

CHAPTER 8: SOCIOECONOMICS, REGENERATION AND HEALTH

Introduction

- 8.1 This chapter assesses the impact of the proposed development on socio-economics, regeneration and health.
- 8.2 During the construction phase the key issues are considered to be:
- The provision of temporary employment for the construction works at a local and regional level; and
 - The impact of temporary, local spending relating to construction activity.-
- 8.3 During operation the key issues are considered to be:
- Impact on local employment through direct, indirect and induced employment;
 - Housing requirements in the area, including the need for affordable housing, and the relationship between these requirements and the proposed development;
 - The impact of the proposed development on demographics in the area, in particular, population and household size and structure;
 - The effect on demand and provision of education services;
 - The effect on demand for local community facilities;
 - The effect on demand for healthcare facilities;
 - Impact on the Welsh language; and
 - Synergy with the wider regeneration aims for Holyhead and the Island
 - Effect on recreation opportunities
- 8.4 IOACC require planning applications to be accompanied by a separate report on health impacts and a separate report has been prepared, which is presented at Appendix 8.2. The Health Impact Assessment (HIA) component has been based around IOACC's HIA Toolkit and will entail screening the proposals against the HIA toolkit. The toolkit is intended to be used as a screening tool to help identify whether or not further HIA related work is required.
- 8.5 IOACC also require the planning application to be accompanied by a Language Statement that looks at the potential impacts on the Welsh language. This is included at Appendix 8.3. This chapter considers the impact on the Welsh language, drawing on the results of the Language Statement.
- 8.6 This socio-economic chapter of the Environmental Assessment cross references the HIA Screening report (and vice versa).
- 8.7 The chapter describes the methods used to assess the impacts, the baseline conditions currently existing at the site and surroundings, the potential direct and indirect impacts of the development arising from the factors identified at paragraphs 8.2 and 8.4 above, the mitigation measures required to prevent, reduce, or offset the impacts and the residual impacts. It has been written by WSP, with additional inputs by Regeneris Consultancy and HOW Planning.

Planning Policy Context

National Planning Policy

Planning Policy Wales (PPW)¹

- 8.8 PPW indicates tourism is vital to economic prosperity and job creation in many parts of Wales. It is a significant growth source of employment and investment, based on the country's cultural and environmental diversity. Tourism can be a catalyst for environmental protection, regeneration and improvement in both rural and urban areas.
- 8.9 The Welsh Government is producing revised planning policy for economic development to make sure that it can deliver on their aspirations for economic recovery in Wales.
- 8.10 The draft revised Chapter 7² of PPW states that for planning purposes the Welsh Government defines economic development as development of land and buildings for activities that generate wealth, jobs and incomes. Economic land uses include the traditional employment land uses (offices, research and development, industry and warehousing), as well as retail, leisure, and public services. It is essential that the planning system considers, and makes provision for, the needs of the entire economy and not just those uses defined under parts B1-B8 of the Town and Country Planning Use Classes Order.
- 8.11 In terms of housing need, PPW requires IOACC to demonstrate a deliverable 5 year housing supply (paragraph 9.23).

Wales Spatial Plan³

- 8.12 The Plan was adopted in 2004 and updated in 2008. It is a principle of the Wales Spatial Plan that development should be sustainable. Sustainable development is about improving wellbeing and quality of life by integrating social, economic and environmental objectives in the context of more efficient use of natural resources.
- 8.13 The Wales Spatial Plan aims to deliver sustainable development through its Area Strategies in the context of the Welsh Assembly Government's statutory Sustainable Development Scheme.
- 8.14 The vision for North West Wales Spatial Plan Area recognises that it is unique in both a Welsh and UK context due to its exceptional natural environment, built heritage and strong cultural identity. The Area's towns and villages and the surrounding countryside are home to generations of Welsh speaking communities that attach a strong importance to place - intricately linked with its dramatic landscape and coastline.
- 8.15 The Plan notes that the economy has been restructuring for some time and faces some immediate challenges, including loss of employment in the nuclear industry at Trawsfynydd and Wylfa, continued restructuring within agriculture, finite lifespan of traditional primary industries such as quarrying, and the impact of globalisation on manufacturing industries. People from the UK and beyond have moved into the Area to take advantage of both the new opportunities and the high quality of life it has to offer. The vision seeks to ensure that these opportunities continue to be realised and are able to benefit those living in the Area, whether it be access to jobs, homes, leisure activities or services, whilst maintaining sense of place and supporting and promoting the Welsh language, culture and heritage.

- 8.16 Agreed priorities for the area include maximising the opportunities of Holyhead as a major international gateway and the A55 and E22 Trans European Networks route as a key transportation corridor, particularly between the prosperous economies of Ireland, North East Wales and beyond, whilst ensuring appropriate transport links between the hubs and rural areas are adequate to provide access to services, employment and leisure opportunities (ref page 90).
- 8.17 Capitalising on the region's outstanding environment, including the coast, ecological and historical heritage, and strong cultural identity to promote and develop healthier communities and build higher-value sustainable tourism is another priority. The latter includes the development of the Area as a quality destination, including improving the accommodation stock and realising the potential of marine leisure and outdoor activities (ref page 90)
- 8.18 Holyhead is recognised as a key growth settlement in the Wales Spatial Plan with the focus of providing services and employment, and building on established strengths to support and spread prosperity to the wider rural hinterland (Ref Page 91).
- 8.19 Holyhead is also identified as a key international gateway in the Wales Spatial Plan (Ref page 92).
- 8.20 The Plan also notes that the Spatial Plan Area has a strong cultural identity and unique sense of place, and is an established visitor destination with a wealth of visitor facilities. The tourism industry is a key employment sector and has the potential to improve quality of life, reduce economic inactivity, and enhance regeneration and conservation. However for the area to reach its potential it will be necessary to enhance the built environment and tourism facilities through regeneration, to bring it up to par with the exceptional and dramatic natural environment, for example to further develop outdoor activities, golf, eco-tourism and events, and the development of one or two regionally significant, quality all-weather attractions that can be accessed by sustainable modes.
- 8.21 The sector has direct links to other priorities in the area, one being the enhancement of Holyhead as a visitor gateway. The stakeholders will need to be encouraged to continue to address all aspects of the visitors' experience via the destination management approach.

TAN 2: Planning and Affordable Housing (June 2006)⁴

- 8.22 TAN 2 requires LPA's in preparing their Local Development Plans to address housing land supply both for market and affordable housing. The TAN requires LPA's to:
- Include an affordable housing target in the development plan which is based on the housing need identified in the local housing market assessment;
 - Indicate how the target will be achieved using identified policy approaches; and
 - Monitor the provision of affordable housing against the target (via the Local Development Plan Annual Monitoring Report) and where necessary take action to ensure that the target is met.

TAN 13: Tourism⁵

- 8.23 TAN 13 states that tourism makes a major contribution to the Welsh economy, provides employment in a wide variety of occupations and can bring benefits to local economies and communities in urban and rural areas. The TAN advises that

tourism development can comprise a range of different, but interdependent activities and operations which overlap with sport, entertainment, the arts and other recreation and leisure activities. While it cannot be regarded as a single or distinct category of land use, the issues it raises should be addressed in preparing or revising development plans and may feature in development control decisions.

- 8.24 It advises that development plans may provide guidance on opportunities for larger scale or innovative projects, appropriate facilities for the countryside or designated areas and the provision of facilities in historic towns and seaside resorts.

TAN 20: The Welsh Language – Unitary Development Plans and Planning Control (June 2000)⁶

- 8.25 TAN 20 highlights the importance that the land use planning system has on the needs and interests of the Welsh language and how it can be utilised to effectively contribute to its wellbeing.
- 8.26 The TAN states that in determining individual planning applications and appeals where the needs and interests of the Welsh language may be a material consideration decisions must, as with all other planning applications, be based on planning grounds only and be reasonable. These planning grounds include adopted development plan policies, including those which have taken the needs and interests of the Welsh language into account. The TAN confirms that LPA's should determine planning applications in accordance with the adopted development plan unless material considerations indicate otherwise.

'Achieving our Potential' - the national Tourism Strategy for Wales⁷

- 8.27 This Strategy includes a detailed action plan that identifies five strategic challenges facing the industry - branding, quality, access, skills and partnership. The associated regional tourism strategy states "The vision for tourism in North Wales is to build a viable and prosperous tourism industry attracting visitors throughout the year". Implementing the above measures along with the Welsh Coastal Tourism Strategy and sub-regional strategies which identify significant opportunities for coastal tourism, and improving the overall offer will raise the profile of the area and provide a better quality, higher valued tourism product.

Communities First⁸

- 8.28 Communities First is the Welsh Government's flagship programme to improve the living conditions and prospects for people in the most disadvantaged communities across Wales.
- 8.29 The Communities First programme is working in the most deprived areas throughout Wales helping to improve the lives of many residents of all ages.
- 8.30 Communities First is about working in partnership. Communities First can enable and encourages Public Sector, Third Sector and Private sector organisations to work together to achieve common goals.
- 8.31 There are five Communities First partnerships on Anglesey incorporating six disadvantaged areas:
- Tudur Ward, Llangefni
 - Amlwch Port
 - Porthyfelin, Holyhead

- Morawelon, Holyhead
- Maeshyfyrd and Holyhead Town Ward

Regional Policy

North West Wales Spatial Development Strategy⁹

- 8.32 The second consultation draft of this document was produced in 2008. Reducing deprivation in Holyhead is a strategic priority within the Strategy; removing Morawelon from the top 10% most deprived wards in Wales by 2020 is identified as a primary target for success in this strategy.

Regional Economic Development

- 8.33 Funding under the Objective 1 programme ran from 2000-2006 and resulted in a total investment of £38.3 million of European Union (EU) Structural Funding in the Island's economy continues, the current programme runs from 2007-2013.
- 8.34 The £1.4 billion Convergence West Wales & the Valleys 2007-2013 Programme represents a similar level of investment to Objective 1. The programme aims to create structural economic change in underperforming economies by targeting investment to create jobs, attract investment and regenerate communities.
- 8.35 The £800 million Rural Development Plan for Wales 2007-2013 sees a shift in emphasis of the EU Common Agricultural Policy into building sustainable rural communities for the 21st Century. Activities on Anglesey funded through this programme aim to respond to the current generational change and create a prosperous future for rural Anglesey.
- 8.36 Both programmes have a tight focus on the Lisbon agenda for investment in creation of jobs and economic growth, and Gothenburg agenda promoting sustainable development and environmental protection. Anglesey is well placed to benefit from both these programmes and projects are being approved on a continuous basis that deliver positive outcomes on the Island.
- 8.37 A number of other funds are also available from INTERREG Cooperation Programmes and other European Funding Programmes which are accessible through the development of projects with European partners.

North Wales Tourism Strategy¹⁰

- 8.38 The current North Wales Tourism Strategy indicates that the volume of local tourism has locally stayed broadly constant over the last decade but that annual spend showed some decline. The North Wales Tourism Strategy also states in its SWOT analysis that the North Wales tourism industry is characterised by seasonality, low value attractions and stock in need of upgrade. The document calls for efforts to re-establish North Wales as one of the UK's premier and most desirable locations and for North Wales to become one of the top 5 UK tourism destinations. Other important objectives for the local tourism sector are (i) attracting higher spending visitors and (ii) reducing seasonality.

