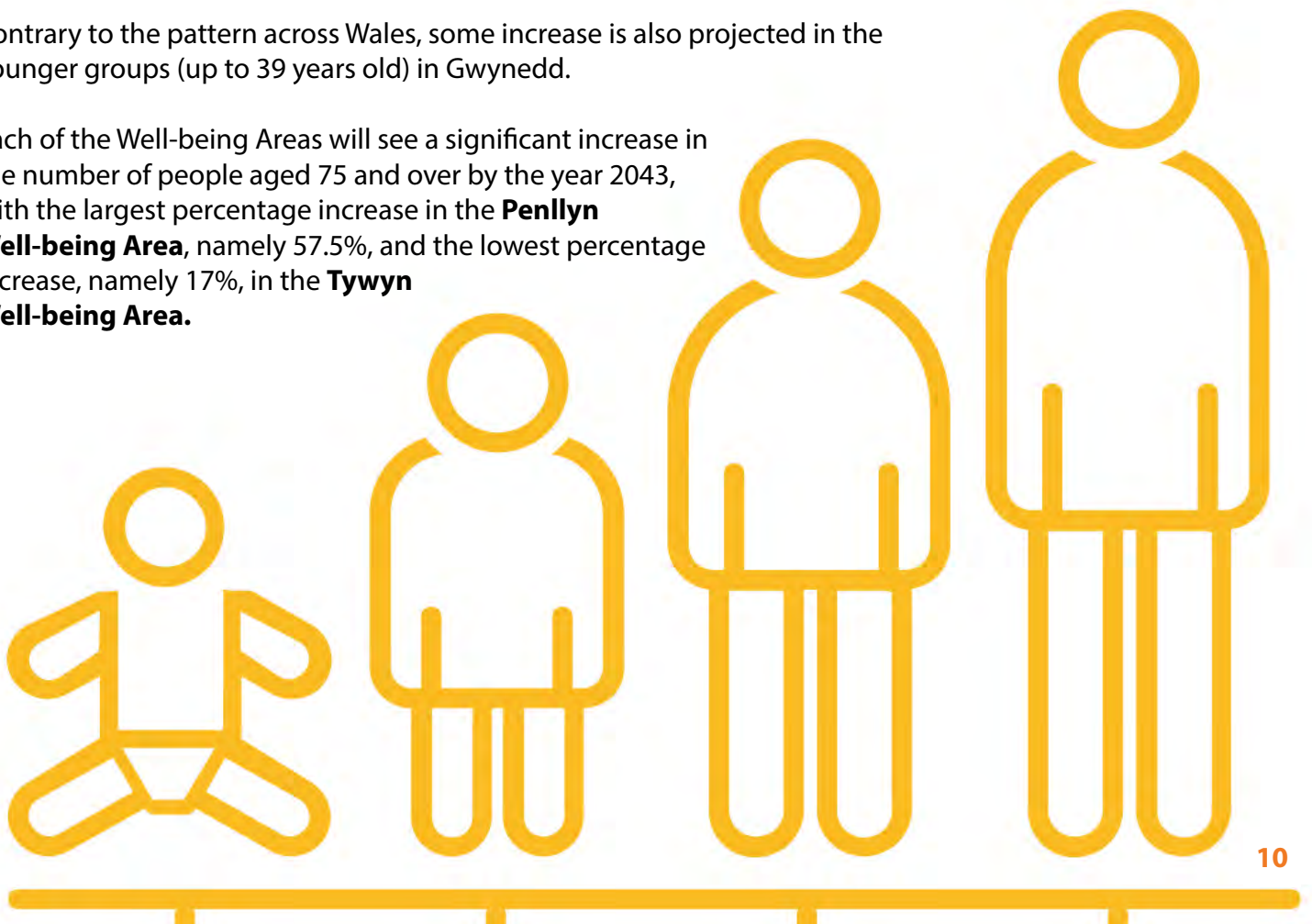


As Gwynedd is a vast and varied area, we can assume that the population change pattern will differ across the county, and in order to allow for better planning Gwynedd Council's Research and Information Team has created lower level projections using the Well-being Areas. In terms of the Well-being Areas, the biggest percentage increase of 18% is projected in the **Caernarfon Well-being Area** and **Penllyn Well-being Area**, while it's expected for the population of the **Bangor Well-being Area** to reduce by nearly 4% and the **Dolgellau Well-being Area** by nearly 3%.

There are different projected across the age groups. In Gwynedd, the biggest percentage increase, namely 42%, is expected in the population aged 75 and over. This is also true for Wales with a 60% increase in this age category.

Contrary to the pattern across Wales, some increase is also projected in the younger groups (up to 39 years old) in Gwynedd.

Each of the Well-being Areas will see a significant increase in the number of people aged 75 and over by the year 2043, with the largest percentage increase in the **Penllyn Well-being Area**, namely 57.5%, and the lowest percentage increase, namely 17%, in the **Tywyn Well-being Area**.



An ageing population

Whilst a longer living population is to be celebrated, it also highlights challenges as we look to the future.

The [Inequality in a Future Wales](#) (2021) report by the Future Generations Commissioner and Public Health Wales looks at what challenges and opportunities the future could bring and the importance of creating a more equal Wales. The report looks at three main areas: the future of work, climate change and changing demographics. It notes that an ageing population can lead to a rapid increase of inequalities in education, employment, health and social care provision.

The Covid-19 period has also highlighted specific challenges for older people. The risk of death from the virus was much higher for this age group and the social changes that happened 'overnight' as a result of the pandemic had the potential to have an increasingly negative impact on this generation, that his, because of the lower percentage with digital skills, higher percentage living alone and / or on the 'shielding list'. ([Leave no-one behind, Older People's Commissioner for Wales](#))

Case Study - Age Friendly Gwynedd

Efforts have been made in recent years to maintain an 'age friendly' Gwynedd, with the Intergenerational work program looking to promote socialisation and friendship between older people and the younger generation. The program endeavors to do this in a varied and creative way, for example, pen pals, a creation café and projects between schools and residential homes, tackling complex themes such as loneliness and ageism.



Pontio'r Cenedlaethau

Diversity



When looking at the wider demographics of Gwynedd, it's important to consider the 'protected characteristic' set out in the Equality Act. This includes: age, gender, language, disability, race, ethnicity, religion or belief, pregnancy or maternity, sexual orientation and gender reassignment.

If we were to consider Gwynedd as a village of only 100 people, half would be women, 17 people would be under 16 and 4 people from a black or minority ethnic background. 21 individuals would have a limiting long-term illness or impairment, with 12 households earning less than £ 10,000 a year with 9 of the 60 working-age people claiming out of work benefits. 59 people would be Christian, 30 people of no religion and 2 people of another religion ([Strategic Equality Plan 2020-24](#))

Further data can be found in the [Is Wales Fairer Report?](#) (2018). A report was also commissioned by the North Wales Public Services Board Officers network to gain a more in-depth understanding of equality data at a local level. Other sections of the Well-being Assessment will make specific reference to the well-being of some of the characteristic groups.

The Welsh Language

The Welsh language has an important role to play in the cultural and social well-being of Gwynedd.

According to the results of the 2011 Census, 65% of the Gwynedd population aged 3 years and over can speak Welsh, which is higher than the Wales percentage of 19%. Gwynedd had the highest percentage of all Wales' counties, although the figure has reduced over the last decades compared to 76% in 1981.

The percentage varies from area to area, where the highest percentage can be found in the **Caernarfon Well-being Area** (80%) and the lowest in **Dolgellau/Tywyn Well-being Area** (48% - it was necessary to combine Dolgellau and Tywyn due to significant amendments to the boundaries over the decades).

We expect the 2021 Census results soon but in the meantime, data is available from other sources to help create a picture of Welsh language usage in Gwynedd.

According to the National Survey for Wales (2019/20), 61% of the population aged 16 and over in Gwynedd use the Welsh language in their day-to-day lives. This is much higher than the all Wales percentage of 10%. The same survey indicates a reduction in the percentage of people aged 16 and over who can speak Welsh over the last few years from 70% in 2017/18 to 66% in 2018/19, and 64% in 2019/20. A reduction was seen on an all-Wales level from 19% in 2017/18 to 16% in 2019/20. It has to be noted that the National Survey for Wales gathers information based on a sample of responses and this may impact on accuracy, which should be kept in mind when any National Survey for Wales results are discussed in this assessment. Despite this, it does give an idea of the situation in Gwynedd.



64% of primary school children speak Welsh always or often on the yard

According to a Language Charter questionnaire from 2019, 64% of primary-aged children in Gwynedd speak Welsh all the time or often in the playground. There is a variety within the Gwynedd well-being areas. The lowest percentage can be seen in the **Tywyn Well-being Area** (7%) and the highest in the **Penllyn Well-being Area** (87%) and the **Caernarfon Well-being Area** (84%).

The same source shows that the percentage of secondary-aged children in Gwynedd who speak Welsh all the time or often in the playground is slightly lower than the primary sector, namely 42%. Again, there is a variety within the Gwynedd well-being areas. The lowest percentage can be seen again in the **Tywyn Well-being Area** (5%) and the highest in the **Ffestiniog Well-being Area** (78%) and the **Caernarfon Well-being Area** (78%).

Welsh communities

Gwynedd residents have told us that the Welsh language is important to them, and that it's something they find positive about living in the county. This is not felt across all areas, and while residents in communities such as Pen Llŷn, Caernarfon and Ffestiniog note that the Welsh language and culture is something that matters to them, based on preliminary survey results it does not seem to be as much of a priority in the Ardudwy area - within the **Dolgellau Well-being** boundary, and the Dysynni area - within the **Tywyn Well-being** boundary, (Interim Report of the Our Area 2035 exercise). These differences correspond to what the data tells us above.



While the engagement work has highlighted the importance of the Welsh language to the well-being of our local communities, it has also highlighted a concern about the continuation of the language. There are links between the long-term trends of the Welsh language in Gwynedd and the challenges that are presented as a result of many factors, including inward migration, and changes in habits due to technological developments. Developments during Covid-19 led to increasing concerns about the Welsh language and local and national calls to act to protect the language in our communities. These concerns include the prosperity of the housing market, more investment in second and holiday homes, remote working that allows for the relocation from urban areas to rural or coastal areas, and cases of traditional house names being changed to new English names (housing is discussed in greater detail in the '**Economic**' chapter of this booklet).

Discussions and conversations with local groups, Community Councils and Councillors have highlighted this concern (Ardal Ni 2035), as seen from the following quotes:

"A large number of non-Welsh speakers intended to learn the Welsh language when moving to the area, but because there are plenty of other non-Welsh speakers living in the area, they can socialise together and do not see the need to learn the language." (Llanengan Community Centre - **Llŷn Well-being Area**)

"Evident Anglicisation has occurred in the area; ignoring traditions - changing the names of houses, etc. Many people move into the area and do not learn about the language or the local community." (Harlech Leisure - **Porthmadog Well-being Area**)

"There's a decline in the number of Welsh speaking families especially in villages, e.g. Llanberis, due to the large number of non-Welsh speaking families who have settled there. This is evident in children and young people." (Llanberis Development Group - **Caernarfon Well-being Area**)

A clear element from the conversations was that economic, social and cultural factors are affecting the decline of the Welsh language, but it was also possible to examine these fields for opportunities to recover or protect the language.

Solutions were proposed such as holding more Welsh learning classes, working with the area's young people to raise awareness and pride in the language, endeavour to hold social events to include and immerse non-Welsh speakers in the language and culture and maximise the value of the language by creating jobs in fields such as Information Technology where the Welsh language is required.

