Porthmadog Placemaking Plan

Cyngor Gwynedd

February 2024

Contents

1. Introduction
   - Purpose, study area, and context
   - Sustainable development and the Welsh language
   - Placemaking and method
   - Policy and strategy review

2. Baseline
   - Economic baseline
   - Socio-economic baseline
   - Market baseline

3. Engagement and Vision
   - Stakeholder engagement
   - SWOT Analysis
   - Vision statement and measures of success

4. Options Analysis
   - Old Coliseum
   - Porthmadog Harbour
   - DWP Car Park
   - Parc y Dref
   - Cob Crwn

5. Action Plan

6. Governance and Delivery
   - Governance models and case studies
   - Recommendations

1

Introduction

Introduction

Purpose

Cyngor Gwynedd has commissioned Savills to establish a definitive vision and strategic priorities to guide the regeneration of Porthmadog town centre.

Study Area

The Plan focuses on the town centre, which extends from the Harbour northwards along the High Street to the Old Coliseum site but recognises the importance and links with the wider town and surrounding area.

Context

Porthmadog is a harbour town in Gwynedd, adjacent to the Snowdonia National Park and forms part of The Slate Landscape of Northwest Wales World Heritage Site. The town was established on the Glaslyn Estuary in the early 1800s following the construction of a sea wall and became a highly significant part of the North Wales slate industry by the middle of the 19th century with Porthmadog Harbour exporting slate from nearby quarries across the world.

Today, Porthmadog is one of the largest urban centres in Gwynedd with a population of 2,600 residents, although it has seen a small decline in population since 2011. The town is an important site of employment and services for the region and serves residents of the town and an extensive rural hinterland to the east and south.

The town is a major hub for tourism in North Wales due to the area's outstanding natural landscape and its proximity to visitor attractions such as Portmeirion and the Ffestiniog & Welsh Highland Railway. There are more than 13,000 bedspaces in the Porthmadog area, the majority of which are in caravan parks to the west of the town around the village of Morfa Bychan.

Despite Porthmadog's success as a visitor destination, the town has faced serious economic and regeneration challenges and has not fully realised its potential. Housing, employment, retail, and the public realm have been consistently raised as issues in public consultations (such as Ardal Ni and Helo Port) and identified as regeneration priorities in historic plans for the town (such as the 2007 Area Regeneration Plan and 2014 Town Centre Action Plan).
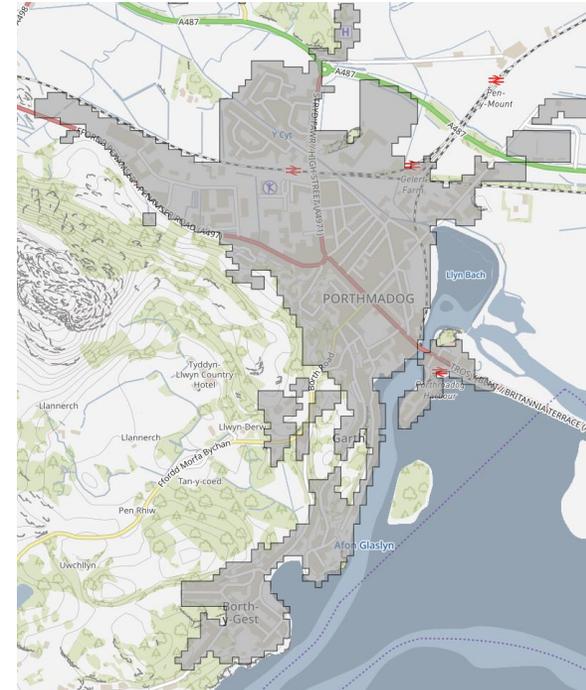
Porthmadog built-up area
(Welsh Government)
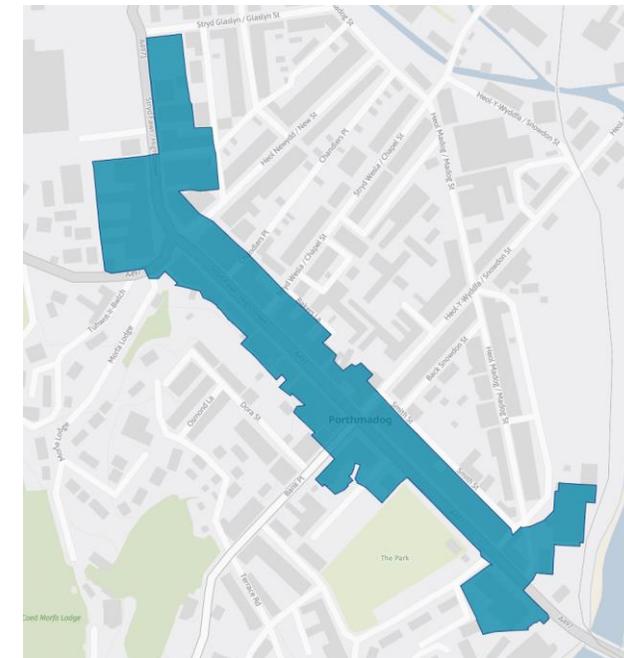
Porthmadog defined town centre (Joint LDP)

Introduction

Sustainable development and the Welsh language

Welsh is the community language of Porthmadog and is used by the vast majority of residents in their daily lives. Data from the 2021 Census indicates that 77% of Porthmadog residents are Welsh speakers, placing the town amongst the top 1% of small areas in Wales by proportion of Welsh speakers.

As a result, sustaining and strengthening Welsh as a living, community language has been a central consideration in the production of this Plan. Sustaining and strengthening Welsh in Porthmadog requires good quality jobs, affordable housing, and a high quality of life to retain local residents and attract former residents back to the area.

Recent projects covering the local area, Arfor I and Llwyddo'n Lleol, have successfully harnessed economic development to increase the use of Welsh[1], and the Arfor II programme identifies the economic opportunities of young people and families as central strengthening the Welsh language in the region[2].

Whilst economic opportunities are critical, Dr Elin Royles (Centre for Welsh Politics and Society, Aberystwyth University) finds that social conditions (i.e. quality of life) are also highly important in retaining and attracting back residents[3]. As such, interventions in the town centre should not be exclusively focused on economic outcomes and should also look to improve year-round quality of life for residents. For example, developing a health centre to improve local access to healthcare services and enhancing the local active travel network to create more opportunities for travelling on foot and by bike.

Therefore, this Plan focuses on interventions designed to directly promote the use of Welsh and its unique local heritage alongside a broader range of interventions that can indirectly promote the language – such as affordable housing, quality employment opportunities, and public realm improvements.

Map of Local layer Super Output Areas (LSOAs) with more than 75% of Welsh speakers in the 2021 Census
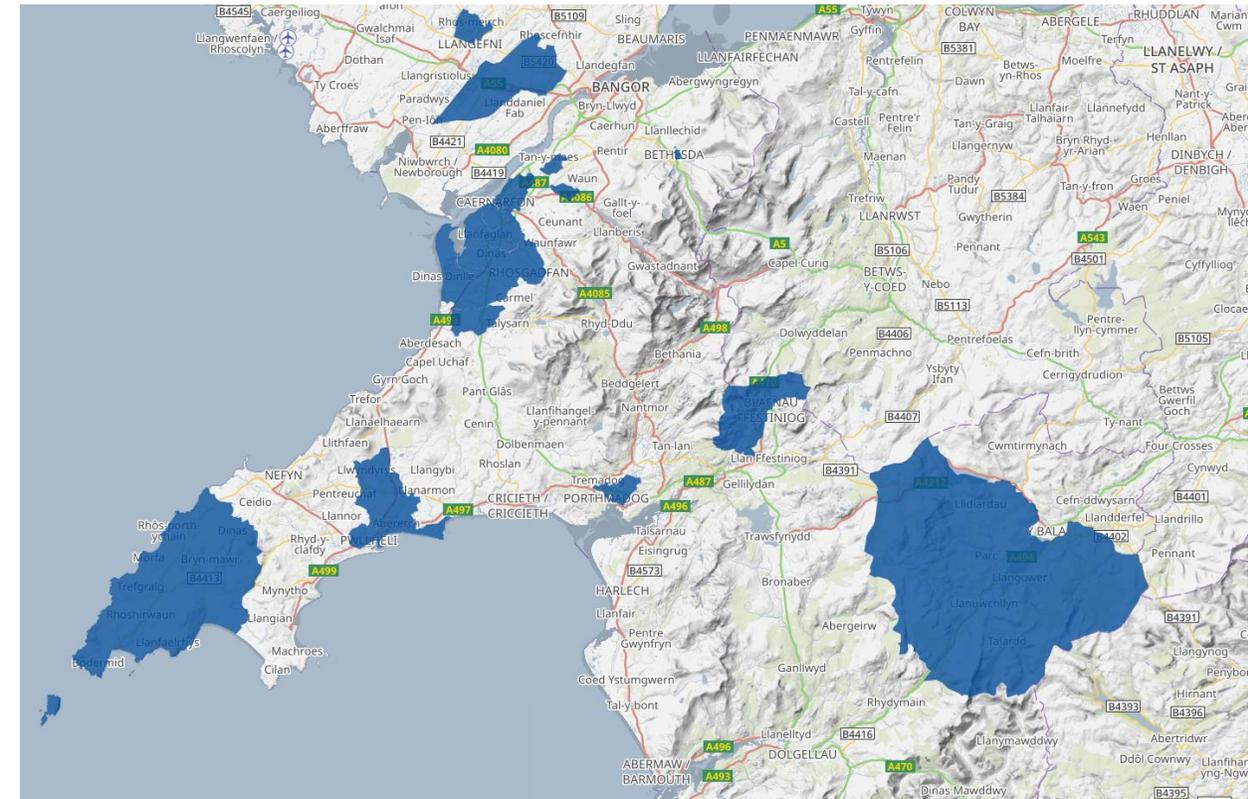
1) Evaluation, Conclusions and Recommendations of the Arfor Programme, October 2021, Wavehill Research
2) Arfor II Prospectus 2022 – 2025
3) How to support the economy and strengthen the Welsh language? October 2023, Arsyllfa Observatory

Introduction

Placemaking

Placemaking is a place-led and community-based approach to planning, urban design and place management. Placemaking forms a core part of Welsh Government's approach to supporting town centres and the Welsh Government stated in the Town Centre Position Statement[1] that regeneration funding will be targeted toward towns with a placemaking plan. The approach is also recognised as an important means of delivering the national well-being goals set in Well-being of Future Generations Act.

Placemaking is defined by the Welsh Government as "a holistic approach to the planning and design of development and spaces, focused on positive outcomes. It draws upon an area's potential to create high quality development and public spaces that promote people's prosperity, health, happiness, and well-being in the widest sense"[2] To achieve these positive local outcomes, the Design Commission for Wales (DCfW) advocates for "working collaboratively across sectors and disciplines to comprehensively consider the future development of distinctive and vibrant places"[3] This involves delivering on a range key themes at the same time - these themes are identified in the 'Placemaking Wales Charter' as people and community, location, public realm, identity, movement, and mix of uses.

Good placemaking requires developing a detailed understanding of the activity, form and meaning of a place, and subsequently building on these components to deliver new development, improvements to existing places or interventions such as events which help to create activity in a space. DCfW define the three components as:

• *Activity* – The activities that occur in the place supported by land uses, pedestrian and cycle movement, play and social life within the public realm and events.

• *Form* – The physical setting that makes up the place including the townscape, built form, landscape, topography, ecology, microclimate and public realm.

• *Meaning* – The unique features of a place including the context, identity of existing places, unique sense of place, significant built and natural features, cultural associations, sensory experiences, safety and inclusiveness and sense of belonging.'

The placemaking process (Project for Public Spaces, 2022)

Define Place and Identify Stakeholders

↓

Evaluate Space and Identify Issues

↓

Place Vision

↓

Short Term Experiments and Management

↓

Ongoing Reevaluation and Long Term Improvements

Stakeholder Roles
advise/suggest
bring additional
resources
implement & maintain

Expert Roles
inform
facilitate
design & Implement

1) Town Centre Position Statement (2023)
2) Planning Policy Wales 11th edition (2021)
3) Placemaking Wales Guide and Charter (2020)
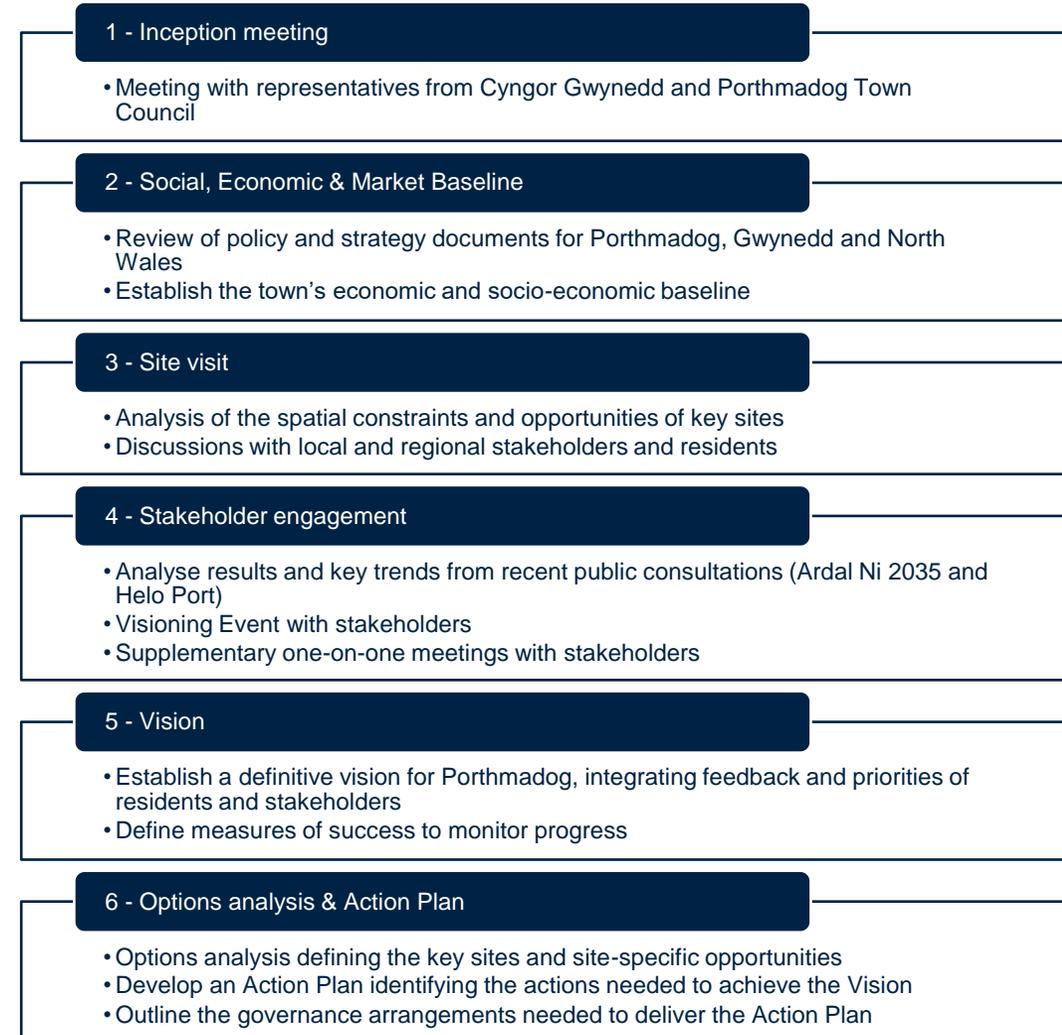
Introduction

Our method

The method followed to develop the Plan is shown in the figure opposite. The placemaking principles and guidance set by DCfW and Welsh Government have guided the production of the Plan at every stage. A multi-disciplinary team has developed the Plan with a broad range of specialisms, including in planning, urban design, and economic development, as to develop a comprehensive understanding of place and a detailed and feasible place-based approach to change, rooted in the community's aims and priorities.

The first four stages of developing the Plan were centred on developing a detailed understanding of Porthmadog as a place – focusing on the activities, built and natural features, and heritage and cultural associations which define the town centre as a place.

The voices of local stakeholders and community members are integral to placemaking, and Stages 1, 3 and 4 were focused on building an understanding of the perspectives of stakeholders and residents, through analysis of recent public consultations and meetings with key stakeholders and organisations. Stage 2 involved extensive research and data analysis to build a detailed understanding of the town's social and economic features, including potentially 'hidden' challenges that need to be considered in the Plan.

The final two stages are focused on integrating the findings from the previous stages to set a definitive vision for Porthmadog and an accompanying Action Plan to set a clear course for achieving this vision. The Action Plan features a clear set of projects and actions, categorised by timescale and cost, as well as an outline of the governance arrangements necessary to deliver the Plan.