Local Policies and Strategies

Development Plan

- 8.39 The majority of the Cae Glas site is allocated as an Employment Site (Proposal S1) known as Ty Mawr Farm, Holyhead. The remaining land is situated in the Open Countryside. The entire site is located outside of Holyhead's Settlement Boundary as defined by the Local Plan.¹¹
- 8.40 The Kingsland site is partially located within the Settlement Boundary of Holyhead in the east and this part of the site is also allocated for Physical Infrastructure and Environmental Works (Proposal FF11 in the Local Plan and FF6 in the stopped Unitary Development Plan)¹². The Kingsland site is covered in part by a Physical Infrastructure and Environment. The proposals for the site included a new ice rink, upgrade of leisure centre and Holyhead Stadium, Golf Driving Range, Archery Range and relocation of Holyhead Rugby Club pitches and cricket square.
- 8.41 In February 2011, IOACC adopted an Interim Planning Policy: Large Sites (IPP).¹³ The IPP Large Sites is the most up to date policy adopted by the Council relating to housing. The policy document is used to assess proposals for large scale residential development.
- 8.42 The IPP Large Sites applies to all applications for large scale residential development (50 or more dwellings or a site area of 1.5 hectares or more) in and adjacent to the main centres. The main purpose of the IPP Large Sites is to ensure that IOACC maintains a 5 year housing land supply until the JLDP is adopted.
- 8.43 The Kingsland site is located entirely within the Holyhead Settlement Boundary as defined in the Stopped UDP, which is the first priority for release under the IPP Large Sites.

The Anglesey Economic Regeneration Strategy¹⁴

- 8.44 This Strategy covers the period between 2004-2015. It was produced by the Anglesey Economic Development Partnership) and is the current regeneration framework for the Island. It recognises the serious socio-economic issues characterising the island and its economies. It states:

'Anglesey is an island with deep-seated economic problems: high levels of migration of its young people, high levels of unemployment, significant levels of social deprivation, rural economic problems and a number of small-scale, low skills employment sectors'. (p4)

'The lack of employment opportunities means that the Island needs to implement a long-term programme of sustained investment if it is to retain skills and intellectual capital' (p16)

- 8.45 When it was drafted in 2004 the Anglesey Economic Regeneration Strategy also notes the seriousness of continuing poor economic performance compared with the rest of Wales. It warned... 'forecast economic growth for Anglesey suggests the prosperity gap with the rest of Wales/UK is expected to deteriorate significantly during the next 10 years...' (p7).
- 8.46 Economic Regeneration Strategy for Anglesey contains an ambitious target for reaching 21,000 full time equivalent jobs by 2015, from a baseline of 18,000 jobs in 2003.

Holyhead Forward's Regeneration Strategy (2008 to 2013)¹⁵

- 8.47 This Strategy identifies a number of significant challenges which face Holyhead and articulates the need for... 'A well-targeted, strategically co-ordinated approach is needed to break the cycle of deprivation, and capitalize on the opportunities for regeneration to reverse the town's fortunes'.

A new rebranding and marketing project for Holyhead and Holy Island recently commenced.¹⁶ The project forms part of a Welsh-Irish partnership with the towns Rhyl, Dun Laoghaire, and Athy. It is 75% funded under the EU Ireland-Wales Interreg Programme, with match funding from the Welsh Assembly Government, Anglesey County Council, and Holyhead Town Council. Holy Island has been identified as a key asset for attracting tourists and the project will aim to better integrate Holyhead and Holy Island.

Energy Island Programme

- 8.48 The Anglesey Energy Island Programme is intended to attract new, high quality energy-related jobs to Anglesey over the next two decades. Formally launched by the then Deputy First Minister Ieuan Wyn Jones in June 2010, the Programme is co-ordinated by the Economic Development Unit of IOACC.
- 8.49 The Energy Island vision is to create a world-renowned centre of excellence for the production, demonstration and servicing of low carbon energy.
- 8.50 The objectives include:
- Production – Investing in new low carbon energy production to help secure a stable energy future for Wales
 - Demonstration – Establishing world-class facilities to place Anglesey as a leading location for low carbon energy innovation and demonstration
 - Servicing – Ensuring that local companies and people benefit and take advantage of opportunities from new energy investments.
- 8.51 The centrepiece of the Anglesey Energy Island Programme is the potential development of a new nuclear build at Wylfa. However, it is also hoped to attract companies who will develop renewable energy technologies including wind (on and offshore), tidal, biomass as well as nuclear.

Energy Island Enterprise Zone

- 8.52 Following the Welsh Governments announcement in September 2011 to provisionally include Anglesey as one of five locations in Wales to benefit from Enterprise Zone status, IOACCs Economic Development Unit has been working closely with key stakeholders in the public and private sectors to develop the concept further and agree the sites which will benefit from the initiative.
- 8.53 In order to promote Anglesey as a suitable location for Enterprise Zone status, IOACC has produced a draft Energy Island Enterprise Zone Prospectus¹⁷ which sets out the opportunities available to capitalise on the scale of planned investment in low carbon energy on the island which amounts to an investment of over £8billion. These include projects such as opportunities in on and offshore wind power, biomass, micro-generation and marine renewables as well as the proposed new nuclear power station and extended operation, defueling and decommissioning of the existing power station at Wylfa and complementary leisure development at the Penrhos Coastal Park and Cae Glas sites. The provisional Energy Island Enterprise Zone will include 250 hectares of land.

Wylfa Nuclear New Build: Construction Workers Accommodation Position Statement¹⁸

- 8.54 In March 2010 Horizon Nuclear Power announced Wylfa as their preferred site for their first nuclear development in the UK. The new power station will safeguard skills locally, and provide multiple effects in related industries such as construction, with positive effects on Anglesey, North Wales and the Welsh economy. The estimated six year construction period will provide extensive job opportunities, reaching 6,000 workers at its peak in 2017.
- 8.55 In March 2011 IOACC prepared the Wylfa Nuclear New Build: Construction Workers Accommodation Position Statement. The document has been adopted by the Council's Board of Commissioners and is a material consideration in the determination of this planning application. It is understood however that the document has not been subject to a community consultation exercise.
- 8.56 A number of options were considered by IOACC. Option 5 assumes the provision of a mix of accommodation, thereby minimising risk to the new build development through the provision of a "working camp" facility, and securing economic benefits through the use of new and existing provision. This approach uses case study experiences elsewhere, using the following split for temporary demand:
- 30% of workers accommodated in purpose built accommodation (this could be on or off site and could include temporary accommodation);
 - 35% use private rented accommodation (mix of new and existing);
 - 35% use tourist accommodation (mix of new and existing).

Our Island - Our Future Shaping the Community Strategy for Anglesey 2012 – 2025¹⁹

- 8.57 IOACC consulted on a replacement Community Strategy in 2011. By April, 2013 all key statutory plans will need to be integrated. This means that an Integrated Plan will build on and replace the Children and Young People's Plan, Health, Social Care & Well-being Strategy, Community Safety Partnership Plan and the Community Strategy. Key points from the Community Strategy are reviewed below:
- 8.58 Anglesey's opportunities and challenges include:
- The Energy Island Programme which will contribute to ensuring sustainable rural communities by for example increasing job opportunities and wage rates.
 - Multi agency issues
 - Closer collaboration between departments, services, partnerships and counties in delivering public services
 - Reduction in Public Sector Finances
 - Providing citizens with adequate access to information and the opportunity to express their views for feeding into the decision making process
 - Crime & Community Safety Issues:
 - Risk of an escalation in crime & disorder due to the current economic climate and its impacts on public services
 - The impact of future large scale projects

- Health issues:
 - Levels of obesity on the increase
 - High levels of smoking in adults (24%)
 - Higher hospital admissions than national average due to alcohol and drug related issues.
- Economic issues:
 - Lowest GVA in UK of 55% and high levels of inactivity
 - Significant job losses over the last 2 years and impact on average earnings
 - House price to earnings ratio
 - The significant Tourism sector.
- Issues related to a changing Demographic Profile:
 - Annual population growth of 4% until 2031 with growth in life expectancy and ageing population leading to increased pressure on services and housing
 - Net outward migration of 16-24 year olds and inward migration of 45-64 year olds will lead to major impact on economic activity
 - Changing nature of communities impacting on access to services in rural areas
 - Likely effect on the educational provision in rural areas - Impact of population trends on Welsh language and culture.

***Children and Young People's Plan (2011-2014)*²⁰**

8.59 The main theme which runs through the Children and Young People's Plan is tackling child poverty. The report highlights the need to develop and implement the following strategies as being essential in the delivery of the entire plan:

- Family Support Strategy
- Early Support Strategy
- Joint Commissioning Strategy
- Anti-Bullying Strategy
- Arts and Culture Strategy
- Young People's Accommodation Strategy
- Workforce Development Strategy
- Childcare Strategy

8.60 The plan identifies 7 core aims on how to deliver the plan and its subsequent strategies, these are as follows:

- To provide every child on the Isle of Anglesey a flying start in life so that they may reach their full potential
- Every child and young person including those most vulnerable have the skills and confidence to prepare them for adulthood and employment on the Isle of Anglesey.
- Every child and young person on the Isle of Anglesey is healthy and feels safe.
- Every child and young person on the Isle of Anglesey is able to access and enjoy play, leisure, sport and cultural activities of their choice to improve their physical and emotional wellbeing.
- All children and young people have the opportunity to participate and are respected.

- Every child and young person on the Isle of Anglesey is supported and lives in a safe home and community.
- All children and young people on Anglesey are not disadvantaged by poverty

Health, Social Care & Well-being Strategy (2011-2014)²¹

8.61 The Strategy focuses on future planning and commissioning priorities for service delivery to improve the health and wellbeing of the population in Anglesey. An emphasis has been placed on identifying and tackling the wider determinants of health and reducing health inequalities. Three priority themes have been identified. The three themes are:

1. Promoting Healthy Lifestyles,
2. Managing Chronic Conditions and
3. Promoting Independence.

8.62 These have been chosen since they reflect national priorities and are seen as areas where the greatest health gain can be achieved by working in partnership.

Local Housing Strategy, 2007²²

8.63 The Strategy identifies the following service priorities:

- To increase the amount of affordable housing and choice, with a focus on social rented provision. The will include the improvement of all social housing to meet the Welsh Housing Quality Standard by 2012 and maintain it thereafter.
- Tackling homelessness
- Improving the quality of housing across all tenures
- Working towards achieving sustainable housing options for vulnerable households
- Tackling fuel poverty and increasing energy efficiency
- Community sustainability and social inclusion

Welsh Language Supplementary Planning Guidance (SPG)²³

8.64 This SPG provides guidance on how IOACC will take into account the well being of the Welsh Language in the development process and the supporting information that may be required to allow an adequate assessment of individual planning applications. It was adopted by the County in 2007.

8.65 Community and town council areas on Anglesey can be defined as Language Sensitive Areas as 25% or more of their Community Council areas speak Welsh based on the 2001 Census. The threshold has been recommended at this level by the report on 'Planning and Welsh Language.'

8.66 The SPG identifies the need for a Language Statement to accompany specified planning applications. If necessary IOACC may request a Language Impact Assessment be undertaken.

Approach

Assessment Methodology

8.67 The assessment considers likely temporary and permanent social, economic and community effects during construction and once the Proposed Development is complete. As previously noted, no published standards or guidance exist for

assessing socio-economic effects within EIA. As a result, this assessment is based on professional experience and judgement. It has also been informed by other documents prepared as part of the planning application, including a Health Impact Assessment and Welsh Language Impact Assessment.

