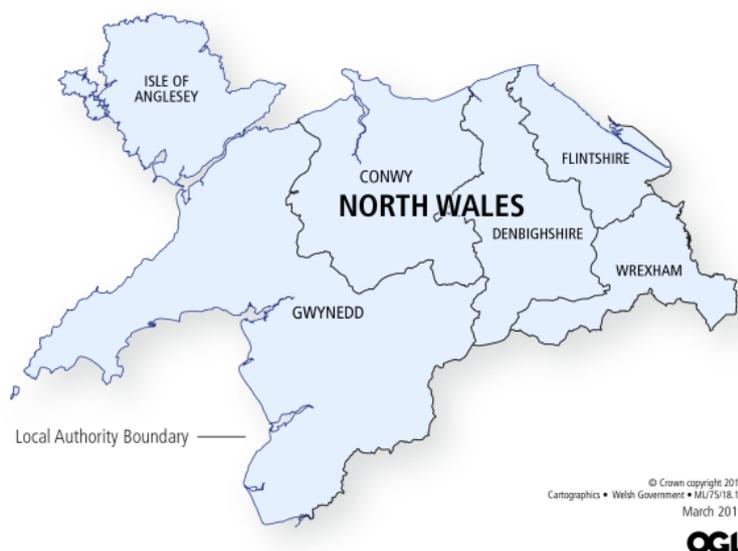


Summary statistics for Welsh economic regions: North Wales

30 May 2019
SFR 40/2019

The North Wales region comprises the local authorities of Isle of Anglesey, Gwynedd, Conwy, Denbighshire, Flintshire and Wrexham. The aim of this release is to give a statistical breakdown of the North Wales region and to highlight differences that may exist across the region for the nine topics in question.



Key Points

- The population of North Wales is more evenly distributed across its local authorities than in the other two regions, ranging from an estimated 155,000 residents in Flintshire to around 70,000 in the Isle of Anglesey.
- Welsh-speakers in North Wales form a higher proportion of the population than in other regions.
- For the year ending 30 June 2018, North Wales had the highest employment rate and lowest unemployment and economic inactivity rates of the three Welsh regions.
- The most recent available regional data shows that Gross Domestic Household Income (GDHI) was higher in North Wales than in the other Welsh regions.

About this release

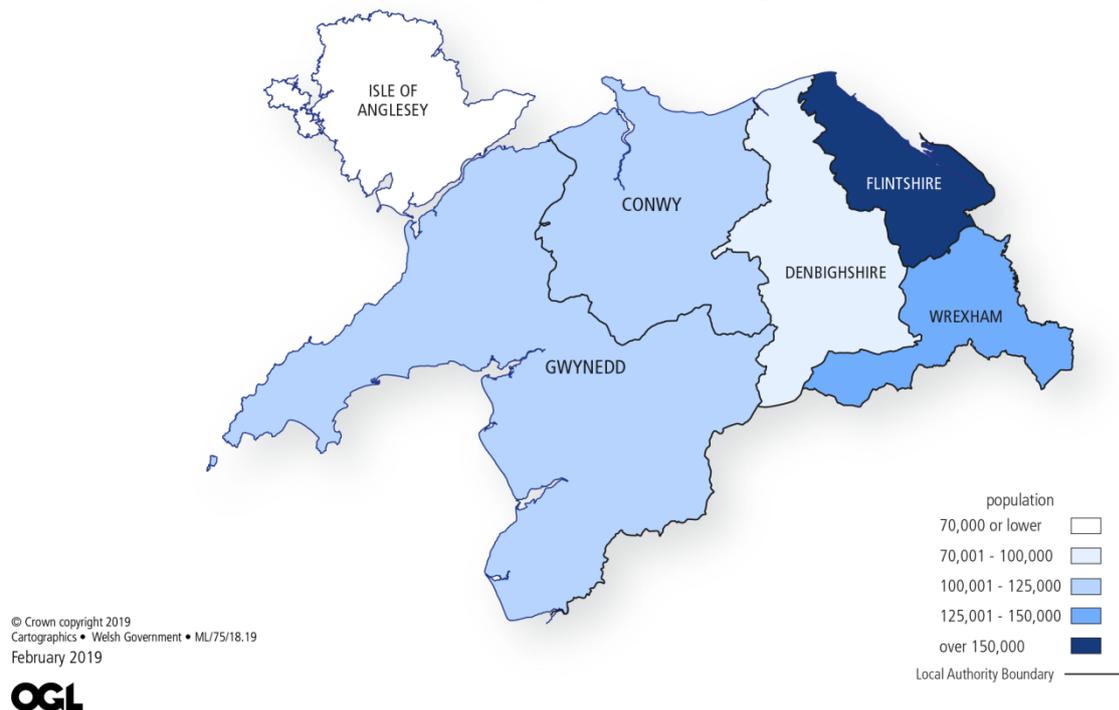
This release is one four statistical outputs summarising statistics on nine key topics for Wales and the three Welsh economic regions, as defined in the Economic Action Plan. Together these releases have been prepared to inform regional planning, supporting the National Infrastructure Commission for Wales, the National Development Framework and the Economic Action Plan.

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Population

Figure 1: Population in North Wales, by local authority, 2017



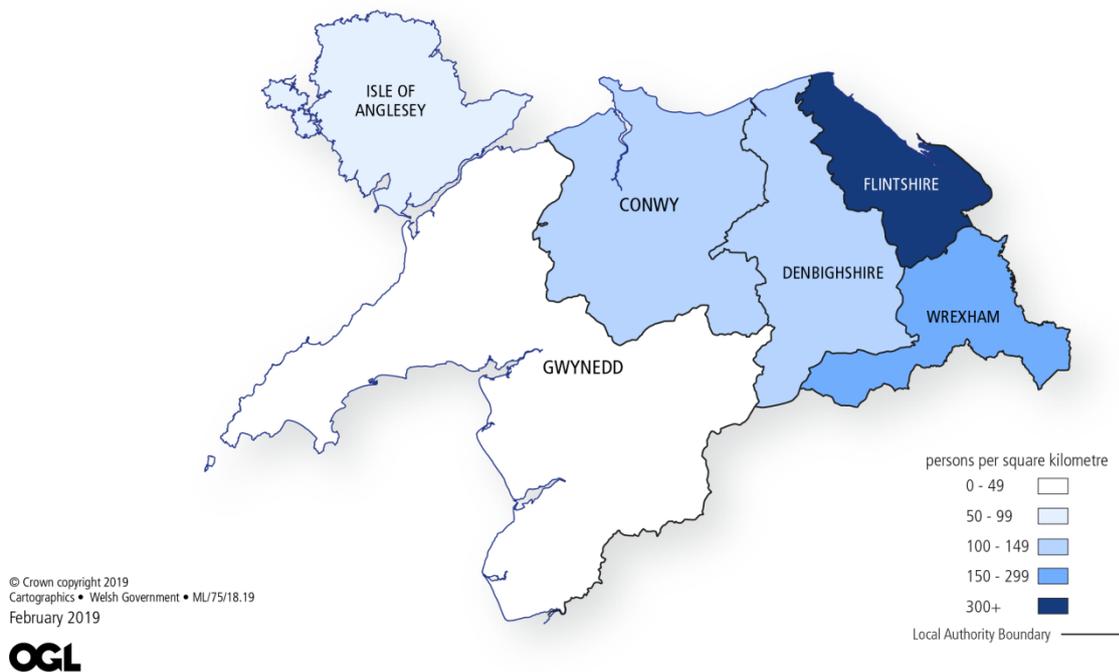
Source: Mid-year population estimates, Office for National Statistics

In 2017, North Wales had a total [estimated population of 696,300 persons](#)¹.

Of the three regions, it exhibited the most even population distribution across authorities, with over 100,000 residents each in 4 of the 6 authorities: Flintshire, Wrexham, Gwynedd and Conwy. Of these, Flintshire was the most populous, with an estimated 155,000 inhabitants, while the Isle of Anglesey, with its 70,000 residents was the least populated.

¹ [StatsWales: Population estimates by local authority and year](#)

Figure 2: Population density (persons per square kilometre) in North Wales, by local authority, 2017



Source: Mid-year population estimates, Office for National Statistics; Standard area measurements, Office for National Statistics

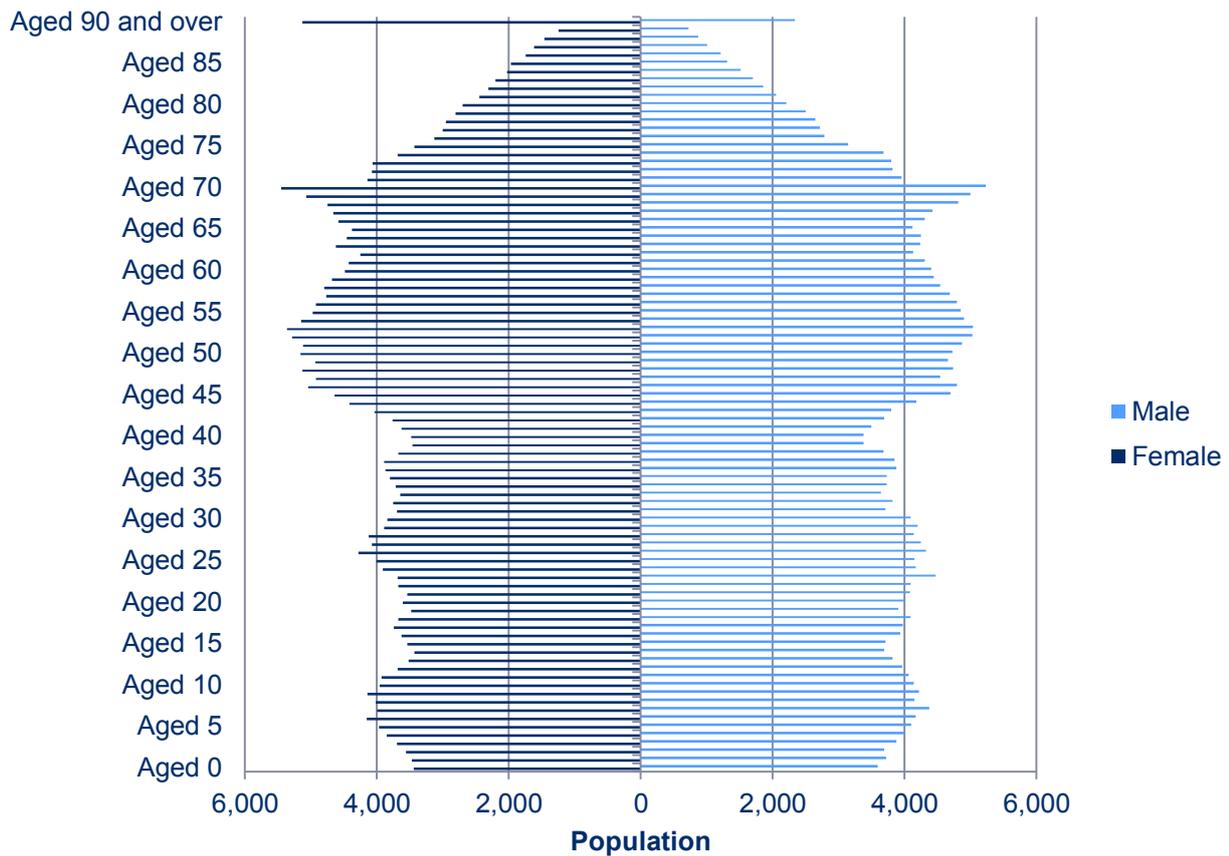
North Wales had a [population density](#)² of 113.2 persons per square kilometre in 2017.

Flintshire was the most densely populated of the six local authorities in the region, at 354.6 persons per square kilometre. Gwynedd was the most sparsely populated authority, at 48.8 persons per square kilometre. Between 2007 and 2017, population density grew by 2.5 per cent in North Wales. This was the lowest rate of population density growth of the three regions in Wales during this period. The authority with the largest population density growth rate in the region was Gwynedd, at 3.6 per cent. The Isle of Anglesey saw the lowest rate, with population density growing by 0.1 per cent from 2007 to 2017.

Welsh Government analysis of 2011 Census data (unpublished) shows that in North Wales, both the number and proportion of residents living in settlements with 25,000 or more residents was lower than in the other two regions. This can partly be attributed to the fact that North Wales is the only region without a settlement with over 100,000 residents.

² [StatsWales: Population density \(persons per square kilometre\) by local authority and year](#)

Figure 3: Population distribution in North Wales by age and gender, 2017

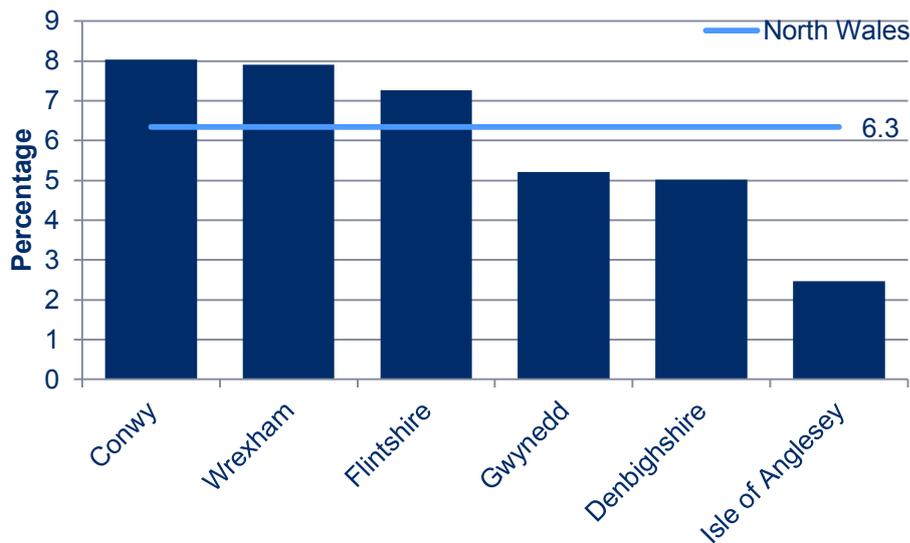


Source: Mid-year population estimates, Office for National Statistics

[North Wales has an ageing population](#)³. Between 1997 and 2017, the proportion of the [population aged 65 and over](#)⁴ has increased from 19 per cent to 23 per cent, while the proportion of the population aged 15 and under has fallen from 20 per cent to 18 per cent.