ENVIRONMENTAL



Gwynedd's unique and natural environment

In addition to its key role in environmental well-being, the area's natural environment has an important role to play when assessing further well-being themes. For example, it can have an impact on social well-being as spending time outside in nature can have a positive impact on mental and physical health. This became even more apparent during the Covid-19 pandemic. Further information about this close connection can be seen in the **'Cultural'** and **'Social'** chapters of the Assessment, but some of the features that make Gwynedd's natural environment unique and varied, can be seen below.

The coast

Gwynedd's coast extends from Llanfairfechan in the north to Machynlleth in the south, and corresponds to 180 miles as you follow the National Coast Path. The boundaries of six out of the eight Well-being Areas include a unique part of this coast.

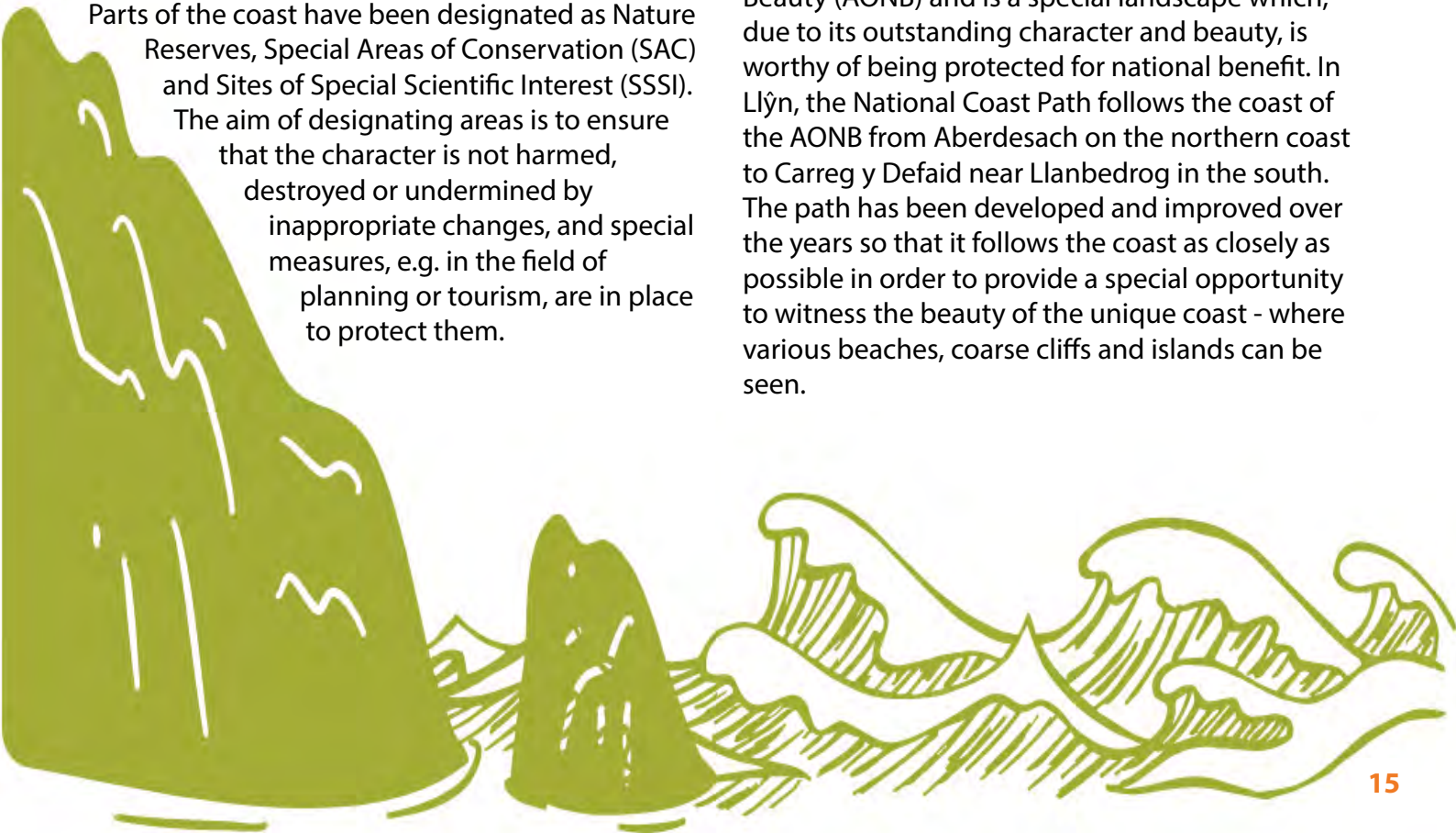
Parts of the coast have been designated as Nature Reserves, Special Areas of Conservation (SAC) and Sites of Special Scientific Interest (SSSI). The aim of designating areas is to ensure that the character is not harmed, destroyed or undermined by inappropriate changes, and special measures, e.g. in the field of planning or tourism, are in place to protect them.

In the **Caernarfon Well-being Area**, the Menai Straits have been designated as a SAC and is one of Wales' gems in terms of marine biodiversity.

Reefs and underwater sand banks, tidal mud and sand plains, intertidal rocky banks, rare rocky islands and sessile oak woodlands are seen dotting the coastal slopes down to the edge of the water. The estuary of Afon Gwyrfai feeds into the south-west, which has also been designated as a SSSI due to its ornithology and marine biology features. Sea-grass beds and a widgeon population of national importance can be seen here and large quantities of hawthorn, oysters, lapwing, curlew and reds are also seen in the bay.

When travelling along the coast towards the west, the entire marine area of Pen Llŷn a'r Sarnau (SAC) is an important habitat due to its breeding population of bottle-nose dolphins.

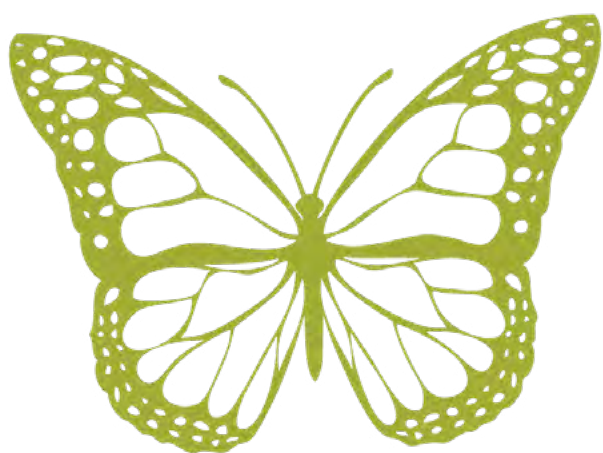
The **Llŷn Well-being Area** coast has been designated as an Area of Outstanding Natural Beauty (AONB) and is a special landscape which, due to its outstanding character and beauty, is worthy of being protected for national benefit. In Llŷn, the National Coast Path follows the coast of the AONB from Aberdesach on the northern coast to Carreg y Defaid near Llanbedrog in the south. The path has been developed and improved over the years so that it follows the coast as closely as possible in order to provide a special opportunity to witness the beauty of the unique coast - where various beaches, coarse cliffs and islands can be seen.



Of course, the maintenance and management of the coast poses a challenge, especially in considering coastal erosion. Nefyn Bay between the Nefyn headland and the Bodeilas (**Llyn Well-being Area**) headland has been the subject of minor landslide activity for many years (specifically: 2001, 2009, 2021). The slopes of Nefyn Bay have been covered with weathered debris and this is particularly exposed to shallow landslide, especially when the water is saturated. Flood risk and coastal erosion in Wales will worsen as a result of climate change.

Down towards the southern coast of the county, the Morfa Harlech National Nature Reserve is located near Harlech (**Porthmadog Well-being Area**) and the Morfa Dyffryn National Nature Reserve near Barmouth (**Dolgellau Well-being Area**) - both are some of the most important sand dune systems in Wales and home to a wide range of plants and animals, which have all have been specifically adapted for life near the sea. The sand dunes maintain substantial populations of breeding birds and this is also an important place for mammals, reptiles and amphibians. The hare breeds in the area, and the creeks, marshes and ponds are home to grass snakes and great crested newts.

As well as being biodiversity reserves, our dunes help protect our wider environment by providing a natural solution when defending against flooding and coastal erosion as well as maintaining water flow and assisting essential pollinators such as bees and butterflies.



Local people and visitors cherish sand dunes due to their unique character and they provide a backdrop for a day on the beach and the perfect natural play area for every child.

Lakes and rivers

Another environmental feature that is important to Gwynedd is lakes. Lakes provide habitats for plants and animals, maintain the ecosystem and also offer opportunities to generate hydroelectricity. They also enable local people and visitors to go out to enjoy wildlife.

Wales' largest natural lake, namely Llyn Tegid, is in the **Penllyn Well-being Area**, and measures five miles long and half a mile wide at its widest point. The lake is a popular spot for water activities such as paddle-boarding, canoeing, sailboarding and fishing. Although Llyn Tegid is a natural lake, it requires management under water reservoir legislation as the embankments of the lake provide flooding defence for the town of Bala. This was seen most recently as a result of heavy rainfall in November 2020. Natural Resources Wales have already commenced work to ensure that the lake continues to be safe in the long-term.



Another distinctive lake is Llyn Padarn in Llanberis, which is within the boundaries of the **Caernarfon Well-being Area**. Llyn Padarn has now been designated as the only freshwater bathing lake

in Wales and the results of samples taken there by Natural Resources Wales in 2021 reached the highest “outstanding” standard.

However, there are other areas that have suffered from water pollution as a result of metal mining that dates back to the Bronze Age. Whilst the majority of mining ended by the 1920s, spillages from underground works and metals leaching from rubble tips are still significant sources of water pollution. Among examples are rivers surrounding Blaenau Ffestiniog (**Ffestiniog Well-being Area**) and the Dyfi and Mawddach catchment areas (**Tywyn Well-being Area**) where sources include lead and gold mining.

Mountains

Snowdon, the highest peak of Snowdonia mountains in the **Caernarfon Well-being Area**, measures 1085m (3,560 feet). Most of Snowdon is a National Nature Reserve and is managed by the Snowdonia National Park Authority, in partnership with several other organisations.

This is one of Wales’ national assets that attract people from all over the world to Gwynedd. Approximately 700,000 people now visit Snowdon every year compared to approximately 500,000 in 2018. A higher number of visitors to Snowdon places additional pressure on public services, including the emergency services and local services such as waste collection and parking enforcement, and this was increasingly highlighted in the media during the pandemic.

It can also put pressure on wildlife and Snowdon is an important habitat for several species of animals and flowers.

Snowdonia is the only home in the United Kingdom for the delicate flower of the Snowdon lily, which grows on the rock-face and in rocky creeks, it prefers the arctic-alpine environment - cold, with ice and snow. With mild winters as a result of climate change, the plants may be under real threat of disappearing completely.



Over the past five years, Cynllun Eryri was published, namely the Statutory Management Plan by the Snowdon Partnership. Its purpose is to outline how the Partners would protect, care for and develop the special qualities of Snowdonia for the future, ensuring that every person respects, enjoys, understands and cares for the mountain and its environment and that local people get the best out of living in a National Park.

Also in Snowdonia are the Carneddau, which are home to two of the five peaks over 3000 feet in Snowdonia - Carnedd Llywelyn and Carnedd Dafydd. The area is also home to rare animals and plants, including iconic species such as the chough



and the Carneddau ponies, along with fragile habitats such as the mountain heaths - Wales' tundra.

The Carneddau peat-land is an important natural resource to hold and store carbon, reduce greenhouse gases emissions, promote biodiversity and water management. Peat-land habitats help to regulate our climate and the water cycle, both of which are essential to well-being. Deep peat soils are important to mitigate climate change as they hold and store atmospheric carbon.