Method followed to produce the Placemaking Plan

1 - Inception meeting
- Meeting with representatives from Cyngor Gwynedd and Porthmadog Town Council

2 - Social, Economic & Market Baseline
- Review of policy and strategy documents for Porthmadog, Gwynedd and North Wales
- Establish the town's economic and socio-economic baseline

3 - Site visit
- Analysis of the spatial constraints and opportunities of key sites
- Discussions with local and regional stakeholders and residents

4 - Stakeholder engagement
- Analyse results and key trends from recent public consultations (Ardal Ni 2035 and Helo Port)
- Visioning Event with stakeholders
- Supplementary one-on-one meetings with stakeholders

5 - Vision
- Establish a definitive vision for Porthmadog, integrating feedback and priorities of residents and stakeholders
- Define measures of success to monitor progress

6 - Options analysis & Action Plan
- Options analysis defining the key sites and site-specific opportunities
- Develop an Action Plan identifying the actions needed to achieve the Vision
- Outline the governance arrangements needed to deliver the Action Plan

Introduction

Policy and strategy review

This section reviews relevant policy and strategy documents covering regeneration, land use, and economic development in Porthmadog, Gwynedd and North Wales. Documents are summarised, features relevant to Porthmadog are highlighted, and key findings are presented.

Future Wales: The National Plan 2040 (2021)

Future Wales is the national development plan and is designed to guide strategic planning decisions at the national level. Porthmadog is located in the west of the North Wales region, south of the North Wales Coastal Towns Regional Growth Area and nearby Traswfynydd which is identified as a potential site for a Small Modular Reactor. The North Wales Metro, a corridor of improvement to the public transport and active travel network, is located 30km north of the town. Future Wales indicates that development in the town should support local aspirations and need, complementing rather than competing with efforts to grow cities and towns in Growth Areas.

*Anglesey and Gwynedd Joint Local Development Plan 2011 – 2026 (2017)*

The Local Development Plan (LDP) is the basis for planning and development decisions in Anglesey and Gwynedd (outside of the Snowdonia National Park). Porthmadog is identified as a key centre in the LDP with recognition of its importance for residents as a site for employment, retail and services and its role as a major visitor destination. The town is at the second highest tier of the settlement and retail hierarchies, categorised as an urban service centre and an urban retail centre, beneath the regional centre of Bangor.

The LDP also highlights significant development constraints which reduce the number of sites viable for the development of residential or employment uses in Porthmadog. Most of the land surrounding the town is a designated flood zone (C2 – without significant defensive infrastructure), special landscape areas (Glaslyn & Dywryd Estuary and Porthmadog and Tremadog Bay) surround the town to the east and west, and the town's western boundary is bounded by a steep hill. As a result, there are very few sites suitable development sites and there are no sites in the LDP allocated for residential or employment in Porthmadog.

Anglesey and Gwynedd are currently preparing separate LDPs. Gwynedd's new LDP is anticipated to be adopted by the Council in 2027 and is unlikely to feature significant residential or employment allocations in Porthmadog due to the same development constraints currently facing the town.

Cyngor Gwynedd is also the first Local Planning Authority in Wales to serve an Article 4 Direction revoking the right to change the use of main homes to second homes, second homes to short-term holiday lets and vice versa without planning permission. If the Cabinet of Cyngor Gwynedd vote in favour of introducing the Direction, it will be implemented in 2024.

North Wales Regional Strategic Diagram (Future Wales)
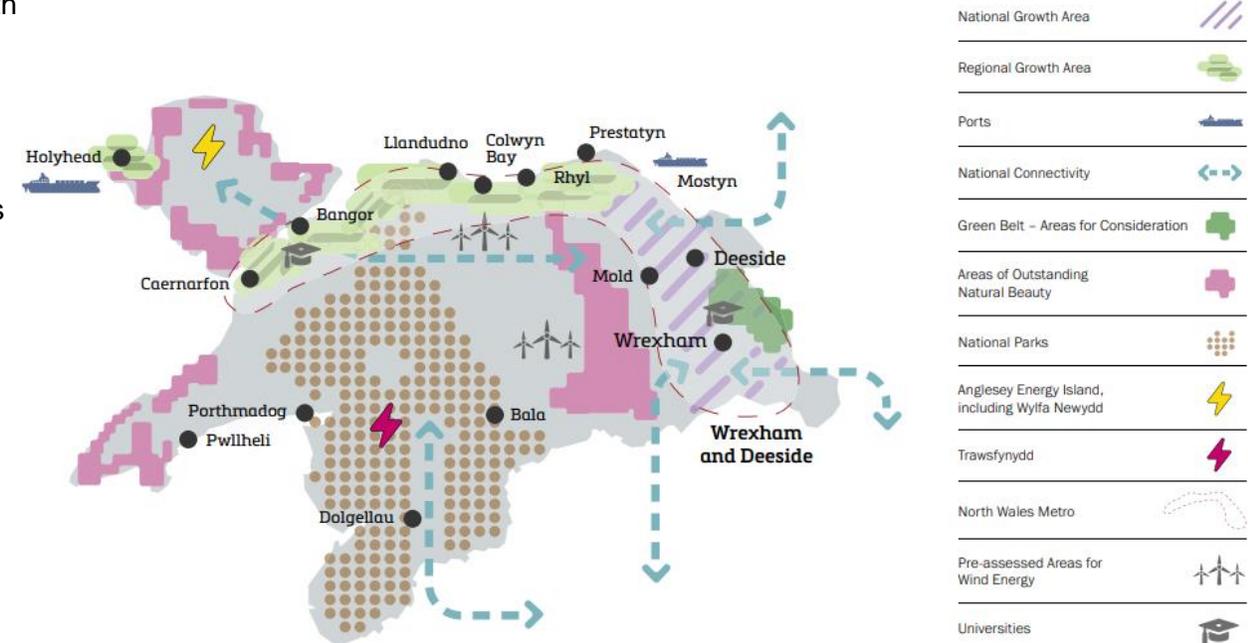
Introduction

North Wales Regeneration Strategy 2018 – 2035 (2018)
The Strategy is a guidance document designed to align regeneration in North Wales with other initiatives to drive economic growth in the region, such as the North Wales Growth Vision (2016) and the North Wales Regional Economic Framework (2021). The Strategy establishes a spatial and thematic framework for the prioritisation of investment, setting out the following regional regeneration objectives:

- Reduce inequality
- Strengthen the visitor economy
- Protect the rural economy
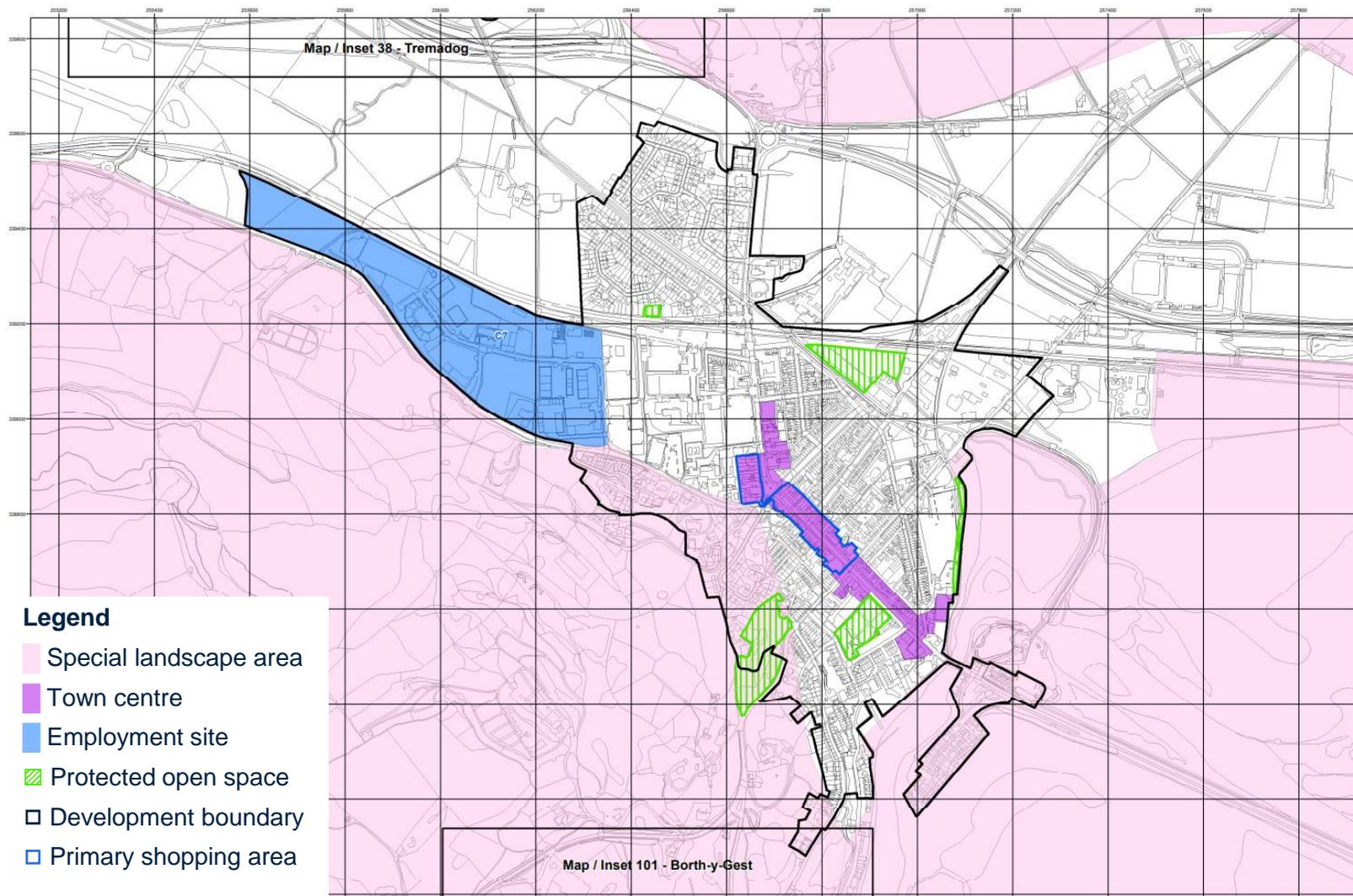- Modernise town centres
- Improved housing offer

A Growth Vision for the Economy of North Wales (2016)
The Ambition North Wales Economic Ambition Board developed a vision for North Wales to become: "A confident, cohesive region with sustainable economic growth, capitalising on the success of high value economic sectors and our connection to the economies of the Northern Powerhouse and Ireland."

The Growth Vision was founded on three key principles:
- Smart – with a focus on innovation and high value economic sectors to advance economic performance.
- Resilient – with a focus on retaining young people, increasing employment levels and skills to achieve inclusive growth.
- Connected – with a focus on improving transport and digital infrastructure to enhance strategic connectivity to and within the region.

Inset map of Porthmadog (Joint LDP)

Legend
- Special landscape area
- Town centre
- Employment site
- Protected open space
- Development boundary
- Primary shopping area

Introduction

The vision developed by Ambition North Wales and its partners, shaped the North Wales Growth Deal, signed in 2020. Welsh Government and UK Government are jointly investing £240 million into the Growth Deal over 15 years. The aim of the Growth Deal is to build a more vibrant, sustainable and resilient economy in North Wales, building on our strengths to boost productivity while tackling long-term challenges and economic barriers to delivering inclusive growth.

Three high growth sectors have been targeted by Ambition North Wales to drive productivity in the region: low carbon energy, high value manufacturing, and agri-food and tourism. Commercial land and property market failure and digital infrastructure are identified as key barriers to growth and are also targets for investments.

6. Empowering communities for the benefit of our future generations
7. Connectivity (transport & digital)
8. Leverage benefits of the public sector
9. Low carbon energy
10. Food & Drink Industry

North Wales Regional Framework (2021)

The North Wales Regional Economic Framework (REF), developed by Welsh Government, provides a framework that captures how the public, private and third sectors will deliver on their priorities. The REF links directly with the structure of the Growth Deal and the aim is for the achievement of priorities to boost productivity and accelerate sustainable economic and inclusive prosperity. Three core themes for the region are defined within the REF : social and community wellbeing, low carbon economy, and the experience economy.

The REF recognises the region's strengths in low carbon energy, tourism, and food and drink sectors, whilst also identifying pockets of deprivation, poor connectivity and longer commutes, with residents of North Wales having the longest commute anywhere in Wales.

Based on an analysis of key issues and opportunities in the region and stakeholder feedback ten priorities for the region are identified:

1. Skills & Workforce
2. Investment in magnets, hubs, supply chains, R&D, innovation & Entrepreneurship
3. Balanced support for indigenous & inward investors
4. Language, culture, place & heritage
5. Foundation Economy & a vibrant Micro/SME base

Position of the North Wales Regional Economic Framework within regional policy and funding
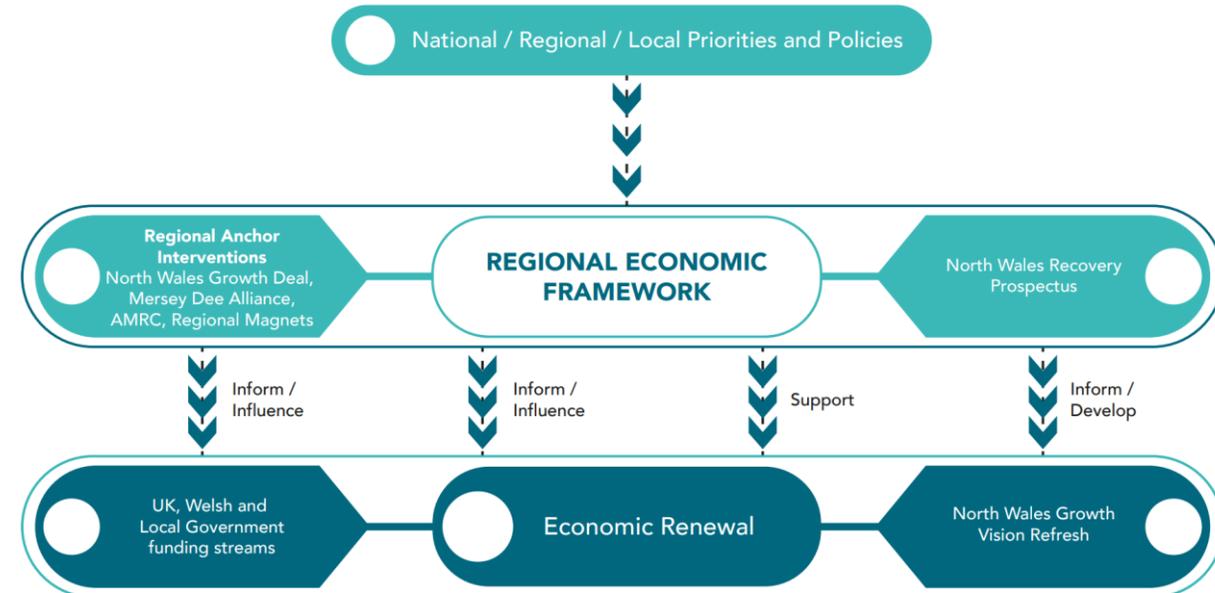
Introduction

Gwynedd and Eryri Sustainable Visitor Economy 2035 (2023)

The Strategic Plan, produced by Cyngor Gwynedd and the Eryri National Park Authority, sets a vision and three Sustainable Visitor Economy Principles (shown in figure below) for tourism in the region. The social, economic, and environmental sustainability is central to the Strategic Plan which is oriented around celebrating and protecting the region's culture, heritage and natural environment.

Delivery arrangements are a key consideration of the Strategic Plan – in 2021 Cyngor Gwynedd and the National Park Authority signed a Memorandum of Understanding (MOU) to facilitate the development of the Strategic Plan. The Plan identifies collaborative working as key to manage tourism in the region and a Sustainable Visitor Economy Partnership has been formed to deliver on the Plan's recommendations. The Partnership has representation from the private, public and third sector as well as local community groups.

The Slate Landscape of Northwest Wales World Heritage Site Property Management Plan (2020)

The Management Plan outlines the approach of Cyngor Gwynedd, and its partners to managing The Slate Landscape of Northwest Wales World Heritage Site, providing a framework for using the World Heritage Site (WHS) status to protect, promote and to improve the region. The designation of WHS is the highest global recognition of heritage value.

Porthmadog Harbour and the Cob form part of The Slate Landscape of Northwest Wales designation. Governance of the WHS is centred on partnership working between public and private-sector groups across all levels. The Management Plan focuses on maintaining the integrity and authenticity of the site and promotes the sympathetic adaptive re-use of historic assets. Cyngor Gwynedd also confirm within the Management Plan that slate heritage will be integrated into its economic regeneration plan and the opportunity for the WHS to support local regeneration is also recognised.

UNESCO state "that it is rarely the designation itself which achieves the impacts, but particularly the actions and investments of the local stakeholders." [1] As such, the key opportunity the WHS designation presents Porthmadog is as a catalyst for investment and action, with the Harbour providing a clear focal point.