8.68 The assessment of socio-economic effects is based on a number of methodologies and data sources including the following:

- Construction effects have been assessed using a ratio of construction employment to output with employment estimated by Regeneris Consulting Ltd. Their report is included at Appendix 8.1;
- Predicted employment levels, including employment associated with spend from the residential development at Kingsland have been calculated by the applicant and Regeneris Consulting Ltd. Their report is included at Appendix 8.1. The assumptions made are discussed under the assessment of each employment type;
- Effects associated with meeting housing requirements have been assessed having regard to local planning and housing policy and the review of baseline data;
- Impacts on demographics in the area have been assessed having regard to relevant baseline data, including the evidence base for the JLDP;
- The effects on the availability of education facilities has been assessed using published data;
- Effects on community facilities have been assessed having regard to the baseline situation and evidence base for the JLDP;
- The availability of healthcare facilities in the local area has been assessed using published NHS data. This information is compared to the population forecasts for the Proposed Development to estimate the likely effect on primary healthcare facilities;
- Effects on the Welsh Language have been informed by an Impact Assessment that is at Appendix 8.2;
- Synergies with the wider regeneration aims for Holyhead and the Island have been assessed having regard to the policy context discussed above, and;
- Effects on recreation have been assessed having regard to the baseline situation.

8.69 The assessment considers likely temporary and permanent social, economic and community effects during construction and once the Proposed Development is complete.

Effect Identification

8.70 Three categories of economic effects have been considered in line with the HM Treasury Guidance and the English Partnerships' Additionality Guidance: direct, indirect and induced, which are defined as follows:

- Direct - refers to the initial injection of expenditure, i.e. people employed in the construction of the Proposed Development (direct and contracted employment) and expenditure of goods, services and capital for the construction;
- Indirect - refers to the subsequent rounds of expenditure generated throughout the supply chain by the initial expenditure on goods, services and capital; and
- Induced - refers to the expenditure of those who derive their income from the direct and indirect effects of the Proposed Development.

8.71 Both the indirect and induced effects are also referred to as multiplier effects and are calculated through a composite multiplier.

Employment Effects

- 8.72 The employment effects are calculated based on the number of full time jobs that would be provided within the study area during construction and during operation of the Proposed Development. The methodology employed follows the recommendations set out in the English Partnerships' Guidance. The method consists of assessing the net additional effects, i.e. after accounting for deadweight, leakage and displacement. These concepts are defined as follows:
- Deadweight - also referred to as 'do nothing' scenario, relates to the outputs/outcomes that would have occurred without the Proposed Development;
 - Leakage - refers to the proportion of the Proposed Development's benefits that accrue outside the study area; and
 - Displacement - refers to a reduction in economic activity elsewhere within the target area due to an increase in activity caused by the Proposed Development. This may occur both when the Proposed Development uses scarce resources, such as labour, land, and/or capital pushing their prices up, or when the Proposed Development takes market share from existing firms in the study area producing a similar product or service.
- 8.73 The assessment of employment effects has been undertaken by Regeneris Consulting Ltd. and this Chapter references that work.
- 8.74 All job estimates provided are expressed in gross terms. The nature of the leisure facilities to be developed at Penrhos and Cae Glas are such that they will bring additional trips and expenditure to Anglesey, either in the form of new visitors or existing visitors making additional trips to the Island. With this in mind, displacement of jobs from existing accommodation providers and existing food and drink establishments etc. is not considered to be a significant issue. The new leisure provision will fundamentally complement rather than compete with existing provision.

Significance Criteria

- 8.75 For the purposes of this assessment, the types of socio-economic effects listed below are considered. The assessment methods applied vary according to the type of effects being assessed.
- Primary effects - relate to direct quantifiable effects (e.g. job creation). The identification and assessment of these effects was informed by previous experience and knowledge of the generic job creation benchmarks applicable to the construction industry;
 - Secondary effects - relate to additional quantifiable effects, primarily derived through the use of forecasting models or application of multipliers to the primary effects;
 - Wider effects - relate to non-quantifiable effects on the wider area. A qualitative assessment has been undertaken to ascertain their significance; and
 - Duration - described as temporary or long-term. The range and extent of socio-economic effects have been assessed over two timescales, namely during the construction phase and during operation.
- 8.76 The assessment criteria below have been adopted in this chapter as follows:
- Major Beneficial: where the Proposed Development would cause significant improvement to the existing socio-economic climate and local community;

- Moderate Beneficial: where the Proposed Development would cause moderate improvement to the existing socio-economic climate and local community;
- Minor Beneficial: where the Proposed Development would cause minor improvement to the existing socio-economic climate and local community;
- Negligible: where the Proposed Development would cause a negligible improvement to the existing socio-economic climate and local community that is neither beneficial or adverse in nature;
- Minor Adverse: where the Proposed Development would cause a minor adverse effect to the existing socio-economic climate and local community;
- Moderate Adverse: where the Proposed Development would cause a moderate adverse effect to the existing socio-economic climate and local community;; and,
- Major Adverse: where the Proposed Development would cause a major adverse effect to the existing socio-economic climate and local community;

8.77 The above criteria are applicable to the following geographical scales:

- Local level: Effects within the immediate area of the Proposed Development (i.e. Holyhead);
- County level: Effects within the Isle of Anglesey; and
- Regional level: Effects within Wales.

Assumptions / Limitations

8.78 Assumptions in relation to the assessment of effects are made explicit under the assessment of each potential effect. The techniques used to complete this chapter are considered to be appropriate and proportionate and as such no limitations are identified.

Baseline Conditions

8.79 This section describes the current socio-economic characteristics. In order to establish the baseline conditions, a review of existing sources of information on socio-economics was carried out, e.g. 2001 Census from the Office for National Statistics and more recent work commissioned by IOACC which notes:²⁴. (Appendix 8.1 contains additional background data on the economic baseline.)

"Anglesey is truly one of the most peripheral economies in the UK and this is reinforced by its physical detachment from the mainland (albeit that it is served by the A55 and Port connections to Ireland). Perhaps one of the major difficulties facing peripheral economies like Anglesey is not necessarily the rate at which they lose jobs but the ability to generate new employment – especially in higher value sectors".

Population

8.80 The Mid –Year Population Estimates series (adjusted after the 2001 Census) shows that the population of Ynys Mon reached a peak of 70,000 in 1988. After falling between 1988 and the Census year of 1991, the population briefly recovered to reach about 69.8 thousands by 1993. There followed a period of sharp decline, to a low point of 67.7 thousands in 1998. From 2001 onwards, the population has again shown recovery. The 2001 Census population and Mid-Year population estimates for the Isle of Anglesey is presented below in Table 8.1.

Table 8.1: 2001 Census Population and 2010 Mid-year Population Estimates

Area	2001 Census Population ¹	Mid-Year Population Estimates 2010 ²	Percentage Change between 2001 Census Data and 2010 Mid-Year Population Estimates
Anglesey	66,829	68,600	2.5%

Office for National Statistics Census Data 2001.²⁵

- 8.81 Annual Population Survey data shows there has been a net loss of 1,300 working age residents since 2005, a -3.3% decline compared to a 1.2% increase at the level of Wales²⁶.
- 8.82 The evidence base for the emerging Development Plan highlights the following issues:
- Anglesey has a history of population fluctuation;
 - The population is getting older at a rate that cannot be accounted for by natural change alone;
 - There is net out migration of young people, but net in migration of older people;
 - The aging population is leading to reductions in available workforce; and
 - Recent European employment/migration trends may be partly offsetting this problem.
- 8.83 In Anglesey, although the proportion of 16-64 year olds has remained fairly constant, at around 61-62% of the population, it has dipped in the past few years. The proportion which traditionally has been classed as "working aged" (16 to 59 for women and 16 to 64 for men) has followed the same trend but dropped more in recent years – from 58% in 2005 to 56% in 2009.
- 8.84 At the other end of the age scale, young adults (18 to 24) made up about 9% of the Island's population in 1992, dropping to 7% by 1996 and only recovering slightly to 8% since 2008.

Welsh Language

- 8.85 The Welsh Language is inextricably linked to the Welsh cultural fabric of a community. It is axiomatic that the use of the Welsh language in the community is a robust indicator of the health and vitality of the Welsh language and culture. Table 8.2 shows the change in Welsh speaking between 1991 and 2001 (the latest date for which information is currently available). Although there was a reduction of 1.9% in Welsh speakers between 1991 and 2001 on Anglesey 60% of the population were able to speak Welsh.

Table 8.2: Welsh Language 1991 – 2001

Local authority	Welsh speaking 1991		Able to speak Welsh 2001		Change	
	Number ¹	Percent	Number	Percent	Number	Percentage points
Isle of Anglesey	41,239	62.0	38,893	60.1	-2,346	-1.9
Gwynedd	78,732	72.1	77,846	69.0	-886	-3.1
Conwy	31,444	30.6	31,298	29.4	-146	-1.2

¹ Estimates for individual authorities

Local authority	Welsh speaking 1991		Able to speak Welsh 2001		Change	
	Number ¹	Percent	Number	Percent	Number	Percentage points
Denbighshire	23,293	26.7	23,760	26.4	467	-0.3
Flintshire	18,405	13.5	20,599	14.4	2,194	0.8
Wrexham	15,985	13.7	18,105	14.6	2,120	0.9
Powys	23,589	20.5	25,814	21.1	2,225	0.5
Ceredigion	36,027	59.1	37,918	52.0	1,891	-7.1
Pembrokeshire	19,754	18.3	23,967	21.8	4,213	3.4
Carmarthenshire	89,221	54.9	84,196	50.3	-5,025	-4.5
Swansea	28,549	13.3	28,938	13.4	389	0.1
Neath Port Talbot	23,710	17.8	23,404	18.0	-306	0.2
Bridgend	10,161	8.3	13,397	10.8	3,236	2.5
Vale of Glamorgan	7,752	6.9	12,994	11.3	5,242	4.4
Rhondda; Cynon; Taff	20,038	9.0	27,946	12.5	7,908	3.5
Merthyr Tydfil	4,238	7.5	5,532	10.2	1,294	2.7
Caerphilly	9,710	6.0	18,237	11.2	8,527	5.2
Blaenau Gwent	1,522	2.2	6,417	9.5	4,895	7.3
Tor-faen	2,126	2.5	9,780	11.1	7,654	8.7
Monmouthshire	1,634	2.1	7,688	9.3	6,054	7.2
Newport	2,878	2.3	13,135	10.0	10,257	7.7
Cardiff	18,089	6.6	32,504	11.0	14,415	4.4
Wales	508,098	18.7	582,368	20.8	74,270	2.1

Source: ONS 2001

Deprivation

- 8.86 Anglesey has a total of 44 Lower Super Output Areas (LSOAs) and this is the geographical building block for the Welsh Index of Multiple Deprivation. The main urban areas of Holyhead and Llangefni both experience patterns of deprivation.
- 8.87 Six out of the seven SOAs that comprise the town of Holyhead are within the top 20% most deprived wards in Wales according to the Index of Multiple Deprivation²⁷, with one in the top 10% (Morawelon) and two in the top 15% (Porthyfelin and Holyhead Town).
- 8.88 Within the Welsh Index of Multiple Deprivation, Holyhead and its wider urban area (the seven ward area) performs particularly badly on Housing and Education domains.
- 8.89 In proportional terms levels of deprivation are high in Anglesey West – mainly Holyhead (followed by Conwy key centres, Caernarfon and Bangor). This further underlines the specific problems facing Anglesey and its remoter urban areas where there is a notable contrast with conditions prevailing in the rest of the sub-region.