Forests and marshes

Coed-y-Brenin (**Dolgellau Well-being Area**) is a particularly important leisure destination for tourists in the area and it includes mountain biking, trails of national prestige along with running and walking routes. Increasingly over the past few decades, woodland plantations and forests have been used for leisure activities, that buy an additional economic value to these ecosystems,

and can therefore contribute towards the tourism sector in the area (tourism is discussed in greater detail in the '**Economic**' chapter of this booklet).

There are also other important forests in Gwynedd such as the Beddgelert Forest, that has over 10,000 visitors each year and is a hidden gem of walking, cycle and horse-riding trails, and wildlife in the centre of the Snowdonia National Park. The ancient oak coppices of Maentwrog Forest in the Vale of Ffestiniog should also be mentioned - a National Nature Reserve that is home to approximately 170 species of lichen, which is an essentially important biodiverse habitat for nature.

There are also important marshes in Gwynedd, which can offer solutions for the challenges of climate change. Llŷn Fens (**Llŷn Well-being Area**) is marshland namely a type of wetland that is fed by mineral-filled water. It's of international importance in terms of nature and also improves the quality of our water, helps to reduce flooding and assists to battle against climate change by storing carbon.



Climate and Nature Crises



Protecting the environment for future generations is one of the greatest challenges of our age. The mid-twentieth century has seen a dramatic rise in global temperatures and is associated with extreme weather events, rising sea levels, droughts and floods. One of the major contributors to climate change and temperature rise is the high levels of carbon and other greenhouse gases emitted into the atmosphere by human activities.

In addition to their impact on the area's environmental well-being, evidence suggests that the climate and nature crises will have a negative impact on mental well-being and because of the concern it causes. Although there is no data available at a Gwynedd level, the National Survey for Wales

2020/21 shows at an all-Wales level that 76% are either very concerned or fairly concerned about climate change and 71% of the respondents feel that climate change is already having an impact in Wales.

The Climate Change Act (2008) requires the UK Government to publish a Climate Change Risk Assessment every five years. The UK Government has commissioned the Climate Change Committee (UKCCC), an independent public body, to carry out this task and the third version was published in January 2022, with a national summary available for Wales. The Assessment sets the scientific basis for taking action to reverse climate change and in response the Welsh Government has published two statutory mitigation Plans ([Prosperity for All: A Low Carbon Wales](#) and [Prosperity for All: A Climate Conscious Wales](#)). Gwynedd and Anglesey Council, along with Natural Resources Wales, have stated their support for tackling the climate crisis.

Net zero carbon and decarbonisation

Emissions of carbon dioxide and other greenhouse gases released into the atmosphere is a major driver of climate change. In order to achieve 'Net Zero Carbon' by 2030 (the statutory target set by the UK Government), greenhouse gas emissions to the atmosphere need to be counterbalanced.

This means reducing emissions across sectors, ranging from housing, transport and energy, to farming and agriculture. In March 2022 Gwynedd Council published its [Climate and Nature Emergency Plan](#) which sets out the steps it will take in conjunction with partners to achieve net zero carbon.

[Future Trends Wales Report 2021](#), highlights that the richest countries, including the UK, tend to have the highest emissions, and often the least affluent nations are most vulnerable to the effects of climate change. Similarly, while increasing climate risks will affect the whole of Wales, some communities in Gwynedd will be particularly vulnerable to change, for example, through flooding (as discussed below)



Flooding

With a much higher proportion of coastline compared to other counties in Wales, one of the most prominent side-effects of climate change is flooding. **In Gwynedd, there are currently 11,285 properties at risk of flooding / defended from fluvial, tidal and surface water flooding.**

11,285 Gwynedd properties at risk of flooding



The 10 communities identified as those most at risk in Gwynedd and Anglesey are:

- Porthmadog
- Bangor
- Tremadog
- Pwllheli
- Tywyn
- Fairbourne
- Y Bala
- Dyffryn
- Bermo
- Dolgellau

These are based on the [Register of Communities at Risk \(2019\)](#) which is a document prepared by Natural Resources Wales where communities across Wales are ranked from 1 to 1,838 based on flood risk. Tidal flooding (affecting coastal communities) and river and surface water flooding (due to extreme weather) affect Gwynedd's communities, leading to devastating consequences for people, homes, nature and agricultural land.



The Welsh Government published a [National Strategy for Flood and Coastal Erosion Risk Management in Wales \(FCERM\)](#) in 2020, and the West Wales Shoreline Management Plan by Natural Resources Wales, together with a number of partners, also sets the strategic, long-term approach for coastal management against the risks of sea flooding. In some areas difficult decisions will have to be made in terms of continuing coastal protection from flooding and erosion or allow parts of the coast to develop naturally to adapt to changing environmental conditions over the next 20, 50 and 100 years. Fairbourne (**Tywyn Well-being Area**) is one example and following discussions between Partners and the community the Fairbourne Project Board - Moving Forward has set its intention to protect the village until at least 2054.

The Local Authority is responsible for leading on flood management plans for ordinary watercourses, surface water and groundwater and there are national requirements to publish a Local Flood Strategy for the area. The Gwynedd and Anglesey Local Development Plan also sets out criteria for new residential development and the relocation of existing permanent dwellings for areas affected by coastal erosion and flood risk.

Tackling climate change through nature conservation

Everything we do, from the water we drink, the air we breathe and the food we eat all depend on the natural world. The processes that keep our water reservoirs clean and food growing in the fields are underpinned by the wildlife - or **biodiversity** - that surround them, and without any of these, other species could not survive.

The wildlife of Wales is in decline, with latest findings showing that one in six species in Wales is at risk of extinction. As a result, on 30 June 2021 the Welsh Government declared a nature crisis and called for statutory targets to be set to halt and reverse the decline in biodiversity. The climate change crisis and the loss of biodiversity are inextricably linked. Loss of biodiversity is exacerbated by climate change, and vice versa. However, the creation and restoration of biodiverse habitats can also provide solutions to help us adapt to climate change and while new research and technology is being developed to try and store carbon safely, currently the most effective approaches are the natural ways in which carbon is absorbed and stored in trees, plants, lands and plankton.

As already noted, the Llŷn Fens, the Carneddau peatlands, Morfa Harlech and Morfa'r Dyffryn sand dunes are natural systems that have proven useful in reducing carbon emissions. We can also use the world of nature with spatial and landscape opportunities in order to respond to the challenge of climate change, for example, farming practices that are more sustainable, better housing quality, employment opportunities in clean industries. . Farmers in the Uwch Afon Wnion catchment area within the **Dolgellau Well-being Area** work in partnership with the Snowdonia National Park and Gwynedd Council to use nature based solutions, such as improving forest management and to increase the volume of stored carbon and water.

Exploring 'opportunities for a resilient ecosystem' and 'supporting sustainable land management' are key areas covered by [National Resources Wales' North West Wales Area Statement](#). These are documents that set out how we can better manage of our natural resources for the benefit of future generations and it details how spatial variations such as land management, protecting our water and soil could be beneficial to well-being.



Green Gwynedd

The people of Gwynedd have told us that living in a greener and more eco-friendly area is important to them, and a main issue that needs attention if they are to live in the 'ideal place' by the year 2035.

Although an important factor across the county, preliminary survey results show that it's a higher priority for residents of the Llŷn and Pwllheli communities (**Llŷn Well-being Area**), Porthmadog (**Porthmadog Well-being Area**), Bangor and Bro Ogwen (**Bangor Well-being Area**), Bala and Penllyn (**Penllyn Well-being Area**) and Dolgellau (**Dolgellau Well-being Area**) (Our Area 2035 Interim Report, unpublished).



In detailed conversations with groups, Community Councils and Councillors there was a desire to adopt plans to reduce the environmental impact of travel and a call for more car charging points. (Our Area 2035) This is in line with evidence in the [Future Trends Wales Report \(2021\)](#), which shows that the purchase of electric and hybrid vehicles has increased from 1% of the market in 2015 to 11% in 2020, with a further increase projected by the mid-2020s. The [Inequality in a Future Wales \(2021\)](#) by the Future Generations Commissioner and Public Health Wales also highlights potential to tackle climate change in the field, but that there are also potential inequalities associated with green transport because poorer communities (as well as women, ethnic minorities, and disabled people) are not involved in the planning and policy decisions related to electric vehicles (Gwynedd's public transport and travel habits are discussed in greater detail in the '**Social**' chapter of this booklet)

The local groups were also keen to make more use of renewable energy, such as solar and hydropower to avoid the impact of climate change in Gwynedd. (Our Area 2035). The following quotes convey some of these messages:

"A green town - listed buildings need to be allowed to provide solar panel and make it easier for people to use and access renewable energy. More electric charging points and electric buses only."
(Discover Dolgellau - **Dolgellau Well-being Area**)

"We need to make extensive use of the area's renewable energy asset to generate electricity from wind and sea and use electricity to create Hydrogen fluid to run vehicles and heat homes in the area with an emphasis on creating community companies to serve villages or whole areas." (Y Ganolfan Nefyn - **Llŷn Well-being Area**)

"To see an area that has created an innovative model of a green economy."
(Ogwen Partnership and local groups - **Bangor Well-being Area**)



Recycling and fly-tipping

In Gwynedd, figures published by Welsh Government **show an increase in the percentage of municipal waste sent to be reused, recycled or composted from 59% in 2015/16 to nearly 66% in 2020/21**. In 2015/16, the percentage was slightly lower than the Wales percentage but by 2020-21 the Gwynedd and Wales percentages are very similar.

The fly-tipping rate is lower in Gwynedd than in Wales as a whole. Despite this, figures published by the Welsh Government show an increase in the number of fly-tipping cases recorded in Gwynedd from 529 in 2014/15 to 679 in 2020/21.

There is now an increasing emphasis on keeping resources in use and avoid waste as much as possible.

In March 2021 the Welsh Government published its [‘Beyond Recycling’](#) strategy to encourage working in partnership to develop a circular economy within communities. There are already plans for projects such as a second-hand shop, a Repair Café and an equipment loan Library in Gwynedd. The intention is to minimise waste, while promoting economic activity and community regeneration.

Air quality

NO₂ concentration is one way of measuring air quality and it's conveyed as average micrograms (µg) per m³ and this data was published by the Welsh Government. NO₂ is primarily released in the air from the burning of fuel, emissions from cars, trucks and buses and power plants. A higher level of NO₂ is a sign of air pollution.

In 2019, there was an average of 4.8 µg/m³ NO₂ in residential dwelling locations in Gwynedd, this figure has varied from 4.4 µg/m³ to 4.9 µg/m³ annually since 2015. This was much lower than the Wales average measurement of 9.2 µg/m³ in 2019, that had varied between 8.9 µg/m³ to 11.4 µg/m³ annually since 2015.



Clean and tidy communities

Street cleanliness is inspected annually by Keep Wales Tidy. In 2021/22, 141 streets in Gwynedd were inspected and **97% were of high or acceptable cleanliness standard, i.e. Grade B or higher**. Prior to the pandemic, in 2019/20, 142 streets in Gwynedd were inspected, and 95% were Grade B or higher. This percentage is very similar to the data from 2015/16 included in the previous Well-being Assessment, namely 96%.



The Keep Wales Tidy street cleanliness inspections note the type of litter found on Gwynedd streets, and in 2021/22 the most common type of litter was litter associated with smoking (present on 57% of the streets inspected). This type of litter was followed by confectionery litter (39% of the streets), drinks litter (27% of the streets) and fast food waste (16% of streets). Alcoholic drinks litter was present on nearly 5% of the inspected streets during the survey. The organisation notes that cleaning cigarette butts is expensive and difficult as they are small, and also have a significant negative impact on the environment as they pollute, are eaten by wildlife and also have plastic elements that do not rot.