³ [StatsWales: Population estimates by gender and year](#)
⁴ [StatsWales: Population estimates by local authority and age](#)

Figure 4: Percentage population change in North Wales, by local authority, 1997-2017



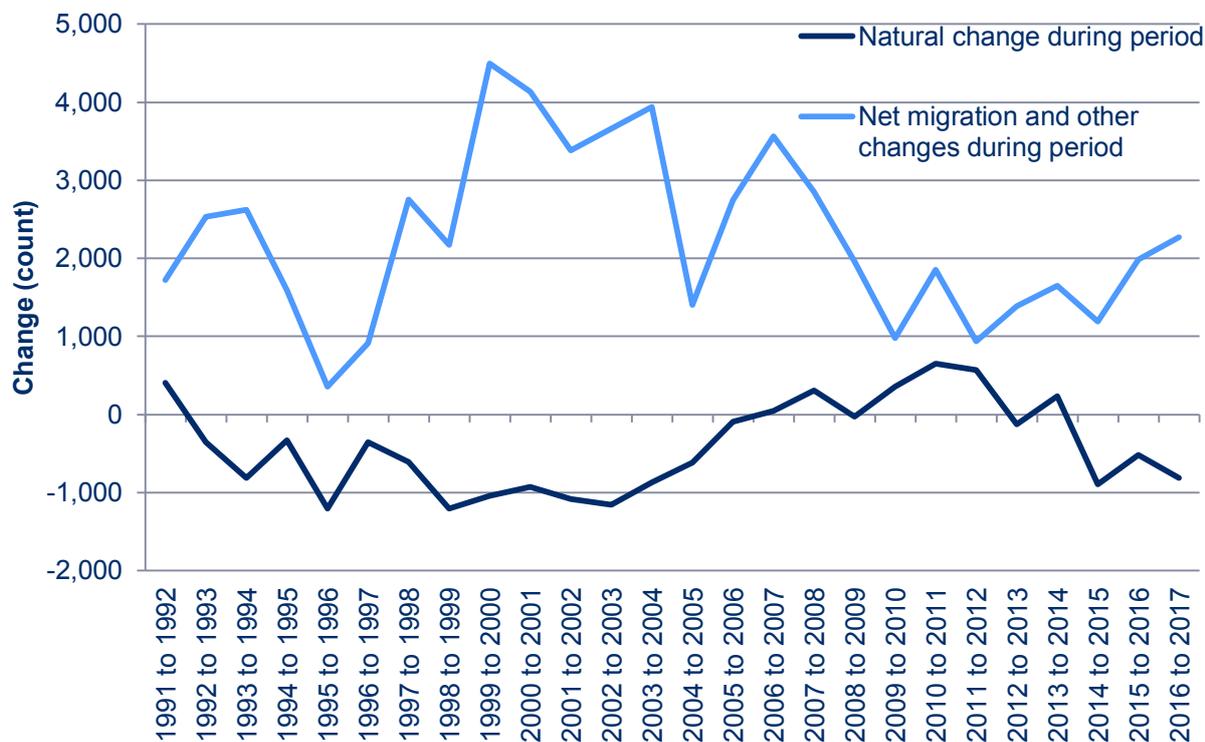
Source: Mid-year population estimates, Office for National Statistics

All six authorities in the region have grown in population between 1997-2017, with a [regional population growth rate](#)⁵ of 6.3 per cent over this period.

The population growth rate was lower between 2007-17 than between 1997-2007. Conwy had the greatest population growth rate in the region for the 1997-2007 period, but Gwynedd has gone from being the authority with the region's lowest population growth rate for the 1997-2007 period, to the highest population growth rate for the 2007-2017 period. The Isle of Anglesey saw the lowest population growth between 2007-2017, with a net change of fewer than 100 residents over this period.

⁵ [StatsWales: Population estimates by local authority and year](#)

Figure 5: Components of population change in North Wales over time



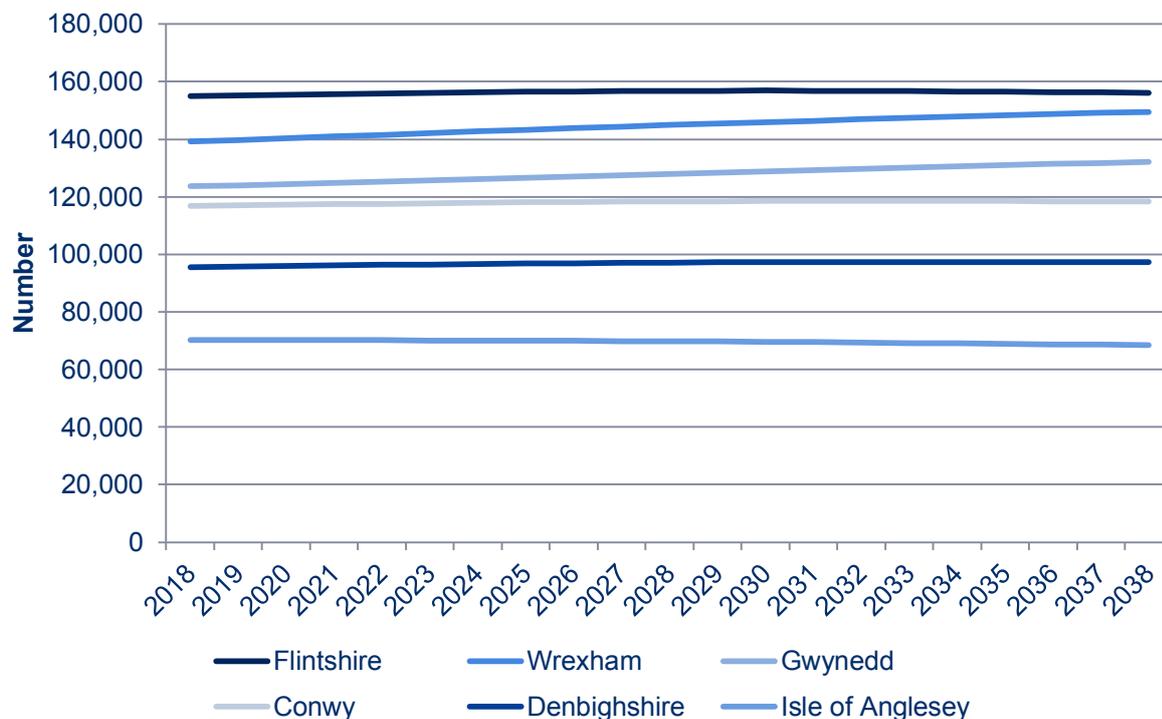
Source: Mid-year population estimates, Office for National Statistics

Looking at data showing [components of population change](#)⁶ across North Wales, we see that since the 1991-92 period, more population change has been attributable to net migration and other changes than to natural change (births and deaths). Since the 1991-92 period, net migration and other changes have been strictly positive, meaning that more people have been moving into the region than have been moving out (as opposed to births and deaths). Meanwhile, natural change (the difference between the number of births and deaths) has fluctuated between positive and negative net change. In the last few years this has been negative and decreasing, meaning that there have been more deaths than births in the region.

Looking at local authorities, we see that Gwynedd saw the largest net change in population due to migration and other changes during the 2016-17 period. We also notice that population change due to net migration and other changes was positive in all authorities during this period. 4 of the 6 local authorities experienced negative natural change in 2016-17, with only Flintshire and Wrexham experiencing more births than deaths in the period. The highest level of negative natural change was in Conwy.

⁶ [StatsWales: Components of population change, by local authority and component](#)

Figure 6: Projected population change in North Wales over time, by local authority



Source: 2014-based projections for local authorities in Wales, Welsh Government

In North Wales, the population is [projected](#)⁷ to increase by 2.1 per cent in the 2018-2028 period, and 3.1 per cent in the 2018-2038 period.

Figures quoted are based on the principal population projections. However, a number of variant projections are also produced which provide other future scenarios based on alternative assumptions of future fertility, mortality, and migration. These do not represent upper or lower bounds, but do illustrate what the population could look like if, for example, fertility were to become lower than assumed for the principal projection.

Further information on 2014-based local authority population projection variants can be found accompanying the [Local authority population projections release](#)⁸.

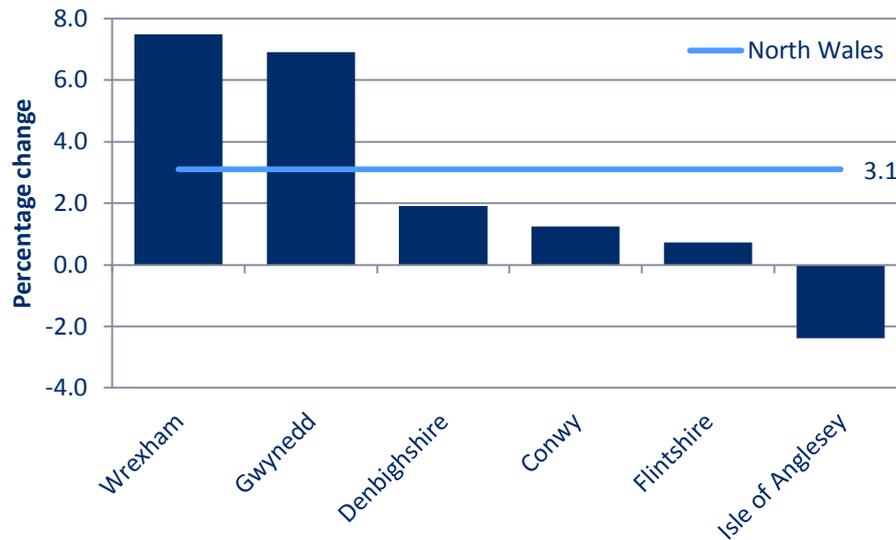
Further information on 2016-based national population projection variants can be found on the [ONS website](#)⁹.

⁷ [StatsWales: Population projections by local authority and year](#)

⁸ [Welsh Government: Local authority population projections](#)

⁹ [ONS: National Population Projections: 2016-based statistical bulletin](#)

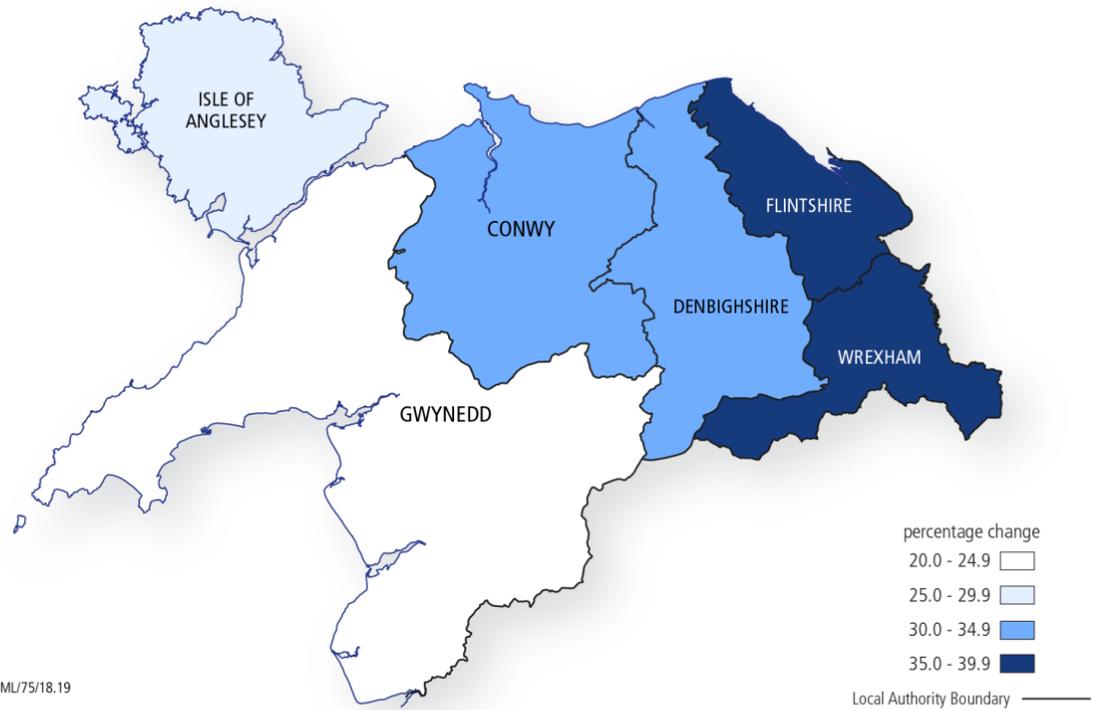
Figure 7: Percentage change in projected population in North Wales, by local authority, 2018-2038



Source: 2014-based projections for local authorities in Wales, Welsh Government

Wrexham's population is projected to grow the most by 2028. Meanwhile, the Isle of Anglesey's population is projected to contract by 0.5 per cent by 2028 and by 2.4 per cent by 2038 relative to the 2018 population projection. The populations of 2 authorities, Conwy and Flintshire, are projected to grow over the next ten years, and then contract in the following ten years. This data is based on local authority 2014-based projections, and should not be viewed as a forecast.

Figure 8: Percentage change in projected population of persons aged 65 and over in North Wales, by local authority, 2018-2038 (based on 2014 projections)



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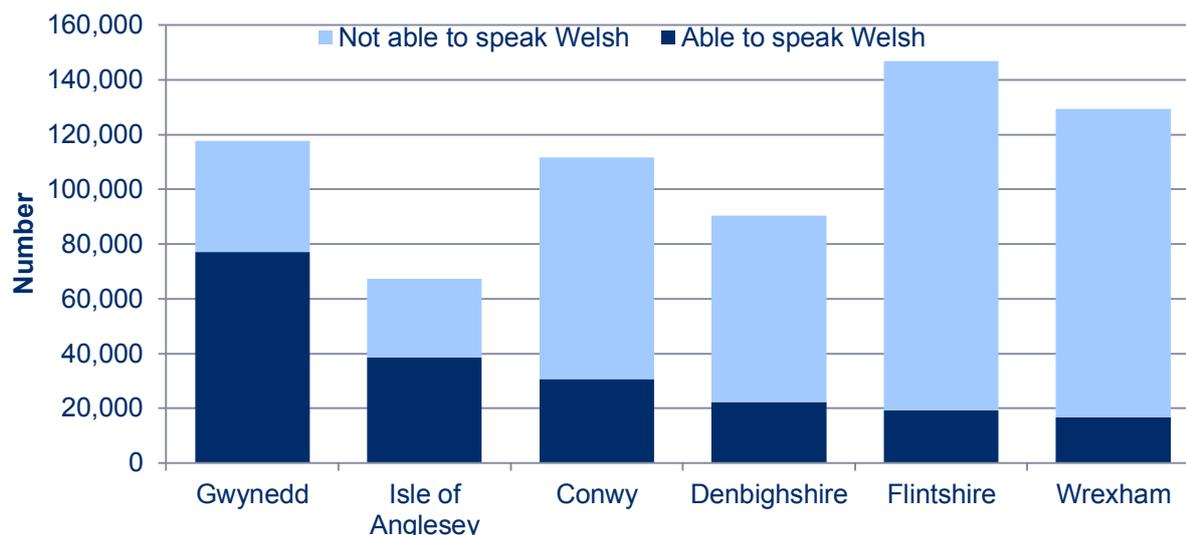


Source: 2014-based projections for local authorities in Wales, Welsh Government

Across North Wales, the [population of adults aged 65 and over](#)¹⁰ is projected to grow to 189,500 by 2028, an increase of 16.6 per cent on the projected figure for 2018. By 2038, this figure is projected to increase to 214,600, an increase of 32.0 per cent on the projected figure for 2018. The population of adults aged 65 and over is projected to grow at a higher rate than the total population during this period. This data is based on the local authority 2014-based projections, and should not be viewed as a forecast.

¹⁰ [StatsWales: Population projections by local authority and year](#)

Figure 9: Stated Welsh-speaking ability of persons aged three and over in North Wales, by local authority, 2011



Source: 2011 Census, Office for National Statistics

According to [census data](#)¹¹, there were 204,406 Welsh speakers aged three and over in the region in 2011. Although the number of Welsh speakers may be similar in different areas, it's important to also consider the percentage of Welsh speakers in each area as this may vary considerably due to different population sizes.

