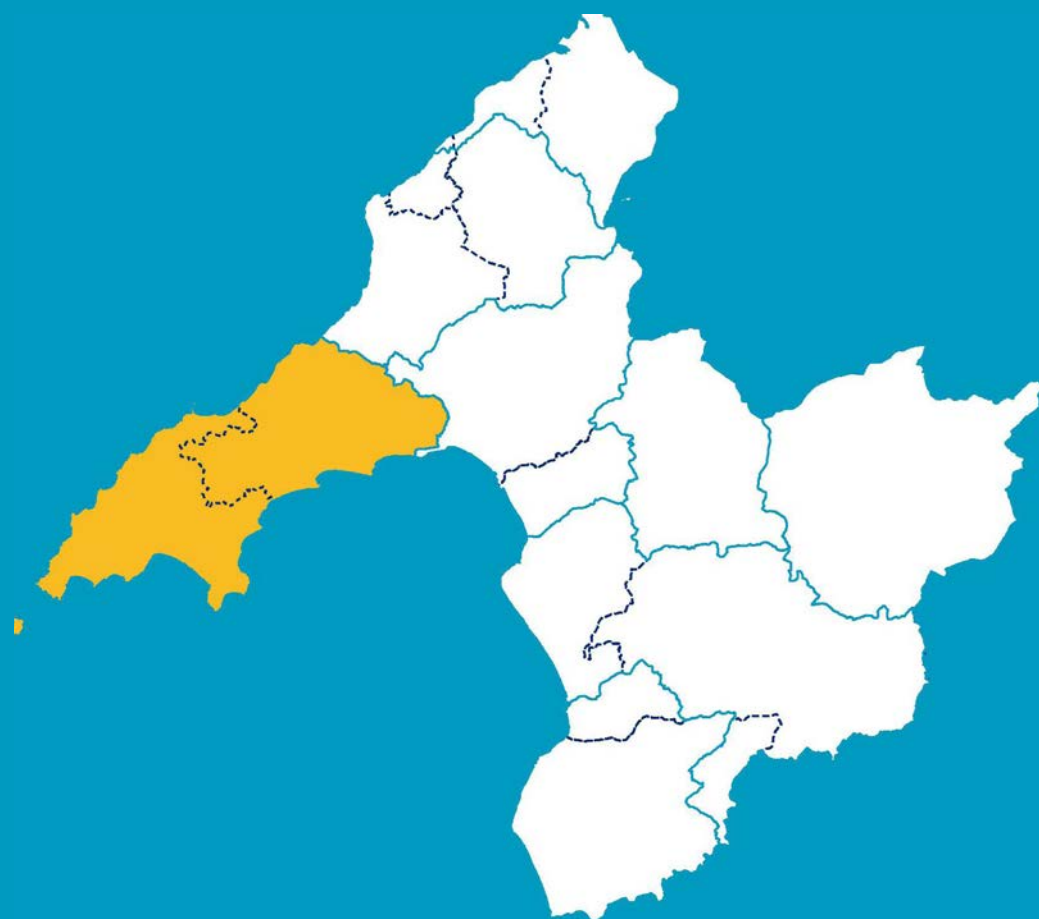


IT'S YOUR AREA WHAT'S IMPORTANT?

LLŶN AREA



The Well-being of Future Generations (Wales) Act came into force on 1 April 2016. The aim of the Act is to improve the social, economic, environmental and cultural well-being of Wales.

The Act has established a Public Services Board (the Board) for every local authority area 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 is a partnership that includes the county councils, the fire and rescue service, the health service, Natural Resources Wales and other partners from the public and third sector.

The Gwynedd and Anglesey Public Services Board has divided the whole area into 14 smaller areas. Research has been undertaken on behalf of the Board on each of the 14 areas in order to understand and learn more about the well-being of those areas. In addition to the available data, partners of the Public Services Board have engaged extensively with our communities in recent months. In Gwynedd, the main piece of engagement work was the 'Our Area 2035' exercise. The aim of this project is to engage and work with residents, groups and organisations to help communities identify those priorities that will need to be addressed over the next 10-15 years and create and realise local regeneration plans. In order to work with smaller communities, the Llŷn well-being area has been split in two, namely the Llŷn Area and the Pwllheli Catchment Area.