1) Socio-economic Impacts of World Heritage Listing
https://whc.unesco.org/en/socio-economic-impacts/

Boundary of The Slate Landscape of Northwest Wales World Heritage Site

Introduction
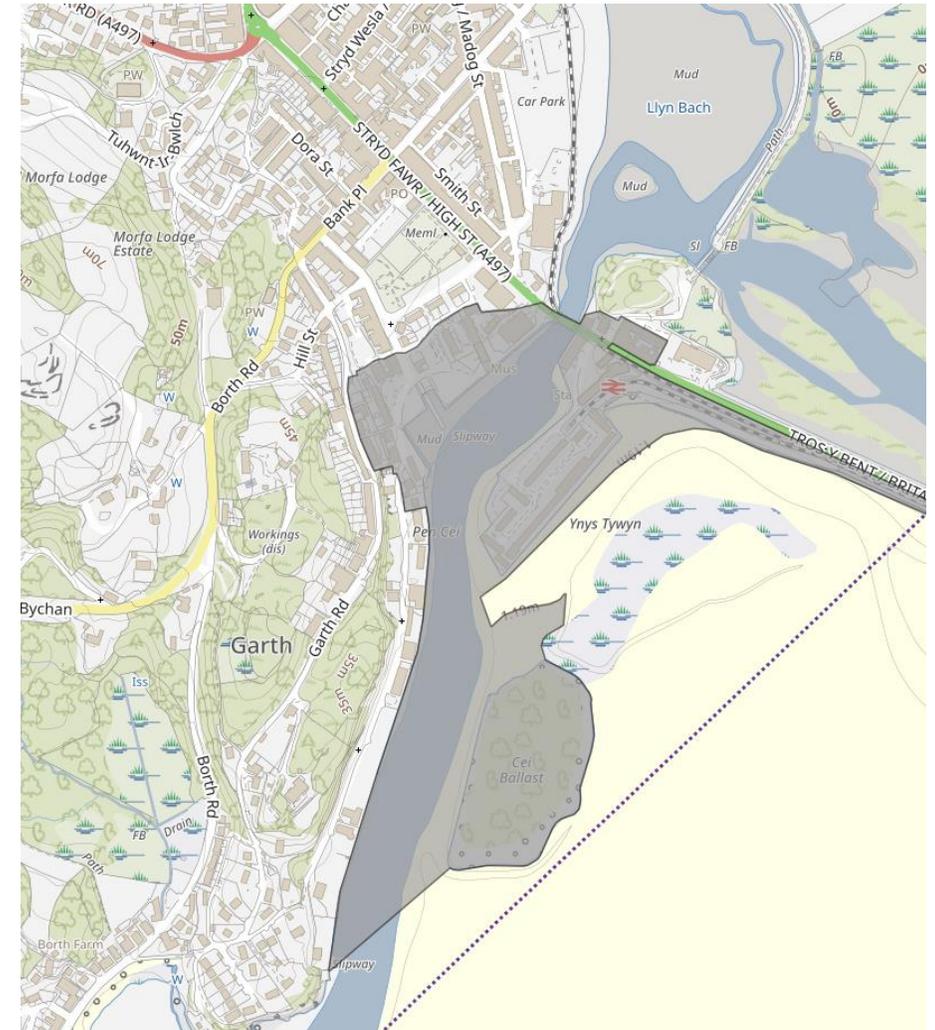
Local plans

The following section reviews the two previous regeneration plans for the town and maps the key sites identified and projects identified.

Porthmadog Area Regeneration Plan 2007 – 2013

The Area Regeneration Plan was developed as part of the county-wide Gwynedd Regeneration Strategy and identifies the main measures and projects for the regeneration of Porthmadog and surrounding area.

The following themes are identified as the main priorities for the area's regeneration:

- Increase growth and economic prosperity
- Vibrant Communities
- Housing and Residential Units
- Modernise town centres
- Local Services
- Language and Culture

Stakeholders' aspirations for the local area are shown in the figure below.

Community members	Voluntary organisations and businesses	Service providers
• Housing for local people • More and better jobs • Increased visitor spend • Diversified retail offer	• Promotion of language and culture • Harbour area • Vacant and underutilised buildings	• Affordable housing • Develop town into transport interchange • Make the most out of transport links

Porthmadog Town Centre Action Plan 2014 – 2017

The Action Plan was prepared by the Town Centre Partnership, Porthmadog Chamber of Trade, and Cyngor Gwynedd. The Porthmadog Town Centre Partnership was formed with support from Welsh Government and Cyngor Gwynedd to develop the Action Plan and deliver regeneration initiatives in the town. The Chamber of Trade and Town Centre Partnership are no longer active.

The Action Plan sets three priorities for the town and identifies a series projects to improve the performance and vibrancy of the town centre:

- Support innovative approaches to regeneration
- Support businesses and services to establish, grow and prosper
- Increasing the vibrancy of town centres by increasing spend per head, especially outside the peak summer season

The projects identified are largely thematic and apply across the whole town centre with many focused-on place activation (e.g. creation of an Events Forum), marketing and promotion (e.g. improvements to signage and interpretation) and local decision-making (e.g. appointment of Town Centre Manager). Projects with a spatial focus include the development of an outdoor play area, creation of a key civic centre and events hub, establishment of gateways to the town, and bringing derelict buildings back to use – please see the next page for a **map of key sites**.

Underpinning most of the projects is an attempt to shift away from a highly seasonal visitor economy and an aim to increasing the year-round vibrancy of the centre as well as develop a higher value visitor offer.

Many of the priorities set in the Action Plan remain relevant with data presented the following section highlighting continued challenges building housing in the town and diversifying the local economy. Some aims of the Action Plan have been achieved, for example, most vacant buildings on the high street have been brought back to use, however, many of the projects with a clear spatial focus have not been delivered. This may be linked to the absence of local groups with a suitable structure to drive forward change within the community, with the end of the Town Centre Partnership and Chamber of Trade.

Introduction

Key sites

The review of previous local plans for Porthmadog (2007 Area Regeneration Plan and 2014 Action Plan) identified three defined sites in the town centre as key opportunity sites:

1. Porthmadog Harbour and Pen Cei Square

2. Parc y Dref

3. Old Coliseum Site

Since the previous plans, the Coliseum Cinema has been demolished and is currently a vacant site, being considered by the Health Board as a potential site for a new health centre. Parc y Dref and the Harbour remain largely unchanged, and the opportunities highlighted in previous plans to improve play facilities, promotion of heritage, and the public realm of both sites, remain.

This Plan retains a focus on these four sites and in the Options Analysis introduces an additional two sites:

4. DWP Car Park

5. Cob Crwn

These five sites present the key spatial opportunities for Porthmadog, and targeted site-specific interventions have the potential to deliver significant economic, social and environmental benefits for the town.

Key
- ● Sites identified in previous plans
- ● Additional sites identified in this Plan

Introduction
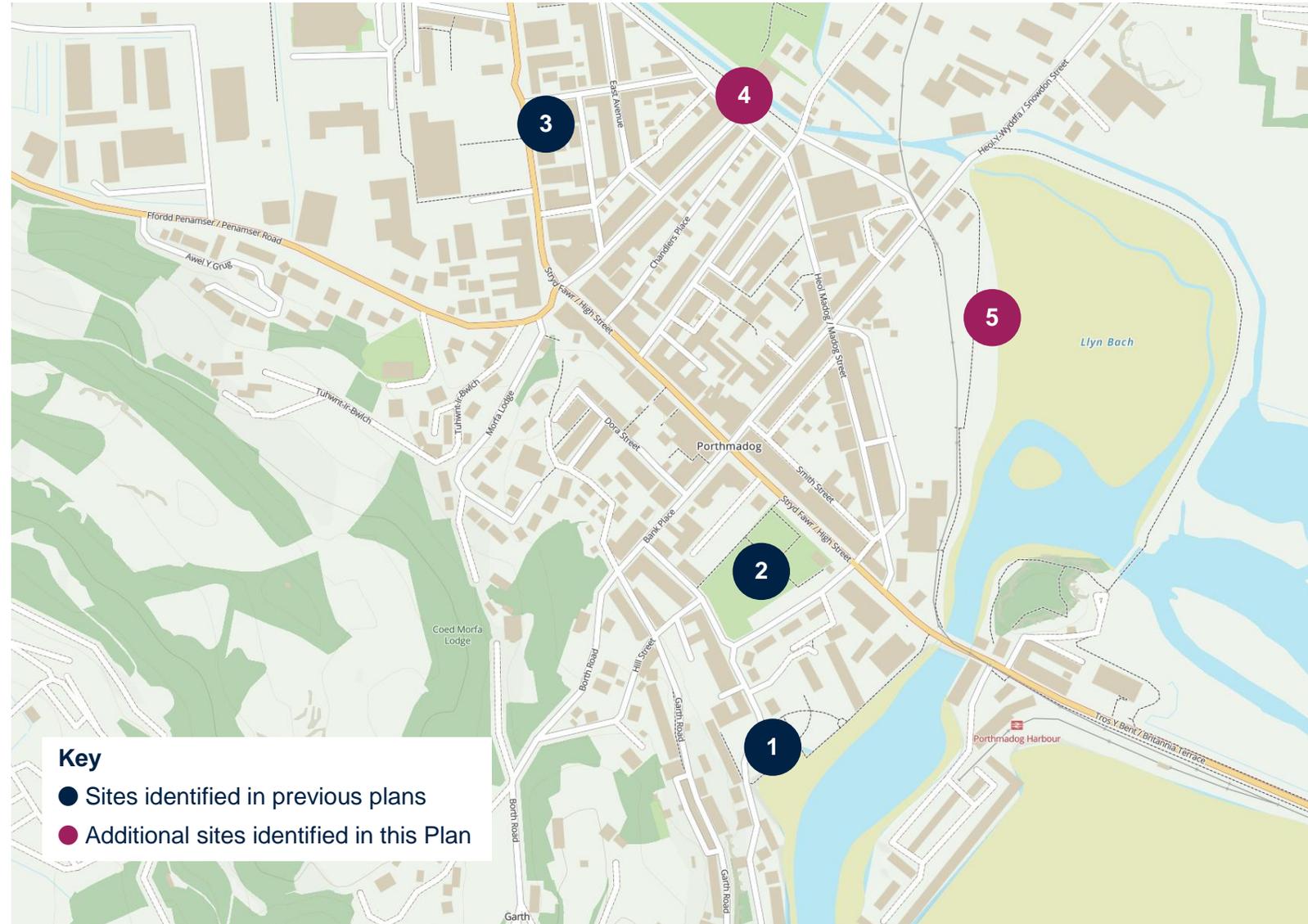
Key findings from policy review

There is a clear **ambition for change** across the region, with plans at all levels identifying a need and ambition for change. Local plans for Porthmadog show significant ambition, highlighting a range of physical regeneration opportunities and outlining a case for change driven by housing, employment and heritage.
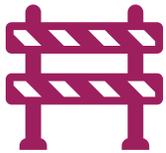
Low productivity, digital infrastructure and the commercial property and land markets are commonly identified as the key **barriers to economic development** in North Wales. These challenges are not evenly distributed across North Wales, with more rural locations in Gwynedd and Anglesey often facing greater challenges.

The designation of the **Harbour and Cob Mawr** as a World Heritage Site is a clear opportunity for action and investment. Local plans show a desire for improving the public realm of the town centre and better promoting local heritage, and the WHS designation provides a framework and catalyst.

Plans and strategies related to the visitor economy place a strong focus on **sustainable tourism**, with a clear need to manage the social, economic and environmental externalities of tourism to ensure that communities fully benefit.

Collaborative and partnership working are consistently identified as key to driving economic regeneration and wider change in the region. Partnerships have been formed to manage the WHS and deliver on the Strategic Plan for the visitor economy and have been successful driving regeneration in other towns in Gwynedd.

Across the two local plans for Porthmadog (2007 Area Regeneration Plan and 2014 Action Plan) there is significant consistency in the challenges identified and the actions and projects proposed to regenerate the town. The nature of local opportunities, a clear focus on a small number of key sites (e.g. Porthmadog Harbour and Old Coliseum) and the range of projects not delivered indicate that **local governance** arrangements are critical to driving future change.

2

Economic, Socio-Economic & Market Baseline

Economic Baseline

Economic Baseline

This section provides analysis of current and historic economic trends, compared to regional and national statistics. This includes analysis on:

- Population and population growth

- Employment

- Skills and qualification

- Occupations

- Business counts by industry and size

- Jobs by sector, location quotient and GVA

Where available, data has been analysed at a Porthmadog Built Up Area (BUA) level. However, the most recent data published at this level was the 2011 Census. Whilst this avoids the skew caused by the Covid-19 pandemic in the 2021 Census, we have backed up the data with a more recent Gwynedd comparator. Where Porthmadog BUA level data is unavailable, Gwynedd has been used compared to Welsh and UK averages.

Economic Baseline

Population and Population Growth

According to the 2021 Census, the Porthmadog built-up-area has a population of 2,574 usual residents.
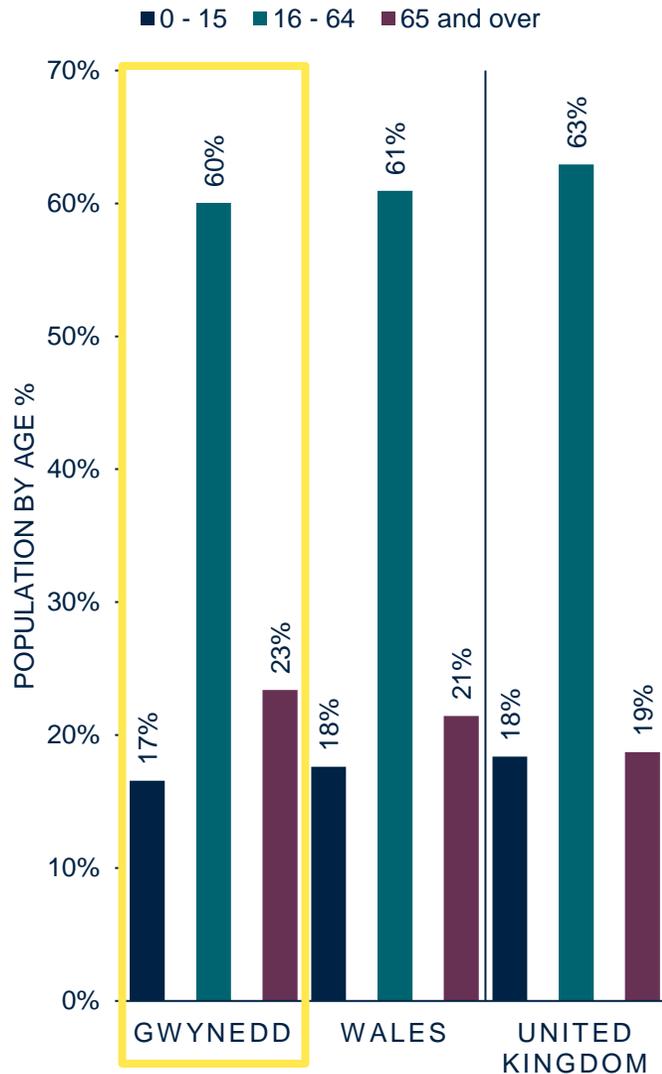
The most recent population estimates in 2021 show that Gwynedd has a total population of 117,100. This accounts for 4% of the Welsh population.

17% of the population in Gwynedd are aged 0-15. 63% are of working age (16-64). This is slightly lower than the national average. However, Gwynedd has a higher-than-average population aged 65 and over (23%).
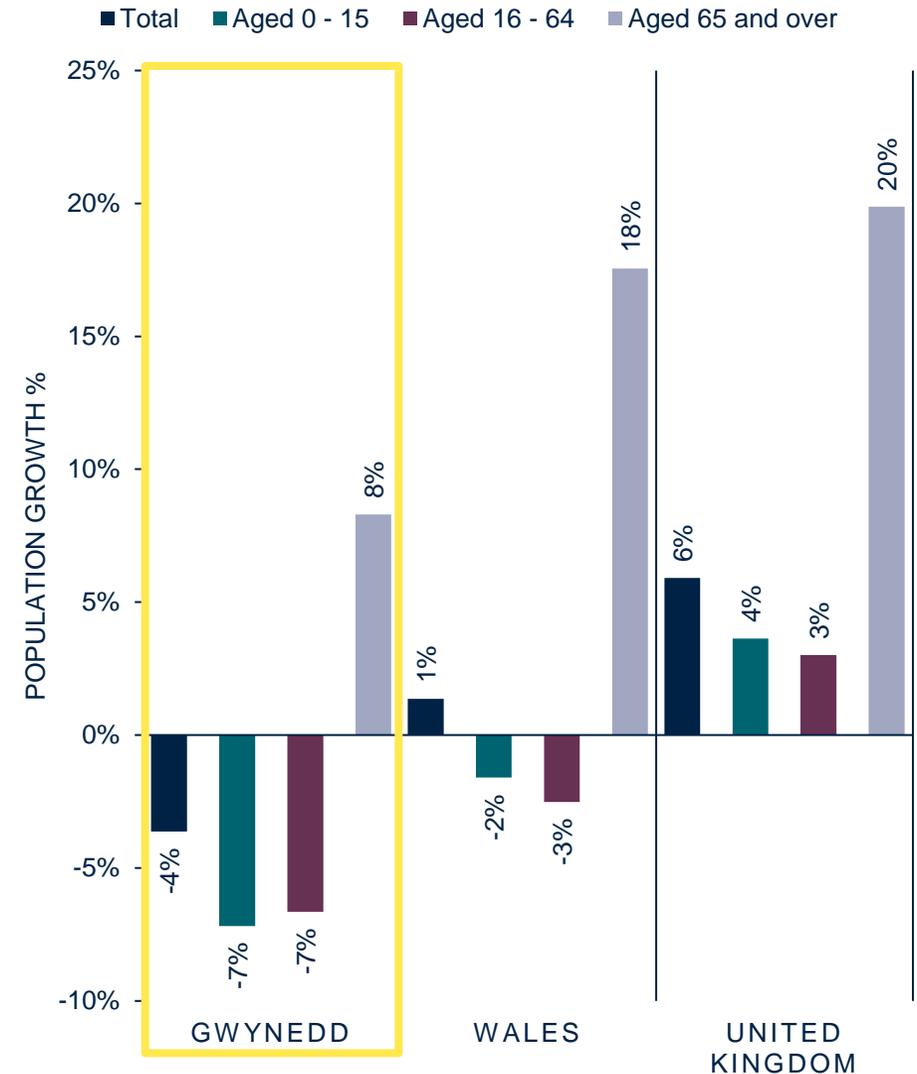
Overall, the population in Gwynedd has shrunk by 4% in the period of 2011-2021. This is in comparison to growth of 1% in Wales and 6% in the UK. There has also been a higher than average 7% reduction in population for those aged 0-15 and 16-64. Whilst the aged 16-64 population grew by 8%, this is significantly lower than the 18% and 20% growth seen in Wales and the UK.