The census is the key source of information about the number of people who can speak Welsh. The National Survey for Wales (NSW) and the Annual Population Survey (APS) also collect information about respondents' Welsh speaking ability and frequency of speaking Welsh (the NSW only collects information for those aged 16 or over while the APS collects information for those aged three and over like the census). Estimates of Welsh language ability from household surveys are historically higher than those produced by the census and it is not known exactly why this is the case. It's likely that differences in how these surveys and the census are carried out affect the estimates. More information can be found in a [blog post by the Chief Statistician](#)¹² discussing Welsh language data.

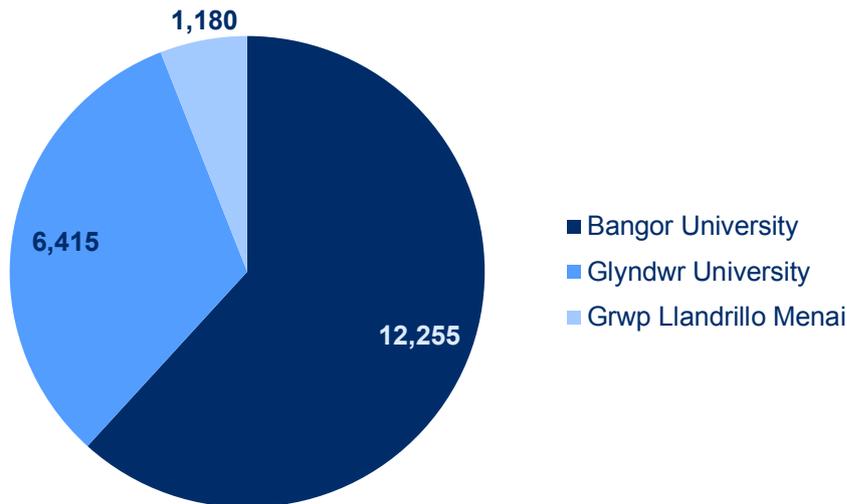
Data from the [Annual Population Survey](#)¹³ shows that in the year ending June 2018, Gwynedd was the authority with the highest proportion of Welsh speakers both in North Wales and in Wales as a whole, with 76.4 per cent of residents aged three and over saying they could speak Welsh. Flintshire had the lowest rate of Welsh-speaking in North Wales at approximately 23.3 per cent. On a regional level, North Wales had the highest proportion of Welsh speakers in Wales, at an estimated 42.7 per cent in the year ending June 2018, up approximately 3.9 percentage points on the data from the year ending June 2008. It is also worth noting, however, that on a local authority level, Flintshire is one of only 2 authorities in Wales where Welsh-speaking rates have decreased over the last ten years. Regional percentages have been calculated from published rounded data.

¹¹ [StatsWales: Welsh speakers by local authority, gender and detailed age groups, 2011 census](#)

¹² [Chief Statistician's update: a discussion about the Welsh language data from the Annual Population Survey](#)

¹³ [StatsWales: Annual Population Survey estimates of persons aged 3 and over who say they can speak Welsh by local authority and measure](#)

Figure 10: Student enrolments to Higher Education Institutions in North Wales, 2016-17



Source: Higher education student record, Higher Education Statistics Agency

In 2016-17, there were nearly 20,000 [enrolments on Higher Education \(HEI\) courses](#)¹⁴ in North Wales, representing around 14 per cent of student enrolments across Wales. Bangor University saw the highest number of HE enrolments in the region, representing over 60 per cent of total enrolments in the region. Please note that percentages have been calculated from published rounded figures.

¹⁴ [StatsWales: Student enrolments in Wales by institution, level and mode of study](#)

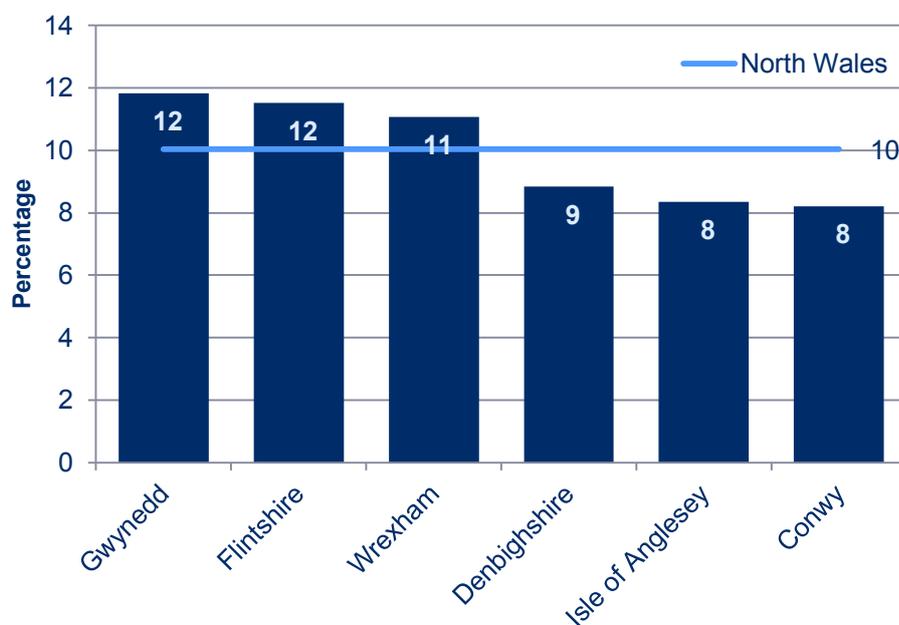
Health

Life expectancy is a measure of how long, on average, people can expect to live using estimates of the population and the number of deaths. Healthy life expectancy estimates the number of years spent in very good or good general health.

[Data from the Office for National Statistics](#)¹⁵ shows that in North Wales between 2015 and 17, Gwynedd was the local authority with the highest life expectancy at birth and healthy life expectancy at birth for females, and the highest healthy life expectancy for males. However, the highest male life expectancy was in Flintshire and Conwy.

Wrexham was the authority with the lowest healthy life expectancy for males, and the lowest life expectancy for females. The lowest healthy life expectancy for females was on the Isle of Anglesey, and the lowest life expectancy for males was in Denbighshire. The range of the percentage of life expectancy in good health across the region was the lowest of the Welsh regions, at 3.8 percentage points for females and 3.6 percentage points for males.

Figure 11: Adults aged 16 and over showing 0 or 1 healthy lifestyle behaviours, by local authority, 2016-17 and 2017-18* (age standardised)



* The 2016-17 and 2017-18 periods have been combined for data quality reasons

Source: National Survey for Wales

Across North Wales in 2016-17 and 2017-18 combined, 10 per cent of adults aged 16 or over showed 0 or 1 of the [five healthy lifestyle behaviours](#)^{16, 17}.

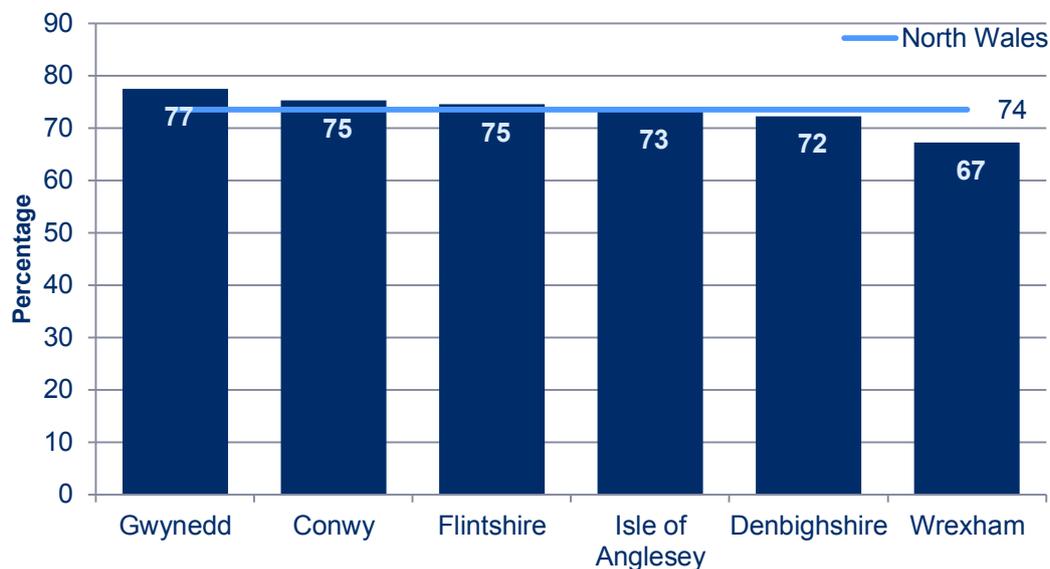
¹⁵ [ONS: Health state life expectancies, UK: 2015 to 2017](#)

¹⁶ [National Survey for Wales: population health](#)

¹⁷ Healthy behaviours are not smoking, average weekly alcohol consumption 14 units or lower, eating at least 5 portions fruit & veg the previous day, having a healthy body mass index, and being physically active at least 150 minutes the previous week.

Considering local authorities within the region¹⁸, Conwy and Isle of Anglesey were the authorities with the lowest percentage of reported low levels of healthy lifestyle behaviours (8 per cent), while Gwynedd and Flintshire had the highest proportion of adults aged 16 or over showing 0 or 1 healthy behaviours (12 per cent). However the difference was not statistically significant.

Figure 12: Percentage of adults aged 16 and over reporting they are in good or very good general health, by local authority, 2016-17 and 2017-18* (age standardised)



* The 2016-17 and 2017-18 periods have been combined for data quality purposes

Source: National Survey for Wales

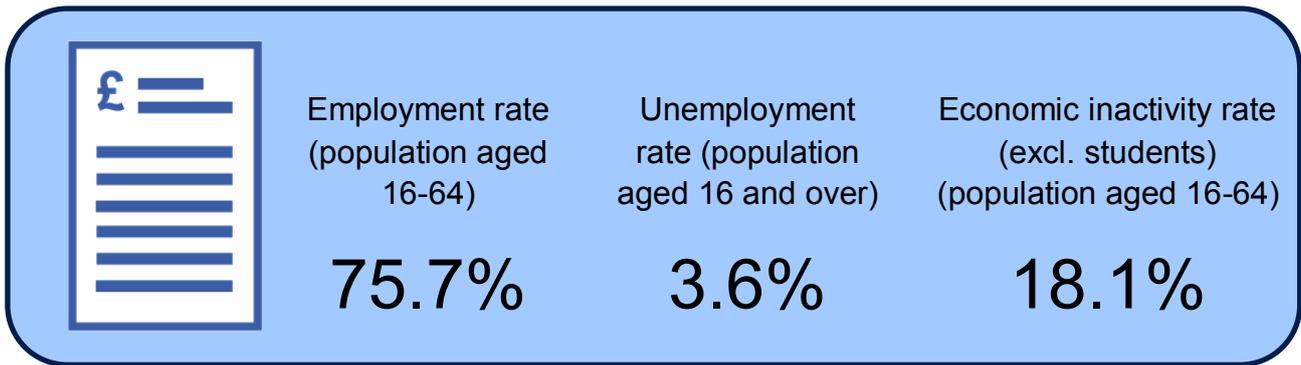
Within the region, 74 per cent of adults aged 16 and over reported they were in [good or very good general health](#)¹⁹ in 2016-17 and 2017-18 combined. This was the highest proportion across the three regions of Wales. Breaking the data down by local authority²⁰, we see that Gwynedd had the highest level of self-reported health, with 77 per cent of adults aged 16 or over reporting they were in good or very good general health. Wrexham had the lowest proportion in the region at 67 per cent.

¹⁸ For local authority data taken from the National Survey for Wales (0 or 1 healthy lifestyle behaviours and self-reported good health), not all differences between local authorities are statistically significant.

¹⁹ [National Survey for Wales: population health](#)

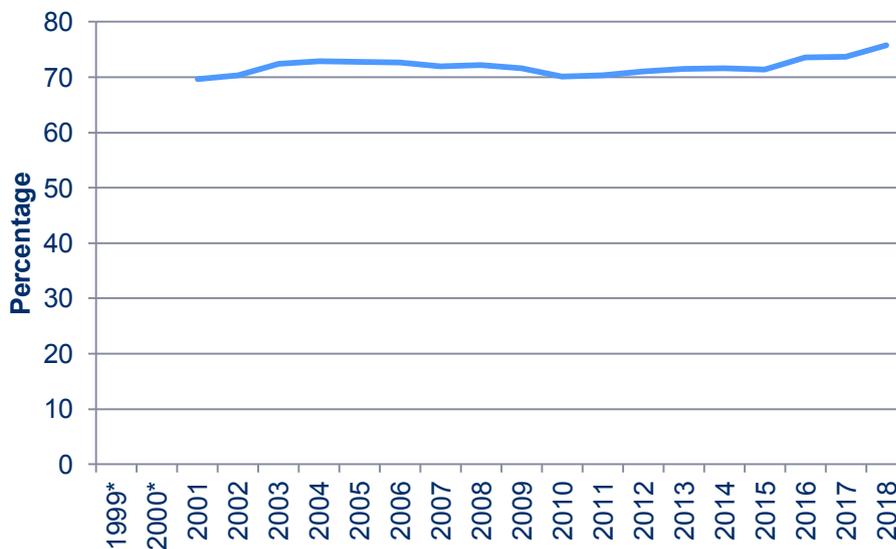
²⁰ For local authority data taken from the National Survey for Wales (0 or 1 healthy lifestyle behaviours and self-reported good health), not all differences between local authorities are statistically significant.

Employment



Source: Annual Population Survey, Office for National Statistics. Data relates to year ending 30 June 2018

Figure 13: Employment rate in North Wales, 1999-2018



Notes

Data for 1999 to 2004 is year ending 28 February. Data from 2005 onwards is year ending 30 June. 1999 and 2000 data for this geography level were not considered sufficiently robust for publication

Source: Annual Population Survey, Office for National Statistics

For the year ending 30 June 2018, North Wales had the highest employment rate and lowest unemployment and economic inactivity rates of the three Welsh regions.

The employment level is the total number of people (aged 16+) that are in employment and the [employment rate](#)²¹ is the percentage of the population (aged 16-64) that is in employment. Of the three regions, North Wales had the highest employment rate in Wales in the year ending 30 June 2018, and was also the region with the smallest range in both employment rate and employment level across local authorities. This means that employment levels are distributed more evenly across North Wales' local authorities relative to the other two regions, reflecting the even distribution of the population across local authorities, as seen in the [Population chapter](#).

Since 2001, the region's employment rate has increased by 6.1 percentage points, faster than the Wales increase of 5.5 per cent. The Isle of Anglesey was the local authority in North Wales that saw the largest increase in the employment rate, growing 9.9 percentage points over the same period.

The unemployment level is the total number of people who are unemployed and the [unemployment rate](#)²² is the percentage of the economically active population who are unemployed (using the International Labour Organisation's (ILO) definition of unemployment). For the year ending June 2018, the unemployment rate in North Wales was 3.6 per cent, lower than any other region in Wales, and also lower than both the UK and Wales unemployment rates. Since 2001, the unemployment rate in North Wales has fallen by 0.9 percentage points. Flintshire's unemployment rate saw the most marked change, decreasing by 2.6 percentage points since 2001.