Industrial Structure

- 8.90 Anglesey has an adverse industrial structure, with a strong dependence on production and transport activities, including concentrations of relatively low value manufacturing. Relative to the rest of the North West Wales sub-region the local economy is much more significantly skewed towards production activities – manufacturing, electricity generation, construction and also transport. The issue is not just the sectors represented but the sub sectors within them, for example, in manufacturing there has been and remains a strong representation of medium/low and low technology activity.²⁴
- 8.91 Equally, the local economy also has benefited from a number of very high value added jobs at the Wylfa plant, which collectively mean that the average gross value added per employee overall in Anglesey has been quite reasonable. There is a clear vulnerability here, given the planned closure of Wylfa.
- 8.92 Approximately 4,000 residents within Holyhead are in employment, with most of these occupying transport or manufacturing related jobs. This is similar to the Anglesey average, where residents are less likely to be employed within the construction, education, health or social work sectors relative to the sub-region.
- 8.93 Employment change over the period 2004 – 2008 shows that the sub-region overall out-performed Wales with a 5.1% increase in the number of jobs. However, whilst Gwynedd fared the best, followed by Conwy, Anglesey actually saw a decline in jobs (-1.2%). This reflects some of the weaknesses in its underlying economic structure.
- 8.94 It is estimated that from 2008 – 2010 something in the order of 900 (32%) of manufacturing jobs in Anglesey were lost over the period. Anglesey has been especially exposed, not only due to the significance of manufacturing here, but also reflecting the importance of many lower value activities. The closure of AAM Plant was also significant.
- 8.95 The depreciation of the pound in late 2007 – 2008 helped improve the competitiveness of industry. Moreover, manufacturing employment has performed well, particularly in relation to the attraction of inward investors both in high value and more traditional manufacturing sectors such as food processing. Easy access to markets in Ireland is a factor. For example, French bakery firm PV France announced its intention to re-locate from its current UK base in Merseyside to Llangefni. The firm envisages around 105 jobs being created in the first stage, its ambitious plans to expand into growth markets in Ireland and Sweden.

Tourism

- 8.96 The Isle of Anglesey County Council STEAM Report 2010 puts the number of annual visits to the island at circa 1.5 million trips, generating a total of £147m of direct annual tourism spend²⁶.
- 8.97 The current North Wales Tourism Strategy states that the volume of tourism trips across the whole of North Wales has stayed broadly constant over the last decade. The latest STEAM data suggests that Anglesey may have “bucked” this wider trend with a 2.4% average annual increase in visitor numbers between 2005 and 2010. Visitor numbers in 2005 stood at 1.3 million trips.
- 8.98 Day visitor spend accounts for about 9% of all tourism spend in Anglesey. Trips to non-serviced accommodation contribute the majority of spend (75% of all spend is from trips to Anglesey involving a stay in non-serviced. 13% of all spend is tied

to trips to serviced accommodation 3% from trips to stay with friends and relatives.

8.99 The Anglesey tourism market is based in large part on its natural assets, namely its coastline and rural landscape. There are a number of historic properties (such as Beaumaris Castle and Plas Newydd), heritage attractions (notably via the Heritage Journey and the Copper Kingdom at Amlwch) and other attractions (such as Anglesey Sea Zoo and the Anglesey Model Village) that complement these natural assets. Trips are dominated by the traditional holiday markets, with large number of families with children staying in rental properties, caravanning or camping. Appendix 8.2 provides more detail on the tourism sector on the Island.

8.100 Various partners are agreed on what is needed to boost Anglesey tourism, with this being:

- A substantial reduction in the seasonality of the sector with far more year round activity and jobs. Currently the four month period June to September accounts for 49% of all visitors to Anglesey, and total visitor numbers drop to around 65,000 per month from December through to March.
- A shift towards higher value markets that bring with them different demands/tastes and associated higher levels of average spend.

8.101 Boosted by recent growth in tourism trips to the Island, the Anglesey Tourism Partnership has significant ambitions for growth, equating to annual growth of between 3% and 5% in the total size and value of the local tourism market. If these growth rates are applied to the existing tourism base it would imply a target of an additional 460,000 to 830,000 tourism trips (or an additional 1,000 to 1,800 tourism jobs) by the end of the next 10 years.

Recreation

8.102 Table 8.3 below shows data provided by IOACC, which indicates that numbers of visitors to the Penrhos Coastal Park increased steadily until 2007 but slipped back in 2008 before recovering slightly in 2009 and 2010. No more recent data is available and it is not known at what position the counter is positioned within the Coastal Park.

Table 8.3: Visitors to the Penrhos Coastal Park 2003 - 2010

2003	2004	2005	2006	2007	2008	2009	2010
14,890	16,705	18,176	18,306	25,167	19,288	22,365	20,959

8.103 The numbers presented seem low for an attraction of this size, averaging just 57 visitors a day in 2010. No data on the seasonality of visits is presented, which could reasonably be expected to show that the peak time for visits is the summertime.

Labour Market Characteristics

8.104 The analysis below is summarised from the Anglesey Energy Island Programme Potential Outcomes and Performance Measures²⁴.

8.105 Analysis of employment by occupational structure indicates that Anglesey has a much lower proportion of high value professional and managerial occupations than either Wales or GB, but a slightly higher proportion of skilled trades and personal services, sales and customer services.

- 8.106 Information for 2009 indicates that there is a smaller proportion of the resident population qualified to NVQ level 4 and above compared to Wales or GB.
- 8.107 The continual entry and exit of plants and firms is thought to be crucial to the growth of an economy. This process - known as economic churn - is thought to impact on industry productivity through increased competition leading to greater cost efficiency. There is a strong and positive relationship between levels of 'churn' in the economy and economic performance. It can also facilitate creative destruction whereby more innovative firms enter the market, replacing existing incumbent firms using current technologies.
- 8.108 Whilst the registration rate for new businesses for 2007 is lower than the GB average in each of the local authority areas across North Wales, and only in Flintshire and Wrexham does it exceed the average for Wales, it is notably lower in Anglesey and Gwynedd. This indicates a low rate of economic change and implies poor economic performance.
- 8.109 Looking at longer term trends (1996-2007) in relation to the overall change in the stock of businesses it is evident that Anglesey exhibits a persistently lower level of new firm formation compared to Wales or other better connected parts of the sub-region such as Conwy.
- 8.110 There are also relatively high levels of self-employment on Anglesey (10% of economically active people, compared to 8.2% in Wales) but these are often associated with low pay and insecure conditions.

Economic Activity

- 8.111 Table 8.4 outlines economic activity in the wards of: Trearddur, Kingsland, Holyhead and London Rd. In addition, it also shows the activity within the whole of Anglesey and Great Britain.

Table 8.4: Economic Activity in the Wards surrounding the Study Area and the wider Area

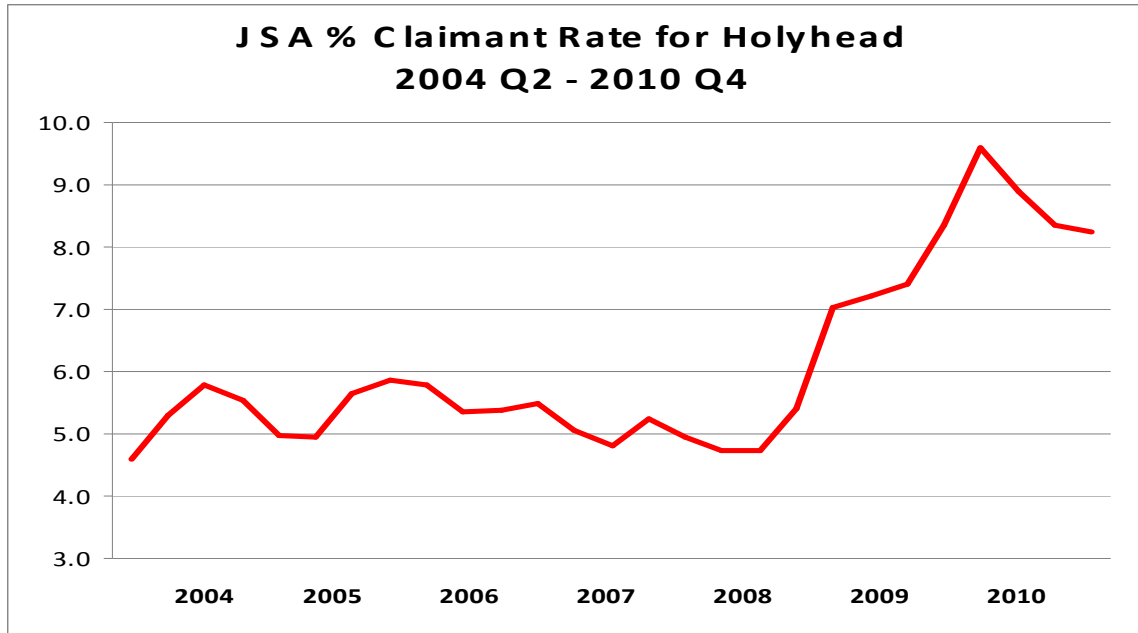
Economic Activity	Trearddur	Kingsland	Holyhead Town	London Rd	Isle of Anglesey	GB
% People aged 16-74 employed full-time	31.9	34.9	31.4	30.8	74.8	75.9
% People aged 16-74 employed part-time	9.3	13.4	11.2	13.8	25.2	24.1
% People aged 16-74 self-employed	11.8	3.4	6.8	3.7	9.6	8.8
% People aged 16-74 unemployed	4.0	6.1	7.0	7.9	8.4	5.7
% People aged 16-74 retired	20.6	13.3	13.6	15.7	6.4	4.5
% People aged 16-74 permanently sick / disabled	7.8	9.4	12.0	9.8	1.3	1.1

Source: (2001 census data)

- 8.112 Holyhead has one of the highest levels of unemployment and economic inactivity in Wales. Wards within the area are consistently placed highest in terms of Anglesey's local unemployment levels, with Holyhead town and London Rd wards

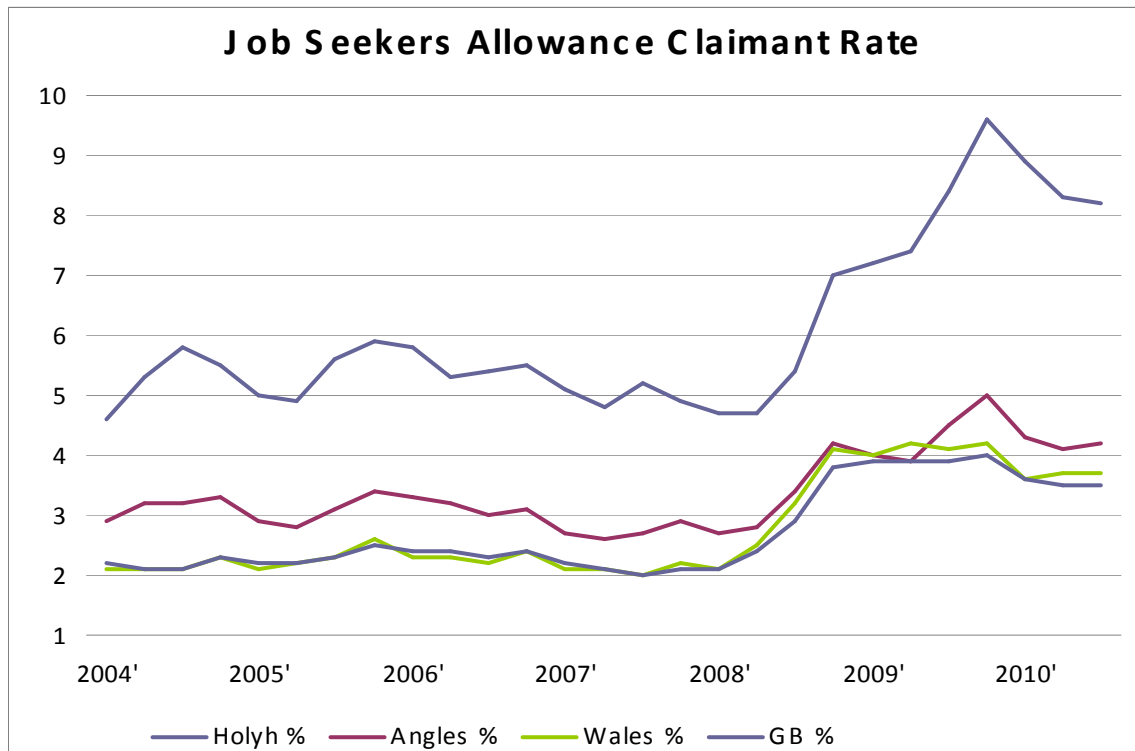
both with unemployment figures at or above 7%. Figures 8.1 and 8.2 below show the town's JSA rate is now over twice the Anglesey and Great Britain average rates, with over 600 JSA claimants (Economic Development Service²⁸). In addition, table 8.2 above also suggests that the wards surrounding the Site have a high proportion of people who are retired, with the highest being 20% in Treaddur. The GB average for people who are retired is 4%.