In addition, Keep Wales Tidy look at Adverse Environmental Quality Indicators (AEQIs) during their inspections. Weeds and debris may have a negative impact on the appearance of the streets and contribute to flood risk by causing an obstruction to channels and gulleys, and this was found on 89% and 90% of the streets inspected under that system. Furthermore, illegally erected posters were seen in nearly 3% of the streets, with graffiti in slightly over 1% of the streets. No vandalism was found in the streets inspected.

Keep Wales Tidy notes that dog faeces is a problem that is often a cause of concern for people in terms of its appearance and possible impact on health. This is especially true for young children as their immunity is undeveloped and they are more likely to come into contact with the waste by playing in parks and in sand on the beach. A public consultation was conducted by Gwynedd Council about dog fouling in June 2021. There were over 1,300 respondents and 81% of respondents of the consultation in Gwynedd believed that dog fouling was a problem in their area. Within the Gwynedd well-being areas, some variety can be seen, and the lowest percentage can be found in the **Penllyn Well-being Area** (67%) and the highest in the **Caernarfon Well-being Area** (88%).

In Caernarfon in particular, litter and the general appearance of streets was one of the main problems affecting well-being and the way people felt about their area (Our Area 2035 Interim Report, unpublished). This may be due to the urban nature of the area and the high number of tourism in the summer. This is what local groups had to say about litter in the area:

"A lack of community pride - litter being discarded, irresponsible dog owners, low-level vandalism, illegal fly-tipping and wild camping." (Nebo and Nasareth Area Committee - **Caernarfon Well-being Area**)

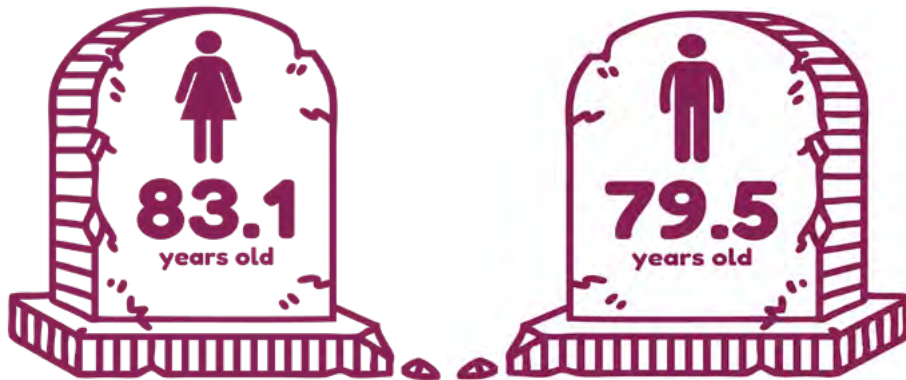
"Awful litter across the Estuary - often from McDonalds / Costa Coffee - need to find a way of addressing things like this." (Gisda - **Caernarfon Well-being Area**)

"Dog fouling and littering causes problems, especially over the summer when there are more tourists around." (Brynrefail Community Group - **Caernarfon Well-being Area**)

SOCIAL



The health of Gwynedd's population



According to the Office for National Statistics' latest figures, the **life expectancy of males in Gwynedd is 79.5 years, while the life expectancy of females is 83.1 years.** This is slightly higher than Wales figures where the life expectancy of males is 78.3 years and the life expectancy of females is 82.1 years.

The Office for National Statistics also measures 'healthy' life expectancy, which is an estimate of time spent in "good" or "very good" health. The data is based on individuals' perception of their own general health. Healthy life expectancy from 2017 to 2019 in Gwynedd was 64.8 years for men and 68 years for women, the highest across the North Wales region. ([North Wales Population Needs Assessment](#)) However, as noted in the Population Needs Assessment, it's unlikely that the data conveys the full picture of health inequalities between more deprived communities and more prosperous areas.

Chronic health conditions can also have an impact on well-being, and the WIMD data indicators from 2019 indicate that a chronic condition diagnosis recorded by a GP (percentage per 100) in Gwynedd is 12.9. This is lower than the all Wales rate, namely 14.3.

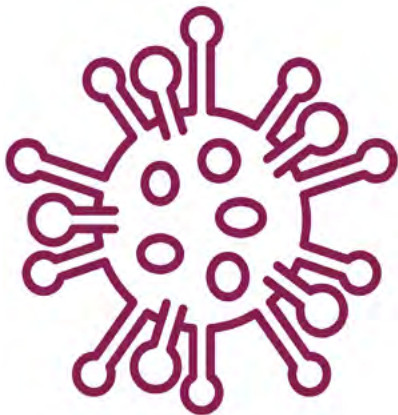
Healthy lifestyle

National Well-being Indicators that measure a healthy way of living have an important part to play when assessing the health of the county's population. According to the Wales Public Health Observatory (2017/18-2019/20) figures, nearly 38% of adults aged 16-64 have a healthy weight in Gwynedd, this is more or less the same as the figure for the whole of Wales. This figure increases to 41% in adults aged 65 and over in Gwynedd, which is higher than the Wales percentage of 38%. There is a link between this indicator and the physical exercise indicator, which is discussed in greater detail in the '**Cultural**' chapter of this booklet.

The National Survey for Wales data (2018/19 & 2019/20 - combined two years) **show that nearly 31% of adults aged 16 or older in Gwynedd noted that they had eaten at least 5 portions of fruit and vegetables the previous day**, higher than the all Wales level of 24%. The same data indicates that the percentage of adults who noted that they had not eaten any fruit or vegetables the previous day in Gwynedd was a little lower than Wales, namely 6% compared with 8%.



Other factors affecting our health are smoking and alcohol consumption. The National Survey for Wales figures for 2018/19-2019/20 noted that **11% of people aged 16 and over state that they smoke**, one of the lowest figures among Wales' counties, and according to the Wales Public Health Observatory figures from 2018/19-2019/20, 16% of people consume more alcohol than the guideline (14 units a week). These two figures are lower than the figure for the whole of Wales, where 17% smoke and 19% consume more than the guidelines.



Covid-19 and health

Over the past two years Covid-19 has had an impact on global health, and most of the health data currently available at a Gwynedd level refers to the pre-pandemic period. It's therefore important to be aware that the situation in the county has now changed, and the data to date is unlikely to measure the true health impact of the pandemic.

The [North Wales Population Needs Assessment](#) identifies that one potential long-term challenge for the health and social care sector is managing patients with 'Long Covid' symptoms. The Office for National Statistics has estimated that up to 15% of individuals who have tested positive for the virus experience 'Long Covid' symptoms and Betsi Cadwaladr University Health Board modeling indicates that up to 7,000 patients may experience symptoms over the coming year. The Wales Center for Public Policy's '[Well-being and Impact of Covid-19 and Brexit](#)' evidence paper states that Covid-19 has (directly and indirectly) exacerbated many of the health inequalities experienced prior to this period, as well as affecting physical health and the mental health of the population.

Mental health

Mental health is an important part of well-being, and data from the 2019 WIMD indicators indicate that a mental health condition diagnosis recorded by a GP (percentage per 100) in Gwynedd is 20.3. This is lower than the all Wales rate, namely 23.2, and is one of the lowest of Welsh counties. The mean score of the Warwick-Edinburgh Mental Wellbeing Scale is another means of measuring the County's mental health, and this data has been collected by the National Survey for Wales. A score of between 14 and 70 is given, depending on the response of respondents to different statements, a higher score suggests a better mental well-being. The Gwynedd score was 51.6 in 2016 and 52.9 in 2018. In comparison the all Wales score was 50.9 in 2016 and 51.4 in 2018.

However, not everyone with mental health problems seeks help. The [North Wales Population Needs Assessment](#) identifies some cohorts as being at higher risk than others and highlights that about three quarters of registered suicide deaths in 2020 were male. It's also noted that farmers are a high risk occupational group, which is significant to Gwynedd's rural communities.

The pandemic has also affected mental health, and some groups that have been identified as of higher risk are - people on low incomes, people who changed employment, people who are self-employed, Health Service employees, care workers and other frontline staff, Black, Asian and minority ethnic communities and children and young people.

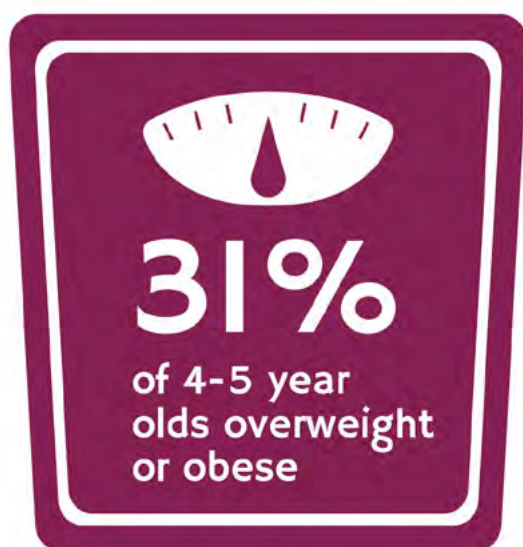
Health of children and young people

Specific health statistics for Gwynedd children are also available. Prenatal, pregnancy and early years are influential and research suggests that the quality of development from 0-4 years has an impact on things such as readiness to attend school, educational attainment, and health and well-being throughout life .

Welsh Government data shows that the percentage of individual live births with a low birth weight is slightly lower in Gwynedd than Wales, namely 5.7% compared to 6.1%. Between 2017 and 2020, this percentage has fluctuated between 5.1% and 5.7% in Gwynedd and 5.6% and 6.1% in Wales as a whole.

The overall average for breastfeeding at 10 days of age for Wales is 35%, the North Wales average is lower at 34%, but Gwynedd has the highest rates in the region at 37%. Breastfeeding provides health benefits of reducing infant mortality, reduced likelihood of childhood obesity and reduced hospital admissions ([North Wales Population Needs Assessment](#))

In Gwynedd, Welsh Government data notes that the percentage of all children fully immunised on schedule by the time they are four years old has slightly increased from 88% in 2017 to 91% in 2019. This is higher than Wales levels where 88% had been fully immunised in 2019. According to Wales Public Health Observatory data from 2017/18, 8.5% of Gwynedd children aged 11-16 consumed alcohol and 3.2% smoked. In comparison, 7.9% of all Wales children aged 11-16 consumed alcohol and 3.6% smoked.



Childhood obesity rates in Wales are the highest in the UK. The latest available data for North Wales (2018/19) highlights that 29% of 4-5 year olds have been assessed as overweight or obese as part of the Program National Children Bill. This is a 6% increase since the start of annual measurements in 2011/12. **At the Local Authority level, Gwynedd has the highest rate in North Wales at 31%.**

Being overweight or obese puts an individual at increased risk of a variety of health conditions including type 2 diabetes, cancer, musculoskeletal conditions, heart disease and stroke. It's estimated that up to 25% of obese people experience mental health conditions such as depression. In children, evidence suggests that there is an increased risk of bullying in school and the associated mental health implications of this.

Being overweight or obese also reduces the likelihood of children participating in physical activity and experiencing the associated benefits (see '[Cultural](#)' chapter on children's sports participation levels in Gwynedd).

While we await the update of the Child Measurement Program data for Wales, recent data from England and Scotland suggest that the Covid-19 pandemic has had a negative impact on children's weight due to reduced opportunities to be physically active and limited access to healthy food choices. Rates in England increased from 23% to 27%, and from 22.4% to 29.5% in Scotland, between 2019/20 and 2020/21. The data also identifies that the proportion of children who are overweight or obese increases as they get older, suggesting that once children become overweight or obese, it's difficult to reverse. The need for primary prevention and early intervention to address risk factors for overweight and obesity across the life course, at a whole system level, is therefore clear. Obesity is strongly associated with deprivation in both children and adults in Wales. Rates of overweight and obesity children are 1.7 times higher among children living in the most deprived areas, compared to those living in the least deprived areas. In adults there is a 9.2 percentage point difference between overweight and obesity rates among those living in the most and least deprived.