The [economic inactivity rate](#)²³ is the percentage of the population who are not working and not seeking nor available to work. Economically inactive people include people looking after the family and / or home, retirees and people with a sickness or disability. For the year ending 30 June 2018, the economic inactivity rate in North Wales was 18.1 per cent, the lowest across the Welsh regions, and a decrease of 6.5 percentage points compared to 2001. This change was slightly greater than the change across the whole of Wales. Wrexham's economic inactivity rate saw the most marked change, decreasing by 10.8 percentage points since 2001.

More information on regional economic statistics can be found in the [Welsh Government's regional economic and labour market profiles](#)²⁴.

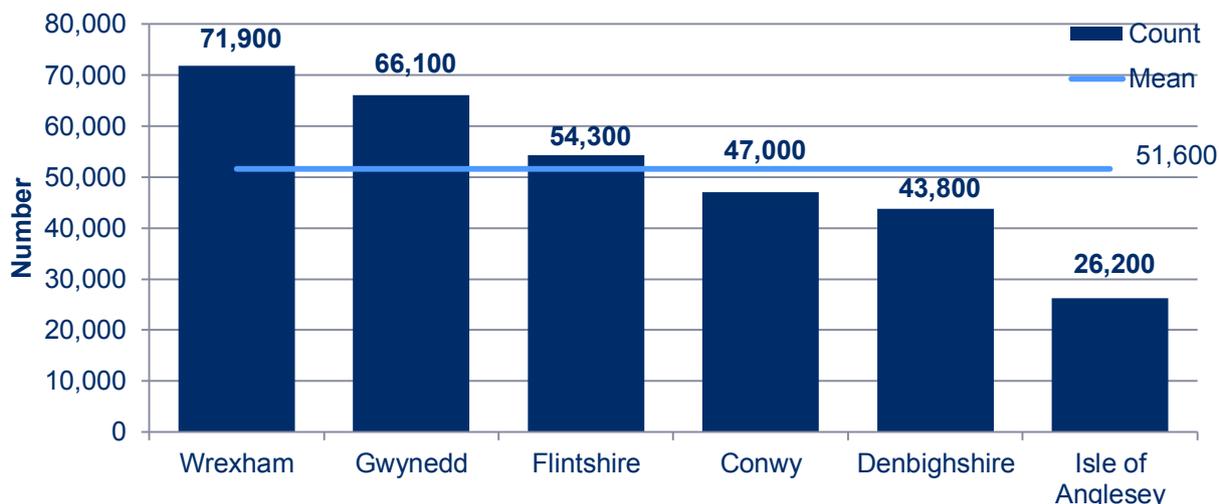
²¹ [StatsWales: Employment rate by Welsh local area, year and gender](#)

²² [StatsWales: ILO unemployment rates by Welsh local areas and year](#)

²³ [StatsWales: Economic inactivity rates \(excluding students\) by Welsh local area and year](#)

²⁴ [Welsh Government: Regional economic and labour market profiles](#)

Figure 14: Workplace employment, by local authority, 2017



Source: Annual Population Survey, Office for National Statistics; Business Register Employment Survey (BRES), Office for National Statistics

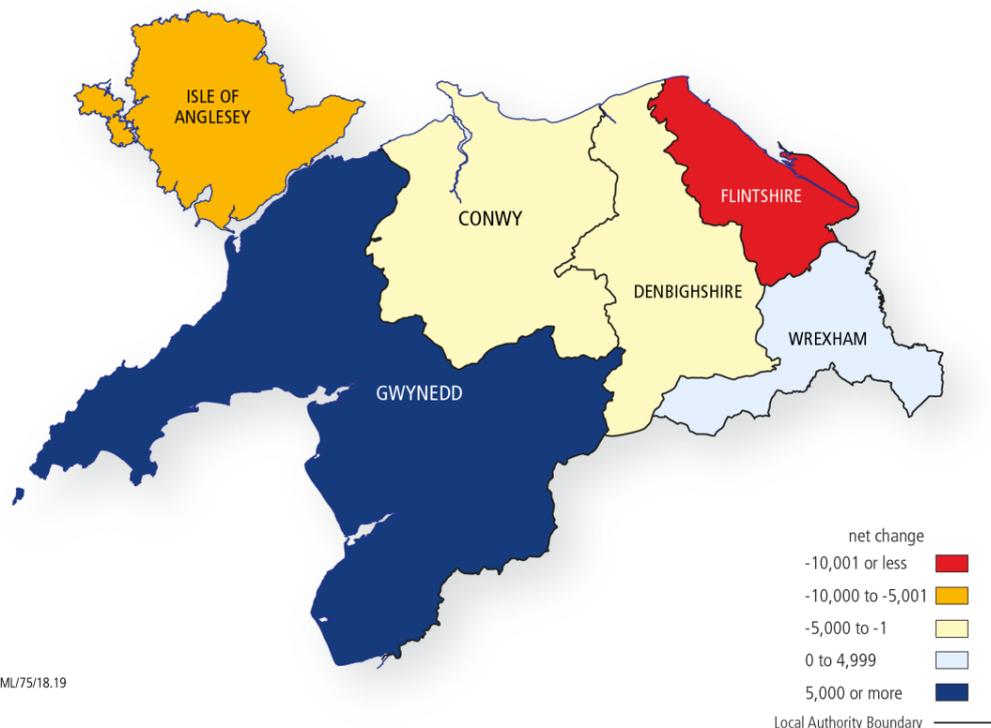
[Workplace employment data](#)^{25, 26} shows that 309,300 people worked in the region in 2017. The average level of employment across the region's six local authorities was 51,600. This was the lowest level in Wales, as was the region's median level, which was 50,700.

The Information and communication sector saw by far the largest percentage growth in workers over the 2007-2017 period, while the greatest change in the level of employment was in the Professional, scientific and technical activities; administrative and support service activities sector, which grew by 8,200 people. The Production sector saw the greatest decrease in percentage terms. When considering the number of workers however, it was the Wholesale, retail, transport, hotels and food sector that decreased the most over this period in the region and across Wales, losing 9,300 workers across North Wales. Note that percentage changes have been calculated from published rounded data.

²⁵ [StatsWales: Workplace employment by Welsh local areas and broad industry](#)

²⁶ Workplace employment data is collected from businesses through the Business Register Employment Survey (BRES), and focuses on employment and employee data. This is in contrast to the Labour Force Survey (LFS) and Annual Population Survey (APS) data, which is taken from data mainly collected from residents of private households.

Figure 15: Change in local authority populations in North Wales due to people commuting in and out for work, 2017



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Source: Annual Population Survey, Office for National Statistics

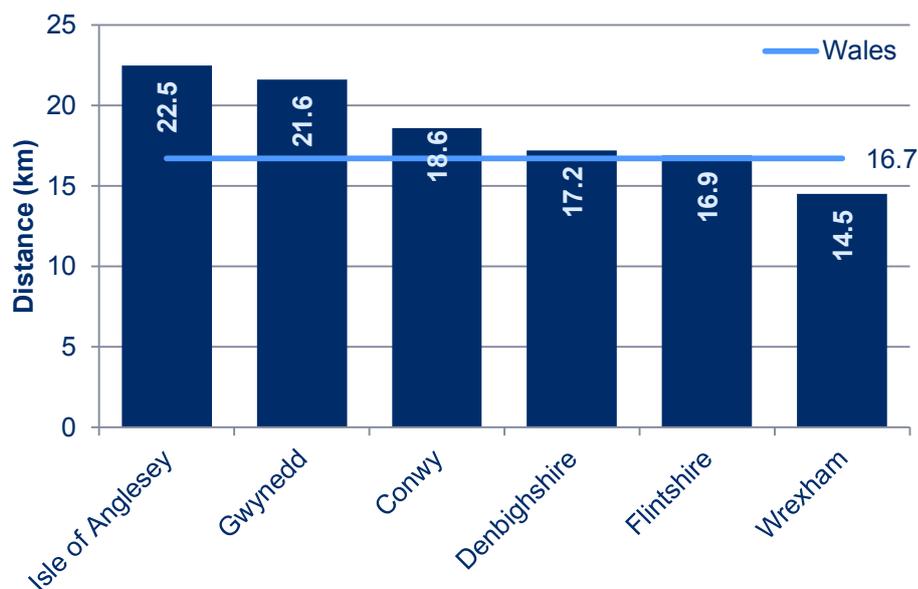
As a whole, the net change in workers across the region was -25,000, the greatest net change of the three regions. This indicates that the number of people in the region fluctuates as people go to work outside the region, particularly [across the border](#)²⁷ into areas such as Cheshire West and Chester, and Shropshire. Note that net changes and data for the regions have been calculated from published rounded data.

Data from 2017 indicates that the [net worker population change](#)²⁸ was negative in 4 of the region's 6 local authorities, meaning that in these authorities, more people commute out of the authority to work than commute in from other authorities. Flintshire, the most populous local authority in the region, saw the greatest outflow of workers.

²⁷ [StatsWales: Detailed commuting patterns in Wales by Welsh local authority](#)

²⁸ [StatsWales: Commuting patterns by Welsh local authority and measure](#)

Figure 16: Average distance travelled to work (km) by workers aged 16-74 in 2011, by local authority of residence



Source: 2011 Census, Office for National Statistics

[2011 Census data](#)²⁹ shows that, on average, working residents aged 16-74 in all local authorities in the region had longer distances to commute to work than the Wales average, except in Wrexham. Commuting distances increased in each local authority in the region since 2001.

As in the rest of Wales and the rest of the UK, [2018 data](#)³⁰ shows that the vast majority of enterprises had fewer than 10 employees. When comparing the distribution of enterprises across the regions by size, North Wales sat between the South East Wales and Mid and South West Wales regions for each size-band category except for Small Enterprises, of which it had the highest proportion of the three regions. Percentages are based on published rounded data.

Data for the year ending 31st December 2017 shows that in two local authorities in the region (Gwynedd and Flintshire) the proportion of [men and women aged 18-64 with no qualifications](#)³¹ was higher than the Wales figure of 8.7 per cent, and in one of these, Flintshire, the percentage of men and women aged 16-64 qualified to NQF level 2 or above was lower than the Wales level of 78.5 per cent.

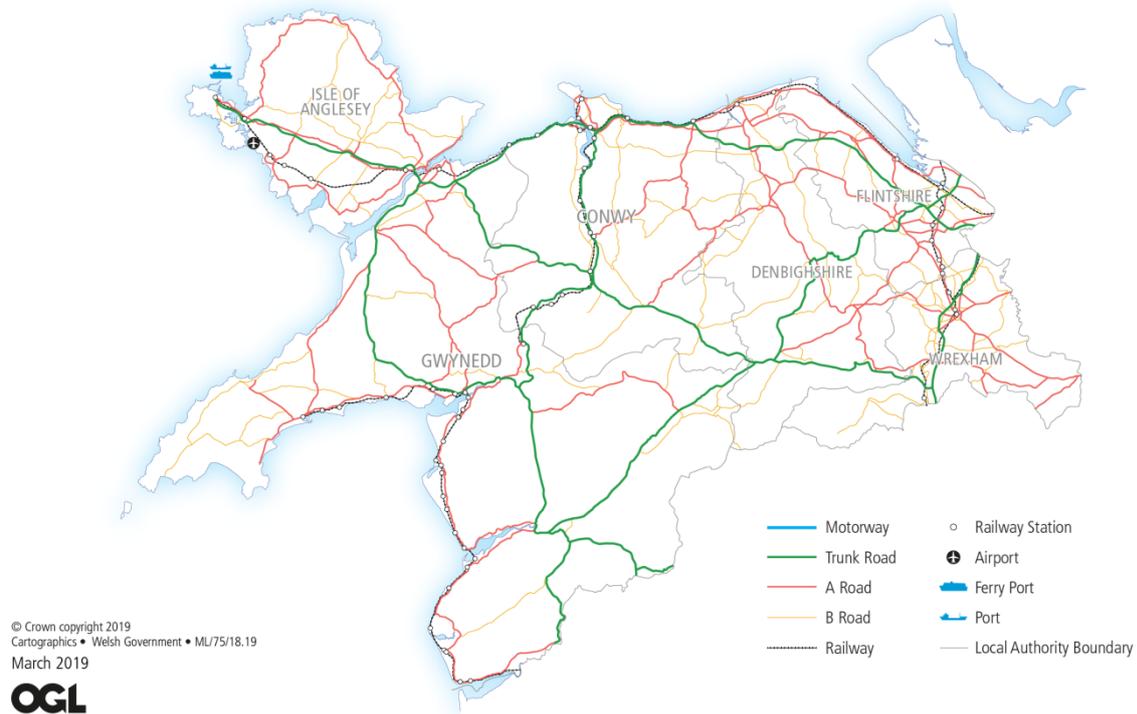
²⁹ [ONS: 2011 Census Analysis, Distance Travelled to Work](#)

³⁰ [StatsWales: Enterprises by industry \(SIC2007\), size-band and area](#)

³¹ [StatsWales: Highest qualification level of working age adults by region and local authority](#)

Transport

Figure 17: Transport Infrastructure in North Wales



Source: Ordnance Survey

North Wales' transport infrastructure includes a port and ferry port in Holyhead on the Isle of Anglesey, as well as 1 of the 2 airports in Wales.

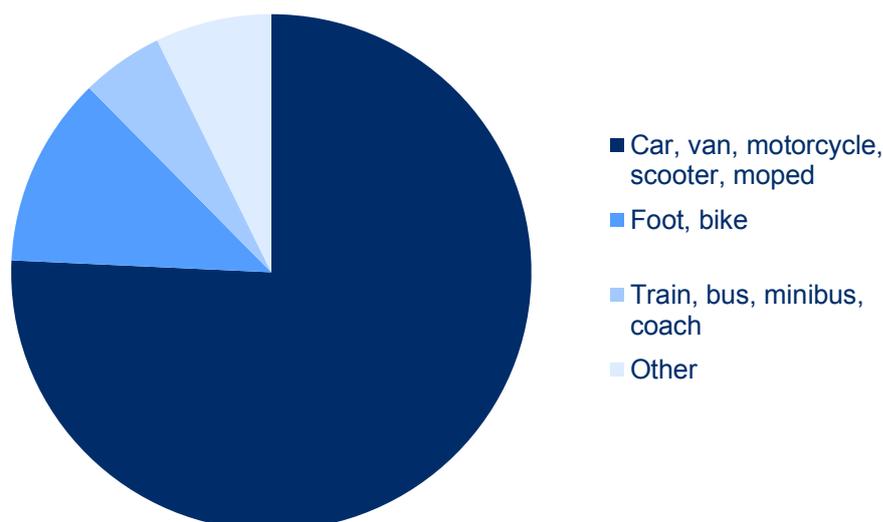
Holyhead, the third most important [port](#)³² in Wales by freight volume, is the main port for freight and sea passenger transport with the Irish Republic.

The [A55](#)³³ runs for approximately 87 miles between Holyhead ferry port, through the Welsh local authorities of Anglesey, Gwynedd, Conwy, Denbighshire and Flintshire before crossing the border into England and finishing in Chester. There were two parts of the A55 which frequently had average speeds of less than 30 mph. These sections are in Holyhead and around the Britannia Bridge crossing.