It is also important to note that the research has highlighted some data gaps and that some figures are based on 2011 Census data, which is now over 10 years old. Our intention is to regularly update the data contained in this booklet in order to capture the key messages that have been conveyed about the wellbeing of the county, and thus led to the formulation of a Well-being Plan, which will guide the Board's work over the coming years.

Since the previous assessment in 2016, our communities have faced substantial changes in light of Brexit and more recently the Covid-19 pandemic. Dealing with the crisis has highlighted the importance of services provided by the voluntary and public sector to our communities, and the importance of the joint-working between them. Also, the crisis has highlighted issues that already existed in our communities, for example, poverty and employment, mental health, second homes and loneliness.

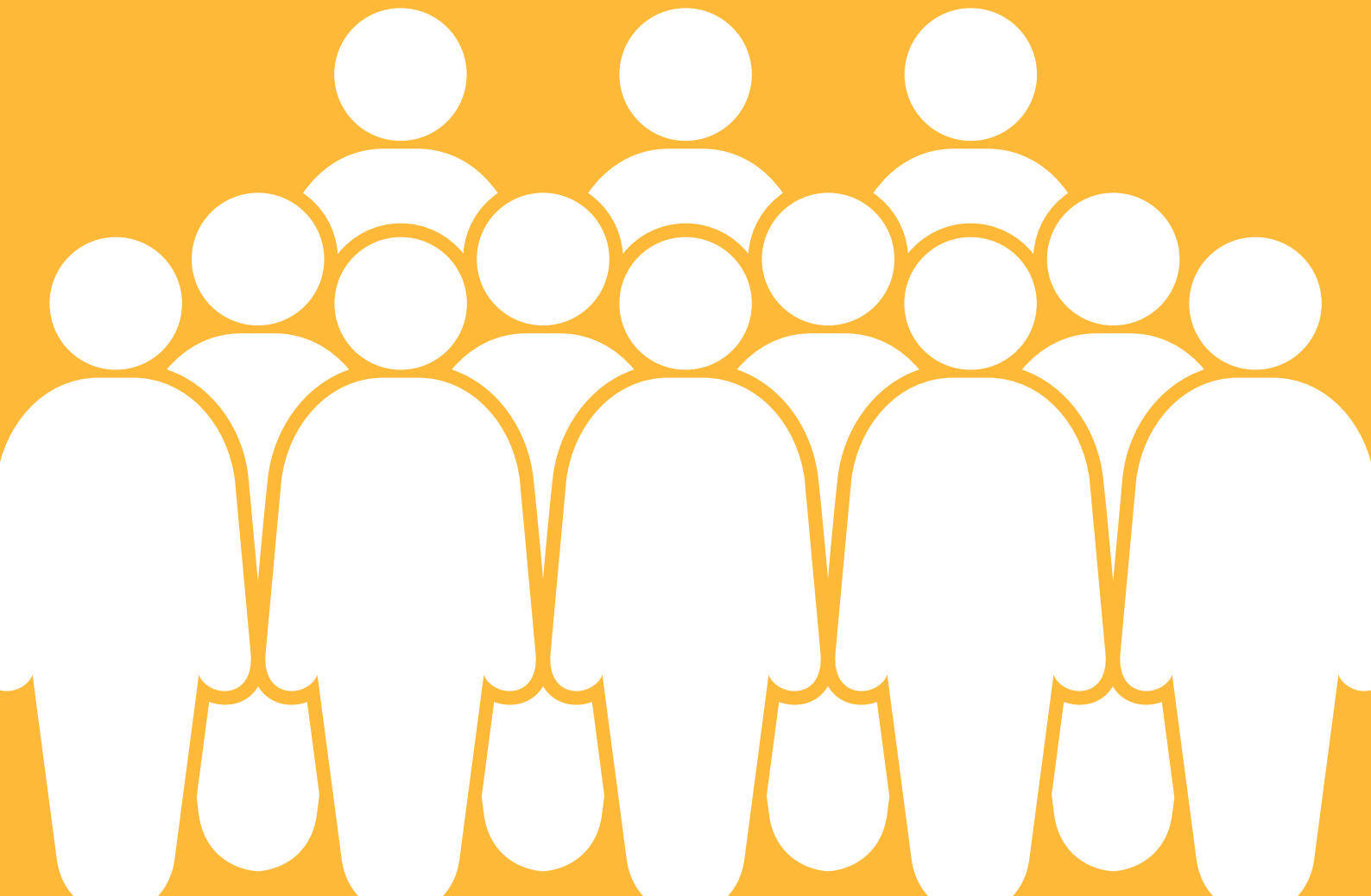
The period has also highlighted the importance of our environment which is central to the health and well-being of our residents and our local economy, attracting visitors to the area. As we look towards a greener path out of the Covid-19 pandemic, it is an opportunity for us to revisit how we use our natural assets to tackle the threats of the climate and nature crises.