Access to Health Services

In the Gwynedd Well-being Areas in 2020/21, the average ambulance response time for a 'red' call, that is the most serious type, was quite varied as shown by the Wales Ambulance Services NHS Trust.

The lowest average times were in the **Bangor Well-being Area** (06:32 minutes) and **Caernarfon Well-being Area** (08:21 minutes) and the longest in the **Tywyn Well-being Area** (14:29 minutes) and **Bala Well-being Area** (14:32 minutes). This has increased over the last few years, and in 2018-19 the lowest average times were once again in the **Bangor Well-being Area** (04:45 minutes) and **Caernarfon Well-being Area** (07:04 minutes) and the longest in the **Tywyn Well-being Area** (11:46 minutes) and **Bala Well-being Area** (10:44 minutes).



In the Penllyn Well-being Area ambulance response time was:

14:32 minutes

Data from the Welsh Index of Multiple Deprivation (WIMD) from 2019 was used to assess access to services and travel time in this assessment. Return public and private travel time to a *GP surgery* is higher in Gwynedd than Wales, with an average time of 54 minutes and 11 minutes compared to 40 minutes and 7 minutes respectively. This is also true for travelling to a *pharmacy* where the average return public travel takes 53 minutes and 11 minutes by private travel compared to 38 minutes and 7 minutes for Wales. Lack of access to health services has a greater impact on Gwynedd's rural communities and some equality characteristics, including disabled people and older people, who are less likely to have access to a vehicle and are also more likely to need the health services.

Another area of concern is dentistry, and according to a report by the British Dental Association (BDA) in April 2019 only 18% of dentists in the Betsi Cadwaladr University Health Board area were accepting new adult NHS patients and only a quarter were accepting children as new NHS patients.

During conversations with groups, Community Councils and Councillors, concerns about suitable health provision locally were common, and a key message in the rural communities of Pen Llŷn (**Llŷn Well-being Area**), Bro Dysynni (**Tywyn Well-being Area**) and Dolgellau (**Dolgellau Well-being Area**). Here is an example of comments received:

"Traveling to Wrexham or Ysbyty Gwynedd is not easy. Ignorance by hospital staff that we live so far away and need to make special arrangements to arrive. With will, understanding and technology, the hospital could be a major center serving the population." (Dolgellau Town Council - **Dolgellau Well-being Area**)

"No A&E in Tywyn, and an 80 mile trip (there and back) to Aberystwyth in an emergency." (Llanegryn Community Council - **Tywyn Well-Being Area**)

"People unable to get a doctor's appointment, not enough health resources to serve the area, the situation has worsened since Abersoch surgery has closed and the service centralised at Rhydbach Surgery, Botwnnog." (**County Councillor - Llŷn Well-being Area**)

Keeping safe

According to the National Survey for Wales in 2020/21, 88% of the people of Gwynedd feel safe at home, when walking in the local area, and when travelling. This is the highest percentage of all Wales counties and is higher than the percentage for the whole of Wales, namely 68%. This percentage in Gwynedd has increased from 73% in 2016/17 and 81% in 2018/19. There is a difference in the percentage of women and men who felt safe in Gwynedd, and in 2020, 77% of the women who responded to the survey felt safe compared with 100% of men. This is also true for all Wales where 51% of women and 84% of men felt safe.

In Gwynedd, on average between 2017/18 and 2019/20, there were 113 cases of a deliberate fires and 335 cases of accidental fires, according to the Fire Service data. The deliberate fire cases figure is higher than the number reported in the last well-being assessment while the accidental fire cases figure is lower.

Data from Data.Police.uk indicates that the rate of crimes per 1,000 of the population aged 16 year and over varies between the different Well-being Areas. In 2020, the lowest rate was in the **Tywyn Well-being Area** (59) and **Penllyn Well-being Area** (69) and the highest in the **Caernarfon Well-being Area** (120) and **Bangor Well-being Area** (150), which suggests

a close relationship between crime and the nature of the area - rural or urban. Community safety and concerns about drug and substance misuse were also themes that arose in Caernarfon and Bangor during a 'doorstep talks' exercise by Adra housing association.

During the lockdown, all crimes report to the Police reduced in number. This was true nationally. The biggest decreases were to be seen in acquisitive crimes (e.g. stealing) of all sorts, and violent crimes as people stayed at home. When Covid-19 restrictions were lifted, it's understood that crimes in general increased gradually back to the pre-lockdown numbers, but this is not true of all crimes.

Unsurprisingly, re-opening the night-time economy (e.g. pubs and clubs) had a substantial effect on local crime levels. An increase in the number of hate crimes mainly related to tensions between individuals which led to verbal abuse was recorded. This could be seen through the Country as people's movements during the Covid-19 restrictions caused bad feeling between individuals and groups. In addition, the situation with second homes contributed extensively to this situation. The Police respond to every case of hate crime and investigate them in full. The national definition of hate crime, as used by the Police, includes race-related discrimination, including between UK nations, i.e. Welsh/English, therefore when these incidents happened were recorded as hate crime.

The Community Safety Partnership is a group of organisations working together to look at how crime and disorder can best be tackled across Gwynedd and Anglesey. The Partnership's priorities are consistent with the Safer North Wales Partnership Board Strategy of crime and anti-social behavior prevention, tackling violent crime, tackling serious organisational crime and protecting and building resilient communities and maintaining public safety. In addition, regional work is ongoing to raise awareness of domestic violence and victims' voices (VAWDASV).



Bangor crime rate per 1,000 of the population

Keeping in touch

The availability of facilities and access to services is an important part of well-being and is likely to be different throughout the county as Gwynedd is a vast and varied area. Travel times to services are discussed throughout this assessment under the various well-being headings using the WIMD data indicators from 2019.

As seen in relation to travel times to a pharmacy and GP above, return public and private travel times to a grocery store are much higher in Gwynedd than the whole of Wales, with an average time of 40 minutes and 6 minutes, compared with 32 minutes and 4 minutes.

2011 Census data indicates that 79% of homes in Gwynedd have a car or van, which is lower than the figure for the whole of Wales, namely 77%. A difference can be seen in this percentage in the various Well-being Areas, with the highest percentage in the **Bangor Well-being Area** (74%) and **Ffestiniog Well-being Area** (74%) and the lowest in **Penllyn Well-being** (84%). The availability of public transport and facilities (which is a challenge for rural communities) and economic poverty (with increasing car running costs) are factors that should be considered when looking at these figures.



This booklet has already looked at the challenges and opportunities of green transport (see **'Environmental'** chapter) but transport also a social issue that influences our day-to-day life in terms of our ability to work, learn and enjoy ourselves. With a focus on a greener future, [Llwybr Newydd: The Wales Transport Strategy 2021](#) sets out three priorities which are: Bring services to people in order to reduce the need to travel, allow people and goods to move easily from door to door by accessible, sustainable and encourage people to make the change to more sustainable transport.

Public transport

In Wales, three quarters of all public transport journeys are by bus. The 'Mobility in Wales' research shows that some equality characteristic groups have different transport needs, especially when considering bus services. For example, it's noted that disabled people rely on a bus service more than the rest of the population, women are more likely to suffer from inappropriate bus timetables as they are more likely work part-time or irregular hours and young people, who rely on the service for education and enjoyment needs, but is a particular challenge for children living in poverty. ([Mobility in Wales](#))



The availability of bus services for residents is a concern, and a theme that has been highlighted throughout the county in the Our Area 2035 engagement exercise. Preliminary survey results show that it's higher priority in Porthmadog and Penrhyndeudraeth (**Porthmadog Well-being Area**), Bro Peris (**Caernarfon Well-being Area**) and Bala and Penllyn (**Penllyn Well-being Area**). (Our Area 2035 Interim Report, unpublished)

Public transport was also a prominent theme of discussion among local groups, Community Councils and Councillors. Here is an example of the type of concerns highlighted:

"Public transport doesn't go often enough especially to meet the needs of people who need to travel to work, and to allow young people to visit friends in nearby villages and towns." (Llanrug and Cwm y Glo Community Council - **Caernarfon Well-Being Area**)

"Public transport is serious - no opportunities for single people in the area to travel to another town / village and impact on social and mental health opportunities." (Cwmni Nod Glas - **Dolgellau Well-Being Area**)

"It's a very rural area and far from everywhere. Traveling is difficult without a car and this adds to the problems of loneliness especially for the older generation. The service offered by O Ddrws i Ddrws is a great help but needs to be properly funded." (Member of Plas Carmel Committee - **Llŷn Well-being Area**)

Isolation and social contact

Data from the National Survey for Wales shows an increase in the percentage of respondents aged 16 and over who agree that they belong to the area; that people of different backgrounds get along well; and that people treat each other with respect in Gwynedd, with a percentage of 78% in 2020/21 compared to 60% in 2016/17 and 53% in 2018/19. It's noted that the Gwynedd percentage in 2020/21 is higher than the Wales percentage of 69%, and the Wales percentage has also increased from 50% in 2016/17 and 52% in 2018/19. Unfortunately, the survey does not include data on the views of Gwynedd's children and young people. Corresponding information on the views of younger groups would be useful in providing a full picture for Gwynedd.

Community spirit and friendly neighbours has been highlighted as a very important theme throughout the county, by local residents, groups and organisations. This was one of the main assets that made Gwynedd a good place to live. This was a consistent message across the Well-being Areas. (Our Area 2035 Interim Report, unpublished)

The risk of isolation increases as individuals fail to maintain contact with their communities. According to the Data for Wales figures from 2020, just over **11% of people in Gwynedd are lonely**, compared to the almost 13% for Wales as a whole. These figures have decreased since 2016 where 17% of people in Gwynedd and 17% of people in Wales were lonely, however, qualitative evidence suggests that Covid-19 has led to increased isolation, especially for those with care and support needs. ([North Wales Population Needs Assessment](#))



Case Study - Gwynedd's social prescription

'Social prescribing' is a way of enabling health and care professionals, for example, GPs, to refer people to a variety of local, non-clinical services. Mantell Gwynedd is leading on the scheme in Gwynedd, and the main aim of the Community Liaison Officer post is to support individuals to identify their own needs, and then, where appropriate, to refer on to third sector organisations that provide community activities and other activities. The scheme addresses isolation and seeks to increase confidence, improve health and well-being and improve individuals' quality of life. The aim is not to create a culture of dependency but to facilitate individuals to participate in activities thus reducing the need for medical appointments.

Helping each other

Census data from 2011 shows that 10% of Gwynedd's population provide at least one hour a week of unpaid care. This is slightly lower than the Wales percentage of 12%. Welsh Government data shows that the percentage of people who volunteer in Gwynedd has increased slightly from 31% in 2016 to 33% in 2019. This is higher than the percentage of people who volunteer in Wales, which has dropped from 28% in 2016 to 26% in 2019. According to these figures, Gwynedd has the highest percentage of people who volunteer in Wales. The Wales Center for Public Policy's '[Cultural Well-being](#)' evidence paper states that the positive effects of volunteering include benefits to the individual such as developing confidence and purpose, and social benefits such as helping to build relationships and cohesion.

Unfortunately there is no reliable data to look at the number of local volunteers beyond 2020, however, the Covid-19 period has shown the heroic efforts of volunteers who have been supporting vulnerable people across the county. The Social Return on Investment framework can be used to evaluate specific projects as shown in the '[Porthi Pawb](#)' Evaluation Report. This was a project that distributed hot food to people in Caernarfon, and the benefits noted were that £ 4.78 of Social Value was created for every £1 invested.