³² [Welsh Government: Sea transport \(2017\)](#)

³³ [Welsh Government: Vehicle speeds on the A55 \(April to June 2016\)](#)

Figure 18: Methods of travel to work among employed North Wales' residents aged 16-74, 2011



Source: 2011 Census, Office for National Statistics

According to [census data from 2011](#)³⁴, 75.7 per cent of workers aged 16-74 living in North Wales travelled to work by car, van, motorcycle, scooter or moped. This corresponded to around 237,000 persons across the region. 11.9 per cent (37,000 persons) travelled on foot or by bike. 5.1 per cent (16,000 persons) travelled by train, bus, minibus or coach.

North Wales was the region where adults aged 16 and over were least likely to [walk for more than 10 minutes as a means of transport](#)³⁵ in 2017-18. The highest proportion of people walking was in Flintshire, where 65 per cent did so at least once a month, and the lowest proportion both in the region and in Wales was in Gwynedd (30 per cent). In the same period, the local authority with the highest percentage of adults aged 16 and over using a bicycle as a means of transport at least once a month was in Flintshire (17 per cent). This was the highest rate in Wales. The lowest regular bicycle usage was in Denbighshire (2 per cent).

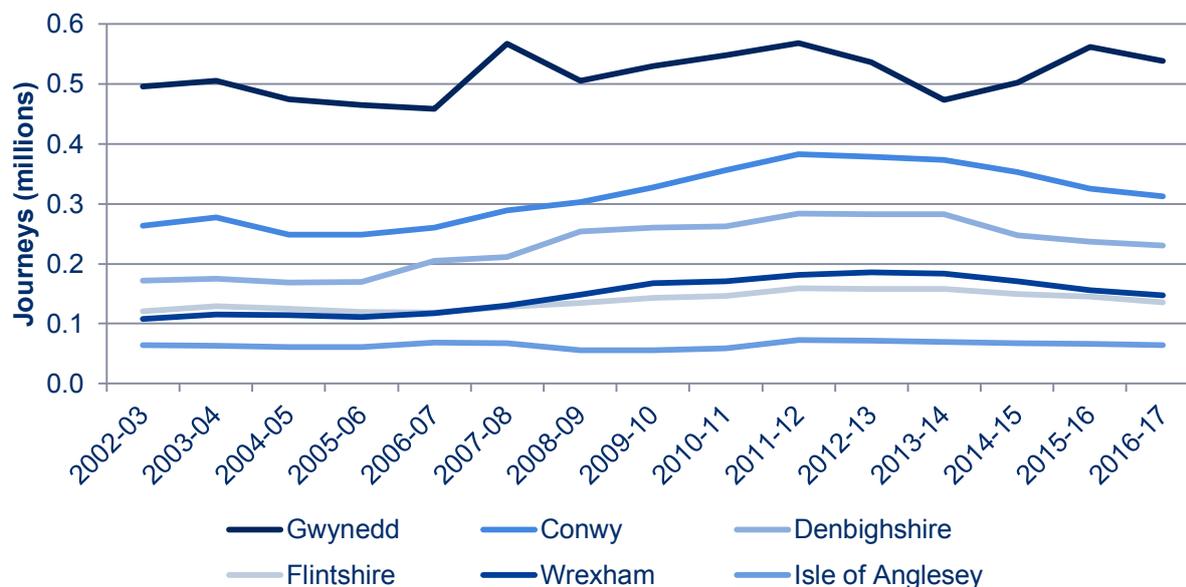
In North Wales in 2016-17, secondary school pupils in Denbighshire were most likely in the region to travel to school by car (35 per cent). Pupils from the local authority of Flintshire were most likely in the region to walk on their own or with other children (49 per cent), while a majority of pupils on the Isle of Anglesey (54 per cent) took a school bus. Wrexham had by far the highest proportion of children taking a local bus to secondary school (23 per cent).

Looking at primary school children in the region over the same period, pupils mainly travelled to school by car or by walking. Flintshire pupils were most likely to travel by car (68 per cent) whilst Wrexham pupils were least likely (45 per cent). Considering walkers, the proportion was highest in Wrexham (53 per cent) but lowest on the Isle of Anglesey (37 per cent).

³⁴ [Nomis, ONS: Method of travel to work \(Table QS701EW\)](#)

³⁵ [Welsh Government: Active Travel: walking and cycling \(April 2017 to March 2018\)](#)

Figure 19: Rail journeys made in North Wales over time, by local authority



Source: National Rail Trends, Regional User Profiles, Office of Rail and Road

Across North Wales, the [number of train journeys](#)³⁶ made in 2016-17 was 1.4 million, an increase of 202,000 on 2006-07. In 2016-17, the greatest share of these journeys (37.7 per cent) happened in Gwynedd. However, Wrexham was the local authority that saw the greatest increase in train journeys in percentage terms over the ten-year period, at 25.8 per cent. The Isle of Anglesey was the only local authority in Wales where the number of train journeys starting and/or ending in the authority fell between these periods.

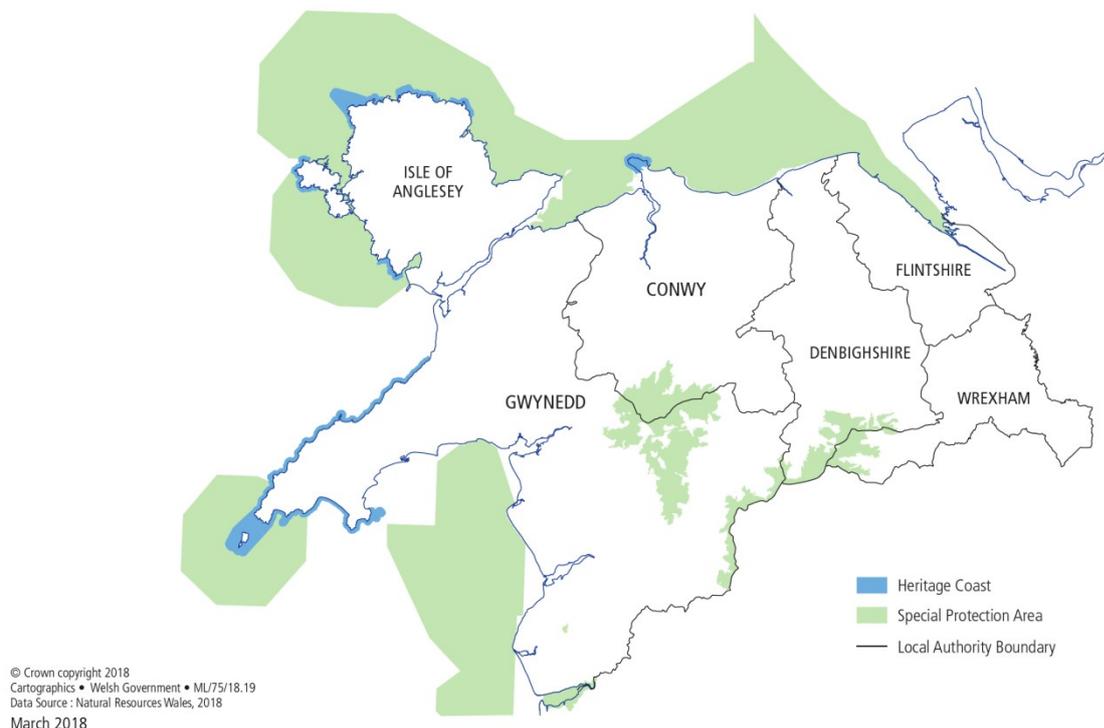
In 2016-17, there were 66 [rail stations](#)³⁷ in North Wales. 3 of these, Bangor (Gwynedd), Rhyl, and Wrexham General were among the 20 busiest stations in Wales by station entries and exits.

³⁶ [StatsWales: Rail passenger journeys by Local Authority and year](#)

³⁷ [Welsh Government: Rail station usage \(April 2016 to March 2017\)](#)

Environment

Figure 20: Heritage Coast and Special Protection Areas in North Wales



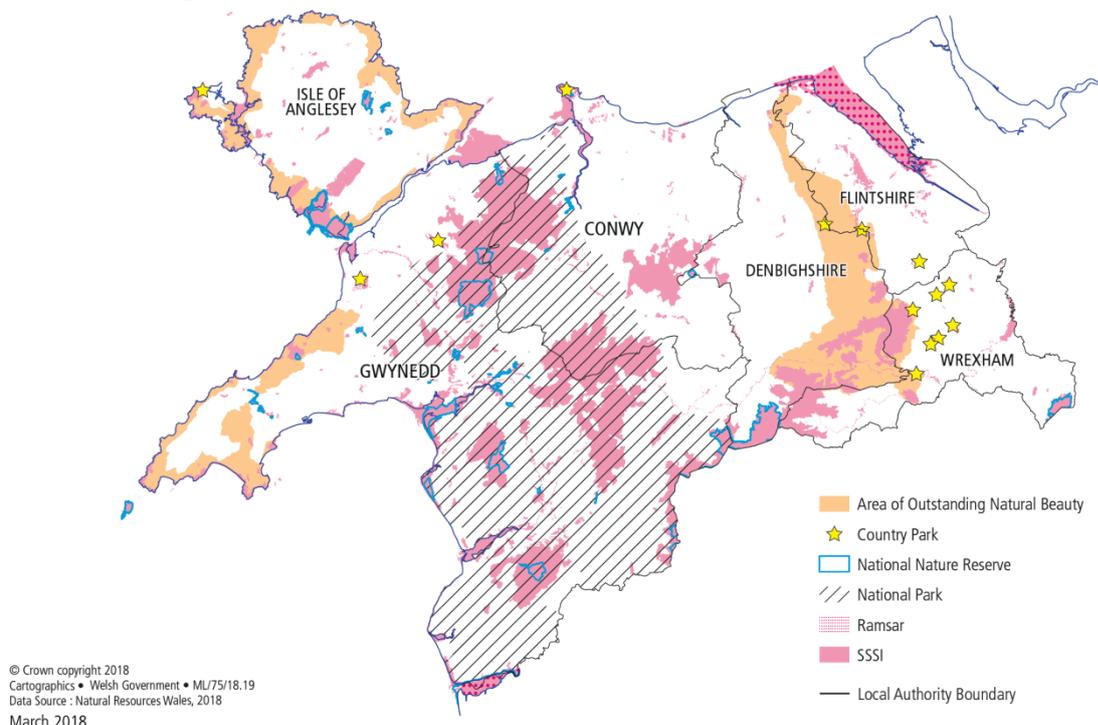
Source: Natural Resources Wales

In North Wales, the Great Orme, North Anglesey Coast, Holyhead Mountain, Aberffraw Bay and Llyn Coast have been designated as [Heritage Coasts](#)³⁸ in order to protect them from insensitive developments. The region is also home to the [Special Protection Areas \(SPAs\)](#)³⁹ of Migneint-Arenig-Dduallt; Bird's Rock; Aberdaron Coast & Bardsey Island; Holy Island Coast; Mynydd Cilan, Trwyn y Wylfa ac Ynysoedd Sant Tudwal; Anglesey Terns; Lavan Sands, Conway Bay; and Puffin Island, as well as sections of the Berwyn, Dee Estuary, Liverpool Bay and Northern Cardigan Bay SPAs. These serve to protect bird species which are either rare or vulnerable, or which, in the case of migratory birds, visit Welsh shores regularly.

³⁸ [Lle: Heritage Coasts](#)

³⁹ [Lle: Special Protection Areas \(SPA\)](#)

Figure 21: Designated Natural Environment in North Wales



Source: Natural Resources Wales

North Wales is home to the Snowdonia [National Park](#)⁴⁰, as well as 3 [Areas of Outstanding Natural Beauty \(AONB\)](#)⁴¹: Clwydian Range and Dee Valley; Anglesey; and Llŷn.

Air Quality

Flintshire had the highest concentration of [nitrogen dioxide](#)⁴² in the air in the region in 2017 ($9 \mu\text{g}/\text{m}^3$), the lowest observed concentration was $5 \mu\text{g}/\text{m}^3$ on the Isle of Anglesey and in Gwynedd. The observed concentration reduced in all local authorities across the region since 2007, with the greatest observed reduction in Wrexham ($5 \mu\text{g}/\text{m}^3$).

Energy

In North Wales in 2017, there was a [low-carbon energy capacity](#)⁴³ of 658 megawatts (MW). This was 18 per cent of the Wales total, and lower than in the other two regions in Wales. Denbighshire was the local authority with the lowest low-carbon energy capacity in the region (65 MW). Flintshire had the highest capacity for low-carbon energy in the region, with more than a third of the region's capacity. 86 per cent of the 17,400 low-carbon energy projects in the region were for solar energy (photovoltaic or thermal).⁴⁴

⁴⁰ [Lle: National Parks](#)

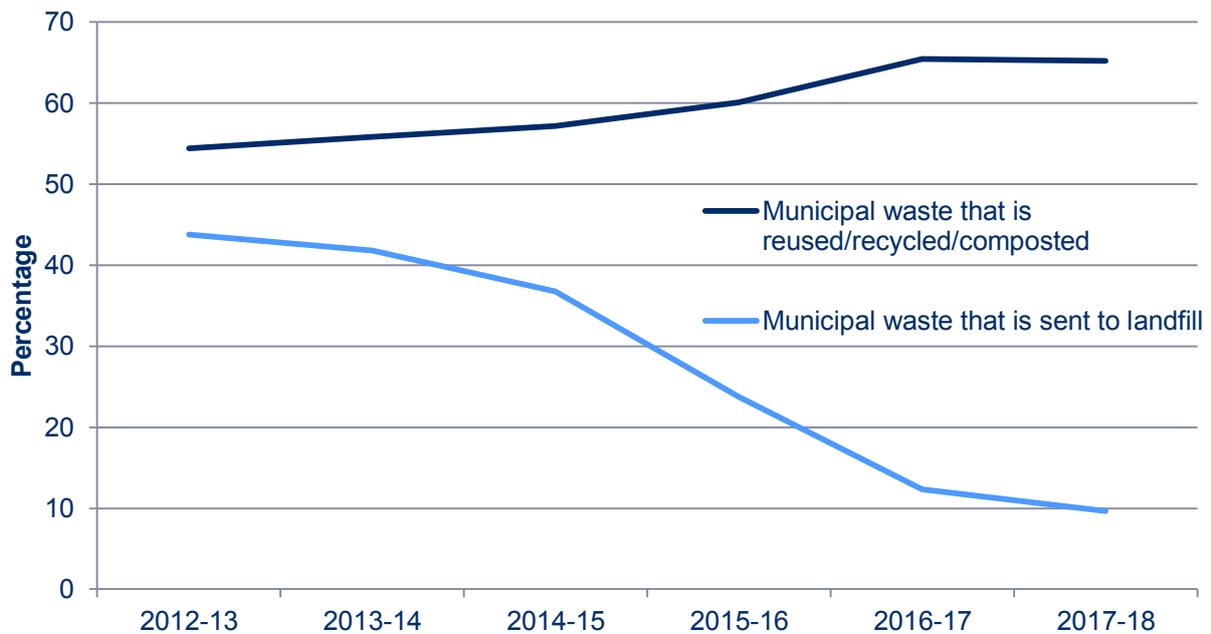
⁴¹ [Lle: Areas of Outstanding Natural Beauty \(AONB\)](#)

⁴² [StatsWales: Air Quality Indicators, by Local Authority](#)

⁴³ [StatsWales: Low Carbon Energy Generation by Local Authority and Technology](#)

⁴⁴ (r) This paragraph was revised on 23/08/2019

Figure 22: Municipal waste treatment in North Wales



Source: WasteDataFlow, Natural Resources Wales

In 2017-18, the amount of [local authority municipal waste](#)⁴⁵ that was reused, recycled or composted was 65 per cent in North Wales, compared to 54 per cent in 2012-13, the earliest year for which directly comparable data is available.