The Well-being Assessment will further address those matters that were brought to our attention during the pandemic.

THIS IS THE INFORMATION WE HAVE GATHERED ABOUT THE LLŷN AREA, WHICH INCLUDES LLANAELHAEARN AND LLANYSTUMDWY. DO YOU THINK THIS IS A FAIR REFLECTION OF YOUR AREA'S STATE OF WELL-BEING?



POPULATION



Who are the people of Llŷn?

19,441 people live in the Llŷn area, which is approximately 16% of Gwynedd's population.

The population of Llŷn is expected to increase over the coming years. **Figures suggest that approximately 20,845 will live in Llŷn by 2043, an increase of 7% since 2019.** This is due to net migration. A similar increase, namely 6%, is anticipated in Gwynedd.



In Llŷn, we expect to see the biggest increase, namely 46%, in the population aged 75 and over. This is similar to Gwynedd projections, where it is expected that approximately 42% more people aged 75 and over will live in the county by 2043.

Language

According to the results of the 2011 Census, **73% of people in the Llŷn area can speak Welsh**, which is higher than the Gwynedd percentage of 65%, and Wales on 19%.

The figure has reduced over the last decades compared to 83% in 1981. This reduction is similar to the rest of Gwynedd, which has reduced from 76% to 65% over the same period.

73%
of people in the
Llŷn area can
speak Welsh

According to a 2019 questionnaire, 72% of Llŷn's primary school children speak Welsh always or often on the yard. This is higher than the Gwynedd percentage of 64%. The percentage of secondary school children who speak Welsh always or often on the yard is slightly lower at 65%, but this is again higher than Gwynedd's figure of 42%.

According to groups and organisations in the Llŷn area, the Welsh language and culture was one of the main features that made the area a good place to live. (Our Area 2035)

“One of the strongholds of the Welsh language, the language is passed on naturally to our children and their children.”
(Menter y Plu volunteer, Our Area 2035)

ENVIRONMENTAL



How green is the area?

Fly-tipping is lower in Gwynedd than the rest of Wales – with 5.1 fly-tipping cases to every 1,000 of the population compared to 10.6. There has been an increase in the number of fly-tipping cases recorded in Gwynedd from 529 in 2014/15 to 633 in 2019/20.

In Gwynedd, an increase has been seen in the percentage of municipal waste sent to be reused, recycled or composted from 59% in 2014/15 to 67% in 2020/21. In 2014/15, the percentage was slightly lower than the Wales percentage but by 2020/21 the Gwynedd and Wales percentages were very similar.



How clean are our streets?

Street cleanliness is inspected annually by Keep Wales Tidy.

In 2019/20 142 streets in Gwynedd were inspected, and 95% were of a high or acceptable standard of cleanliness, that is a Grade B or higher. This percentage is similar to what it was in 2015/16.

Within the Llŷn area 21 streets were inspected, 100% of which received a Grade B or higher in 2019/20. This percentage is the same as it was in 2015/16.



In the dog fouling consultation, 76% of respondents from Llŷn felt that it was a problem in their area, this is lower than 81% with the same view in Gwynedd.

The natural environment

Area of Outstanding Natural Beauty

An Area of Outstanding Natural Beauty (AONB) is a special landscape that, due to its outstanding character, deserves to be protected for the benefit of the nation. Their sole purpose, according to the legislation, is to maintain and enhance the natural beauty of the designated area.

In Llŷn, the National Coastal Path follows the AONB coast from Aberdesach on the north coast to Carreg y Defaid near Llanbedrog in the south. The route has been developed and improved over the years so that it follows the coast as closely as possible. It provides a wonderful opportunity to see the beauty of the Llŷn coastline - the diverse beaches, rugged rocks and islands.