Digital connection

Keeping connected through digital means has been extremely important over the last two years with many services having to move online over the lockdown period. As a result the importance of broadband availability was highlighted for social and also economic reasons (working from home and remote education, online small businesses etc.).

The WIMD indicator figures from 2019 show that **Gwynedd had a higher percentage of a lack of broadband availability on 30Mb/e than the whole of Wales, namely 12% compared to 7%**. This highlights a particular challenge for Gwynedd's rural communities.



The impact of digitalisation is worse for some groups. These include older people, disabled people, low income families, rural households and homeless people, with Digital Communities Wales reporting that around 7% of adults in Wales have digitally excluded. The '[Inequality in a Future Wales](#)' (2021) report by the Future Generations Commissioner and Public Health Wales states that new policies such as remote working need to consider the impact on these groups.

ECONOMIC



Work and Salary



According to the 2011 Census data that looks at occupation, the highest percentage of Gwynedd people aged 16-74 who are in employment, work in the professional occupations (e.g. teachers, doctors or nurses, social workers), namely 17%. To compare, the Wales percentage is 16%. This percentage varies from 9% in the **Penllyn Well-being Area** to 28% in the **Bangor Well-being Area**, which is in keeping with the fact that Bangor is a 'City of learning' due to the presence of the University. It's the most common occupation in the **Bangor Well-being Area** and **Caernarfon Well-being Area**.

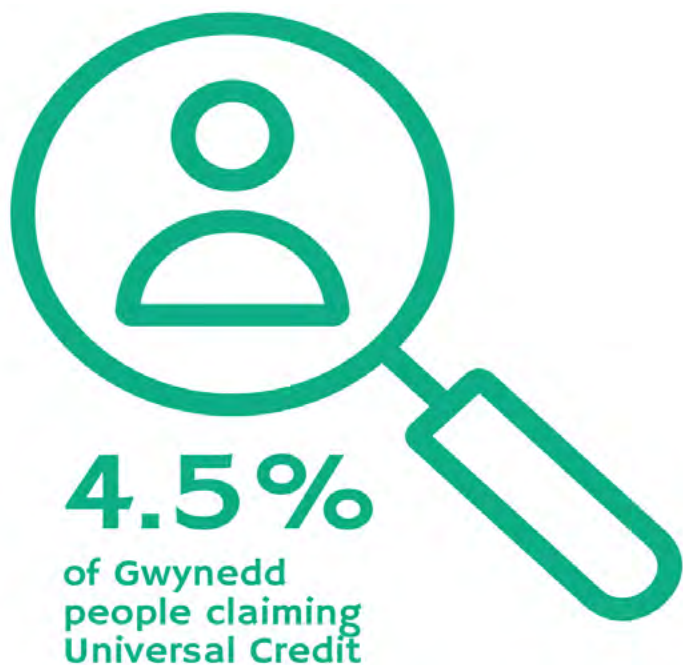
17% work in the professional occupations

In Gwynedd, a high percentage of people also work in the skilled trades occupations (e.g. plumber, electrician, carpenter, farm or agricultural worker), namely 16%, which is higher than the all-Wales percentage of almost 14%. Once again, this percentage varies from 9% in the **Bangor Well-being Area** to 28% in the **Penllyn Well-being Area**. It's the most common occupation in the areas of **Dolgellau Well-being Area**, **Ffestiniog Well-being Area**, **Llŷn Well-being Area**, **Penllyn Well-being Area**, **Porthmadog Well-being Area** and **Tywyn Well-being Area**.

A lower percentage of the people of Gwynedd work in the sales and customer services occupations, at 8%, which is slightly lower than the all-Wales percentage at 9%. Once again, there is a variety in the Well-being Areas from 4% in the **Penllyn Well-being Area** to 11% in the **Bangor Well-being Area** and **Porthmadog Well-being Area**. The lowest percentage of Gwynedd residents work as process, equipment and machinery operators, which is almost 7%, compared with an all-Wales percentage of 8%.

Reliable data on areas of work by local area after 2011 is unavailable, and therefore a significant data gap is evident. The [Inequality in a Future Wales](#) (2021) report by the Future Generations Commissioner and Public Health Wales predicts changes in future work trends with the growth of science, technology and 'green' occupations benefiting the environment. However, a clear message in the report is that inequality needs to be reduced as these sectors grow by offering opportunities that are accessible to everyone, including women who are less likely to take up employment in these areas.

Unemployment



The 2020 Welsh Government's Annual Population Survey notes that the Economic Activity Rate of those of working age, 16 - 64 old is 75% in Gwynedd, compared with the percentage for Wales, namely 76%.

According to the figures of the Office for National Statistics on average **4.5% of people aged 16-64 years in Gwynedd were on Universal Credit between November 2020 and October 2021**. This is higher than the Wales percentage of 5.1%. The figure varies greatly from month to month with the highest percentage February 2021 (5.5%) and the lowest in September and October 2021 (3.4%). It's likely that this is due to the impact of the Covid-19 lockdown at the beginning of 2021.

Within the Gwynedd Well-being Areas, the percentage varies somewhat, and on average, the percentage of people aged 16-64 years who claimed Universal Credit between November 2020 and October 2021 was at its lowest in the **Penllyn Well-being Area** (3%) and **Llŷn Well-being Area** (3.6%) and at its highest in **Caernarfon Well-being Area** (4.9%) and **Ffestiniog Well-being Area** (5.1%). It must be noted that the figure also varies from month to month in the Well-being Areas, likely due to the impact of the Covid-19 lockdown period at the start of 2021, but also in some areas, including Llŷn, Ffestiniog and Porthmadog, that the working pattern of the area is very seasonal.

Salary

The Office for National Statistics' Earnings Survey and Annual Hours indicates that the 2021 median weekly wage (gross) for Gwynedd was around £386 a week, which is lower than Wales as a whole, where the median salary is £469 a week. **The same data shows that the salaries of women are less than the salaries of men in Gwynedd, where the weekly median salary of women is £327 compared with £450 for men**, which is a difference of almost £124 a week. A similar trend can be seen in Wales as a whole, where the weekly median salary for women is £403 compared with £551 for men; a difference of almost £149 a week



£361 weekly median salary in the Dwyfor Meirionnydd area

There is no data available on Well-being Area level; however, **the weekly median salary in the Dwyfor Meirionnydd electoral ward is around £361 a week**, which is lower than the whole of Gwynedd, and Wales. The salaries of women are less than the salaries of men in the area, where the weekly median salary of women is £322 compared with £390 for men; which is a difference of almost £68 a week. The weekly median salary in the **Arfon** electoral ward is around £421 a week, which is higher than the whole of Gwynedd, but lower than Wales. The salaries of women are less than the salaries of men in the area, where the weekly median salary of women is £330 compared with £457 for men; which is a difference of almost £127 a week.

The 2020 Welsh Government's Annual Population Survey notes that 42% of the population over 50 years old work in Gwynedd - that is a little higher than the figures for Wales namely 40%.

Low wages inevitably lead to higher levels of rural poverty and depopulation, which in turn have an impact on our communities, the future of our young people and on the Welsh language. Lack of well-paid jobs is one of the main concerns of Gwynedd residents. (Our Area 2035 Interim Report, unpublished) It seemed to be a high priority theme in all areas across the county, but less prominent in Caernarfon and Bangor. Creating high value jobs to help keep young people in North Wales is a priority for the [North Wales Ambition Board](#), and Welsh Governments' Regional Economic Framework looks at ways of providing better paid jobs, closer to home, to provide opportunities for social and economic improvement.

Cost of living and poverty

£15,941

income left after
paying housing
and tax costs



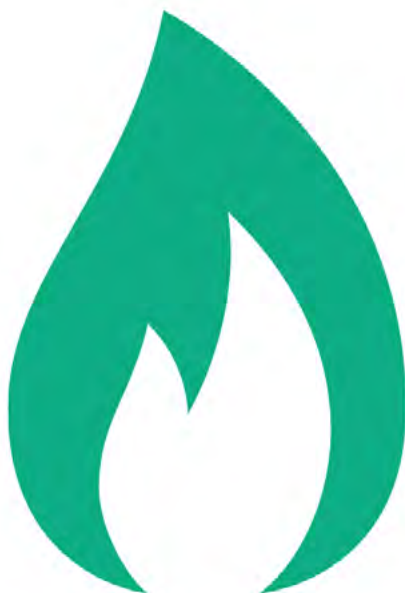
The Regional Accounts data of the Office for National Statistics from 2019 indicate that the **gross household income to be spent by people in Gwynedd, namely £15,941**, is £1,322 less than all Wales. It's likely that this figure has changed by now.

One of the key messages from the consultation on the draft well-being booklets (January to March 2022) was a lack of information on poverty, especially given its prevalence on recent news. In Gwynedd current drivers of poverty include the rising cost of living (rent, fuel and food), Furlough timing and people's work choices, with the Universal Credit payment changes, however we recognise that there is a reliable and current data gap within this field.

However, data is available from the North Wales Regional School Effectiveness and Improvement Service (GWE) that shows the percentage of pupils that are entitled to receive free school meals. In Gwynedd in 2020, 14% of primary school pupils claimed free school meals. The percentage has varied between 13% and 14% annually between 2016 and 2020. By the time primary pupils get to secondary school, the figure reduces to around 12%. Within the Gwynedd Well-being Areas, the lowest percentage of primary school pupils claiming free school meals in 2020 are in the **Penllyn Well-being Area** (9%) and highest in the **Ffestiniog Well-being Area** (17%). By the time pupils arrive at secondary school, the lowest figure is again to be seen in the **Penllyn Well-being Area** (8%) and at its highest again in the **Ffestiniog Well-being Area** (15%).

Fuel poverty is also an important aspect when assessing cost of living and poverty, and according to the 2017/18 figures from the Welsh Government in Gwynedd, there are estimates that **23% of households are in fuel poverty**. This is one of the highest estimated proportions of fuel poverty in Welsh local authorities. However, with the recent increase in fuel prices this figure is likely to be much higher than the estimate in 2018, but unfortunately finding dependable data in this field was problematic.

The '[When ends don't meet: a cost-of-living update](#)' (Cardiff University) briefing paper notes that 56% of Gwynedd's property stock was dated before 1945. This may be linked to low energy efficiency which is more problematic if the cost of heating increases. 'Fuel poverty' is mentioned in the section on economic well-being, but it's also an area of social and environmental well-being (health implications for poorly heated homes, eco-friendly and sustainable options insulation and heating).



23%
of households
are in fuel
poverty - one
of the highest
in Wales

House prices and affordability

According to the Land Registry data and CACI Data (2020) the median price for property in Gwynedd is £160,000, which is similar to the all-Wales figure, which is £163,000. As Gwynedd is a vast area, it's important to look at the median property price in the different Well-being Areas, and how their price in 2020 compare with their price in the last assessment in 2015. A change has been seen in every Well-being Area since the last assessment, and an increase was seen in the **Ffestiniog Well-being Area, Bangor Well-being Area, Caernarfon Well-being Area, Dolgellau Well-being Area, Tywyn Well-being Area** and **Llŷn Well-being Area**. The lowest median property price in the Gwynedd was seen in the **Ffestiniog Well-being Area** area, where in 2020 the median property price was around £95,000, which is still an increase of £18,000 since the last assessment in 2015. On the other hand, the highest median house price was found in the **Llŷn Well-being Area**, where the median price was £218,000 in 2020 - an increase of £43,000 since the last assessment in 2015.