Source: Population Estimates, ONS

Population by age % (2021)

Legend: 0 - 15, 16 - 64, 65 and over

GWYNEDD: 0-15: 17%, 16-64: 60%, 65 and over: 23%
WALES: 0-15: 18%, 16-64: 61%, 65 and over: 21%
UNITED KINGDOM: 0-15: 18%, 16-64: 63%, 65 and over: 19%

Population growth by age % (2011-2021)

Legend: Total, Aged 0 - 15, Aged 16 - 64, Aged 65 and over

GWYNEDD: Total: -4%, Aged 0-15: -7%, Aged 16-64: -7%, Aged 65 and over: 8%
WALES: Total: 1%, Aged 0-15: -2%, Aged 16-64: -3%, Aged 65 and over: 18%
UNITED KINGDOM: Total: 6%, Aged 0-15: 4%, Aged 16-64: 3%, Aged 65 and over: 20%
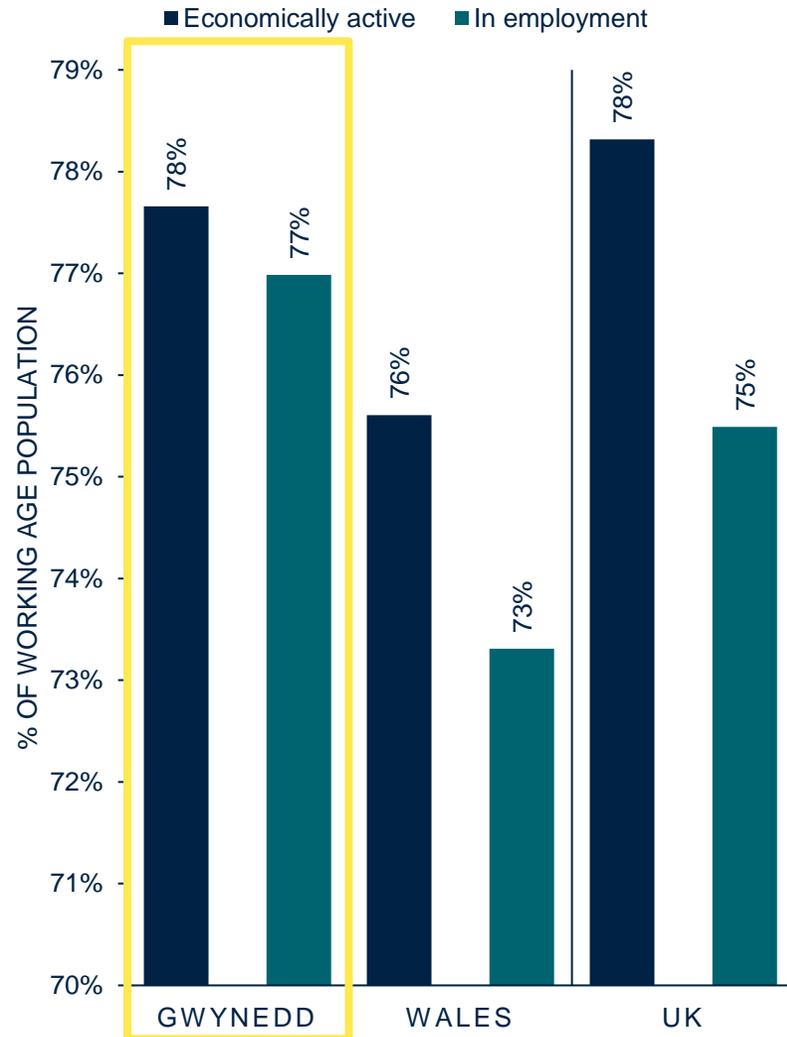
Economic Baseline

Employment

In 2022, there were 57,700 economically active working age residents in Gwynedd. This represents 78% of the working age population. This slightly higher than in Wales but in line with the UK average.

There were 57,000 people in employment in Gwynedd, accounting for 77% of the population. This is a much stronger employment rate than in Wales (73%) and slightly higher than the UK (75%).

In addition, with only 500 residents being unemployed, Gwynedd has a very low unemployment rate of 1%. In Wales and the UK the unemployment rate is 2% and 3%, respectively.

Source: Annual Population Survey, ONS

Working age population in employment and economically active % (2022)

■ Economically active   ■ In employment

% OF WORKING AGE POPULATION

GWYNEDD: 78%, 77%
WALES: 76%, 73%
UK: 78%, 75%

Working age population unemployed (2022)

% OF WORKING AGE POPULATION
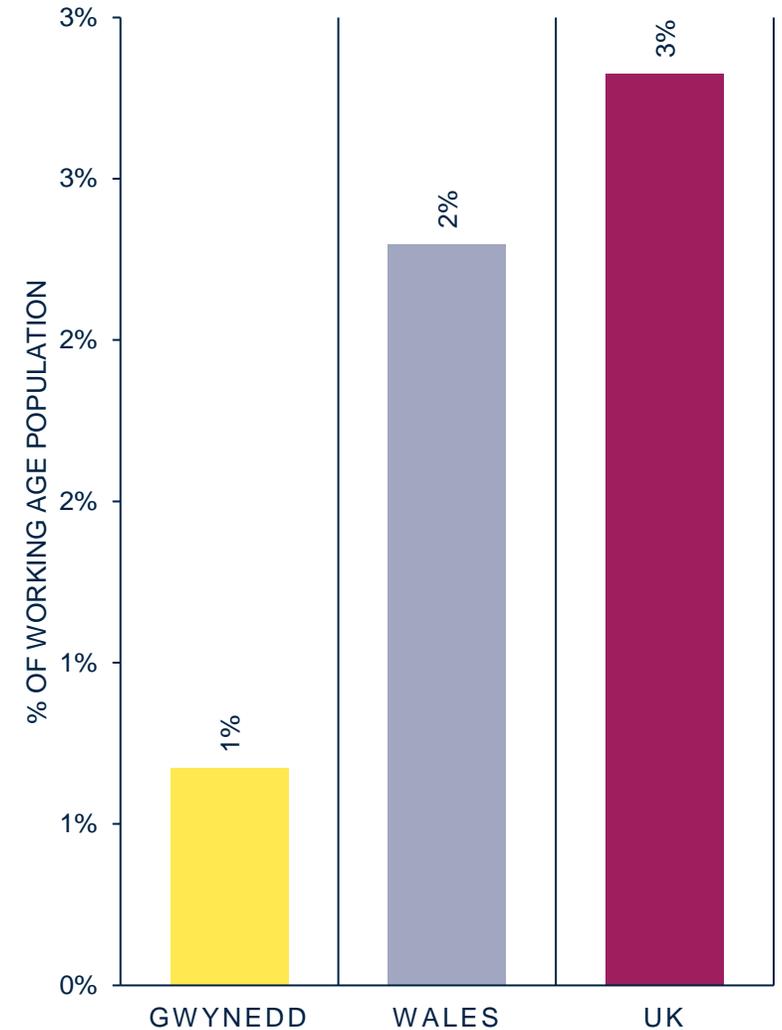
GWYNEDD: 1%
WALES: 2%
UK: 3%

Economic Baseline

Change in Employment

Employment in Gwynedd increased by 10% from 73,600 to 74,300 in the period of 2013-2022. This is slightly above the UK average of 9%, and an even larger increase than in Wales (6%).

In 2013, the employment rate was 71%. This dipped down to 69% in 2015, and has since increased, despite a large dip to 70% during the Covid-19 pandemic. Although Gwynedd's employment rate was hit harder during the pandemic than the average in Wales and the UK, the bounce back in the local authority has been strong.

Source: Annual Population Survey, ONS

Employment rate % (2013-2022)
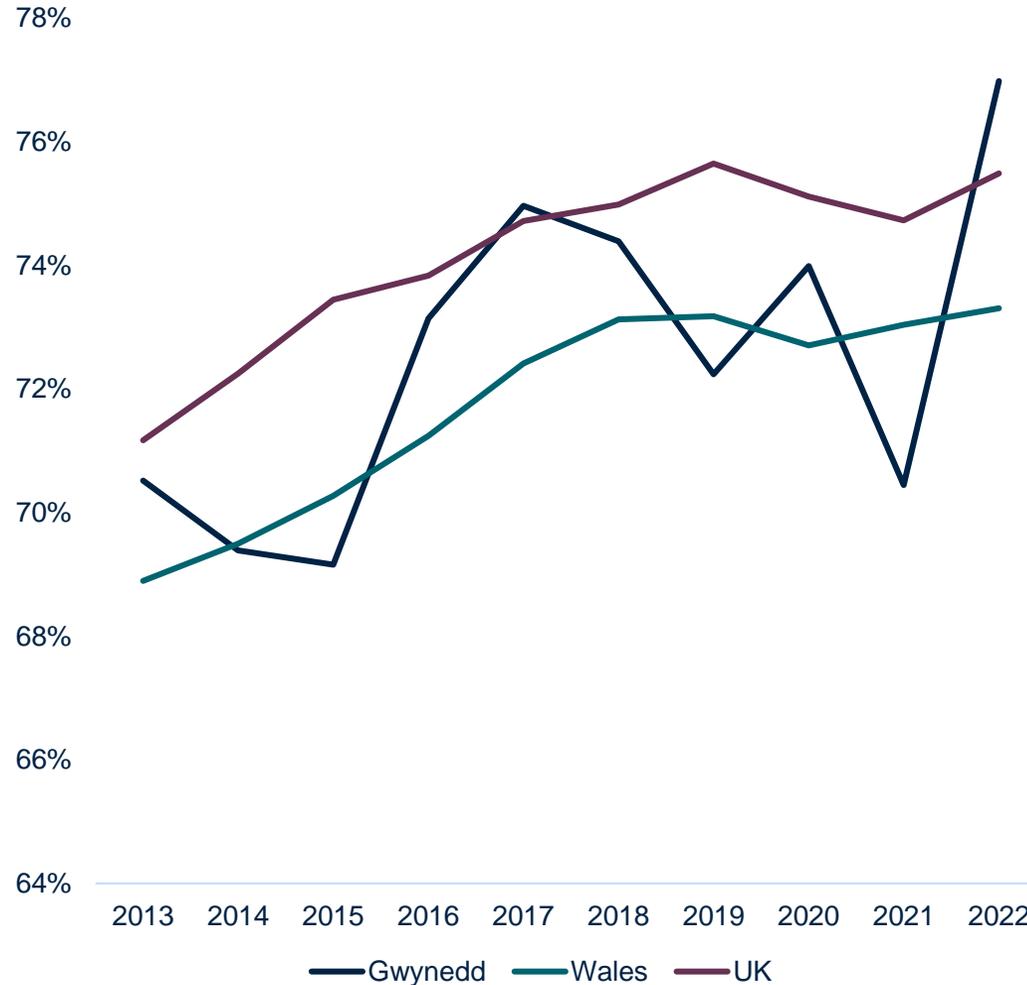
Change in employment % (2013-2022)

Economic Baseline
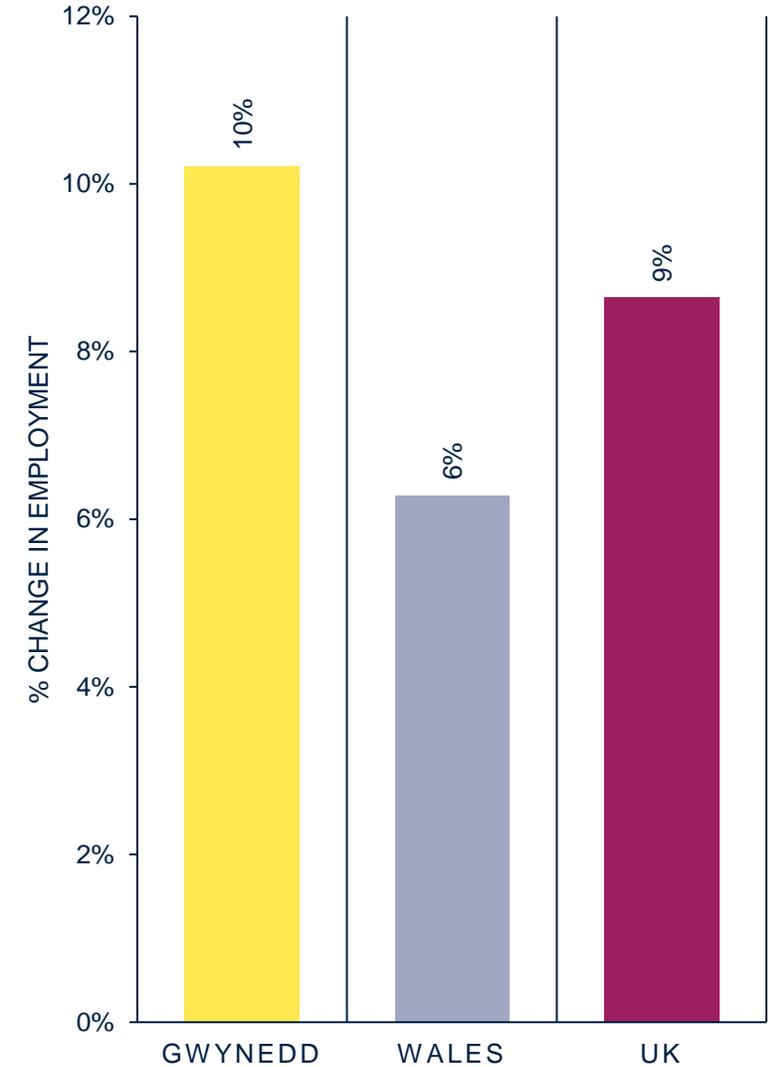
Employment in Porthmadog BUA

In the 2011 Census, there were 2,056 residents in the Porthmadog BUA aged 16-74. 69% of these were economically active.

There were a total of 1,303 residents in employment, representing 63% of the working age population. This is significantly lower than the current employment rate in Gwynedd (which only includes ages 16-64). 20% of employees were self-employed.

There were 73 residents in the Porthmadog BUA that were unemployed in 2011, representing 4% of residents aged 16-74.