Figure 8.1: JSA Claimant Rate in Holyhead



Source: Economic Development Service, IOACC February 2012²⁸

Figure 8.2 Comparison of JSA claimant rate between Holyhead, Anglesey, Wales and GB



Source: Economic Development Service, IOACC February 2012²⁸

Education

Existing Educational Facilities

8.113 The IOACC were consulted in relation to school capacities and provided the information presented below in Tables 8.5 and 8.6 in April 2012. Which indicate the capacity of the primary and secondary schools that fall within Holyhead, the school rolls as counted in January 2012. They have also provided forecast rolls to 2016. There is a surplus of primary school places in the local area which is forecast to remain but reduce in the period between 2012 and 2016

8.114 The surplus of secondary school places is forecast to increase between 2012 and 2016 (see Table 8.6).

Table 8.5: Primary Schools in Holyhead

School	Distance from Kingsland Site (km)	School Capacity	Current 2012 Roll	Forecast Rolls			
				2013	2014	2015	2016
Ysgol Y Parc (Community School)	2.30	228	153	154	158	159	160
Ysgol Llanfawr (Community School)	1.98	285	189	185	193	200	200
Ysgol Llaingoch (Community School)	2.02	223	199	199	206	206	216
Ysgol Kingsland (Community School)	1.15	173	154	168	164	158	162
Ysgol Y Parch Thomas Ellis (Church in Wales)	2.02	162	122	124	125	126	127
Ysgol Santes Fair / St Mary's School (Roman Catholic)	1.75	160	187	188	188	183	185
<i>Totals</i>	-	1231	993	1018	1034	1032	1050
Primary Places Surplus/Deficit (-)	-	-	238	213	197	199	181

Source: IOACC

Table 8.6: Secondary Schools in the Local Area

School - Within the Holyhead catchment area	Distance from Kingsland Site (km)	School Capacity	Actual Roll (2011)	Forecast Rolls - Spring Term				
				2012	2013	2014	2015	2016
Ysgol Uwchradd Caergybi	2.0	1180	791	820	815	822	826	805
Secondary Places Surplus/Deficit (-)	-	-	389	360	365	358	354	375

Source: IOACC

Health

8.115 The Health Profile²⁹ for the Isle of Anglesey as a whole suggests that the population has the lowest rate of premature deaths from heart disease in Wales. It also states that the rates of overall life expectancy, mental health score and deaths from all causes are better than the average for Wales. The profile indicates that the rates for smoking and unemployment in Anglesey are the highest in

Wales, and with an ageing population, access to services is becoming an increasing problem. A similar percentage of people in Anglesey, as in Wales, are reported as having a limiting long term illness (23.3%)²⁹.

8.116 The Proposed Development lies within an area covered by the Betsi Cadwaladr University Health Board. The nearest hospital with an Accident and Emergency (A&E) department is the Ysbyty Gwynedd Hospital in Bagnor, which is approximately:

- 31.5km from Cae Glas Site,
- 30.8km from the Penrhos Site and
- 33.0km from the Kingsland Site.

8.117 In addition to this hospital, there is Ysbyty Penrhos Stanley Hospital located in Holyhead which has a minor accident unit, which is approximately:

- 1.5km from the Penrhos Site,
- 2.0km from the Kingsland Site and
- 1.6km from the Cae Glas Site.

8.118 Table 8.7 sets out the medical facilities which are closest to the Site boundary. The NHS Direct Wales³⁰ website does not indicate whether these GP facilities are currently accepting new patients.

Table 8.7: Proximity of medical facilities

Facility	Location	Distance from the Penrhos Site	Distance from the Kingsland Site	Distance from the Cae Glas Site
Cambria Surgery	Ucheldre Avenue Holyhead Anglesey LL65 1RA	3km	1.8km	2.4km
Victoria Surgery	Victoria Road Holyhead Anglesey, LL65 1UD	2km	1.9km	2.2km
Valley Surgery	London Road Valley Holyhead LL65 3DP	2.5km	5.3km	3.7km

8.119 The following dental practices are also present:

- Longford Road Dental Practice, Holyhead (accepting both private & NHS patients)
- Tara Martin Dental Care, Holyhead (Private patients only)

Housing

8.120 In 2009 the North Wales Local Planning Authorities agreed to apportion housing need at a sub-regional level and the allocation for Anglesey was 175 units annually.

8.121 The County Council's aspiration for employment – led growth will also have associated implications for housing.

8.122 Much of the housing stock within the Holyhead area is dominated by older Victorian terraced housing and by public sector housing estates. The demand for

new private housing in the area has been provided through housing developments in villages such as Trearddur and Valley. House-building in Holyhead has been low compared to the Anglesey and Wales averages. However, there has been an increase in house numbers in the period 2003-2007, from 16% (37 units) to 19% (61 units) of all houses completed on Anglesey in those years. The majority of recent building activity has been attributed to social housing developments; this has resulted in an under-performance in terms of private sector house-building.

- 8.123 Table 8.8 below shows a significant imbalance in dwelling types/market values in Holyhead. It is clear that there is a high proportion of band A and B properties, with a low proportion in bands D/E/F. this indicated a shortage of executive/upper market housing.

Table 8.8: Dwelling Tax Bands

Band	Holyhead* Number	Holyhead* %	Anglesey %	Wales %
A	2,264	47.26	13.45	15.04
B	1,356	28.30	19.90	21.47
C	536	11.19	19.19	21.73
D	489	10.21	21.48	15.89
E	105	2.19	15.48	13.05
F	34	0.71	6.98	7.90
G	6	0.13	2.90	3.65
H	1	0.02	0.47	0.88
I	0	0.00	0.14	0.37

* excluding Parc a'r Mynydd Ward (Source: Neighbourhood Statistics website)

Community and Leisure Facilities

- 8.124 Table 8.9 below, identifies the range of community amenities and leisure facilities which are located predominately within 3km of the Kingsland site. Distances are just presented for this element of the development on the grounds that such facilities are most likely to be used by new residents.

Table 8.9: Community Facilities

Facility	Location	Distance from the Kingsland Site
Park Glannau	Penrhos	3.4km
Tesco Foodstore	London Rd, Penrhos	1.6km
Morrisons Foodstore	Penrhos Industrial Estate, Penrhos	1.7km
Foresters Arms Pub	Porthdafarch Rd, Kingsland	2.6km
Netto Foodstore	Kingsland	1.3km
Holyhead Leisure Centre	Kingsland	2.1km
Kingsland Park	Kingsland	1.0km
The Senior Citizens Club	Bryn Gwyn Rd, Holyhead	1.4km
Lidl Foodstore	Llanfawr Rd, Gwelfor	1.6km
Gwelfor Community Centre	Llanfawr	2.2km
Morawelon Stores	Ffordd Tudur, Llanfawr	2.1km
Morawelon Post Office	Ffordd Tudur, Llanfawr	2.1km
Canada Gardens Park	London Road	1.6km
The Dublin Packet Inn	London Rd, Holyhead	1.7km
London Road Community Centre	London Road, Holyhead	1.6km
Cambria Inn	Cambria St, Holyhead	2.0km
Community Centre	S Stack Rd, Holyhead	2.3km
Breakwater Country Park	Holyhead	2.6km

Facility	Location	Distance from the Kingsland Site
Holyhead Library	Newry Fields, Holyhead	2.2km
Plas Road Allotments	Plas Road, Holyhead	1.4km
Newry Beach Park	Newry Beach	2.7km
Llanfawr Park	Llanfawr Road	2.0km
Llaingoch Park	Old School Road, Holyhead	2.2km
Holyhead Town Hall	Newry Street, Holyhead	2.4km
Holyhead New Park Street English Baptist Chapel	New Park Street, Holyhead	2.4km
Church of St. Cybi	Market Street, Holyhead	1.9km
Holyhead Sailing Club	Beach Road, Holyhead	2.8km

Crime and Public Safety

8.125 Table 8.10 below shows the crime statistics for Anglesey over the period 2010-2011. Crime statistics for the Isle of Anglesey as a whole show that the most reported type of crime was violence against the person, which, at 31%, is also above the national average of 24.75%. Of note is the significantly higher rate of robbery on Anglesey than in the rest of Wales. However, incidence of burglary from a dwelling, theft of a vehicle and theft from a vehicle was lower on Anglesey, compared to the Wales average.

8.126 The rate of recorded offences per 1000 people for 2011-12 was 47.14 on the Island, compared to 62.09 for Wales as whole.

Table 8.10: Crime Statistics for Anglesey and Wales 2010-2011

Crime	Isle of Anglesey		Wales	
	Count	%	Count	%
Violence Against the Person	1017	31.03	42427	24.75
Wounding or Other Act Endangering Life	19	0.58	1685	0.98
Other Wounding	346	10.56	18090	10.55
Harassment Including Penalty Notices for Disorder	289	8.82	11205	6.54
Common Assault	284	8.66	8629	5.03
Robbery	110	10.34	940	0.55
Theft from the Person	10	0.31	3036	1.77
Criminal Damage Including Arson	797	24.31	41863	24.42
Burglary in a Dwelling	112	3.42	9435	5.50
Burglary Other than a Dwelling	265	8.08	14405	8.40
Theft of a Motor Vehicle	39	1.19	5348	3.12
Theft from a Motor Vehicle	89	2.72	14332	8.36
	3278	100	171395	100

Potential Impacts

8.127 This section summarises the likely effects of the Proposed Development arising during construction and operation of the Proposed Development.

Demolition and Construction

Generation of Employment

8.128 The total development costs for all elements of the scheme including the Kingsland residential units are estimated at around £224 million in current prices. The development cost break down is shown in Table 8.11 below.

Table 8.11: Estimated Construction Costs

Construction Activity	Estimated Development Cost (2012 Prices)
Penrhos visitor accommodation	£71.8m
Penrhos centre & services	£27.5m
Total for Penrhos	£99.3m
Cae Glas visitor accommodation	£51.9m
Cae Glas nuclear worker facilities and other site infrastructure	£18.5m
Total for Cae Glas	£70.4
Kingsland residential scheme	£54.4m
Estimated Total Development Costs (excluding further infrastructure costs on leisure village)	£224.1m

Source: Regeneris Consulting/Edmond Shipway cost consultants

- 8.129 The construction of the scheme, as currently configured, will be sequenced in discrete phases with a likely overall build programme spanning 2014 through to 2022 (around eight years in total).
- 8.130 The Department for Communities and Local Government (CLG) and OffPAT evidence (2010) on the number of full-time equivalent employees (FTE) supported per £1m of construction output across a number of categories. This evidence was presented in 2009 prices, and has been updated to 2011 prices. For new housing (the best fit category for the lodge construction and Kingsland residential component), approximately 20 FTE jobs are supported per £1m of construction output – approximately £50,000 per FTE. For commercial developments (the best fit category for other aspects of the leisure village offer), approximately 17 FTE jobs are supported per £1m of construction output – approximately £58,500 per FTE.
- 8.131 Using the assumptions set out above, it has been estimated that the whole development scheme will support an average of 420 Full Time Equivalent (FTE) construction jobs for the duration of the build programme.
- 8.132 This estimate is likely to be under-estimating the total construction employment impacts from the scheme, as further infrastructure costs are likely to be incurred. Table 8.12 highlights the total number of FTE construction jobs per annum for each phase of development. Construction employment peaks in early 2015 at around 1,050 FTE jobs.