“The area is beautiful, a picturesque landscape with natural green spaces, mountains and the seaside on our doorstep.”
(Tudweiliog Community Council, Our Area 2035)

Coastal erosion

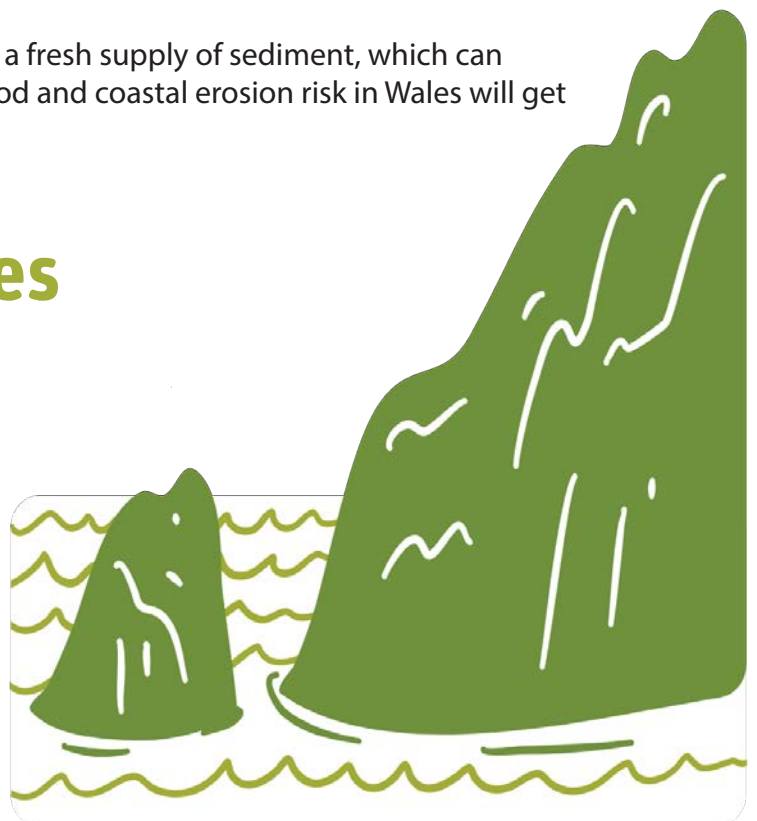
Nefyn Bay, between the Nefyn Peninsula and the Bodeilas Peninsula, has been the subject of minor landslide activity for many years (specifically; 2001, 2009, 2021). There are a variety of landslide types in Nefyn Bay. The slopes are covered with weathered debris and this is particularly vulnerable to shallow landslide, especially when water is saturated.

Coastal erosion is a natural process that provides a fresh supply of sediment, which can benefit the resilience of coasts around Wales. Flood and coastal erosion risk in Wales will get worse as a result of climate change.

Llŷn sea and marshes

The entire marine area of the wider Llŷn Peninsula and the Sarnau Special Area of Conservation is designated as being of paramount importance to its breeding population of bottlenose dolphins.

Fen is a type of wetland that is fed with mineral water. It is internationally important in nature, it also improves our water quality, helps reduce floods and helps combat climate change through carbon storage.



Climate change and flooding

The climate and nature crises are major challenges facing future generations. Over the past century, temperatures have increased, sea levels have risen, and weather patterns have changed significantly.

With a much higher proportion of coastline compared to other Welsh counties, climate change has a distinct impact on communities. **In Gwynedd, 11,285 properties are currently at risk of flooding.**

In the Llŷn area, Pwllheli is one of 10 communities that have been identified as being at high flood risk. As the climate changes, this area, like many other coastal communities across Wales, is predicted to experience more frequent storms and heavy rainfall, as well as sea level rising.

11,285 Gwynedd properties at risk of flooding



When asked what changes they would like to see in the area over the next 10-15 years, living in a green area was one of the priorities of the groups and organisations in Llŷn. Looking towards the future, there was a desire to pursue plans to reduce single use plastic, increase the number of car charging points and make use of renewable energy to help avoid the impact of climate change. (Our Area 2035)

Fresh air

NO₂ concentration is one way of measuring air quality and it is conveyed as average micrograms (μg) per m³. In 2019, there was an average of 4.8 $\mu\text{g}/\text{m}^3$ NO₂ in residential dwelling locations in Gwynedd. This was much lower than the Wales average measurement of 9.2 $\mu\text{g}/\text{m}^3$.



SOCIAL



Good health?