Source: Census, 2011

Porthmadog BUA economic activity, employment and unemployment (2011)

% OF POPULATION AGED 16-74

- ECONOMICALLY ACTIVE: 69%
- EMPLOYEES (FULL & PART TIME): 63%
- UNEMPLOYED: 4%

Economic Baseline
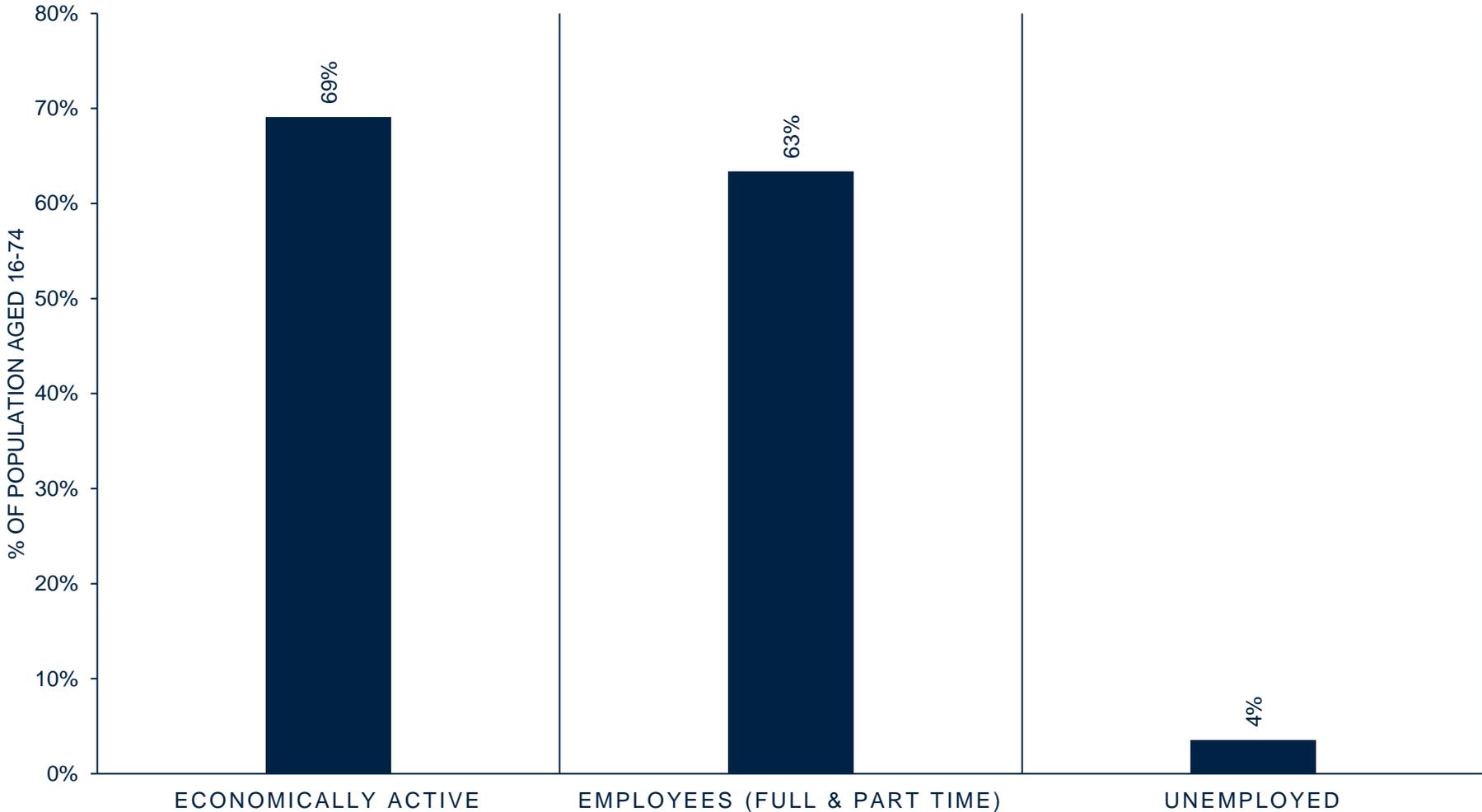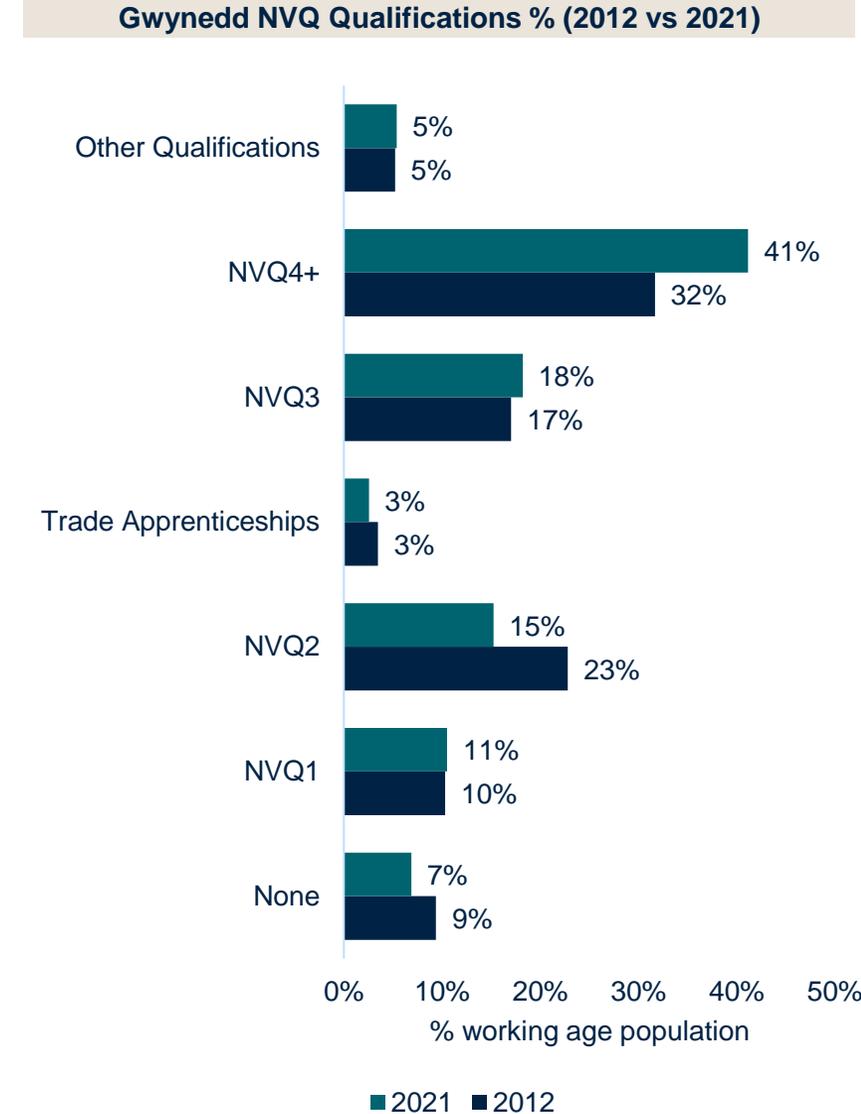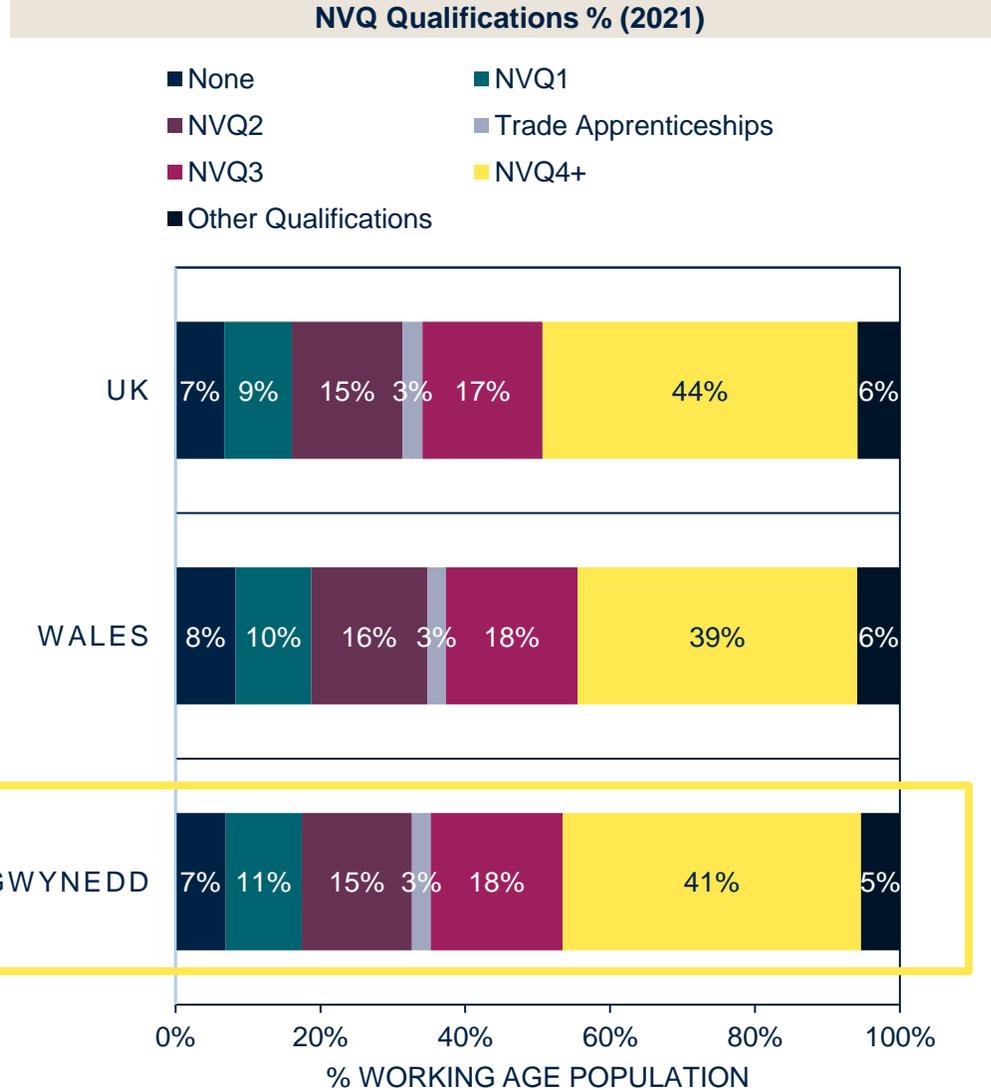
Skills and Qualifications

7% of the working age population in Gwynedd have no qualifications. This has decreased from 9% in 2012 and is in line with the Welsh and UK averages.

41% of the working age population in Gwynedd are qualified to NVQ4+. Whilst this is lower than the average in the UK (44%), it is higher than across Wales (39%).

Gwynedd has seen a large rise in the proportion of its population that are highly skilled. This has increased from 32% to 41% in the last 10 years.

Source: Annual Population Survey, ONS

NVQ Qualifications % (2021)

Legend:
- None
- NVQ1
- NVQ2
- Trade Apprenticeships
- NVQ3
- NVQ4+
- Other Qualifications

UK: None 7%, NVQ1 9%, NVQ2 15%, Trade Apprenticeships 3%, NVQ3 17%, NVQ4+ 44%, Other Qualifications 6%

WALES: None 8%, NVQ1 10%, NVQ2 16%, Trade Apprenticeships 3%, NVQ3 18%, NVQ4+ 39%, Other Qualifications 6%

GWYNEDD: None 7%, NVQ1 11%, NVQ2 15%, Trade Apprenticeships 3%, NVQ3 18%, NVQ4+ 41%, Other Qualifications 5%

% WORKING AGE POPULATION

Gwynedd NVQ Qualifications % (2012 vs 2021)

Category	2021	2012
Other Qualifications	5%	5%
NVQ4+	41%	32%
NVQ3	18%	17%
Trade Apprenticeships	3%	3%
NVQ2	15%	23%
NVQ1	11%	10%
None	7%	9%

% working age population

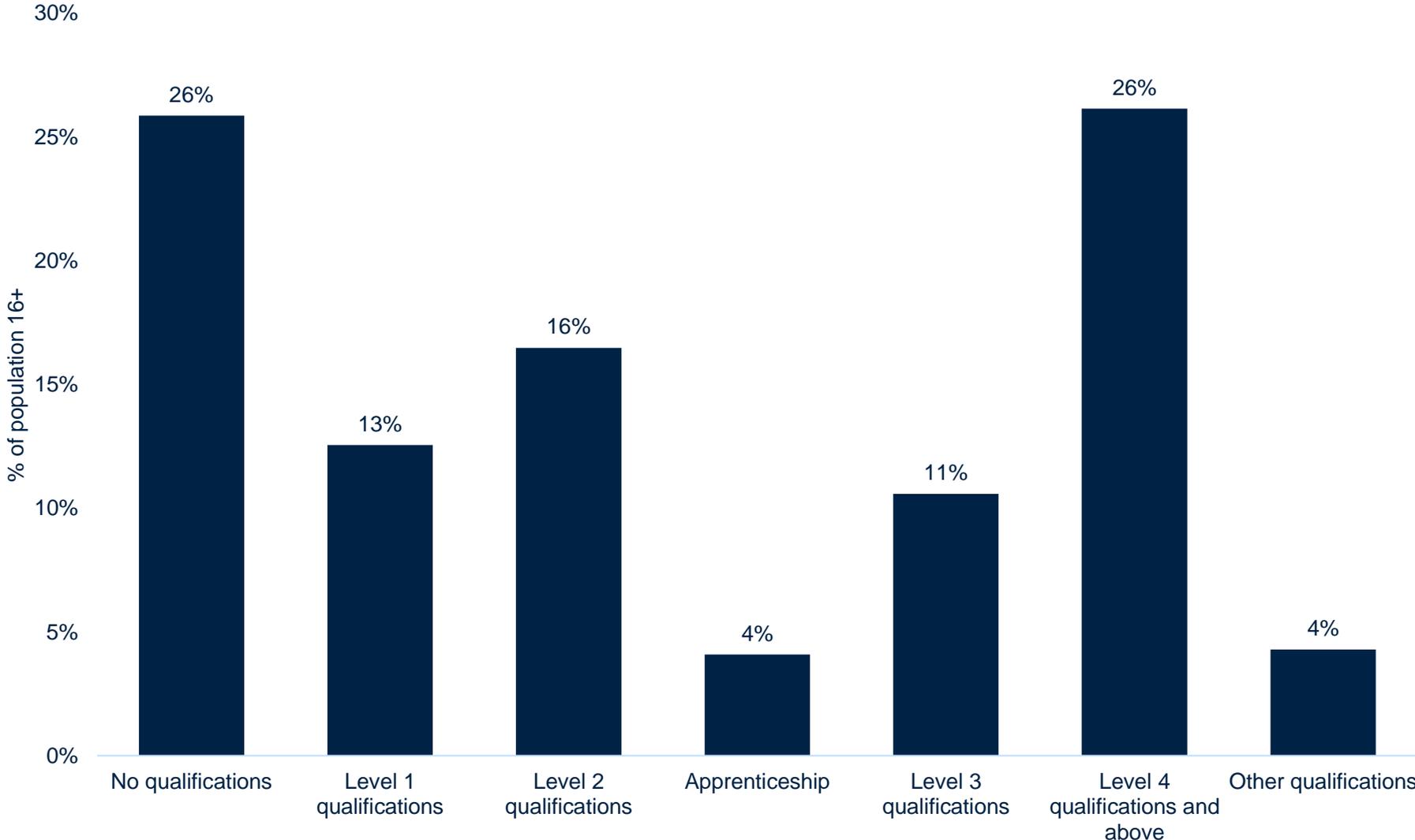■ 2021 ■ 2012

Economic Baseline

Qualifications in Porthmadog BUA

In the 2011 Census, 26% of the population aged over 16 that were residents in the Porthmadog BUA had no qualifications (645 residents).

In addition, only 26% of the population aged over 16 had qualifications at level 4 and above (652 residents). This is significantly lower than national averages.

Furthermore, also according to the 2011 Census, only 14% of residents had a degree or higher degree (345 residents).

Source: Census, 2011

Porthmadog BUA highest level of qualifications (2011)

Bar chart showing % of population 16+ by highest level of qualification:
- No qualifications: 26%
- Level 1 qualifications: 13%
- Level 2 qualifications: 16%
- Apprenticeship: 4%
- Level 3 qualifications: 11%
- Level 4 qualifications and above: 26%
- Other qualifications: 4%
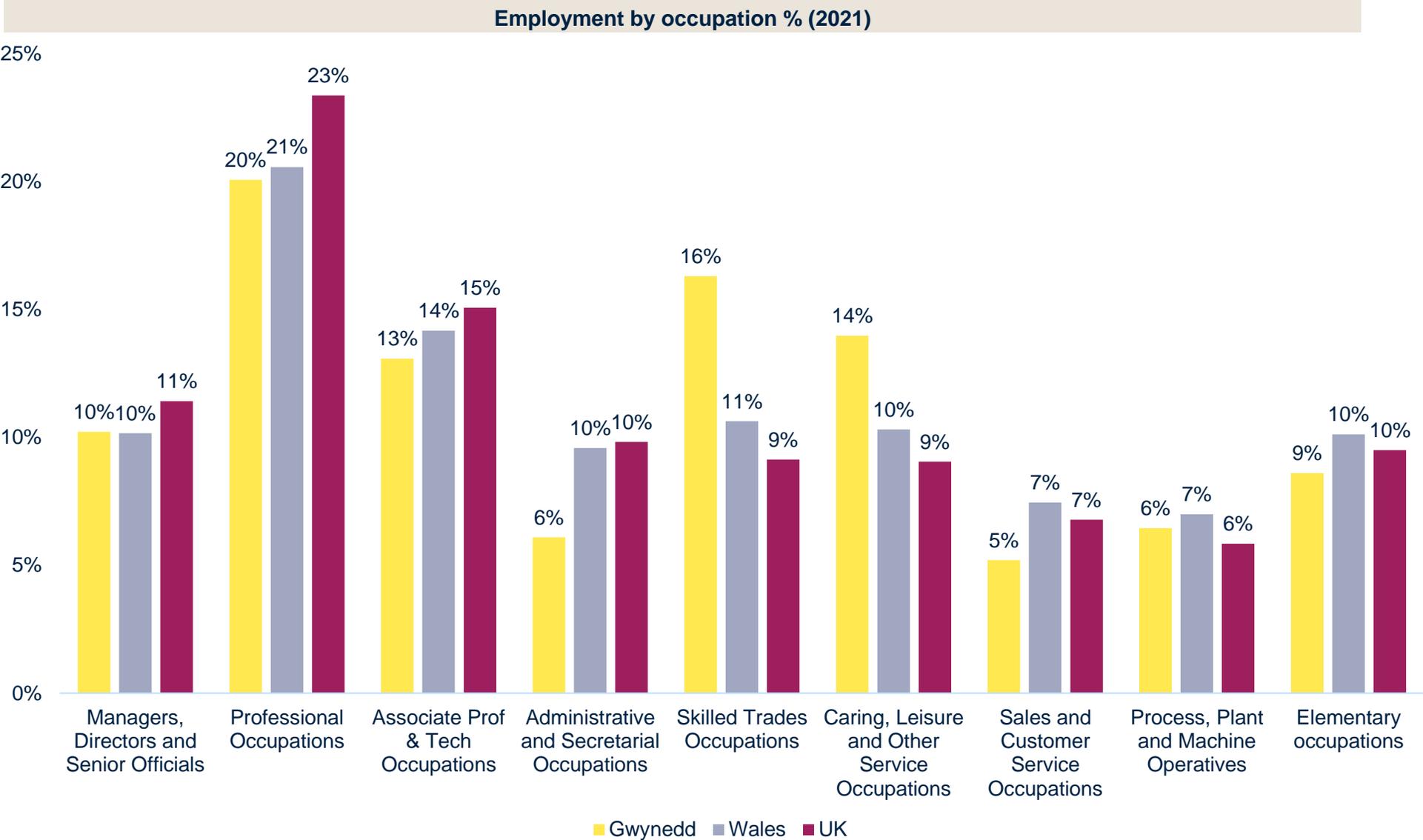
Economic Baseline

Occupations

10% of working age people in employment in Gwynedd in 2021 were employed as Managers, Directors and Senior Officials. This is in line with Wales but slightly below the UK average.