When comparing the figures for 2020 and 2015, a reduction was seen in some areas. In 2020, the median house price in the Porthmadog area was £170,000, which is a reduction of £4,000 since the last assessment. Nevertheless, this is the area with the second highest median price in Gwynedd. In addition, according to the 2020 figures, the median house price in the Penllyn area was around £107,250, which is a £41,750 reduction since the last assessment in 2015. However, it's important to note that these figures are based on a different number and type of sales and this has affected the figures. In 2015, 51 houses were sold, with the most expensive house costing £500,000. On the other hand in 2020, only 28 houses were sold in the Penllyn area, with the price of the most expensive house being much lower, at £299,950.

Housing affordability is an important factor when looking at this field, and the 2020 figures the median household income in Gwynedd is around £26,831, but an income of £32,143 is needed in order to be able to afford an entry-level market priced house. This means that 59% of Gwynedd households have been priced out of the market, which is higher than the percentage for the whole of Wales (56%). However, it is likely that 2020 figures do not show the full impact of the pandemic on house prices in the area, and these will be updated when the data is available.

Case Study - The housing situation in Llŷn

The highest percentage of households priced out of the market is in the **Llŷn Well-being Area** at 69%. The median household income in Llŷn is around £27,734 but at least £40,143 is needed to afford to buy an entry-level market priced house. There is further variation within the area with the highest average area being Abersoch (£ 365,275) and Llanengan (£ 298,500). (Research report ['Managing the use of dwellings as holiday homes'](#))

The data for the **Llŷn Well-being Area** clearly demonstrate that the community faces a number of unique challenges that include aspects across each of the four pillars of well-being (economic, social, environmental and cultural), and that these often compete with each other. This is an area of spectacular scenery and outstanding natural beauty, but highly dependent on low-paid seasonal employment and tourism, with lack of access to services, and rising house prices driven by high rates of second home ownership .



Data from the [Managing the use of dwellings as holiday homes](#) Research Report shows that around 11% of Gwynedd's properties are second homes compared to 3% in Wales. In some areas within Llŷn the percentage of second homes as high as 47% (Abersoch, Llŷn Well-being Area).

The affordable housing and second homes situation is a concern that has been highlighted across the county by residents during the Our Area 2035 public engagement exercise. In fact, a lack of suitable and affordable housing for local people to buy and rent or concerns about the high number of second houses / holiday homes was noted as one of the top five 'negative' issues in each of the 13 local regeneration areas used during the exercise.

In conversations with groups, Community Councils and County Councillors, concerns about the housing situation were paramount. Here is an example of comments received:



11% of Gwynedd houses are second homes

"There is so much demand for housing and the number of houses up for sale and for renting are plummeting ... our salaries can't compete with people from outside the area." (Member of a local initiative - **Llŷn's Well-being Area**)

"We still needs social housing for young people. This year is especially problematic, for example, people are being evicted from their houses / apartments by private landlords as they are attracted to make more money by letting the property out as holiday homes to visitors." (Local councillor - **Twyn Well-Being Area**)

"The lack of affordable housing is a clear concern in our area. The number of properties available at an affordable price to young people is reducing and it's of great concern to us how many young people and their families will be able to remain in our communities in the future." (Ganllwyd Community Council - **Dolgellau Well-being Area**)



Tourism and tourism accommodation



Based on the STEAM (Scarborough Tourism Economic Assessment Model) figures, prior to the Covid-19 period, the tourism sector had grown to contribute over £1.35bn to the Gwynedd economy and employed over 18,200 people with 7.81m visitors visiting annually. The tourism sector is undoubtedly important to Gwynedd's economy, however, tourism can also create additional pressures on public services and the natural world (as already mentioned in the **'Environmental'** chapter of the booklet).

Visitor accommodation businesses can be found across the County. Including AirBnB, in 2019, there were 1,608 visitor accommodation businesses in Dwyfor (around 40% of the Gwynedd total), 1,643 in Meirionnydd (around 42% of the Gwynedd total) and 706 in Arfon (around 18% of the Gwynedd total). The highest numbers can be seen in the **Llyn Well-being Area**, where it's estimated there are 40,718 visitor accommodation beds, which represents around 30% of the total visitor beds in Gwynedd and the **Porthmadog Well-being Area** where it's estimated there are 29,702 visitor accommodation beds which represents 22% of the total number of visitor accommodation beds. On the other hand, the lowest numbers can be seen in the **Bangor Well-being Area**, where it's estimated that there are 4,043 visitor accommodation beds, which represents less than 3% of the total of visitor accommodation beds, and in the **Ffestiniog Well-being Area** where it's estimated that there are 2,287 visitor accommodation beds, which represents less than 2% of the total visitor accommodation beds in Gwynedd.

Of course, figures from 2018/2019 do not convey the impact of Covid-19 on tourist accommodation numbers, and concerns about an increase in AirBnB's at the expense of local households are conveyed in the local conversations above. (Our Area 2035)

Impact of Covid-19 and Brexit on tourism



The Wales Center for Public Policy's ['Well-being and Impact of Covid-19 and Brexit'](#) evidence paper examines the impact of the 'two economic shocks' experienced in recent years on individuals and local communities across areas of Wales.

The report's analysis is that Covid-19 had the most negative impact in the accommodation and food sector, and because North Wales' coastal towns and rural areas had a higher proportion of employees in the tourism, retail and hospitality sectors, the risk to work and wages higher in these communities.

The report similarly highlights the risk of Brexit, and its further negative impact on the agricultural and food/automotive/steel manufacturing and tourism sectors. Most of these effects arise from border delays, as traders adjust to new customs and regulatory requirements as well as a sharp fall in the number of overseas workers available. It has also had major implications for local economy sector and the small businesses that rely on imports and exports, which are reflected in the levels of docking traffic in ports such as Holyhead.

Local economy and businesses



According to the Office for National Statistics Business Demography Data, in 2020, there was a total of 4,380 businesses registered in Gwynedd.

The rates of start-up businesses in Gwynedd is lower than Ynys Môn, North Wales and Wales. In addition, the rate of failing businesses is also lower in Gwynedd compared with Ynys Môn, North Wales and Wales. According to the Office for National Statistics data from 2017, 61% of Gwynedd companies remain in business for at least three years or more. This is higher than the Wales percentage of 54%.

A vibrant local economy and lively town centers can make a significant contribution to the economic and social well-being of areas, as well as offering a range of services to residents and communities. Significant challenges including changes in customer purchasing habits, the rise of online technology, Brexit and Covid-19 (as noted above) over recent years have resulted in the closure of a number of national chain stores that has had an impact on the viability of town centers and 'high Streets'. During the 'Our Area 2035' engagement exercise this was highlighted as the main concern amongst residents of the City of Bangor (**Bangor Well-being Area**) in particular. (Our Area 2035 Interim Report, unpublished) Here are some comments from Bangor's groups, organisations and Councillors:

"I would like to see a number of small shops on the high street that offer something different - which would make the experience of walking the high street something enjoyable and different from shops in a supermarket." (Bangor Strategic Partnership - **Bangor Well-being Area**)

"The decline of High Street, Bangor, is having a detrimental effect on the whole area." (Pentir Community Council - **Bangor Well-being Area**)

"Few shops are open on the high street. People leave and avoid the city. Businesses need to be more flexible with late night opening to attract more customers." (Bangor City Council - **Bangor Well-being Area**)



Skills for Life

Education, training and skills acquisition are vital when considering the development of Gwynedd's economy. According to the 2011 Census data, in Gwynedd, 23% of the population aged 16 years and over do not have a qualification, compared with 26% in the whole of Wales.

This figure varies across the Gwynedd where the percentage is at its lowest in the **Bangor Well-being Area** (17%) and at its highest in **Tywyn Well-being Area** (28%). In Gwynedd, 12% have a Level 1 qualification, 16% Level 2, 15% Level 3, 26% Level 4 or higher and 8% with an apprenticeship or other qualification. To compare with the all-Wales level, 13% have a Level 1 qualification, 16% Level 2, 12% Level 3, 25% Level 4 or higher and 8% have an apprenticeship or other qualification. These figures are now dated, and they will be updated when new data is released.



From 2018/19 the Welsh Government has submitted a new set of performance measures that include the Literacy points score, the Numeracy points score and the Science points score. This makes it difficult to compare year with year over the last few years and there is no analysis per county since 2018/19. However, figures are available for the number of year 11 school leavers that we know are not in education, employment or training (NEET). In Gwynedd, the 2020 percentage is 1.2%, which is lower than the all Wales figure, namely 1.7%.

Childcare

Accessible and affordable childcare in early childhood is essential for the well-being of parents and the child, and is also an important economic factor as it allows the parent to return to work while also providing a foundation of education and early experiences for healthy development.

The Childcare Sufficiency Assessment (2022) shows that there is a very uneven distribution of all childcare providers across Gwynedd. The **Bangor Well-being Area** and the **Caernarfon Well-being Area** have the highest supply of all types of childcare and are also the most populated areas of the county. There is limited supply, and therefore choice, of childcare in the rest of the Well-being Areas. However, due to the limited population, the Childcare Sufficiency Assessment looks at the feasibility or sustainability of running a childcare service in these rural areas.



CULTURAL



Cultural well-being

Cultural well-being includes elements such as sports, arts events, as well as visiting museums and historic places.. These topics are closely linked to social and health well-being, environmental well-being and the Welsh language.

By looking at the data below we must be aware that not all demographic groups have equal access to cultural activities.

The Wales Center for Public Policy's '[Cultural Well-being](#)' evidence paper states that families with children (5-10 years) and those who live in households where one member already engages in cultural activities have a positive impact on participation, with factors such as age (being over 75) , financial status (low income) and ethnicity (people from Black or Asian backgrounds) tend to have a more negative impact on participation. The report suggests that looking and mapping local arts, culture, activities, heritage and sport providers is crucial, and that particular consideration needs to be given to those who live in areas of deprivation or areas that generally have lower participation rates.



Keeping fit and active

Participation in sport has an important role to play in cultural well-being, and as set out in the Wales Center for Public Policy's '[Cultural Well-being](#)' evidence paper, it's linked to improved mental and physical health.

According to the latest School Sports Survey by Sport Wales (2018) the number of Gwynedd children participating in sports is similar to the figure across Wales. **In 2018, 49% of Gwynedd children participated in sport activities three or more times a week** - this compared to 48% in Wales. 66% of Gwynedd pupils participate in community sports outside the school at least once a week, similar to the 65% in Wales.

According to the National Survey for Wales for 2019/20, 33% of adults state that they participate in sport activities three or more times a week in Gwynedd compared to 32% in Wales.



49%

of children participating in sports 3+ times a week

In Gwynedd and all Wales, a difference can be seen in the percentage of men and women who participate in sports activities at least three times a week, while in 2019/20 29% of women and 38% of men in Gwynedd participated with 28% and 36% respectively at a Wales level. Although there are no figures at a Gwynedd level, in Wales in 2019/20 a difference could also be seen in participation per age group with the percentage reducing as people get older and the highest percentage in those aged 16-24 (49%) and the lowest in the 75 and older age group (8%).

The impact of the pandemic on physical health was discussed in the Wales Center for Public Policy's '[Cultural Well-being](#)' evidence paper, and refers to a Public Health Wales survey of February 2021 where 47% of respondents across Wales said they 'felt that their physical fitness levels had deteriorated over the last 12 months'. In addition 40% of respondents said that 'they put on weight'. It's therefore important to be aware of the impact of the pandemic and the lockdown on sports participation levels, and data will be released later in the year to determine the county's participation levels in the wake of the pandemic. This data also reflects the close link between sports participation and good health (as previously mentioned in the '**Social**' chapter of the booklet).