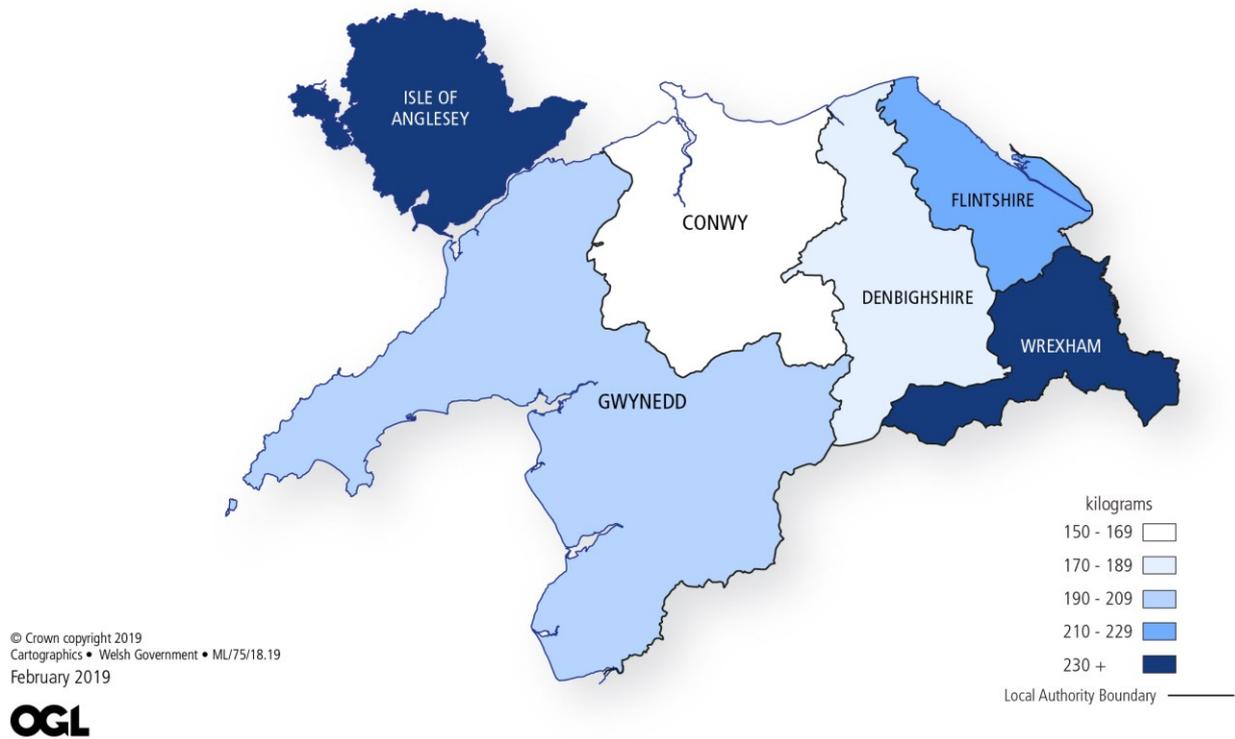
The reported reuse, recycling and composting rate varied across local authorities in 2017-18, from 60 per cent in Gwynedd, to 72 per cent on the Isle of Anglesey. This was also the highest reported rate across Wales.

The amount of local authority municipal waste [sent to landfill](#)⁴⁶ was 10 per cent in North Wales in 2017-18, compared to 44 per cent in 2012-13.

⁴⁵ [StatsWales: Annual reuse/recycling/composting rates by local authority](#)

⁴⁶ [StatsWales: Annual management of waste by management method](#)

Figure 23: Annual residual household waste produced per person (kg) in North Wales, by local authority, 2017-18



Source: WasteDataFlow, Natural Resources Wales

The [annual residual household waste](#)⁴⁷ generated per person across North Wales in 2017-18 ranged from 167kg in Conwy to 254kg in Wrexham. Conwy saw the greatest change in residual household waste generated per person since 2012-13, with a reduction of 24 per cent, or 53kg per person. Meanwhile, Wrexham residents produced on average 35kg more household waste in 2017-18 than in 2012-13.

⁴⁷ [StatsWales: Annual residual household waste produced per person \(kilograms\) by local authority](#)

Prosperity

Gross Value Added (GVA) is the value generated by any unit engaged in the production of goods and services. GVA per head is a useful way of comparing regions of different sizes. It is not, however, a measure of regional productivity.

It should be noted that regional GVA figures are subject to limitations, as they can be affected by the impact of factors such as commuting between regions, and differences between regions in demography and types of employment. Further information on this can be found in the following [ONS blog post](#)⁴⁸. In addition, note that the regional figures are apportioned from national totals based on regional indicators. The regional indicators, which include administrative and survey data, are regarded as the most appropriate sources, but may result in imperfect regional allocations.

In North Wales, [GVA per head](#)⁴⁹ was £20,753 in 2017⁵⁰. Gwynedd, Flintshire and Wrexham all had GVA per head that was higher than the Wales value. Flintshire, however, was the only local authority in the region where GVA per head was higher than the UK value. Meanwhile, the Isle of Anglesey had the lowest level of GVA per head in the region (£14,314), giving a range of £14,606 between the highest and lowest levels across North Wales. Across the region, GVA per head grew 4.4 per cent on the previous year, and 80.2 per cent since 1999. Flintshire saw the largest percentage change in GVA per head since 1999 and 2016, up 108.7 per cent and 8.3 per cent respectively.

In North Wales, [Gross Disposable Household Income \(GDHI\) per head](#)⁵¹ was £16,502 in 2016, the highest of the three regions. Across the region, GDHI per head grew by 0.8 per cent on the previous year, and 60.8 per cent since 1999.

In North Wales, the [median gross weekly earnings](#)⁵² of full-time employees in 2018 was £498.80. Earnings grew in all local authorities across the region compared with 2017 except in the Isle of Anglesey, where earnings decreased by 4.3 per cent, or £20.10. The Isle of Anglesey had the smallest median earnings of the local authorities in North Wales in 2018. The highest median earnings continued to be in Flintshire (£553.00), where median weekly earnings were almost £50 higher than in the next highest-earning region. Gwynedd saw the largest increase in median earnings between 2017 and 2018, up 12.2 per cent (£50.90).

⁴⁸ [National Statistical, ONS: Mind the gap: why the UK might not be the most regionally unequal country](#)

⁴⁹ [StatsWales: Gross Value Added by measure, Welsh economic region and year](#)

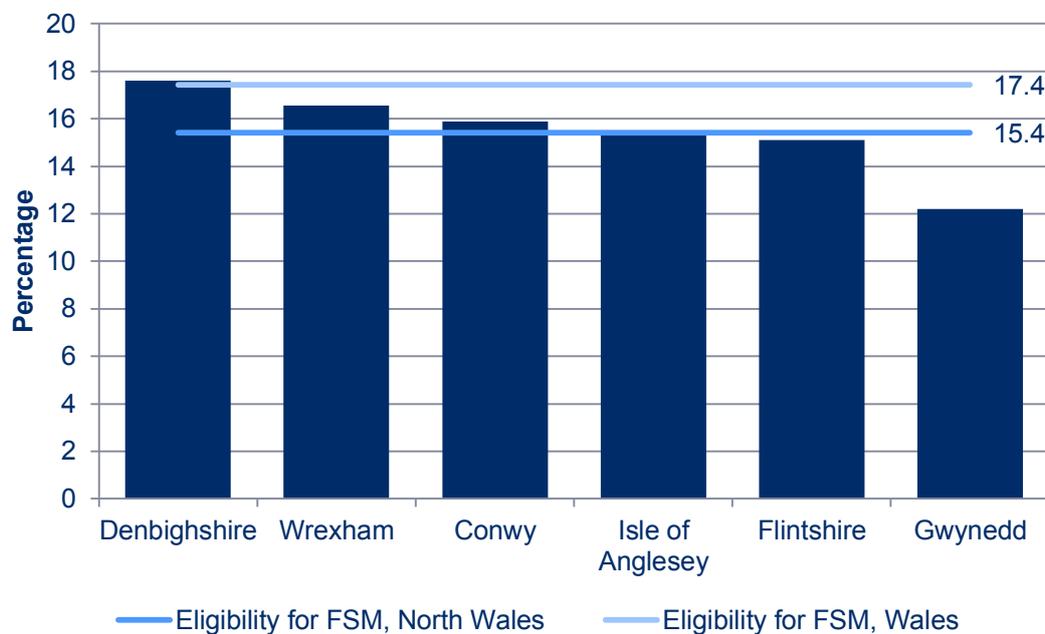
⁵⁰ Data included is the balanced approach for GVA

⁵¹ [StatsWales: Gross Disposable Household income by measure, Welsh economic region and year](#)

⁵² [StatsWales: Average \(median\) gross weekly earnings by Welsh local areas and year \(£\)](#)

[ONS data](#)⁵³ estimates the proportion of workers earning below the living wage (£8.75 in 2018, as defined by the Living Wage Foundation). In 2018, results show that across the region, there was an 11.2 percentage point range between local authorities. The highest percentage being 35.3 per cent in Conwy, and the lowest being 24.1 per cent in Flintshire. Please note that these local authority estimates vary in quality, mainly reflecting the size of the samples.

Figure 24: Free school meal (FSM) eligibility among pupils aged 5-15 in North Wales, by local authority, 2017-18



Source: Pupil Level Annual School Census (PLASC), Welsh Government

In North Wales, 15.4 per cent of pupils aged 5-15 were [eligible for free school meals](#)⁵⁴ in 2017/18, up 1.9 percentage points since 2007/08. The highest rate was in Denbighshire (17.6 per cent), while the lowest was in Gwynedd (12.2 per cent).

⁵³ [ONS: Annual Survey of Hours and Earnings \(ASHE\) - Estimates of the number and proportion of employee jobs with hourly pay below the living wage, by work geography, local authority and parliamentary constituency, UK, April 2017 and April 2018](#)

⁵⁴ [StatsWales: Pupils aged 5-15 eligible for free school meals by local authority, region and year](#)

Welsh Index of Multiple Deprivation

The [Welsh Index of Multiple Deprivation \(WIMD\)](#)⁵⁵ is the Welsh Government's official measure of relative deprivation for small areas in Wales. It is designed to identify those small areas where there are the highest concentrations of several different types of deprivation. Deprivation is the lack of access to opportunities and resources which we might expect in our society. This can be in terms of material goods or the ability of an individual to participate in the normal social life of the community.

The North Wales region contains 423 LSOAs. This is 22 per cent of all the Lower Super Output Layers (LSOAs) within Wales.

Considering the 191 most deprived LSOAs across all of Wales in 2014 - i.e. the 10 per cent most deprived, 23 of them are within the North Wales economic region. This is 5 per cent of all the LSOAs within the region and 12 per cent of the 10 per cent most deprived LSOAs across all of Wales.

Please note that WIMD is due to be updated in November 2019, including an online tool providing further statistical breakdowns by Welsh economic region.

Enterprises

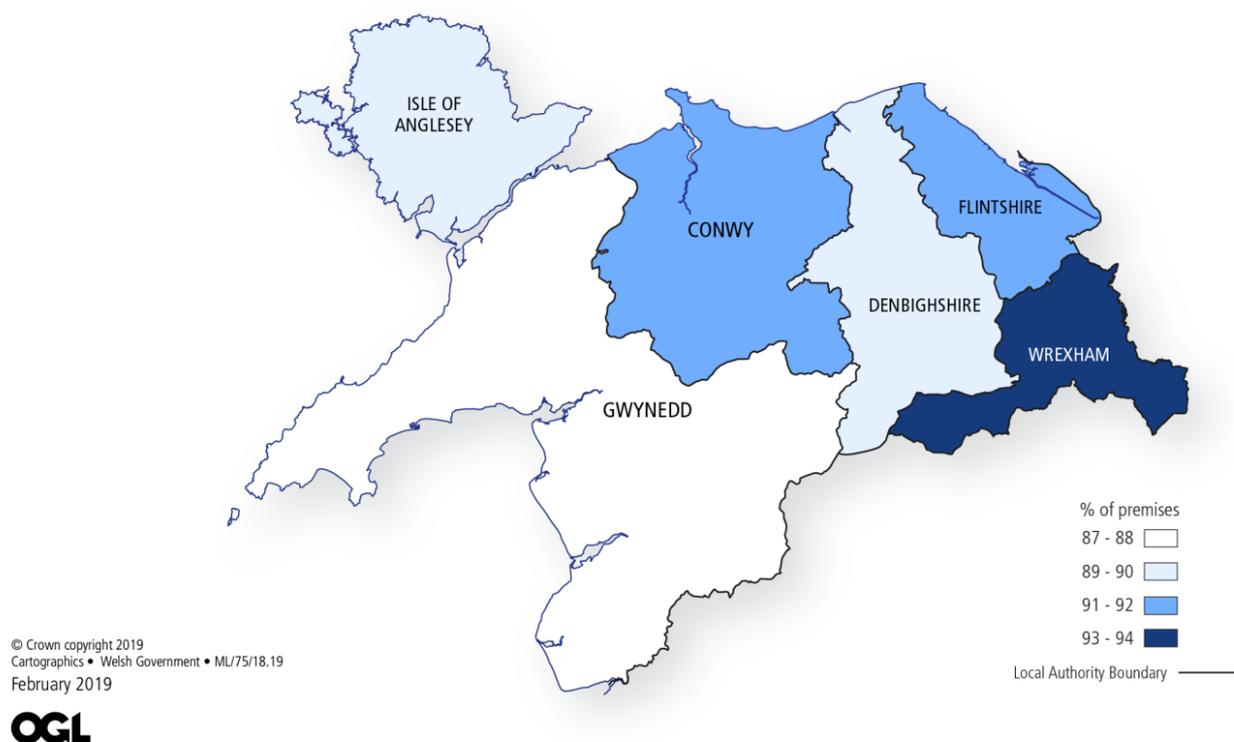
In North Wales, 92.7 per cent of [businesses founded in 2012](#)⁵⁶ survived their first year, and 44.9 per cent were still operating after five years. Percentages have been calculated from published rounded figures.

⁵⁵ [Welsh Index of Multiple Deprivation \(WIMD\)](#)

⁵⁶ [StatsWales: Business Survival Rates by area and survival year](#)

Digital Infrastructure

Figure 25: Percentage of homes and businesses in North Wales with superfast or ultrafast broadband availability, by local authority, September 2018



Source: Connected Nations Report, the Office of Communications

In North Wales in September 2018, access to [a superfast fixed broadband speed \(30Mbit/s or higher\) or an ultrafast fixed broadband speed \(300 Mbit/s or higher\)](#)⁵⁷ was 91 per cent, ranging from 87 per cent in Gwynedd, to 94 per cent in Wrexham.