The percentage of working age people in Gwynedd that are employed in Professional occupations (20%) is significantly lower than the proportion employed at this level in the UK (25%).

Overall, in Gwynedd 43% of people are employed at Associate level or above. This is compared to 45% in Wales and 50% in the UK.

Gwynedd has a significantly higher than average proportion of its population employed in Skilled Trades occupations (16% vs 9% in the UK) and Caring, Leisure and Other Service occupations (14% vs 9% in the UK).

Source: Annual Population Survey, ONS

Employment by occupation % (2021)

Legend: Gwynedd — Wales — UK

Occupation	Gwynedd	Wales	UK
Managers, Directors and Senior Officials	10%	10%	11%
Professional Occupations	20%	21%	23%
Associate Prof & Tech Occupations	13%	14%	15%
Administrative and Secretarial Occupations	6%	10%	10%
Skilled Trades Occupations	16%	11%	9%
Caring, Leisure and Other Service Occupations	14%	10%	9%
Sales and Customer Service Occupations	5%	7%	7%
Process, Plant and Machine Operatives	6%	7%	6%
Elementary occupations	9%	10%	10%

Economic Baseline

Porthmadog BUA Occupations

According to the 2011 Census, out of all usual residents aged over 16 in the Porthmadog BUA, 14% were employed as Managers, Directors and Senior Officials (188 residents).

Overall, 35% of the Porthmadog BUA residents were employed at Associate level and above.

The largest occupation for employment was Skilled Trades occupations, accounting for 16% of those in employment (483 residents).

A large proportion of people in the Porthmadog BUA were employed in elementary occupations (14%) during the time of the 2011 Census.

Source: Census, 2011

Porthmadog BUA employment by occupation % (2011)
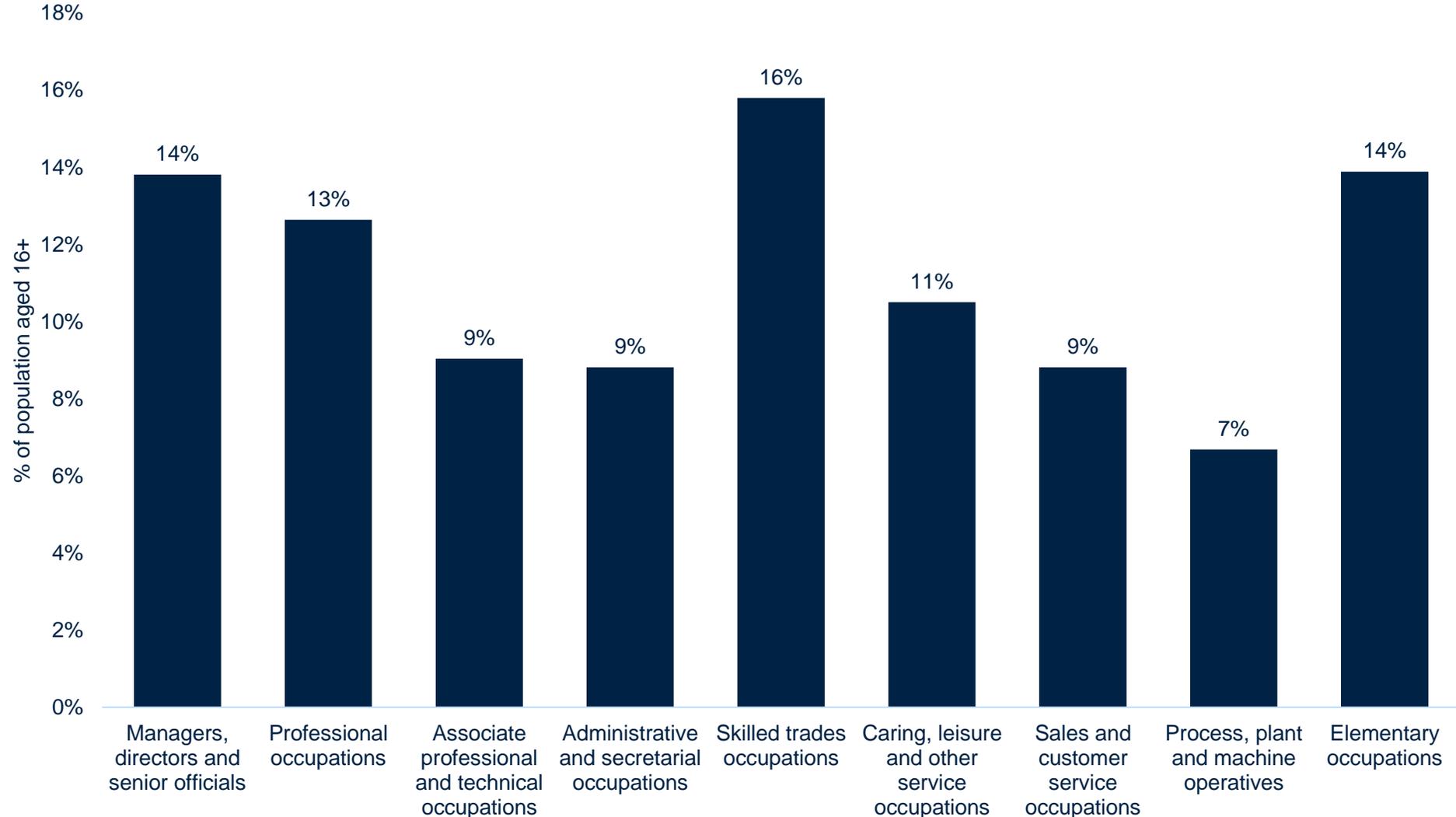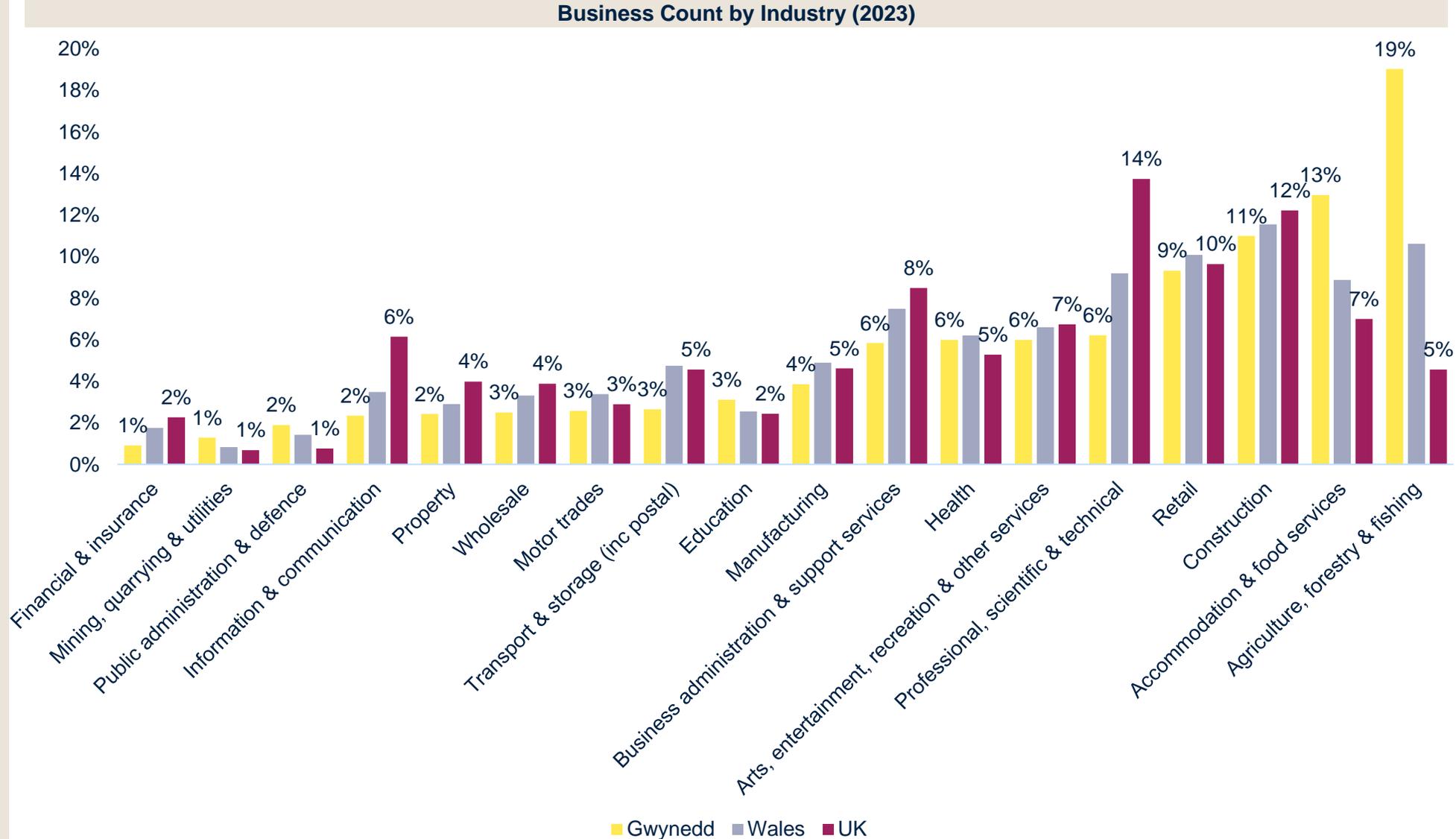
Economic Baseline

Business Count by Industry

When analysing industries in Gwynedd by business count, there are some significant differences to analysis by employees.

The most obvious of these is that Agriculture has by far the largest number of businesses compared to other industries. There are 1,255 Agriculture businesses in Gwynedd, accounting for 19% of the total. This compares to the industry only being the 9th largest for employee numbers.

2nd largest is Accommodation & Food (855), Construction (725) and Retail (615).

Whilst being in the top 5 sectors for number of businesses, Gwynedd lags behind the UK average of 14% for Professional, Scientific and Technical businesses.

Another sector that Gwynedd significantly lags behind the UK is Information & Communication.

Business Count by Industry (2023)

Legend: Gwynedd, Wales, UK

Economic Baseline

Business Count by Size

There are a total of 6,590 businesses in Gwynedd. 84% of these are micro businesses, 14% are small, and 2% are medium. This is largely in line with the Welsh and UK average. There are only 15 large businesses in Gwynedd, representing just 0.2%.

The number of businesses in Gwynedd has grown from 6,305 in 2012, a growth of 5%. This is compared with 22% growth in the UK and 16% growth in Wales.
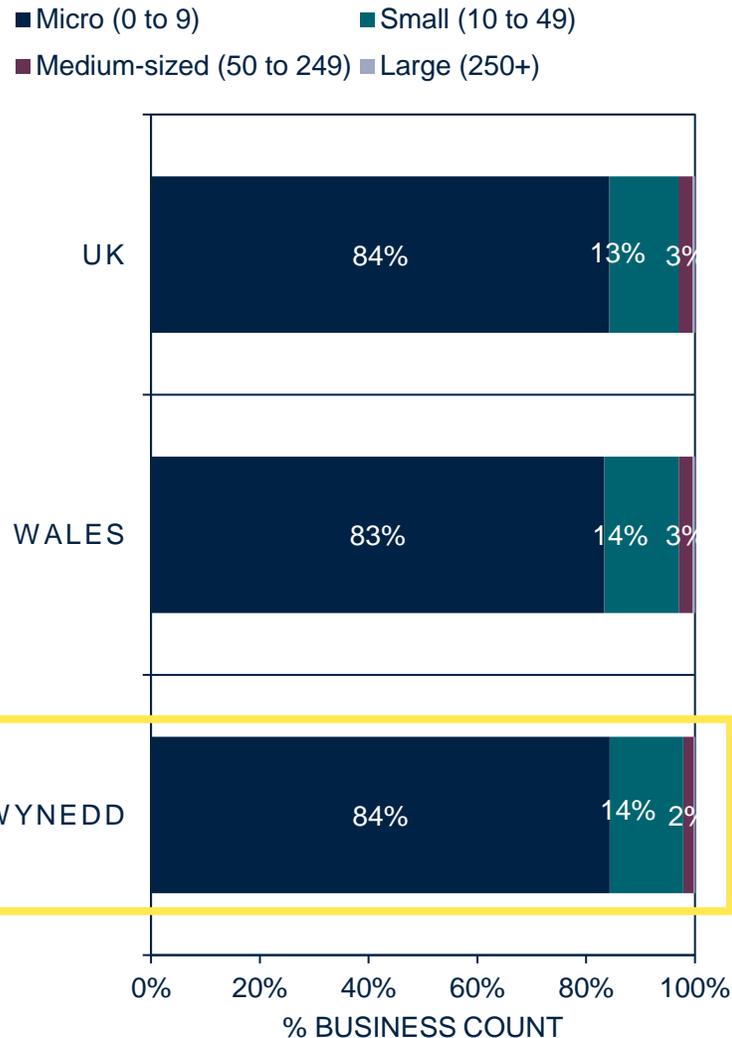
There are Agriculture 1,240 micro businesses in Gwynedd. This account for 22% of all micro businesses and 99% of all Agriculture businesses. There are also a high proportion of Construction and Accommodation & Food businesses.

The largest industry for small businesses in Gwynedd is Accommodation & Food (220 businesses representing 25% of all small businesses). There are also a large proportion of Health and Retail small businesses.
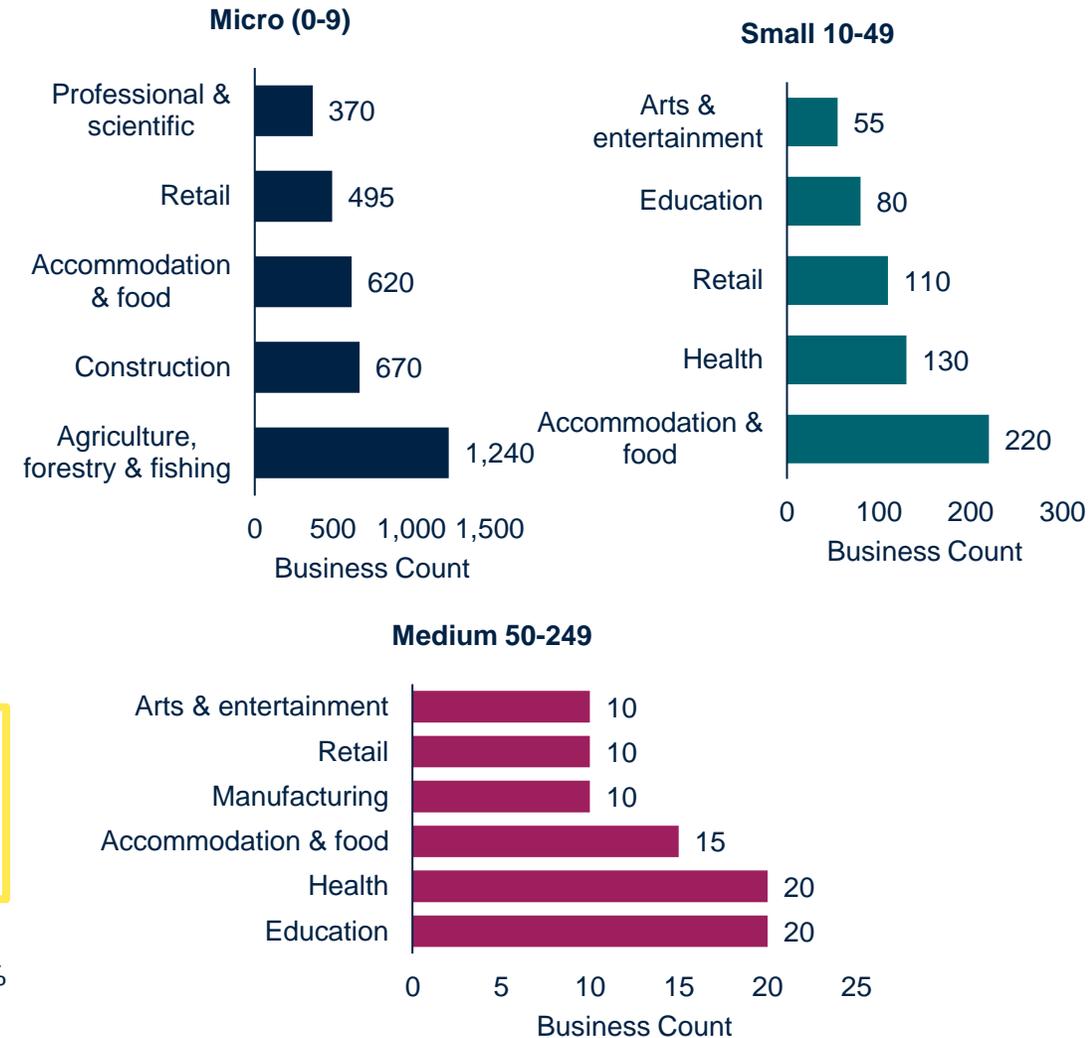
Medium sized businesses are dominated by Education, Health, and Accommodation & Food. The only large business sector is Public Admin and Defence.