In the Llŷn area in 2020-2021 ambulance response times for a 'red' call, which is the most serious type, averaged 11:11 minutes. This has risen in recent years from 07:41 in 2018-2019 and 09:37 in 2019-2020.

Two-way 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 two-way public travel takes 53 minutes and 11 minutes by private travel compared to 38 minutes and 7 minutes for Wales.

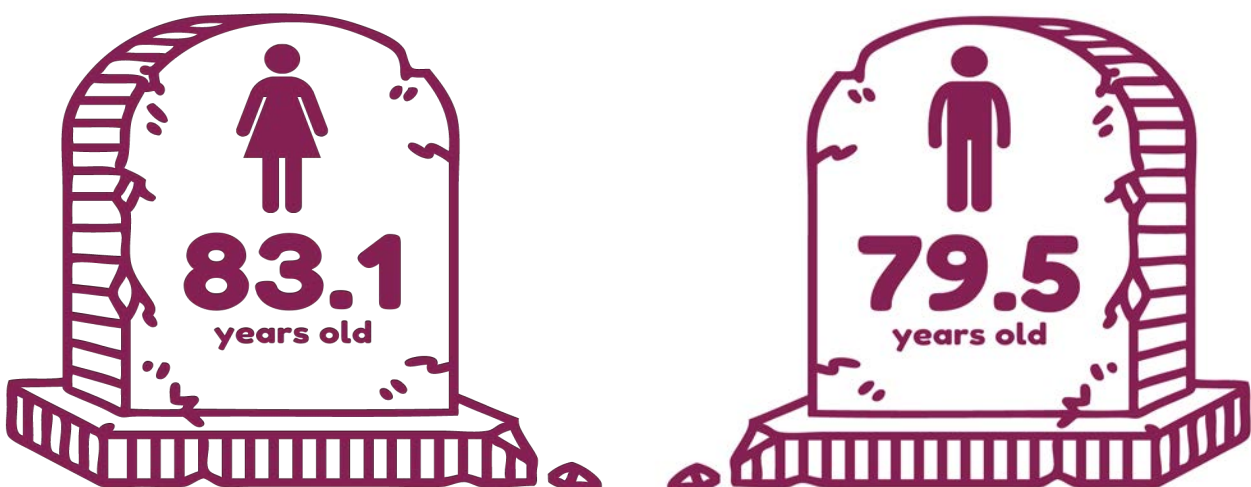
Travel times vary in the Llŷn area, where areas including Aberdaron / Botwnnog and Tudweiliog, Efailnewydd / Buan and Llanystumdwy have a much longer average public travel time to a pharmacy and surgery than the average time for Gwynedd, while the average time in areas such as Pwllheli (North), Pwllheli (South) and Nefyn is much shorter. The average private travel times to a pharmacy for Aberdaron / Botwnnog and Tudweiliog and Llanaelhaearn are some of the highest in Gwynedd while Nefyn, Pwllheli (North) and Pwllheli (South) are some of the lowest.

Conversations with local groups and organisations highlighted concerns about local health provisions, including lack of GP surgery capacity, mental health support and care for older people, as key issues that had a negative impact on how they felt about Llŷn as a place to live. (Our Area 2035)

**“The shortage of doctors makes it impossible to see a medic.”
(Buan Community Council, Our Area 2035)**

Further population health figures are available for Gwynedd to provide an indication of the county's health conditions and patterns.

According to 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.



According to 2017/18-2019/20 figures, 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%.



Other factors that affect our health is smoking and alcohol consumption. **11% of people aged 16 and over state that they smoke**, one of the lowest figures among Wales' counties, and 16% of people report that they consume more than 14 units of alcohol a week. These two percentages are lower than the figure for the whole of Wales, where 17% smoke and 19% consume more alcohol than the guidelines.

In a survey in 2018/19 and 2019/20, 31% of Gwynedd adults noted that they had eaten at least five portions of fruit and vegetables during the previous day, higher than the Wales figure of 24%.

Mental health is an important part of well-being and health. Public Health Wales data from 2018-19 identifies adult mental wellbeing (16 and over) in the form of age-standardised scores. Gwynedd's score is 52.9 which is slightly higher than the Wales score of 51.4.

Data from the National Survey for Wales for 2018/19-2019/20 indicates that 8% of Gwynedd adults have a mental disorder, a slightly lower percentage than the rest of Wales (10%).

Child and adolescent health

Specific health statistics for Gwynedd children are also available.