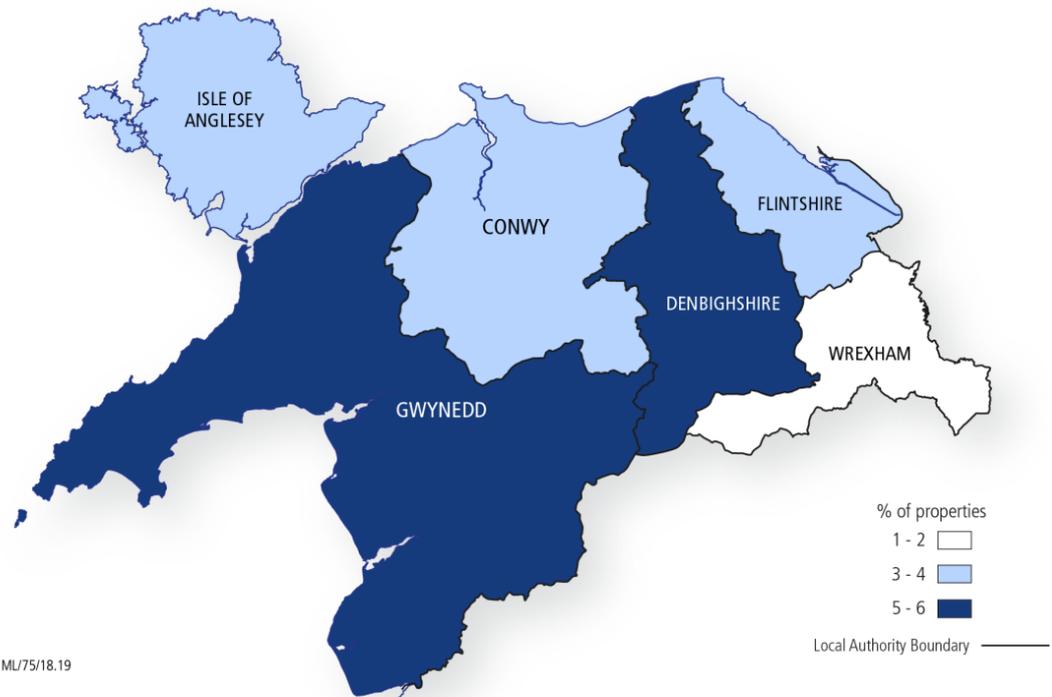
10 per cent of homes and businesses had access to an ultrafast fixed broadband speed (300Mbit/s or higher) - this was 38 percentage points lower than the UK rate of 49 per cent. Access ranged from 4 per cent in Conwy, to 16 per cent in Wrexham.

10 per cent of homes and businesses across the region had access to [full fibre services](#)⁵⁸ in September 2018, this was the highest proportion in Wales, and higher than the UK level. Full-fibre broadband uses fibre-optic cables to connect homes and businesses to the street cabinet, replacing copper connections. Full-fibre connections provide a better and more reliable service that can deliver speeds of up to one gigabit per second.

⁵⁷ [Ofcom: Connected Nations 2018](#)

⁵⁸ [Ofcom: Building a full-fibre future](#)

Figure 26: Percentage of homes and businesses in North Wales not meeting the Universal Service Obligation, by local authority, September 2018



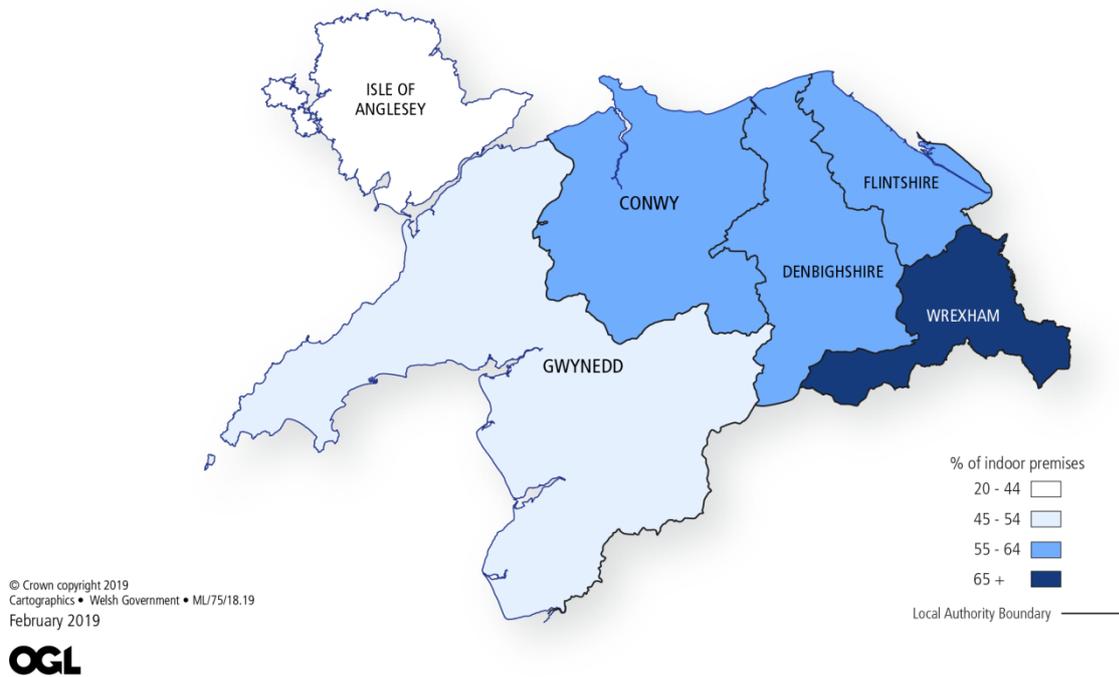
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Cartographics • Welsh Government • ML/75/18.19
February 2019



Source: Connected Nations Report, the Office of Communications

Almost 13,300 homes and businesses across the region, or 4 per cent, did not meet the Universal Service Obligation minimum in September 2018, meaning that they were unable to access a download speed of 10Mbit/s and an upload speed of 1Mbit/s. This proportion was above both the UK average (2 per cent) and the Wales average (3 per cent).

Figure 27: Percentage of homes and businesses in North Wales with indoor 4G coverage from all four network providers, by local authority, September 2018

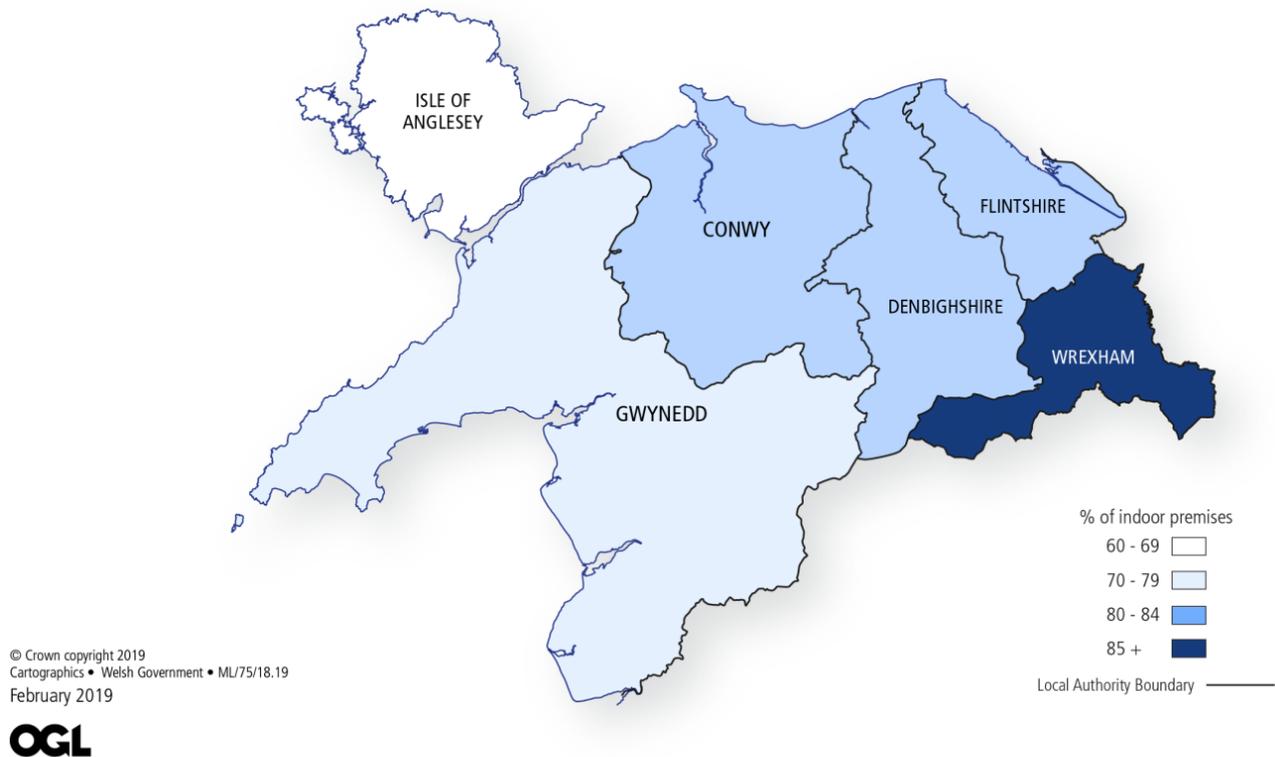


Source: Connected Nations Report, the Office of Communications

Looking at 4G services, the percentage of homes and businesses in North Wales with indoor coverage from all four operators in September 2018 ranged from 22 per cent on the Isle of Anglesey to 69 per cent in Wrexham. The UK average was 77 per cent and the Wales average was 69 per cent.

In terms of geographic coverage, 19 per cent of Gwynedd’s area was not covered by any operator, more than in any other local authority in the region, or indeed in Wales. However, in Flintshire and on the Isle of Anglesey, geographic area not covered by any operator was less than 1 per cent.

Figure 28: Percentage of homes and businesses in North Wales with indoor voice call coverage from all four network providers, by local authority, September 2018



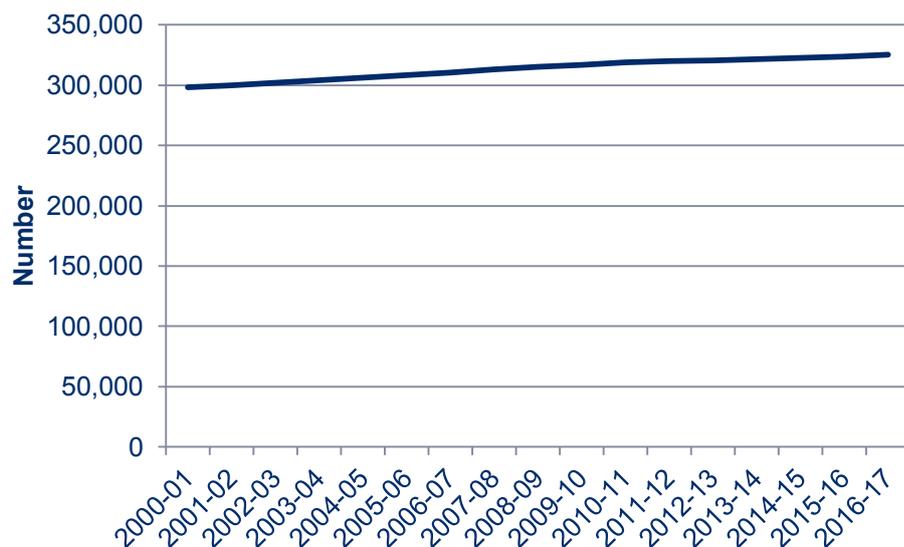
Source: Connected Nations Report, the Office of Communications

For telephone call services in North Wales, the percentage of homes and businesses with indoor coverage from all four operators in September 2018, ranged from 62 per cent on the Isle of Anglesey to 86 per cent in Wrexham.

In 3 local authorities in the region (Isle of Anglesey, Denbighshire and Flintshire), the percentage of Wales' geographic area not covered by any operator was less than 1 per cent, though in Gwynedd this was 10 per cent, the highest proportion in Wales.

Housing

Figure 29: Dwelling stock estimates in North Wales over time (all tenures)

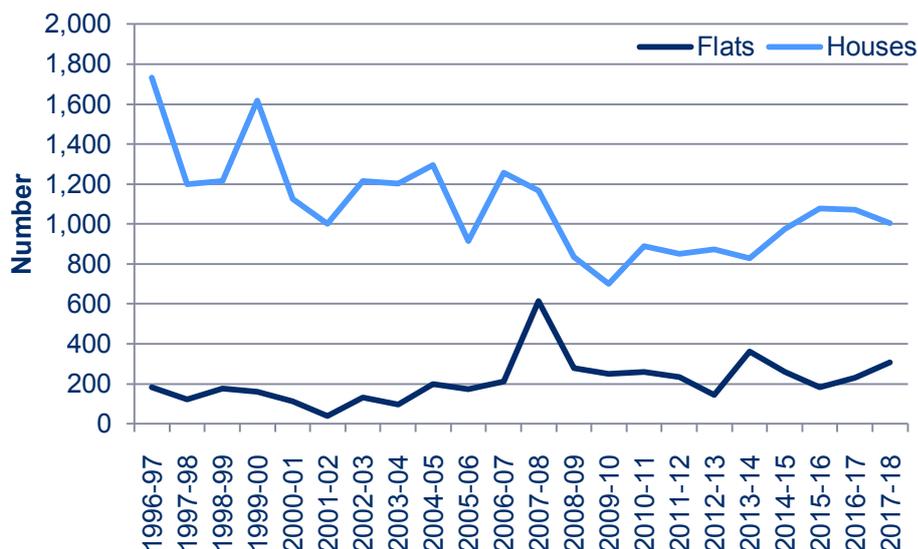


Source: Dwelling Stock Estimates, Welsh Government

The total number of [dwellings](#)⁵⁹ in North Wales has continued to grow steadily with an estimated 325,200 dwellings at 31 March 2017. This represented an increase of 5 per cent over the previous 10 years. Dwellings were more evenly distributed across local authorities than in other regions, ranging from 35,000 dwellings on the Isle of Anglesey to 68,000 in Flintshire. 14 per cent of all dwellings across the region were privately rented, and 71 per cent were owner occupied; both rates were 1 percentage point lower than 5 years previously.