Source: UK Business Count, Nomis

Business Count by Size (2023)

■ Micro (0 to 9)   ■ Small (10 to 49)
■ Medium-sized (50 to 249)   ■ Large (250+)

Gwynedd Business Count by Size and Industry (2023)

Micro (0-9)

Industry	Business Count
Professional & scientific	370
Retail	495
Accommodation & food	620
Construction	670
Agriculture, forestry & fishing	1,240

Small 10-49

Industry	Business Count
Arts & entertainment	55
Education	80
Retail	110
Health	130
Accommodation & food	220

Medium 50-249

Industry	Business Count
Arts & entertainment	10
Retail	10
Manufacturing	10
Accommodation & food	15
Health	20
Education	20

Economic Baseline

Jobs by Sector

The largest sector in Gwynedd by number of employees in 2021 was Health. This sector employed 10,000 people, accounting for 19% of all employees. This is also the largest sector in Wales and Great Britain, but the proportion employed in Gwynedd is much higher.

3rd largest is Education, employing 6,000 employees (12%). This is also a large sector regionally and nationally, but again, the proportion employed in Gwynedd is larger.

Accommodation and Food Services and Retail are the 2nd and 4th largest employment sectors in Gwynedd (12% and 10%). Both outweigh the proportions employed on average.

Other large sectors include Public Administration and Defence, and Arts, Entertainment and Recreation.

Whilst still the 7th largest sector, Manufacturing has a lower proportion of employees than in Wales. Gwynedd also lags behind averages for employment in Professional, Scientific and Technical, Business Administration, Transport & Storage, and Financial & Insurance.

A larger proportion than average (4%) of Gwynedd's employees work in Agriculture, Forestry & Fishing.

Source: BRES, 2021

Employees by Sector % (2021)

Legend: ■ Gwynedd ■ Wales ■ Great Britain
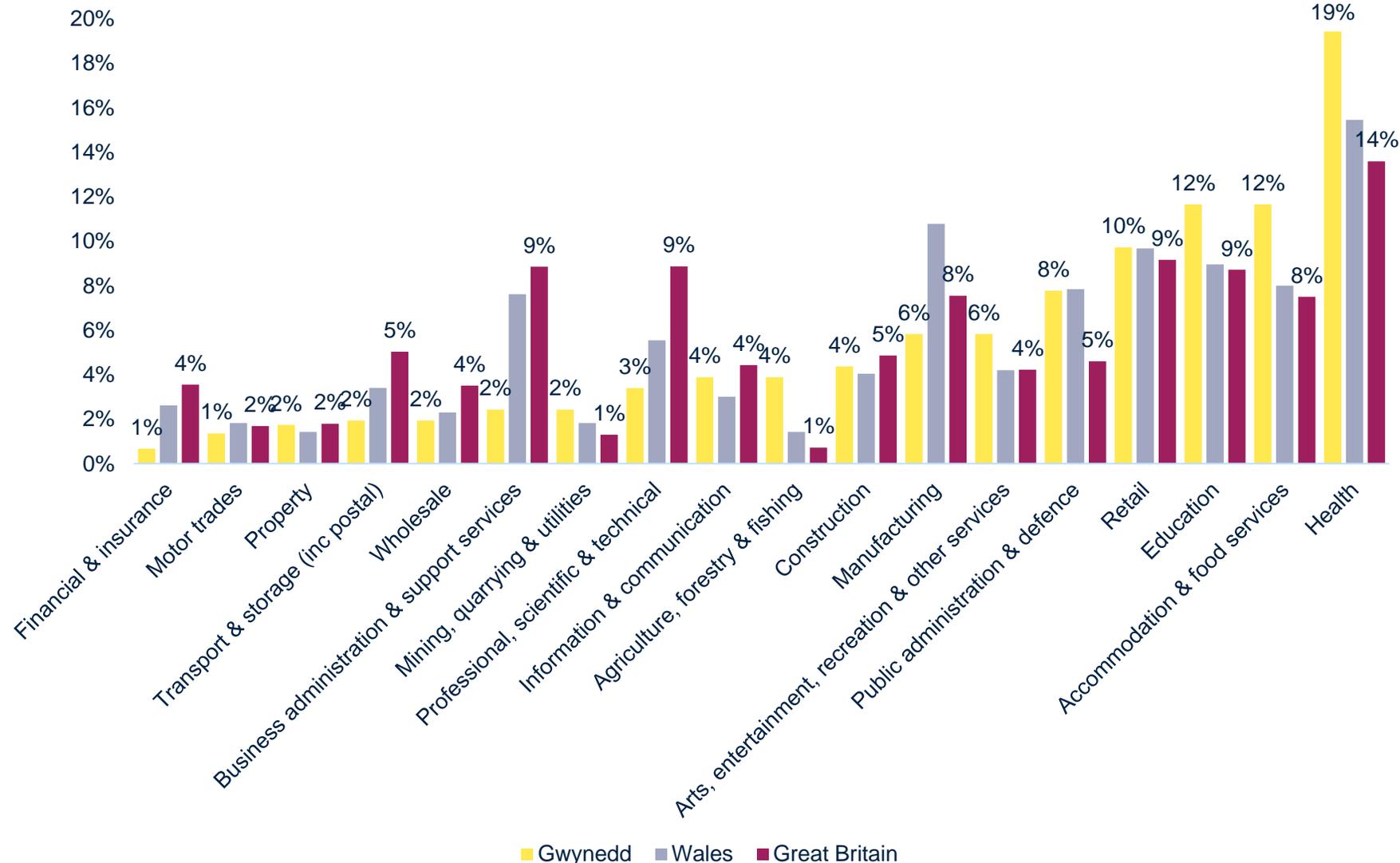
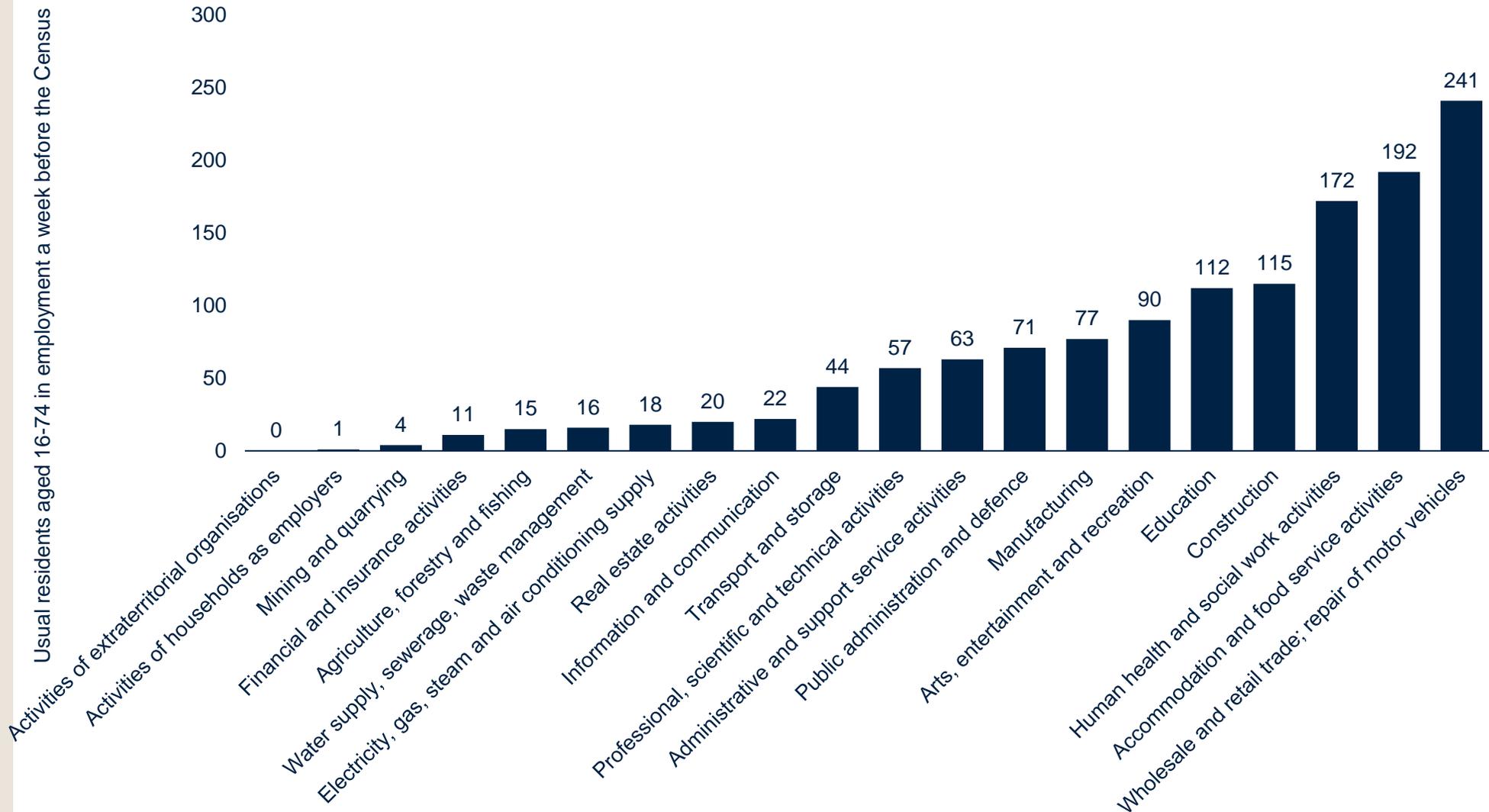# Economic Baseline

Porthmadog BUA Industries

According to the 2011 Census, of those aged 16-74 in the Porthmadog BUA in employment a week before the Census, the largest industry was Wholesale and Retail Trade & Repair of Motor Vehicles. This industry employed 241 people, accounting for 18% of all employees.

Second to this was Accommodation and Food Service Activities, employing 192 people (14%).

The remainder of the top 5 were Health (13%), Construction (9%) and Education (8%). This is largely in line with the present-day industry make-up in Gwynedd, aside from Construction.

Arts, Entertainment and Recreation was also one of the larger employers in Porthmadog BUA (7%).

Source: Census, 2011

Porthmadog BUA employees by industry (2011)

Bar chart — Usual residents aged 16-74 in employment a week before the Census:

Industry	Employees
Activities of extraterritorial organisations	0
Activities of households as employers	1
Mining and quarrying	4
Financial and insurance activities	11
Agriculture, forestry and fishing	15
Water supply, sewerage, waste management	16
Electricity, gas, steam and air conditioning supply	18
Real estate activities	20
Information and communication	22
Transport and storage	44
Professional, scientific and technical activities	57
Administrative and support service activities	63
Public administration and defence	71
Manufacturing	77
Arts, entertainment and recreation	90
Education	112
Construction	115
Human health and social work activities	172
Accommodation and food service activities	192
Wholesale and retail trade; repair of motor vehicles	241

Economic Baseline

Sectors by Employees and LQ

The following graph shows Gwynedd's industries by employment growth and location quotient. The size of each bubble represents the number of employees.

Arts & Entertainment, and Public Admin are in the high growth, high specialisation segment, suggesting these are two of Gwynedd's strongest industries. However, they are only the 5th and 8th largest industries by employee numbers.

Information & Communication, Manufacturing and Professional & Scientific are all growing industries, but not specialised. They are also comparatively small by employment size with plenty of room for further growth.

Agriculture is highly specialised in Gwynedd but has had no growth, as with Health, Gwynedd's largest sector. Accommodation & Food and Education are also large sectors but despite being specialised have been declining in size.

Financial and Insurance has had a big decline in size of 61%.

Source: BRES and Regional GVA by Industry, ONS

Gwynedd Employees, Employment Growth and Location Quotient by Industry
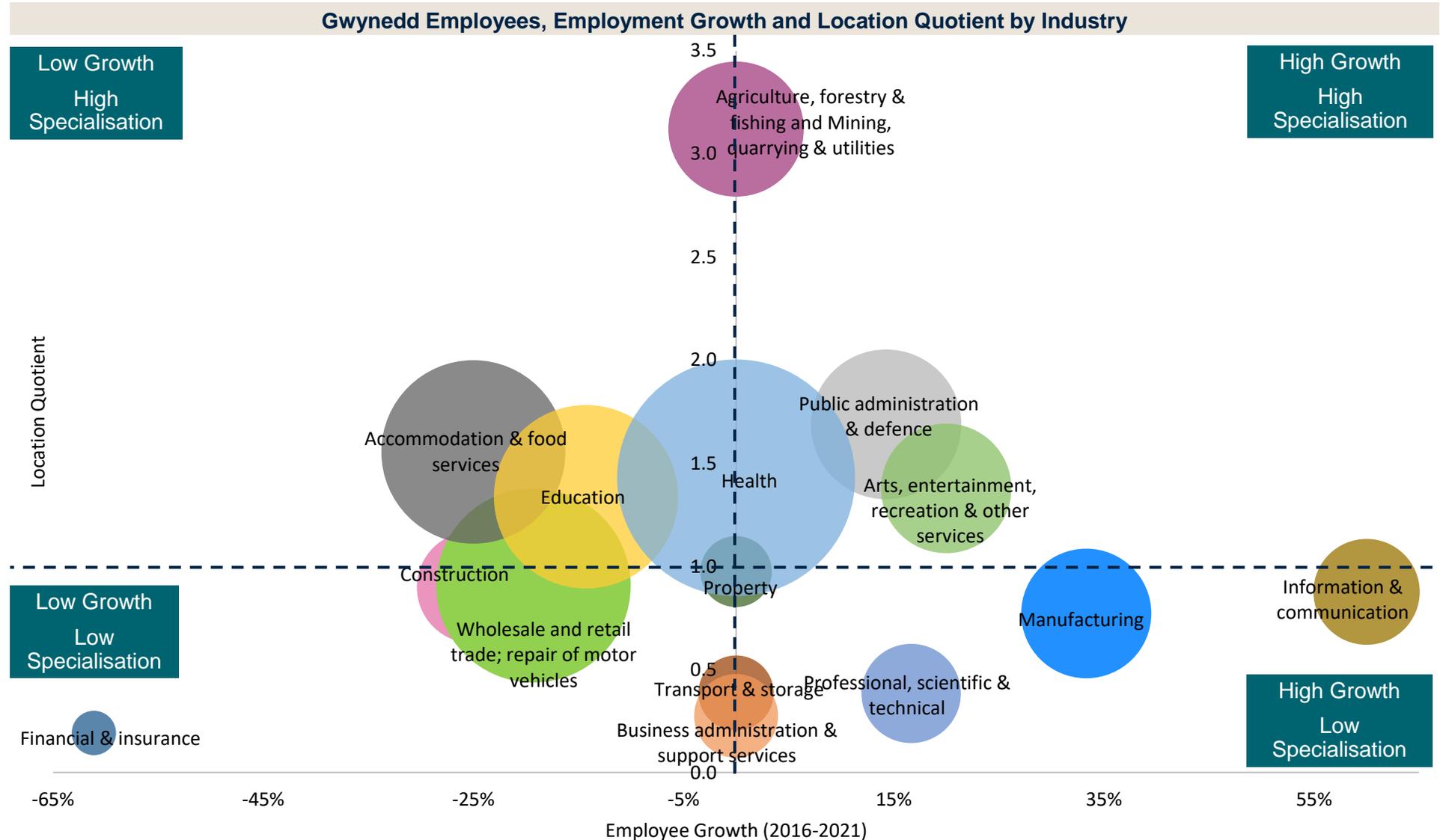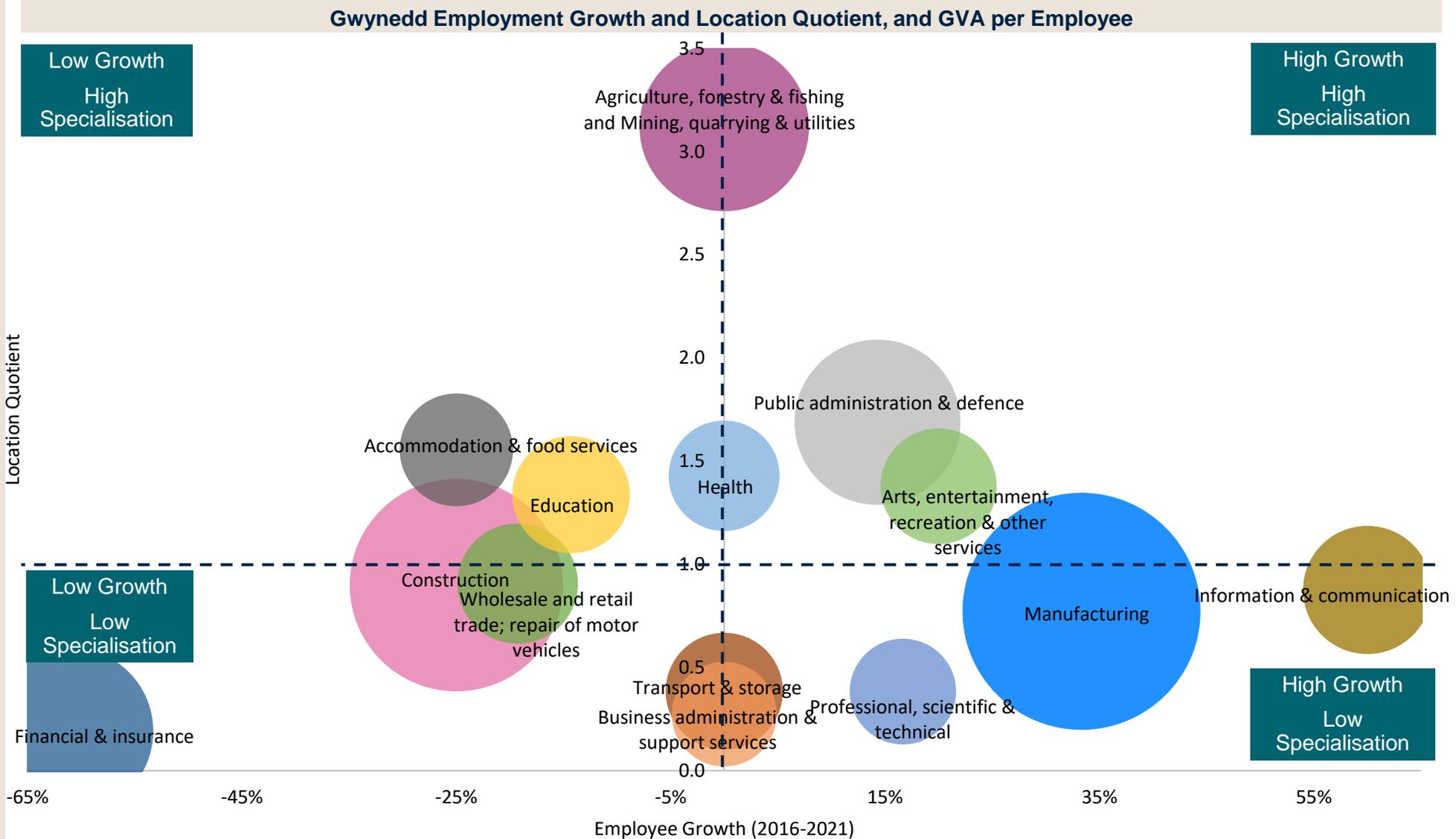
Economic Baseline