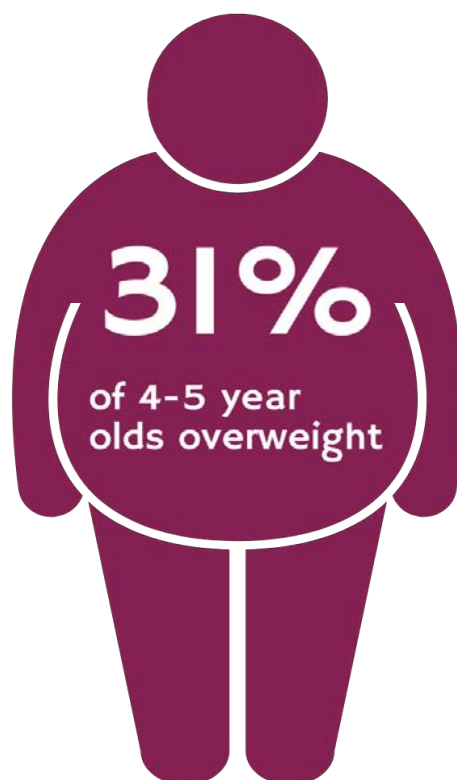
The percentage of individual live births with a low birth weight is slightly lower in Gwynedd than Wales, namely 5% compared to 6%.

In Gwynedd, 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 figure, where 88% had been fully immunised in 2019.

31% of 4-5 year-old children are overweight or obese – which is higher than the Wales figure of 27%.

According to data from 2017/18, approximately 9% of Gwynedd children aged 11-16 consumed alcohol and 3% smoked.

In Gwynedd, the teenage pregnancy rate for girls under 18 years old is 16.6 per 1000 girls aged 15-17, and it has reduced since the previous well-being assessment. This is slightly lower than the all Wales figures, namely 18.9, which has also reduced since the previous well-being assessment.



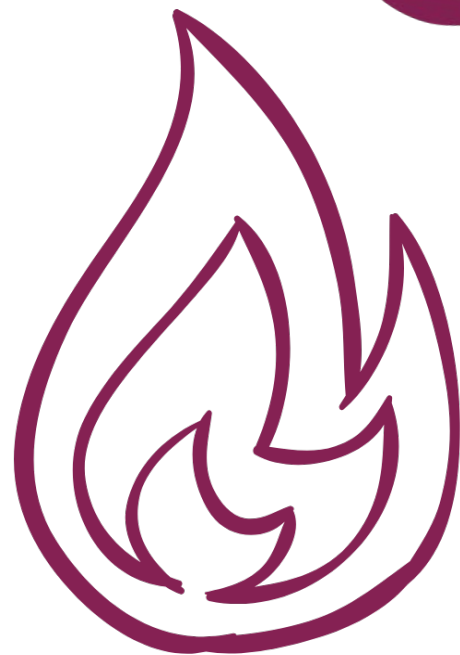
Keeping safe

Llŷn offences per 1,000 of the 16 and over population have slightly increased between 2018 and 2020, from 79 to 81. This is also higher than it was in the previous well-being assessment in 2015, when the figure was 64.

In Gwynedd, 55% feel very safe and 34% feel fairly safe in the local area after dark. Also, 89% feel very safe and 10% feel fairly safe in their home after dark in Gwynedd. More people feel very safe in their local area or home after dark in Gwynedd than the whole of Wales.

However, community safety and concerns about anti-social behavior were both themes to emerge in the Llŷn area during a 'doorstep talks' exercise held by Adra housing association.

On average between 2017/18-2019/20 there were 7 fires that were started deliberately a year in the Llŷn area and 54 accidental fire incidents, these two figures are lower than the number noted in the last well-being assessment. In Gwynedd, on average between 2017/18-2019/20, there were 113 fires that were started deliberately a year and 335 accidental fire incidents a year. The fires that were started deliberately figure is higher than the number noted in the last well-being assessment while the accidental fire incidents figure is lower.



6 | fire incidents in Llŷn

Keeping in touch

83% of homes in the Llŷn have a car or van, which is higher than the figure for Gwynedd, namely 79% and 77% for the whole of Wales.



83% of homes have a car or van in Llŷn

Return public and private travel time to a grocery store is higher in Gwynedd than the whole of Wales, with an average time of 40 minutes and 6 minutes compared to 32 minutes and 4 minutes.