Table 8.12: Estimate of Construction Employment

Construction jobs	Yr 1	Yr 2	Yr 3	Yr 4	Yr 5	Yr 6	Yr 7	Yr 8	Yr 9
Cae Glas - Nuclear worker facilities and other site infrastructure	104	104	104						
Cae Glas - Lodges & Hotel (Build for nuclear workers 2014-2015, refurbishment for visitor accommodation 2021)	226	226						226	
TOTAL CAE GLAS	330	330	104					226	
Kingsland Residential		125	125	125	125	125	125	125	125
Penrhos Centre and Services		156	156	156					
Penrhos Lodges		440	440	440					
TOTAL PENRHOS		721	721	721	125	125	125	125	125
GRAND TOTAL	330	1051	825	721	125	125	125	351	125

Source: Regeneris Consulting Ltd

8.133 Evidence from a comprehensive economic impact analysis on the construction and operation of Center Parcs holiday villages suggests that around 25% of all construction expenditure benefits local construction contractors. Given the economic geography of Anglesey compared to the location of existing Center Parcs it is anticipated that a slightly higher proportion of construction expenditure would be retained locally – possibly up to 40%. This assumption is driven by the peripheral nature of the development site from mainland North Wales in comparison to the Center Parcs experience. Some of the Center Parcs locations were in close proximity to a number of other major towns and cities, and a wider range of competing construction firms. It is estimated therefore that the scheme will yield in the region of **110 and 170 FTE construction jobs for Anglesey residents** throughout the duration of its build programme. The range reflects different assumptions on the degree to which expenditure flows to local contractors.

8.134 The sensitivity of people of working age in the area is considered to be high. The magnitude of change is likely to be medium, given that construction is likely to take place over an 8 year period.

8.135 Therefore there is likely to be a **moderate to major beneficial**, direct, temporary, short term effect on people at the County/Regional levels associated with employment during construction.

Increase in Indirect and Induced Employment During the Construction Phase

8.136 In relation to the Proposed Development, multiplier effects are anticipated as a result of local spending in relation to on-site construction activities, both in terms of the sourcing of local supplies (indirect employment), and local spend by on-site construction workers (induced employment).

8.137 Major construction projects also involve purchases from a range of supplier firms (e.g. bricks, glass, and steel) who, in turn, purchase from their own suppliers

through the supply-chain. The relationship between the initial direct spending and total economic impacts is known as the “multiplier effect”, and reflects that an initial investment can have substantially larger economic benefits as rounds of expenditure are transmitted through the economy.

- 8.138 It is anticipated that some businesses in the local and regional economy would benefit from trade linkages established during the construction of the proposed development. As a result, further indirect jobs would be supported locally in suppliers of construction materials and equipment. In addition, businesses would be expected to benefit to some extent from temporary increases in expenditure linked to the direct and indirect employment effects of the construction phase. This might relate to wage spending by workers in local shops, bars and restaurants and other facilities. These are referred to as induced effects.
- 8.139 The sensitivity of the local economy is judged to be high and the magnitude of change is judged to be medium. Therefore there is likely to be a **moderate beneficial**, indirect, temporary, short term effect on people at the County/Regional levels associated with indirect and induced employment during construction.

Completed Development

Generation of on-site Employment Associated with Penrhos/Cae Glas

- 8.140 The Proposed Development incorporates a number of employment generating uses as set out in Table 8.13 below. This table also includes an estimate of employment in terms of Full Time Equivalent (FTE) jobs.
- 8.141 The scheme is anticipated to include around 815 units available for letting per week (including lodges, cottages and hotel. This is broadly comparable with the size of most of the UK Center Parcs operations. Work is on-going to test the volume of visitors that will be attracted to Anglesey to stay at the scheme. However, based on initial assumptions on occupancy and the nature of bookings (i.e. balance of short stay versus week long bookings) it is estimated the scheme will see annual visitor numbers of between 150,000 and 200,000. This range is somewhat lower than the achieved numbers at equivalent UK Center Parcs, but is a cautious estimate that allows for growth in the longer term. The nature of the facilities available, the number of visitors and the nature of stays will influence anticipated employment.

Table 8.13: Estimation of Potential Visitors (weekly and annually) for the Leisure Village

Facility	Visitors based on 80% occupancy of units, @75% of all potential occupants, staying for the week	Additional visitors from double bookings taken on 30% of lodges.	Total visitors, with double bookings included
Penrhos (500 units)	1,693	482	2,174
Cae Glas (315 units)	1,285	482	1,767
Cae Glas – Hotel (75 units)	90		90
Total Visitors per week	3,068	964	4,031
Total Visitors per annum (50 weeks)	153,400 (say 150,000)	48,200	201,550 (say 200,000)

Source: Land and Lakes Ltd/Regeneris Consulting

- 8.142 Using the lower number of annual visitors (150,000 per annum), it is estimated that the scheme will yield in the region of 465 direct FTE jobs on-site. If this estimate was based on the higher volume of visitors (200,000 per annum) the total jobs supported could be as high as 620 FTEs. This estimate is based on a FTE jobs per visitor estimates which emerge when Center Parc's data is analysed. A standard picture emerges on the visitor to jobs ratio (on average 0.0031 FTE's per visitor) and estimates for the Penrhos / Cae Glas leisure village have been made using this ratio. Just over half the employment would be associated with Penrhos.
- 8.143 Table 8.14 shows the anticipated mix of employment by role based on a review of similar facilities.

Table 8.14: Indicative Staffing Breakdown for the Penrhos / Cae Glas Leisure Village (based on evidence from Center Parc operations).

Roles	FTE jobs (lower estimate)	%
Admin & General	23	5%
Food & Beverage	112	24%
Finance	9	2%
Housekeeping	195	42%
Human Resources	4	1%
Leisure Services	84	18%
Retail	28	6%
Technical Services	14	3%
Total FTEs	465	100%

Source: Sheffield Hallam University, December 2005/Regeneris Consulting

- 8.144 Table 8.15 highlights the build-up of operational employment at the leisure village. With the Penrhos accommodation becoming operational by 2020, approximately 330 FTE jobs will be created to support this first phase. With the addition of the Cae Glas leisure accommodation (refurbished lodges and hotel) by 2022, the full operational employment requirement will be required – 465 FTE jobs based on the lower end of the visitor number range.

Table 8.15: Build-up of Visitors and On-site Employment (FTE jobs), 2020 and 2022

Operational Phasing	Total Annual Visitors (lower estimate) & FTE jobs supported
Penrhos opening in 2020	85,000
On-site Jobs 2020	260
Post 2022 - Penrhos & Cae Glas Operational	150,000
On-site Jobs 2022 onwards	465

Note: Annual visitor estimates based on lettings at 80% occupancy of units, and at 75% guest occupancy. Source: Regeneris Consulting

- 8.145 At existing Center Parcs over a third of all staff are employed on a full-time basis, with the majority working part-time hours of varying length. A similar contracting situation is anticipated to emerge at the Penrhos / Cae Glas leisure village.
- 8.146 Evidence from Sheffield Hallam University's research on Center Parcs showed that around 85% of all staff resided within 12 miles of a leisure village. Given the location of the development to the west of Anglesey, it is expected that the Penrhos / Cae Glas development could easily meet this benchmark, and potentially achieve a higher level of local employment retention. It is estimated therefore that between 75% and 90% of all on-site jobs (or **c.350 to 420 FTEs** using the lower end of the visitor number range) will be taken by Anglesey

residents. The scheme will be particularly beneficial in addressing employment needs in the wards of Holyhead.

- 8.147 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be medium. Therefore there is likely to be a **moderate to major beneficial**, direct, permanent, long term effect at the County/Regional level associated with the generation of on-site employment at Penrhos / Cae Glas.

Permanent, Indirect and Induced Employment Associated with Penrhos/Cae Glas

- 8.148 In assessing the off-site jobs supported through the operation of the leisure village, three main categories have been used. These include:

- The indirect jobs via the off-site expenditure of guests staying at the leisure village.
- Indirect jobs via the corporate supply chain expenditure of the leisure village operator.
- Induced jobs via the wage expenditure of on-site and off-site employees.

- 8.149 It is estimated that in total there will be 110 FTE off-site jobs created in Anglesey as a result of the leisure village scheme, on the basis of the lower end of the forecast visitor numbers. This represents a combined indirect/induced multiplier of 0.20 (110 off-site jobs on top of 465 on-site jobs). This is broadly comparable with established guidance on the use of tourism multipliers. As with the on-site jobs it is assumed the vast majority of the off-site jobs (75% to 90% or 80 to 100) will be taken by Anglesey residents. The report by Regeneris Consulting Ltd. provides more detail on how this figure was arrived at.

- 8.150 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be medium.

- 8.151 Therefore there is likely to be a **moderate to major beneficial**, indirect, permanent, long term effect at the County/Regional level associated with permanent indirect and induced employment associated with Penrhos / Cae Glas.

Permanent Indirect and Induced Employment Associated with Kingsland

- 8.152 In addition to the above, the proposed Kingsland residential units will also support more spending in Holyhead and other centres as a result of a net increase in population locally. Using assumptions on the mix of housing, the potential demographic and household income levels of future residents at the Kingsland site (up to 360 dwellings), as well as reviewing the latest evidence on retail expenditure patterns in Anglesey²⁶, Regeneris estimate that the new households could spend around £7.7 million per annum, with around £43.8m retained within Anglesey. This expenditure could support around 48 FTE jobs across the Anglesey economy.

- 8.153 With the potential for some of these residents to be employed at the leisure village, it is important not to double count impacts as employee expenditure has already been considered in the assessment. As such, a 15% reduction to Kingsland household expenditure has been applied to take account of this issue. On this basis the new households will spend around £6.5m, with around £3.3m retained locally. This expenditure could support around **40 FTE jobs**.

8.154 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be low. Therefore there is likely to be a **minor to moderate beneficial**, direct, permanent, long term effect at the County/Regional level associated with permanent indirect and induced employment associated with Kingsland.

Meeting Housing Requirements

8.155 Kingsland will contribute to meeting future housing requirements but also improve the range of housing available in Holyhead. As noted in the review of baseline data the housing stock of the town is dominated by older Victorian terraced houses and by public sector housing estates. A lack of supply of new private housing has resulted in out-migration from Holyhead. Existing housing in Holyhead is at the lower end of the market.

8.156 Kingsland will therefore help increase the supply of dwelling types which are relatively few in number in Holyhead. In terms of house tax bands, the proposed dwellings are likely to be in price bands which are currently very under-represented in the town. The development would therefore help to reduce the current serious imbalance in the town's dwelling profile, which is directly contributing to its current social imbalance.

8.157 Kingsland will include an element of affordable housing provision. Discussions with IOACC Officers in relation to the extent and type of affordable housing to be delivered are on-going.

8.158 The sensitivity of the population in the County is considered to be high. The magnitude of change is likely to be low. Therefore there is likely to be a **minor to moderate beneficial** direct, permanent, long term effect at the County level associated with the provision of housing at Kingsland.