We should also be aware of the availability of sports facilities in the county. The WIMD data indicators from 2019 show that return public and private travel time to a sports facility is higher in Gwynedd than Wales, with an average time of 71 minutes and 12 minutes compared to 55 minutes and 10 minutes respectively.

Activities for young people

The Play Sufficiency Assessment (2019) states that children and parents / carers are generally happy with the play opportunities and provision in the county, and the main challenge for providers was the need to maintain and upgrade the play equipment and improve road safety around play areas.

However, during the 'Our Area 2035' engagement exercise concern was expressed by groups, Community Councils and Councillors that there was not enough activity for teenagers, leading to social problems such as anti-social behavior and vandalism. Further work to engage with young people will take place as part of the 'Our Area 2035' project over the coming months but here are some comments already expressed during the conversations:

"Lack of youth clubs, no Urdd clubs, no Young Farmers, no drama club, no hockey club, and the nearest astro turf is in Port or Bala. This is having a negative effect on the Welshness of the area."
(Dyffryn Ardudwy and Talybont Community Council - **Dolgellau Well-being Area**)

"Not enough support for the well-being of young people living in a dispersed rural area, having been educated from home and not being able to mix and with no friends support network. Not enough investment in youth clubs." (Botwnnog Community Council - **Llŷn Well-being Area**)

"Lack of resources and opportunities for young people in the area, because of the lack of public transport there is no way for young people to get to Caernarfon or Penygroes without having to rely on a family to drive them there." (Menter Tŷ'n Llan, Llandwrog - **Caernarfon Well-being Area**)

Cultural events and places

Attending arts events, as well as visiting museums and historic places has an important role to play in the area's cultural well-being.

Leisure time figures are available for the pre-pandemic period. According to National Survey for Wales data from 2019/20, **65% of adults in Gwynedd stated they had attended an arts event during the year** and 38% had visited a museum. The Gwynedd figure is lower

than Wales where in 2019/20 70% had been to an arts event and 43% had visited a museum. In 2016/17, 47% had attended historic locations over the past 12 months. The Gwynedd figure is lower than Wales where 58% had attended.

The National Survey for Wales indicates that 68% of adults aged 16 and over in Gwynedd had attended or participated in arts, cultural or heritage activities three or more times a year in 2019/20. This is slightly higher than the percentage in 2017/18 namely 65%. These percentages are lower than the all Wales percentage, although this has also reduced over the same period from 75% in 2017/18 to 71% in 2019/20. When we look at the percentages in Gwynedd during both years, it's seen that there is a difference in the percentages depending on the age groups. In 2019/20, 73% of people aged 25-44, 70% of people aged 45-64, 65% of people aged 65-74 and 49% of people aged 75 and over attend or participate. This reduction in age groups can also be seen for all Wales in 2019/20.

We have to be aware of the impact of Covid-19 and the 'lockdown' periods on these sectors and that the figures look at the pre-pandemic period. When more recent data is available it will be vital to compare this with the pre-Covid-19 period.

Libraries also have an important role to play in culture and the community. WIMD indicator data from 2019 shows that the average return public and private travel time to a public library is higher in Gwynedd than the whole of Wales, with an average time of 61 minutes and 15 minutes, compared with 45 minutes and 10 minutes.



World Heritage Site

The slate landscape of north-west Wales has been added to the UNESCO List of World Heritage Sites, making it the fourth World Heritage Site in Wales.

This Heritage Site has many parts and extends across many areas including the **Caernarfon Well-being Area, Ffestiniog Well-being Area, Bangor Well-being Area** and **Porthmadog Well-being Area**. It includes the landscapes of the Penrhyn, Dinorwig, Dyffryn Nantlle and Ffestiniog quarries. It also includes the National Slate Museum at Llanberis, Penrhyn Castle and the famous Ffestiniog and Talylyn Railways. The nomination provides an opportunity to recognise the contribution of the traditional slate industry on an international platform and to celebrate and protect the Welsh culture associated with those areas.



SAFLE TREFTADAETH Y BYD
Llechi Cymru
Wales Slate
WORLD HERITAGE SITE

The nomination has seen a number of community activities across the areas including artwork, anthems, interpretive murals, exhibitions, events and school trips with Gwynedd's children and young people to highlight the industry's history and to create a sense of community pride. The nomination also creates opportunities to stimulate economic growth and social regeneration in North West Wales.

Gwynedd Council has led the effort to secure a UNESCO World Heritage Site for the North West Wales Slate Landscape, by working with a range of public, voluntary and private sector partners. The co-operation will continue to ensure the greatest benefit to Gwynedd's slate communities.

While groups, Community Councils and local Councilors expressed appreciation of the opportunities presented by the nomination, there was also an emphasis on ensuring that it does not lead to unmanageable tourism levels without adequate consideration of impact on communities, the language, and lack of infrastructure with a further increase in visitors. (Our Area 2035)



Green spaces

There's a link between cultural well-being and spending time in green spaces and nature, and proximity to a natural green space is one form of assessing an area's physical environment. However, while access to local green spaces offers opportunities for community well-being across the county, the dual relationship between the economic opportunities that attracts tourism to the area and the environmental challenges around educating visitors to respect nature can also be seen (as previously mentioned in the '**Environmental**' chapter of the booklet).

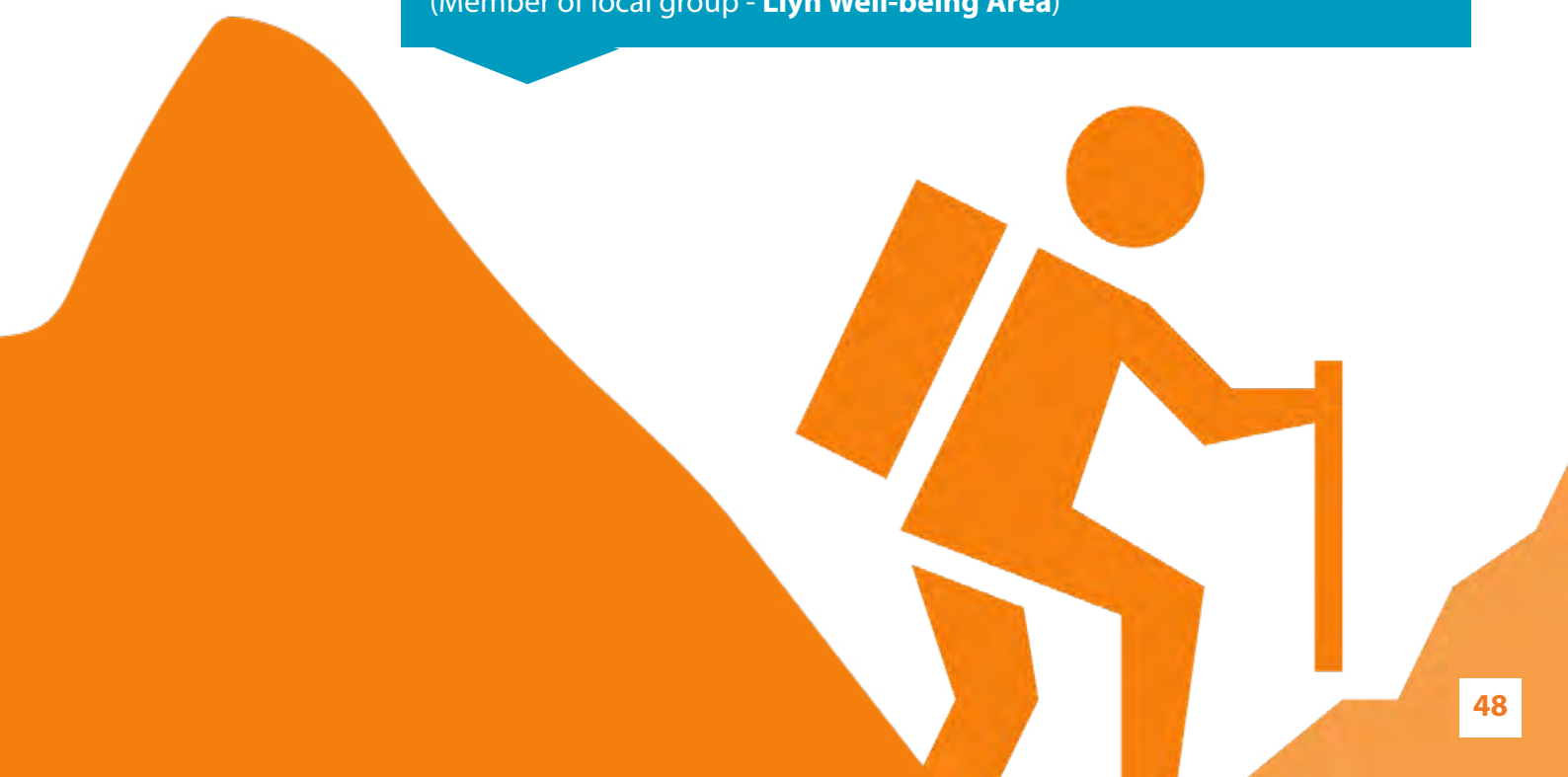
The score from the WIMD indicators data from 2019 for proximity to an Accessible Natural Green Space is the same for Gwynedd and the whole of Wales, namely 77%. Based on the National Survey for Wales figures from 2018/19, 93% of Gwynedd people feel that it's easy to walk to a local green space and 88% are satisfied with the quality of the local green space. Green space and the environment were identified as the county's main assets during the 'Our Area 2035' engagement exercise. Here are some comments from local groups, Community Councils and Councillors:

"It's an area surrounded by natural beauty and local residents have the opportunity to enjoy nature-related recreation." (Ganllwyd Community Council - **Dolgellau Well-being Area**)

"There are plenty of public footpaths and the Covid -19 period has prompted people to look for and find more local routes." (Dolbenmaen Community Council - **Porthmadog Well-being Area**)

"There are a range of distinctive natural features and historic sites in and around the area - the coast, mountains, countryside, lakes and rivers, historic town and remnants of the slate industry - which offer leisure and recreation activities. Keeping healthy, among other things." (Goeslon Memorial Hall - **Caernarfon Well-being Area**)

"A wonderful area between the sea and the mountain. Plenty of outdoor attractions for local residents and visitors to enjoy all year round."
(Member of local group - **Llyn Well-being Area**)



What are the next steps?

By April 2023 the Board will publish a Local Well-being Plan for the areas of Gwynedd and Anglesey. The plan will outline the Well-being objectives of the Board as well as the steps it will take to achieve those objectives.

The Board operates across both counties and the data as well as people's responses to this assessment so far shows that the needs of people and communities across Gwynedd and the isle of Anglesey are very similar. The Board will therefore decide on common well-being objectives for both areas.

We acknowledge that there are gaps in the information that has been gathered and that we need more detailed analysis of individual topics and themes to develop the local plan, and we hope that information from the Census 2021 will also feed into the plan. We also acknowledge that there needs to be further analysis of future trends so that the Board can effectively plan for the future. In order to publish an achievable plan that meets the needs of our communities the Board will consider this assessment of local well-being, but will also consider other assessments that have been published, as well as evidence of what works elsewhere to improve well-being.

The Board will also need to consider the effects of future developments on the well-being of people in Gwynedd and Anglesey, this includes the long term impact of Covid-19 and Brexit. It will do this alongside other established Boards such as the North Wales Economic Ambitions

Board and the Regional Safer Communities Board.

When agreeing the steps that need to be taken to improve well-being of Gwynedd the Board will ensure that public service providers work together to develop an action plan that concentrates on preventative action for positive long term effects.

More importantly, the Board will include you in the process and is keen to hear your opinion on what works in your communities to improve well-being. More information will follow before the end of the year about opportunities to help the Board shape the Well-being Plan.

For more information...

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