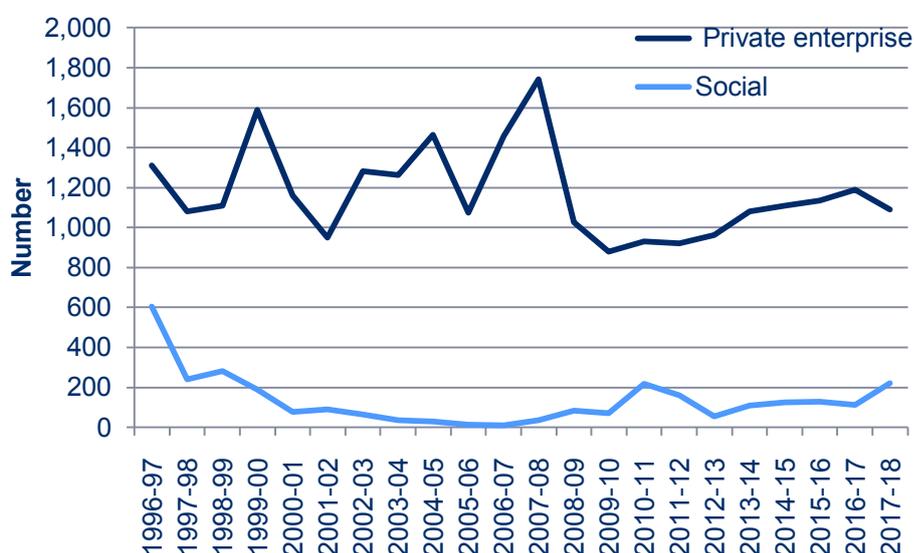
⁵⁹ [StatsWales: Dwelling stock estimates by local authority and tenure](#)

Figure 30: Number of new flats and houses in North Wales completed over time



Source: New house building data collection, Welsh Government

Figure 31: Number of new dwellings completed in North Wales over time, by tenure



Source: New house building data collection, Welsh Government⁶⁰

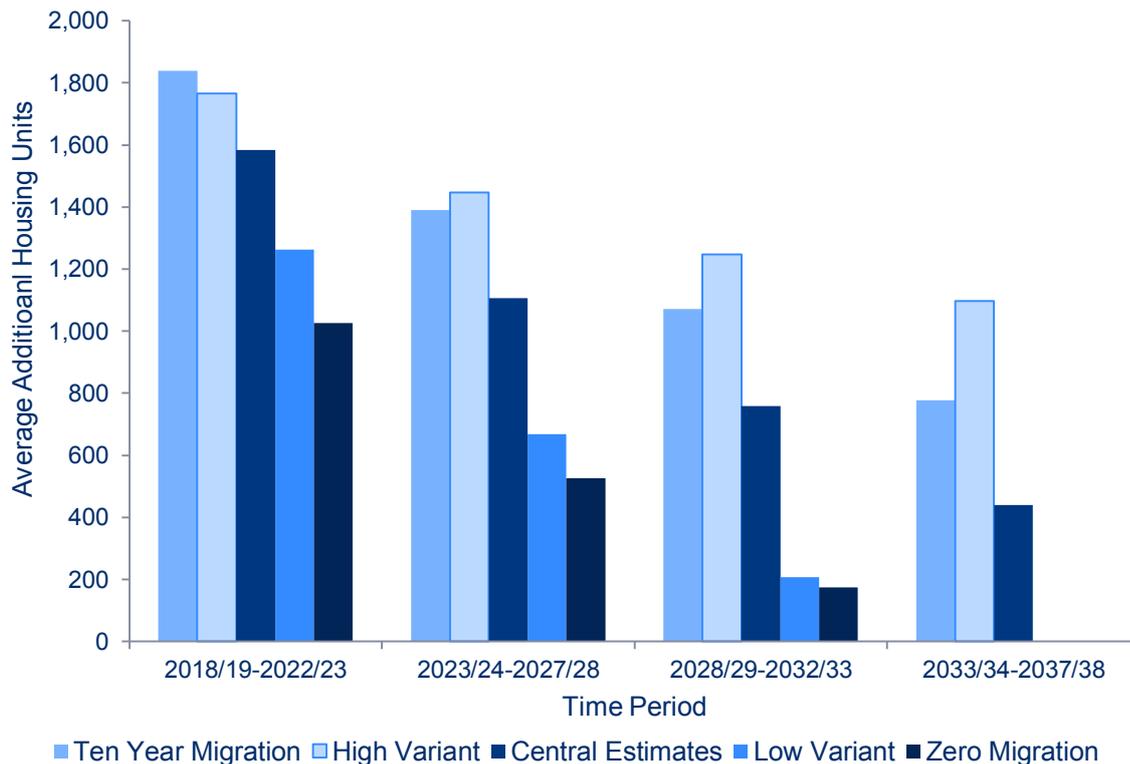
1,311 [new dwellings](#)⁶¹ were completed across North Wales during the 2017-18 period. This is 26 per cent fewer than ten years previously and 1 per cent fewer than 20 years previously. The highest number of new dwellings completed over the 2017-18 period were in Flintshire (428, or 33 per cent) whilst the lowest was on the Isle of Anglesey (110, or 8 per cent).

⁶⁰ The figures provided by local authorities and the National House-Building Council (NHBC) are from records kept for building control purposes. It is sometimes difficult for building control officers to identify whether a dwelling is being built for a Registered Social Landlord (RSL) or for a private developer, which may lead to an under-count of RSL new house building and an over-count for the private sector.

⁶¹ [StatsWales: New dwellings completed by area, dwelling type and number of bedrooms](#)

[Data from the UK House Price Index](#)^{62, 63} shows that in September 2018, average house prices in North Wales ranged from £151,900 in Denbighshire to £170,700 in Isle of Anglesey. This was the smallest range in average house prices of the three regions, reflecting a more uniform distribution of house prices across North Wales' local authorities than observed in the authorities of the other Welsh regions. Conwy was the local authority that observed the greatest increase in house prices between September 2008 and September 2018, with the average growing by £15,200 (or 10.5 per cent). This was despite a fall in prices over the previous year. Gwynedd house prices saw the smallest increase, growing by £10,400 (or 7.2 per cent) over the same period.

Figure 32: Average annual estimates of additional housing need, North Wales



Source: Estimates of housing need in Wales at a national and regional level (2018-based)

[Estimates of housing need](#)⁶⁴ show that for the first 5-year period (2018/19-2022/23), between 1,100 and 1,900 additional housing units are required in North Wales (with a central estimate⁶⁵ of 1,600). For the third period (2028/29-2032/33), the central estimate falls to less than 1,000 and by the mid to late 2030s (2033/34-2037/38) is just over 300. This reflects a slowdown in the projected household growth from the 2014-based household projections. Please note that housing need estimates by tenure (market and affordable) at the regional level will shortly be published on our [website](#)⁶⁶.

⁶² [Land Registry: UK House Price Index](#)

⁶³ Data correct as of the December 2018 publication of the UK House Price Index (UK HPI). The UK HPI is a mix-adjusted index, which mean it is weighted to reflect the actual mix of properties sold in the previous year. The UK HPI is published monthly. All figures in the UK HPI are liable to revisions for up to 12 months.

⁶⁴ [Welsh Government: Housing need and demand \(2018-based\)](#)

⁶⁵ Based on 2014-based principal household projections

⁶⁶ [Welsh Government: Housing need and demand](#)

[2014-based household projections](#)⁶⁷ show that by 2028, there could be around 108,400 one-person households in North Wales, a 9 per cent increase on the projected level for 2018. By 2039, the projected number is over 115,600.

The projected average household size in North Wales in 2028 ranges from 2.13 in Conwy to 2.26 in Flintshire. It should be noted that these data are projections based on past trends, and should not be used as forecasts.

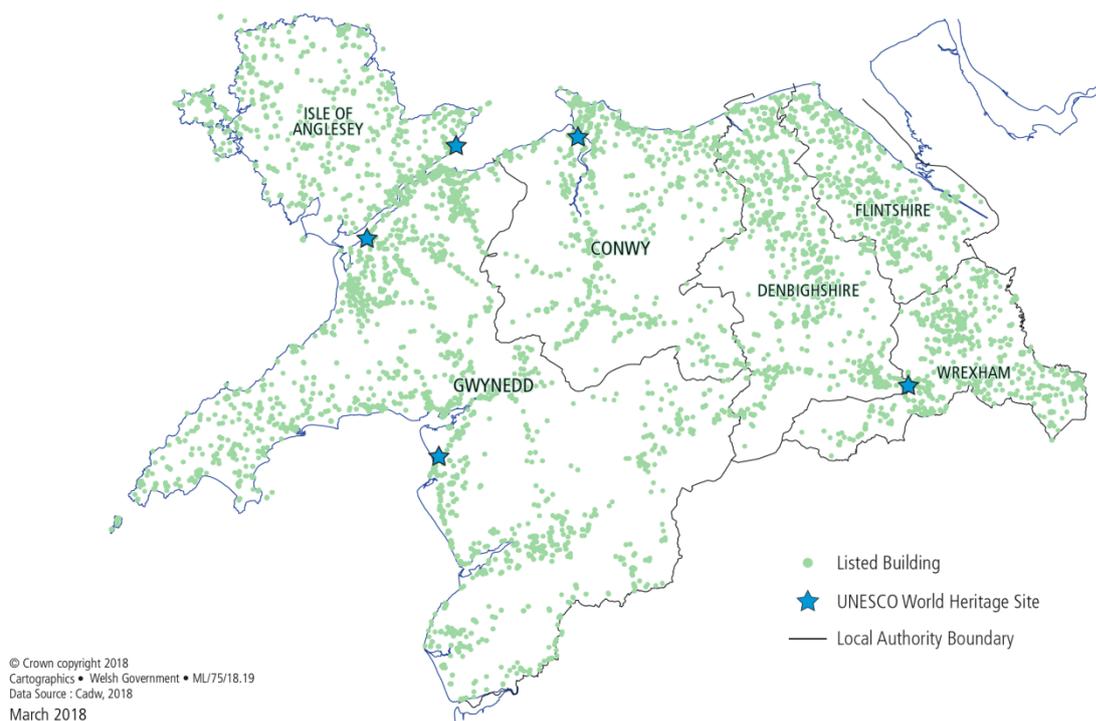
[Local authorities estimated](#)⁶⁸ that 107 persons were sleeping rough across North Wales in the two weeks between 16th and 29th October 2017. This is a slight decrease of 2 per cent (2 persons) compared with the exercise carried out in October 2016, with the number increasing in 3 local authorities and falling in the other 3. Around 42 per cent of persons sleeping rough across the region were located in Wrexham, yet the decrease, compared with the previous year, in the number of persons sleeping rough (16 persons) was greater here than in other local authorities across the region.

⁶⁷ [StatsWales: Household projections by local authority, household type and year](#)

⁶⁸ [StatsWales: Rough Sleepers by local authority](#)

Culture & Heritage

Figure 33: World Heritage Sites & Listed Buildings in North Wales



Source: Cadw

As well as its listed buildings, there are 2 UNESCO world heritage sites located in North Wales. These include 4 sites which form the Castles and Town Walls of Edward I in Gwynedd (Caernarfon, Conwy, Beaumaris and Harlech), as well as Pontcysyllte aqueduct and canal.

North Wales received 22 million [Tourism Day Visits \(TDVs\)](#)⁶⁹ in 2017, resulting in a total expenditure of £700 million. Despite the countryside tourism offered by areas such as Snowdonia National Park, TDV destinations in North Wales were most likely to be seaside or coast-located, with these visits accounting for 31 per cent of the region's TDVs. This was also a higher proportion than seaside and coast visits in other regions in Wales.

The [Wales Accommodation Occupancy Survey](#)⁷⁰ shows that in 2017, North Wales had an annual hotel average room occupancy⁷¹ rate of 67 per cent.

When considering the number of [visits to tourist attractions in Wales](#)⁷² in 2017, 6 of the top 10 paid attractions in Wales in 2017 were in North Wales: Bodnant Garden, Electric Mountain Visitor Centre, Conwy Castle, Great Orme Tramway, Caernarfon Castle and Erddig. Over the same period, 4 of the top 10 free attractions in Wales were in North Wales: Snowdon Summit Visitor Centre, Newborough National Nature Reserve, Pontcysyllte Aqueduct, and Gwydir Forest Park.

⁶⁹ [Great Britain Day Visits Survey \(2017\)](#)

⁷⁰ [Welsh Government: Wales tourism accommodation occupancy surveys \(2017\)](#)

⁷¹ Room occupancy is the number of bedrooms occupied over a given period as a proportion of total available bedrooms.

⁷² [Welsh Government: Visits to tourist attractions \(2017\)](#)

Key quality information

Relevance

This publication is a compendium of key statistics on nine different topics. As such, it brings together data that is already in the public domain at different geographical levels (e.g. Wales, local authority level). Where possible and appropriate, data has been made available at regional level to offer further context on regional differences that may exist in Wales. More information on specific data sources can be found within the individual releases, referenced in the footnotes.

This publication was initially prepared to support policy teams in Welsh Government in preparing and drafting the new [National Development Framework](#)⁷³. However, we anticipate that the scope of the usefulness of this publication is further-reaching. It is anticipated that this publication will be used by Welsh Government, local authorities, other public bodies with a regional interest, and the general public, to (i) gain an overview of data collected for Wales and its local authorities and regions on each of the subject areas and (ii) understand differences that may exist between the Welsh regions. Users with a specific interest in one or more of the topics in this report can find a wider range of statistics and data on [StatsWales](#)⁷⁴.

Accuracy

The statistics included within this release are taken from official statistics sources, though not all of these have been classified as National Statistics. More information about official statistics and National Statistics can be found on the [UK Statistics Authority website](#)⁷⁵. Information about the quality of each of the data sources used can be found within the individual releases, referenced in the footnotes, or within the quality reports that accompany these releases.

Due to the high number of sources included in this publication and the time taken to compile it, more recent data has been published for some sources. This data was known to be the most recently available as at 11/01/2019, though revisions made to data sources, such as the Annual Population Survey (APS) and the Wales tourism performance: January to June 2018 release have been accounted for. Current data is accessible through the links to sources included in the footnotes.

We do not intend to regularly update this report. However, in future, data will be made available on StatsWales and in dashboards, and will be updated as new data is published, ensuring that users are always provided with the latest data.

⁷³ [Welsh Government: National Development Framework](#)

⁷⁴ [StatsWales website](#)

⁷⁵ [UK Statistics Authority: types of official statistics](#)

Timeliness and punctuality

This publication has been prepared to fit in with the timing of the drafting and publication of the [National Development Framework](#). Due to the high number of sources included in this publication and the time taken to compile it, more recent data has been published for some sources. This data was known to be the most recently available as at 11/01/2019.

Accessibility and clarity

Users may access all data included in this release using the links included in the footnotes. The majority of the data underlying the report, including much more detailed breakdowns, are available on StatsWales and through the StatsWales open data services. Quality information and metadata for each of these sources is also available through these links.

This publication is currently available in printable PDF format, but in future, data will be made available as interactive online reports to maximise impact and efficiency using the Welsh Government open data services.

Comparability and coherence

Where different datasets have been used to discuss the same topic (for example in the section on statistics relating to the [Welsh language](#)), an explanation is offered as to the strengths and limitations of each of the sources, and the coherence between them, with further information provided in the sources and links.

Where possible, National Statistics have been used to ensure the data is of high quality and is consistent with statistics on the topics that may be used or other purposes. Further information on the comparability and coherence of each of the sources is available in the sources linked in the footnotes.

Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016 and this release includes 7 of the national indicators, namely the percentage of adults who have fewer than two healthy lifestyle indicators; levels of nitrogen dioxide (NO₂) pollution in the air; the percentage of adults with qualifications at the different levels of the National Qualifications Framework; Gross Disposable Household Income per head; the capacity (in MW) of renewable energy equipment installed; the percentage of people in employment; and the percentage of people who can speak Welsh.

Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the [Well-being of Wales report](#).

As a national indicator under the Act they must be referred to in the analyses of local well-being produced by public services boards when they are analysing the state of economic, social, environmental and cultural well-being in their areas.

Further information on the [Well-being of Future Generations \(Wales\) Act 2015](#).

The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.

Further details

The document is available at: <https://gov.wales/summary-statistics-economic-regions-2019>

Other related links

[National Development Framework](#)

Next update

This publication is a one-off release and will not be updated. However, future data will be made available in dashboard format and will be updated as new data becomes available.

We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided by email to stats.info.desk@gov.wales.

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