Impact on Demographics in the area, in particular, population and household size and structure

8.159 Evidence from the Mid-Year Estimates (2005), and Census output, reveals that the population of Anglesey is getting older at a rate which cannot be accounted for by natural change alone. The County now has an age profile which is noticeably older than that for England and Wales as a whole (Wales alone is somewhere in between).

8.160 The provision of employment (Penrhos / Cae Glas) and housing (Kingsland) could help retain people of working age on Anglesey. It has already been suggested that there will be a relatively high take up of employment locally, relative to other similar schemes with a larger labour market area to draw on. Similarly the provision of housing, including an element of affordable housing, at Kingsland could help retain people on the Island.

8.161 The sensitivity of the population in the County is considered to be high. The magnitude of change is likely to be medium.

8.162 The provision of employment (Penrhos / Cae Glas) and housing (Kingsland) is therefore likely to give rise to a **moderate to major beneficial** direct, permanent, long term effect at the County level associated with the impact on population and households.

Impact on Education Facilities

- 8.163 There is an acknowledged issue on the Island in terms of falling school rolls²⁶. The provision of housing at Kingsland could help maintain demand for school places by retaining a proportion of the population that might otherwise leave the area.
- 8.164 The Kingsland development would be built out over a period of about eight years, with the population also increasing incrementally. This should give time to adjust the provision of education facilities as necessary.
- 8.165 The introduction of employment at Penrhos / Cae Glas could also create demand for vocational training, for example in relation to health and safety, catering etc. helping to maintain such facilities on the Island.
- 8.166 The sensitivity of the population in the County is considered to be high. The magnitude of change is likely to be medium. Therefore there is likely to be a **moderate to major beneficial** direct, permanent, long term effect at the County level associated with the impact on education facilities.

Impact on Recreation Facilities

- 8.167 It has been identified that the completed development would likely attract 150,000 – 200,000 visitors per year to the area.
- 8.168 It is anticipated that most visitors to the Penrhos site and over 50% of visitors to Cae Glas would use the Coastal Park. This would result in a significant increase in the number of visitors of around 100,000 – 150,000 per year.
- 8.169 In order to facilitate this anticipated increase in users of the Coastal Park, the proposals include the improvement and management of the Park in the long term. Walkways will be designed to cope with increased traffic through widening and better quality surfacing. The proposals would also generate visits throughout the year rather than in the summer months.
- 8.170 It is also notable that the proposals include the creation of alternative recreation facilities including publicly accessible woodland at Cae Glas and the nature reserve. This would serve to dissipate visitors around a wider area.
- 8.171 In summary, it is considered that the proposals would result in a **minor beneficial** effect on recreation facilities in the long term.

Impact on Local Community Facilities

- 8.172 A development of 360 units at Kingsland is not considered to give rise to demand for bespoke community facilities. Assuming 2.4 persons per household, the Kingsland development would accommodate 864 people.
- 8.173 If the Island is to experience employment – led growth this will clearly create the need for additional social and community facilities, not just health related facilities.
- 8.174 Population projections prepared as part of the evidence base for the JLDP provide a mixed picture, with the population potentially declining in the period up to 2026. Only the projection based on the migration trend observed in the most recent 5 years data (as at 2003) shows that the population will increase by 2026.

- 8.175 The need for additional community facilities in the context of residential growth will need to be considered as part of the preparation of the JLDP.
- 8.176 As noted earlier, the Kingsland development would be built out over a period of about eight years, with the population also increasing incrementally. This should give time to adjust the provision of community facilities as necessary.
- 8.177 The development at Penrhos / Cae Glas provides significant community facilities in the form of:
- A new publically accessible grass football and cricket pitch with a club house and associated car parking at Cae Glas. The football and cricket pitch replace existing facilities at Penrhos;
 - A visitor centre and 40 hectare Nature Reserve at Cae Glas both of which will be publically accessible;
 - 29 hectares of publically accessible open space will be maintained at Penrhos Coastal Park. The Coastal Park will also connect to the Coastal Path maintaining and enhancing this important route.
- 8.178 The nature of the proposals at Penrhos / Cae Glas is such that they are not anticipated to impact significantly on existing facilities used by the local community, e.g. libraries.
- 8.179 In terms of Kingsland, the magnitude of change is low, the sensitivity of the receiving environment (existing community facilities) is considered to be low. There is therefore likely to be an **adverse** direct, permanent, long term effect on community facilities of **negligible to minor** significance at the local level prior to the implementation of mitigation measures.
- 8.180 The provision of pitches and open space, nature reserve, Coastal Park, links to the Coastal Path and provision of a visitor centre at Penrhos / Cae Glas is considered to have a **beneficial**, direct, permanent, long term, **moderate** effect of County significance, prior to the implementation of mitigation measures because the magnitude of change and sensitivity to change are considered to be medium.

Impact on Health Facilities

- 8.181 Existing health facilities are reviewed in paragraph 8.115 onwards above. The HIA Screening exercise notes that provision of health care facilities is already an issue on Anglesey. As an indication of the scale of need, assuming 1 GP per 1,800 residents the Kingsland development would give rise to demand for about half a GP (assuming 864 people once dwellings fully occupied and that all residents were new to the local area).
- 8.182 As noted earlier, the Kingsland development would be built out over a period of about eight years, with the population also increasing incrementally. This should give health providers time to adjust if necessary.
- 8.183 As a worst case it is assumed that the population has medium sensitivity and the magnitude of change is low. There is therefore potential for a **minor adverse**, permanent long term effect at the local level associated with the demand for health facilities prior to the implementation of mitigation measures.
- 8.184 The proposals at Cae Glas represent an opportunity to temporarily house a large proportion of the construction workers associated with the proposed nuclear development at Wylfa. In total there will be sufficient accommodation for up to 2,000 nuclear construction workers.

- 8.185 It is anticipated that the temporary accommodation at Cae Glas would include a first aid centre and medical staff. Given this provision, it is assumed that the magnitude of change (in terms of demand for off-site medical facilities will be low), the sensitivity to change is high. Therefore it is anticipated that there will be a direct, temporary, short term effect on health facilities of **minor to moderate adverse** effect on health facilities prior to the implementation of mitigation measures.
- 8.186 It is anticipated that the Penrhos / Cae Glas leisure development once operational will include a medical centre and medical staff. In order to comply with relevant legislation it is anticipated that health and safety advice appropriate to individual activities will also be provided to guests, along with safety equipment if appropriate. A medical questionnaire may be required for certain activities by all participants 24 hours prior to the session.
- 8.187 Given the provision of medical facilities on-site at the Penrhos / Cae Glas leisure development it is assumed that the magnitude of change (in terms of demand for off-site medical facilities) will be low, the sensitivity to change is high. Therefore it is anticipated that there will be a direct, permanent. Long term effect on health facilities of **minor to moderate adverse** effect on health facilities prior to the implementation of mitigation measures.

Impact on the Welsh Language

- 8.188 The impact upon Welsh language and culture has been considered in a Welsh Language Assessment, which is presented at Appendix 8.3. This identified that the development could help to support the community of Welsh speakers by providing a range of employment and housing opportunities that would help to reduce the need for local people to leave the area in search of employment. The details of employment generation associated with the proposals have already been stated in this chapter, as has the issue relating to outward migration, particularly amongst the young. The Welsh language and Welsh Community is of high sensitivity. Therefore, the indirect effect of these jobs and housing options on Welsh language and culture is considered to be **moderate beneficial** at the local level in the long term.
- 8.189 The leisure components of the development will seek to promote Welsh culture and language through signage and the interaction of staff and guests in Welsh. Welsh heritage will be celebrated through a heritage centre and the re-use of historic structures and Welsh produce will be sold in the farmers market and the on-site restaurants. Therefore, the impact upon Welsh culture is considered to be **minor beneficial** at the local level in the long term.
- 8.190 Despite these positives, it is considered that there may be potential during the use of the Cae Glas site as nuclear workers accommodation for conflict between local residents and workers when outside of the secure facilities. Although it is intended for workers to remain predominantly on-site, it is inevitable that some will visit Holyhead and could interact with the community in a negative or anti-social way. Therefore, it is anticipated that this element of the proposals could have a **minor adverse** impact at the local level in the short term.

Synergy with the wider regeneration aims for Holyhead and the Island.

- 8.191 The Economic Needs and Benefit Report for the Proposed Development sets out the contribution that the Proposed Development could make to achieving wider economic and regeneration aims. The provision of additional jobs on Anglesey is

a key priority. At least 2,000 new jobs are required just to make up the shortfall on jobs lost in the last decade. This figure rises to 6,300 if the targets in the 2004-2015 Anglesey Economic Development and Regeneration Strategy are to be achieved. The report notes that these figures represent a huge challenge. Attracting investment from the private sector will be crucial given likely future trends in public sector jobs.

- 8.192 Failure to deliver jobs could come with substantial economic and social costs. Already there is a significant loss of working age people from the Island as they seek employment opportunities elsewhere – data shows there has been a net loss of 1,300 working age residents in Anglesey from 2005 onwards. If this is allowed to continue it could impact on the longer term sustainability of many of Anglesey's communities.
- 8.193 The need for additional jobs is particularly acute in Holyhead where there are currently 700 residents claiming some form of unemployment benefit and several wards classed as some of the most deprived in Wales.
- 8.194 Given the relatively peripheral nature of Anglesey, there are only a small number of sectors that can realistically be expected to deliver the employment growth that is required. These are primarily those sectors (energy, tourism etc.) for whom peripherality and access to coastline is a positive feature rather than a negative.
- 8.195 The Energy Island initiative, and particularly the opportunities arising from a potential Wylfa B nuclear new build, will provide a much needed injection of new jobs. However, Energy Island alone will not correct all the economic challenges which face Anglesey. The tourism sector is another sector with the ability to generate additional jobs but has yet to secure transformational projects which match the ambition of Energy Island.
- 8.196 A number of initiatives are being promoted by Holyhead Forward - the regeneration body for Holyhead launched in 2003. Current aspirations include expansion of Port and marine activities, which has significant potential for future growth. Holyhead Forward also prioritises town centre redevelopment, with a series of improvements planned and underway at present to redevelop the townscape, tourism, retail and leisure offer, see paragraph 8.47 for more details.
- 8.197 Immediately outside of Holyhead the Parc Cybi Business Park is a new strategic employment and regeneration site. The development will consist of largely distribution and warehousing space and is expected to house 450 jobs.
- 8.198 The Energy Island initiative, and particularly the opportunities arising from a potential Wylfa B nuclear new build, will provide a much needed injection of new jobs. Initial estimates suggest Wylfa B could generate circa 4,500 temporary construction jobs at its peak and then up to 2,500 permanent operational jobs³¹. This is a significant level of employment creation. The Proposed Development will directly contribute to the positive legacy of development at Wylfa.
- 8.199 As noted in Section 8.52 above, the Energy Island EZ is focused on stimulating demand in energy and energy related activities and businesses. To this end the prospectus supports an approach which will stimulate and build on investment from businesses within the low carbon energy sector on specific EZ sites. In order to minimise displacement there is a need to ensure that the incentives provided are targeted only at businesses within the low carbon energy sector.
- 8.200 The proposed leisure development at Penrhos / Cae Glas will potentially compliment these other initiatives by contributing to the creation of a diverse and

sustainable economy on the Island providing a 'transformational' tourism project for the Island.

- 8.201 Provision of housing at Kingsland could also help retain people on the Island and the Holyhead area and help support employment led growth.
- 8.202 The proposed development has the potential to positively influence the general image and perception which local people and visitors have of Holyhead and Holy Island (complementing and adding value to the on-going 'BRAND' project activities).
- 8.203 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be medium. Therefore there is likely to be a **moderate to major beneficial**, indirect, permanent, long term effect at the County/Regional level associated with impacts on the economy.