There is a variety within the Llŷn area, where Pwllheli (North) and Pwllheli (South) have some of the shortest average private and public travel times in Gwynedd, while Aberdaron / Botwnnog and Tudweiliog, Llanystumdwy and Efailnewydd / Buan have some of the longest public travel times and Aberdaron / Botwnnog and Tudweiliog, Llanystumdwy and Llanengan have some of the longest private travel times in the county.

Figures from 2019 show that Gwynedd had a higher percentage of broadband unavailability at 30Mb/s than the whole of Wales, namely 12% compared to 7%.

16% of Gwynedd residents are lonely, compared with 15% who are lonely across the whole of Wales.

“It’s a very rural area and far from everywhere. Traveling is difficult if you don’t have a car and this adds to the problems of loneliness especially for the older generation.”
(Local group member, Ardal Ni 2035)

Helping each other

According to 2011 Census figures, 10% of the Llŷn area population provides at least one hour per week of unpaid care. This figure is very similar to the Gwynedd percentage.

Pre-pandemic figures show that the percentage of people who volunteer in Gwynedd has increased a little from 31% in 2016 to 33% in 2019, which is higher than Wales’ 26%. Covid-19 probably led to a further increase in this figure, however, there is no data by local area available to measure this.

Community spirit, kindness and the support of enterprises, charities and activist groups were reported as the main things that make the Llŷn area a good place to live, with the pandemic highlighting the community’s willingness to help one another. (Our Area 2035)

“Community spirit during Covid ... volunteers made and delivered Christmas lunch for the community and set up a ‘Messenger’ group for isolated people in Llangybi so that they could get their groceries and prescriptions from the pharmacy.”
(Llanystumdwy Community Council, Our Area 2035)



ECONOMY



Tourism

Including AirBnB there are 1,608 visitor accommodation businesses in Dwyfor, representing around 18% of the total for Gwynedd in 2019.

In the Llŷn area, there are an estimated 40,718 visitor accommodation beds. This represents around 30% of the total number of visitor accommodation beds in Gwynedd.

Four of Gwynedd's 18 main tourism destinations identified by the Council are located in the Llŷn area, namely Aberdaron, Abersoch, Pwllheli and Nefyn.



1,608 visitor accommodation businesses in Dwyfor

Houses and second homes

In 2020, the median house price in the Llŷn area was £ 218,000, an increase of £ 43,000 since the last assessment in 2015.



The median income of the Llŷn families is around £27,734, however at least £40,143 is needed to afford an entry level price on the housing to market. This means that 69% of Llŷn's households have been priced out of the market - the highest percentage of all Gwynedd areas. There is also variation within the Llŷn area, with the highest average prices in Abersoch (£ 365,275) and Llanengan (£ 298,500). About 11% of Gwynedd's houses are second homes compared to 3% in Wales. In some areas of Llŷn, the percentage of second homes is as high as 47% (Abersoch).

It's likely, however, that the 2020 figures does not fully illustrate the impact of the pandemic on the area's house prices, and these will be updated as the data becomes available.

These concerns are highlighted in conversations with local groups, with a lack of affordable housing for local people appearing to be the main issue that's having a negative impact on how they feel about their area. Establishing plans to tackle the problem was also highlighted as the key change needed to improve the Llŷn over the next 10-15 years. (Our Area 2035)

“There is so much demand for housing and the houses for sale and rent are taken up quickly ... our salaries can't compete with people from outside the area.”
(Member of a local enterprise, Our Area 2035)

What do the people of Llŷn do?



Figures from the 2011 Census show that 24% of employed people in the Llŷn area work in the skilled trades. This figure is higher than the Gwynedd percentage of 16%. On the other hand, only 7% work in associate professional and technical occupations - lower than the percentage for Gwynedd at 9% and 11% for Wales as a whole.

Only 10% of those with no qualifications work as managers or directors. The 35% of people with a degree or equivalent are working in the professional field. This is lower than the percentage for the whole of Gwynedd and Wales. Reliable data on areas of work by local well-being area after 2011 is not available, and therefore a significant data gap is evident.



£361 median weekly wage

Salary

The median weekly wage in the Dwyfor Meirionnydd constituency (of which Llŷn is part) is around £361 a week, which is 7% lower than Gwynedd as a whole (£386 a week) and 19% lower than Wales (£469 a week).