Mitigation Measures

- 8.204 The potential for mitigation measures associated with the effects identified above is considered below.

Demolition and Construction

Generation of Employment

- 8.205 Although the effects associated with the generation of employment during construction are judged to be positive there is an opportunity to optimise local recruitment and training by targeting local people. For example, the Taith I Waith/New Work Connections project is aimed at supporting people who, through a range of disadvantages, are economically inactive or unemployed. The project covers the four local authority areas of Anglesey, Conwy, Denbighshire and Gwynedd and is part funded through the European Social Fund.

Increase in Indirect and Induced Employment During the Construction Phase

- 8.206 Multiplier effects are anticipated as a result of local spending in relation to on-site construction activities, both in terms of the sourcing of local supplies (indirect employment), and local spend by on-site construction workers (induced employment).
- 8.207 Although the effects associated with the generation of indirect and induced employment during construction are judged to be positive there is an opportunity to optimise local benefits through initiatives associated with local sourcing.

Completed Development

Generation of on-site Employment Associated with Penrhos/Cae Glas

- 8.208 It is estimated that about 75% and 90% of all on-site jobs (or **350 to 420 FTEs**) will be taken by Anglesey residents.
- 8.209 Although the effects associated with the generation of employment during operation are judged to be positive there is an opportunity to optimise local recruitment and training by targeting local people through a 'Local Employment Policy'.

Permanent Indirect and Induced Employment Associated with Penrhos/Cae Glas

- 8.210 It is estimated that in total there will be 110 FTE off-site jobs created in Anglesey as a result of the leisure village scheme, on the basis of the lower end of the forecast visitor numbers.
- 8.211 Although the effects associated with the generation of indirect and induced employment during operation are judged to be positive there is an opportunity to optimise local benefits through initiatives associated with local sourcing.

Permanent Indirect and Induced Employment Associated with Kingsland

- 8.212 The proposed Kingsland residential units will also support more spending in Holyhead and other centres as a result of a net increase in population locally.
- 8.213 The effect prior to mitigation was judged to be positive. The potential for further enhancement is considered to be limited given the nature of the effect.

Meeting Housing Requirements

- 8.214 Kingsland will help meeting housing requirements and broaden the stock of housing available. No mitigation is required above and beyond the affordable housing provision, which will be agreed with IOACC.

Impact on Demographics in the area, in particular, population and household size and structure

- 8.215 The provision of employment (Penrhos / Cae Glas) and housing (Kingsland) could help retain people of working age on Anglesey. It has already been suggested that there will be a relatively high take up of employment locally, relative to other similar schemes with a larger labour market area to draw on. Similarly the provision of housing, including affordable housing, at Kingsland could help retain people on the Island. No mitigation is therefore required.

Impact on Education Facilities

- 8.216 There is an acknowledged issue on the Island in terms of falling school rolls. The provision of housing at Kingsland could help maintain demand for school places by retaining a proportion of the population that might otherwise leave. No Mitigation is therefore required.

Impact on Recreation

- 8.217 The proposals are considered to be beneficial in terms of the provision of new and improved recreation facilities and increased visitor numbers. Therefore no mitigation is proposed.

Impact on Local Community Facilities

- 8.218 The development at Kingsland is not considered sufficient to give rise to the need for bespoke community facilities but could impact on the capacity of existing facilities. The development at Penrhos / Cae Glas provides significant community facilities.

Impact on Health Facilities

- 8.219 The provision of health facilities is already an issue on Anglesey. As residential development at Kingsland, provision of worker accommodation at Cae Glas and a leisure development at Penrhos / Cae Glas could impact on the demand for health services it is anticipated that further discussions will be held with IOACC and the PCT as the appropriate means by which any impact can be avoided. However, it should also be noted that GP surgeries receive additional funding per patient, which would help to offset the additional demand in the long term.

Impact on the Welsh Language

- 8.220 It has been identified that the temporary use of the Cae Glas site as a workers village could result in negative interactions between local residents and non-Welsh-speaking workers. In order to minimise the potential for conflict the workers will be provided with catering and leisure facilities on-site to reduce the need for visits to surrounding towns and villages. However, it is recognised that some workers will choose to leave the site during non-working hours and therefore workers will be informed of the appropriate code of conduct whilst resident at the site and the penalties for non-compliance. Handbooks covering these issues will also be issued.
- 8.221 All other effects in connection with Welsh language are considered to be positive and no specific mitigation is required.

Synergy with the wider regeneration aims for Holyhead and the Island.

- 8.222 The proposed leisure development at Penrhos / Cae Glas will potentially complement these other initiatives by contributing to the creation of a diverse and sustainable economy on the Island. Provision of housing at Kingsland could also help retain people on the Island and help support employment led growth.
- 8.223 Although the anticipated effect is positive there is an opportunity to optimise local recruitment and training by targeting local people. For example, the Taith I Waith/New Work Connections project referred to above.

Residual Impacts

Demolition and Construction

Generation of Employment

- 8.224 Allowing for mitigation there is likely to be a **moderate to major beneficial**, direct, temporary, short term effect on people at the County/Regional levels arising from employment during construction.

Increase in Indirect and Induced Employment During the Construction Phase

- 8.225 Multiplier effects are anticipated as a result of local spending in relation to on-site construction activities, both in terms of the sourcing of local supplies (indirect employment), and local spend by on-site construction workers (induced employment).
- 8.226 The sensitivity of the local economy is judged to be high and the magnitude of change is judged to be medium. Therefore there is likely to be a **moderate**

beneficial, indirect, temporary, short term effect on people at the County/Regional levels associated with indirect and induced employment during construction.

Completed Development

Generation of on-site Employment Associated with Penrhos/Cae Glas

- 8.227 It is estimated that about 75% and 90% of all on-site jobs (or **350 to 420 FTEs**) will be taken by Anglesey residents.
- 8.228 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be medium. Therefore there is likely to be a **beneficial**, direct, permanent, long term effect at the County/Regional level associated with the generation of on-site employment at Penrhos / Cae Glas. This is judged to be of **moderate to major** significance following consideration of the potential for mitigation.

Permanent Indirect and Induced Employment Associated with Penrhos/Cae Glas

- 8.229 It is estimated that in total there will be 110 FTE off-site jobs created in Anglesey as a result of the leisure village scheme, on the basis of the lower end of the forecast visitor numbers.
- 8.230 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be medium. Therefore there is likely to be a **moderate to major beneficial**, indirect, permanent, long term effect at the County/Regional level associated with permanent indirect and induced employment associated with Penrhos / Cae Glas.

Permanent Indirect and Induced Employment Associated with Kingsland

- 8.231 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be low. Therefore there is likely to be a **minor to moderate beneficial**, direct, permanent, long term effect at the County/Regional level associated with permanent indirect and induced employment associated with Kingsland.

Meeting Housing Requirements

- 8.232 The sensitivity of the population in the County is considered to be high. The magnitude of change is likely to be low. Therefore there is likely to be a **minor to moderate beneficial**, direct, permanent, long term effect at the County level associated with the provision of housing at Kingsland.

Impact on Demographics in the area, in particular, population and household size and structure

- 8.233 The sensitivity of the population in the County is considered to be high. The magnitude of change is likely to be medium. No potential for additional mitigation has been identified. The provision of employment (Penrhos / Cae Glas) and housing (Kingsland) is therefore likely to give rise to a **moderate to major beneficial**, direct, permanent, long term effect at the County level associated with the impact on population and households.

Impact on Education Facilities

- 8.234 The sensitivity of the population in the County is considered to be high. The magnitude of change is likely to be medium. Therefore there is likely to be a **moderate to major beneficial**, direct, permanent, long term effect at the County level associated with the impact on education facilities following consideration of the potential for mitigation. No mitigation measures are suggested in this instance as the effect is positive.

Impact on Recreation

- 8.235 The impact on recreation is considered to be **minor beneficial** at the local level in the long term due to the improvement in the facilities offered and the potential increase in visitors generated.

Impact on Local Community Facilities

- 8.236 In terms of Kingsland, the magnitude of change is low, the sensitivity of the receiving environment (existing community facilities) is considered to be low. Allowing for mitigation there is therefore likely to be a direct, permanent, long term effect on community facilities of **negligible** significance at the local level.
- 8.237 The provision of pitches and open space, nature reserve and visitor centre at Penrhos / Cae Glas is considered to have a direct, permanent, long term, **moderate beneficial** effect of County significance and no mitigation is considered to be required.

Impact on Health Facilities

- 8.238 Assuming the S.106 Agreement includes a contribution towards health facilities it is anticipated that there will be a direct, permanent, long term effect on health facilities of **negligible** significance associated with residential development at Kingsland, provision of worker accommodation at Cae Glas and a leisure development at Penrhos / Cae Glas.

Impact on the Welsh Language

- 8.239 Once the appropriate management processes and codes of conduct are implemented, it is anticipated that there would be no significant impacts upon the Welsh language or community structure associated with nuclear workers. Therefore the residual impact is considered to be **negligible** at the local level in the short term.
- 8.240 Indirect impacts of the development on Welsh language and communities in the local area are considered to be **moderate beneficial** in the long term at the local level. The impact of the development on Welsh culture is considered to be **minor beneficial**.

Synergy with the wider regeneration aims for Holyhead and the Island.

- 8.241 The sensitivity of people of working age in the County is considered to be high. The magnitude of change is likely to be medium. Therefore there is likely to be a **moderate to major beneficial**, indirect, permanent, long term effect at the County/Regional level associated with impacts on the economy.

Conclusions

8.242 In summary the key effects are:

- Delivery of new employment in Anglesey and direct contribution to the primary tourism objectives of the Island.
- The construction phase will sustain approximately 420FTE construction jobs each year over the 8 year period, with between 110 and 170 of these jobs taken by Anglesey residents.
- Once operational, the Proposed Development will yield in the region of 150,000 and 200,000 visitors to Anglesey per annum.
- The leisure village will yield 465 direct on-site FTE jobs on-site based on 150,000 visitors (a figure which could rise to 620 FTE jobs with 200,000 visitors).
- The 465 FTE jobs will span a variety of occupations.
- Between 75% and 90% of all on-site jobs (or 350 FTEs to 420 FTEs) will be taken by Anglesey residents.
- The Proposed Development will help to address the employment needs in deprived wards of Holyhead.
- There is likely to be 110FTE off-site jobs created in Anglesey as a result of the Proposed Development based on 150,000 visitors.
- The majority of off-site jobs (between 65% and 90%, or 80 to 100 FTEs) are predicted to be taken by Anglesey residents.
- The leisure facilities at Penrhos and Cae Glas are likely to bring additional trips and expenditure to Anglesey.
- Kingsland residential units will facilitate more spending in Holyhead and other centres. This could support a further 40FTE jobs on Anglesey.
- Provision of housing in Kingsland could support and maintain demand for school places.
- The Proposed Development has the potential to positively influence the general image and perception which local people and visitors have of Holyhead and Holy Island.

¹ Welsh Assembly Government (February 2011) *Planning Policy Wales Edition 4*

² Welsh Assembly Government (November 2011) *Draft PPW Chapter 7 – Supporting the Economy*

³ Welsh Assembly Government, (2008) *People, Places, Futures – The Wales Spatial Plan*

⁴ Welsh Assembly Government (June 2006) *TAN 2 Planning and Affordable Housing*

⁵ Welsh Assembly Government (1997) *TAN 13 Tourism*

⁶ Welsh Assembly Government (June 2000) *The Welsh Language - Unitary Development Plans and Planning Control*

⁷ Welsh Assembly Government (April 2000) *'Achieving our Potential' - the national Tourism Strategy for Wales*

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