Women's pay is 19% less than men's pay in the constituency. This gap is narrower than the gap across Gwynedd where women are paid 32% less than men.

Lack of high value jobs is one of the key themes that has been noted as a concern in Llŷn, with many commenting that it's having a negative impact on the area because it forces young people to move away to find a job with a good salary.

**“Not enough high value work, for example IT, renewable energy and good quality tourism jobs, to keep young people in the area”
(Y Ganolfan in Nefyn, Our Area 2035)**

Unemployment

75% of Gwynedd residents aged between 16 and 64 are in work or education, which is slightly lower than the Wales percentage of 76%. The percentage of people aged 16-64 claiming Jobseeker's Allowance in the Llŷn area is 3.6%. This is lower than the percentage for Gwynedd, namely 4.5%.

The figure varies greatly month to month with the highest being February and March 2021 (4.8%) and the lowest in September 2021 (2.3%). This is probably due to the impact of the Covid-19 lockdown at the beginning of 2021, and also that the pattern of work in the Llŷn area is very seasonal.

Businesses

In 2020, a total of 4,380 businesses were registered in Gwynedd.

The rate of new business start-ups in Gwynedd is lower than Anglesey, North Wales and Wales.



61%

of companies survive 3+ years

61% of companies in Gwynedd stay in business for at least three years or more. This is higher than Wales at 54%. The rate of failing businesses is also lower in Gwynedd compared to Anglesey, North Wales and Wales.

Skills for life

From 2018/19 the Welsh Government has introduced a new set of performance measures which include literacy, numeracy and science points score. This makes it difficult to make year-on-year comparisons over recent years and there is no breakdown by county since 2018/19.

However, figures are available for the number of year 11 school leavers known not to be in education, employment or training (NEET). In Gwynedd the percentage for 2020 is 1.2%, which is lower than the Wales figure of 1.7%.



The money in your pocket

The money available to spend by the people of Gwynedd, after paying taxes and household bills, is £15,941 per head per annum which is £1,322 less than for Wales as a whole.



In the Llŷn area, 13% of primary school pupils claim free school meals which is slightly lower than Gwynedd as a whole. By the time pupils reach secondary school, the figure drops to 10%, which is also lower than the 12% for Gwynedd as a whole.

According to pre-pandemic figures almost 23% of households in Llŷn are in fuel poverty, which is amongst the highest in Wales. In comparison the figure for the whole of Gwynedd is 20%, whilst Wales has 14% of households in fuel poverty.

However, with the recent fuel price increase this figure is likely to be much higher than estimated in 2018, but unfortunately sourcing reliable data in this field was a problem.

CULTURAL



Keeping fit

According to the latest School Sports Survey by Sport Wales, the number of Gwynedd children participating in sports three or more times per week 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.



49%

of children participating in sports 3+ times a week

In 2019, 33% of adults reported participating in sporting activities three or more times a week compared to 32% in Wales.

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.

Again, a variety can be seen within the area. Llanengan and Aberdaron / Botwnnog and Tudweiliog have some of the longest public travel times in Gwynedd, whilst Pwllheli (North) and Pwllheli (South) is shorter than the average county time. A variety can also be seen when examining private travel, where the average time of Pwllheli (South) is one of the shortest in Gwynedd, and the Llanaelhaearn and Llanengan times are some of the longest in the county.

Leisure time

Return public and private average travel times to a public library is higher in Gwynedd than the whole of Wales, with an average time of 61 minutes and 15 minutes compared to 45 minutes and 10 minutes.





Leisure time figures are available for the run up to the pandemic. According to a survey from 2019/20, **65% of adults in Gwynedd stated they had attended an arts event during the year** and 38% had visited a museum.

Both of these figures have slightly increased since the previous well-being assessment. In 2016/17, 47% had visited historical places, a reduction since the previous assessment.

The effect of the pandemic on arts and culture is apparent, with theatre and cinemas having to close over the lockdown period and subsequent restrictions on the number who could attend events. However reliable figures to measure this effect per local area was not available.

Green spaces

There is 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.

The score for proximity to an Accessible Natural Green Space is the same for Gwynedd and the whole of Wales, namely 77%.

“A wonderful area between the sea and the mountains. Plenty of outdoor attractions for local residents and visitors to enjoy all year round.”
(Local group member, Our Area 2035)



FOR MORE INFORMATION...

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