Sectors by GVA per Employee and LQ

This graph also shows employment growth and location quotient, but instead the size of the bubble represents GVA per worker. Property has been removed to avoid skewing due to extremely high GVA figures.

Manufacturing has the largest GVA per employee in Gwynedd and is a growing sector. However, more could be done to improve specialisation. Agriculture is also highly productive, whilst also having a high LQ of 3.1.

Despite Health and Education being two of Gwynedd's largest industries, productivity is low. This is also the case for Accommodation & Food and Arts & Entertainment.

Construction and Financial & Insurance have high GVA per employee but are currently small and declining sectors in Gwynedd.

Source: BRES and Regional GVA by Industry, ONS

Gwynedd Employment Growth and Location Quotient, and GVA per Employee

Low Growth
High Specialisation

High Growth
High Specialisation

Low Growth
Low Specialisation

High Growth
Low Specialisation

Location Quotient

Employee Growth (2016-2021)

Agriculture, forestry & fishing and Mining, quarrying & utilities

Public administration & defence

Accommodation & food services

Health

Education

Arts, entertainment, recreation & other services

Construction

Wholesale and retail trade; repair of motor vehicles

Manufacturing

Information & communication

Transport & storage

Business administration & support services

Professional, scientific & technical

Financial & insurance

Economic Baseline

Due to data availability at the Porthmadog BUA level, analysis at this boundary has been taken from the 2011 Census and compared with the overall current picture in Gwynedd. In 2011, Porthmadog BUA had a population of 2,918. Of the working age population, 69% were economically active and 63% were employees, with a 4% unemployment rate.

At this time, high levels of the population had no formal qualifications and low levels with the highest NVQ4+ qualifications. This also translates into the types of occupations held by residents in the area. Only 35% were employed at Associate level and above, and a large number of people were employed in Elementary occupations. However, 14% were Managers and Directors which is comparatively high next to recent figures for the local authority area.

The largest employment sectors in Porthmadog BUA were Wholesale & Retail, and Accommodation & Food which links to the tourist nature of the town. Other large sectors were Health, Construction and Education. Arts & Entertainment was the 6th largest sector with 90 employees, and Manufacturing was 7th. Only 15 residents of Porthmadog were employed in the Agricultural sector.

More recent data for Porthmadog's local authority area, Gwynedd, can provide a more up to date and broader image of the wider area which will be influencing Porthmadog residents. Gwynedd's population accounts for just 4% of the total Welsh population and has been declining in size for categories working age and below. The population over 65 has increased but at a slower rate than average. Economic activity and employment rates are high and unemployment is significantly low. The area has also seen a 10% growth in the number of people employed in the last decade.

41% of people in Gwynedd are educated to NVQ4+. Whilst this is significantly higher than in Porthmadog BUA in 2011 (26%), it is lower than the UK average. However, Gwynedd has improved this percentage up from 32% in 2012, so it could be estimated that Porthmadog has also seen some improvement in this time.

10% of residents in Gwynedd are Managers and Directors, and 43% are employed at Associate level and above. This is below the 50% average in the UK, and instead Gwynedd has a high proportion of people employed in Skilled Trades and Caring & Leisure occupations.

Micro businesses are extremely important in Gwynedd. 19% of businesses are Agriculture businesses, with almost all being micro. There are also many Accommodation and Food businesses in the area.

There are many micro Construction businesses, and a large amount of micro and small Retail businesses.

Gwynedd's largest employment sector is the Health industry, employing 19% of the population. The local authority does have some slight specialisation in this industry, with a LQ of 1.4, but this is also the largest industry in Wales and the UK, and employment has not grown in recent years.

Agriculture, Forestry and Fishing is highly specialised in Gwynedd, with a LQ of 3.1. Despite accounting for only 4% of employment, the huge number of businesses and high GVA per employee make this an important industry in Gwynedd.

Tourism is a key driver of the economy in Porthmadog. Gwynedd has a large proportion of employees working in the Accommodation and Food sector and in Retail and the area is specialised in this compared to the UK. However, there has been a reduction in the number of employees in recent years.

Gwynedd has a growing and specialised Arts, Entertainment and Recreation sector. It currently employs 6% of the population and has grown by 20% since 2016. This could be a potential area of opportunity for Porthmadog to harness. This was already a large employer in Porthmadog in the 2011 Census.

Other sectors to see growth in the last 5 years but without specialisation are Information & Communication, Manufacturing, and Professional & Scientific. Information & Communication has had the highest growth in employment of all sectors at 60%. Manufacturing has got the highest GVA per employee in Gwynedd (aside from Property) but the proportion employed in the local authority is significantly below the Welsh average. There is opportunity to improve specialisation in these growth areas.

The sector to experience the largest drop in employment is the Financial & Insurance industry with an employment loss of 61%, but this industry has very high GVA per employee.

Furthermore, with a high number of construction businesses and high GVA per worker, there could be opportunity for growth in the Construction industry.

Socio-Economic Baseline

Socio-Economic Baseline

This section provides analysis on the demographic, social and deprivation baseline of Porthmadog. This includes:

- Household size and composition
- Health & wellbeing
- Crime
- Earnings
- Deprivation

Where available, data has been analysed at a Porthmadog Built Up Area (BUA) level. However, the most recent data published at this level was the 2011 Census. Whilst this avoids the skew caused by the Covid-19 pandemic in the 2021 Census, we have backed up the data with a more recent Gwynedd comparator. Where Porthmadog BUA level data is unavailable, Gwynedd has been used compared to Welsh and UK averages.

Socio-Economic Baseline

Household Size & Composition

35% of households in Gwynedd are 1-person households, and 35% are 2-person households. 14% are 3-person households, 11% are 4-person and 6% are 5-person.

There is an above average proportion of 1-person households (30%), and a below average proportion of 3-person (16%) and 4-person (13%) households compared to national figures.

17% of households are 1 person-households, aged 65+. This is above the England and Wales average of 13%.

16% of households contain a couple family with no children and 6% a couple family with all children non-dependent. 16% of households contain a couple family with dependent children which is below the England and Wales average of 19%.

4% of households contain a lone parent with all children non-dependent and 6% a lone parent with dependent children. This is slightly below the national average of 7%.

Source: Census, 2021

Gwynedd Household Size (2021)

Local authorities within the same region are highlighted
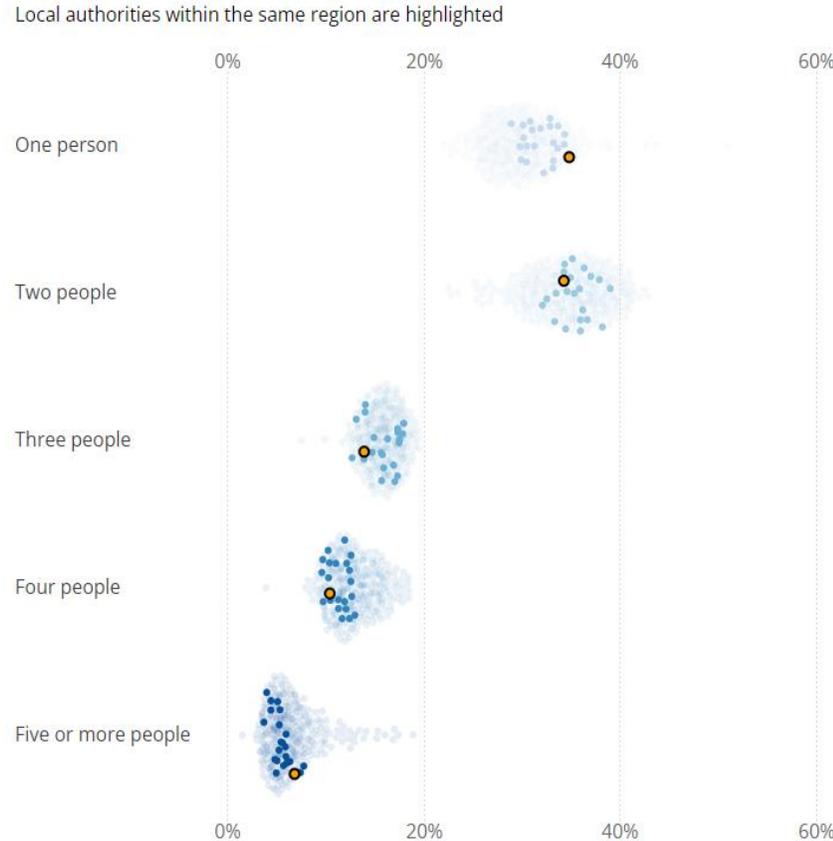
Gwynedd Household Composition (2021)

Source: Office for National Statistics – Census 2021
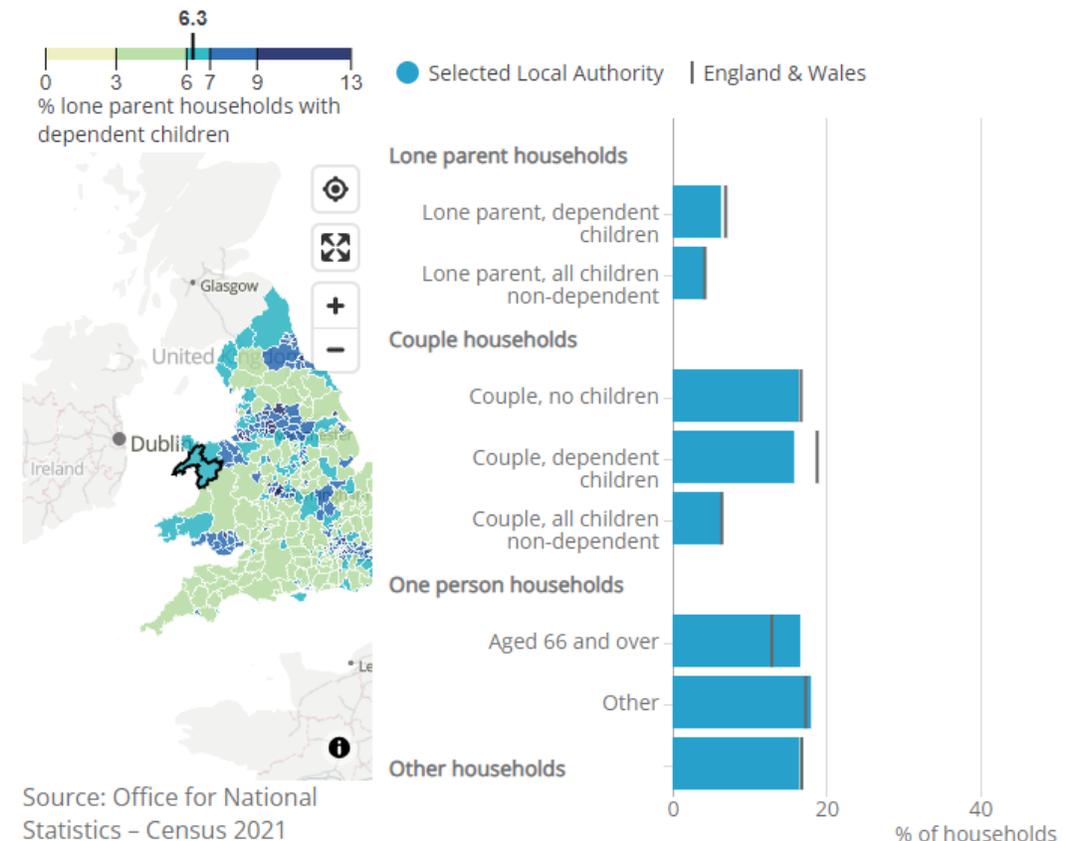
Socio-Economic Baseline

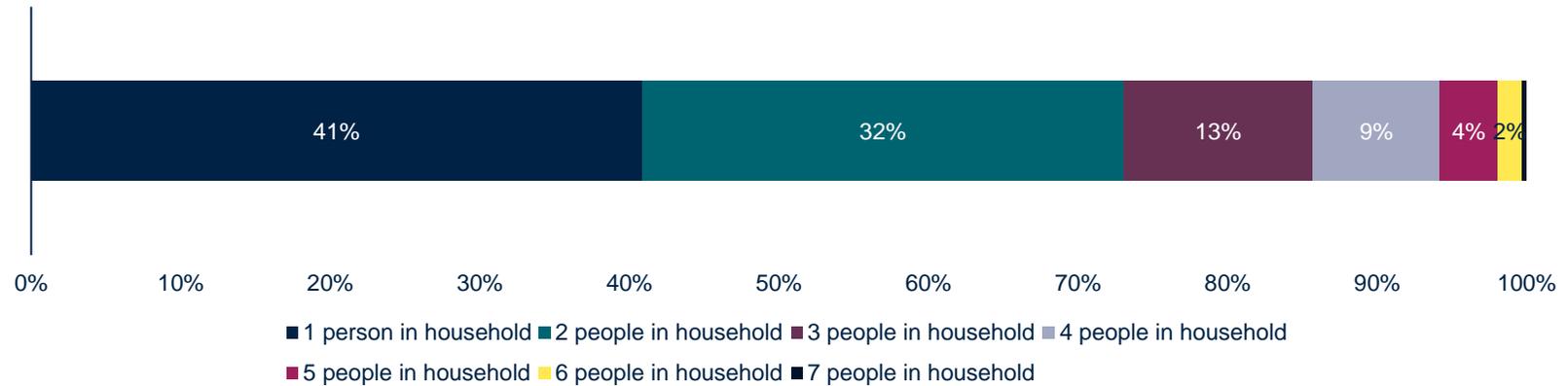## Porthmadog BUA Household Size & Composition

In 2011, 41% of households in the Porthmadog BUA were 1-person households (566). 32% were 2-person households (446) and 13% were 3-person households (175). There were 80 households with 5 people or more (6%), with the largest households being 4 households with 7 people.

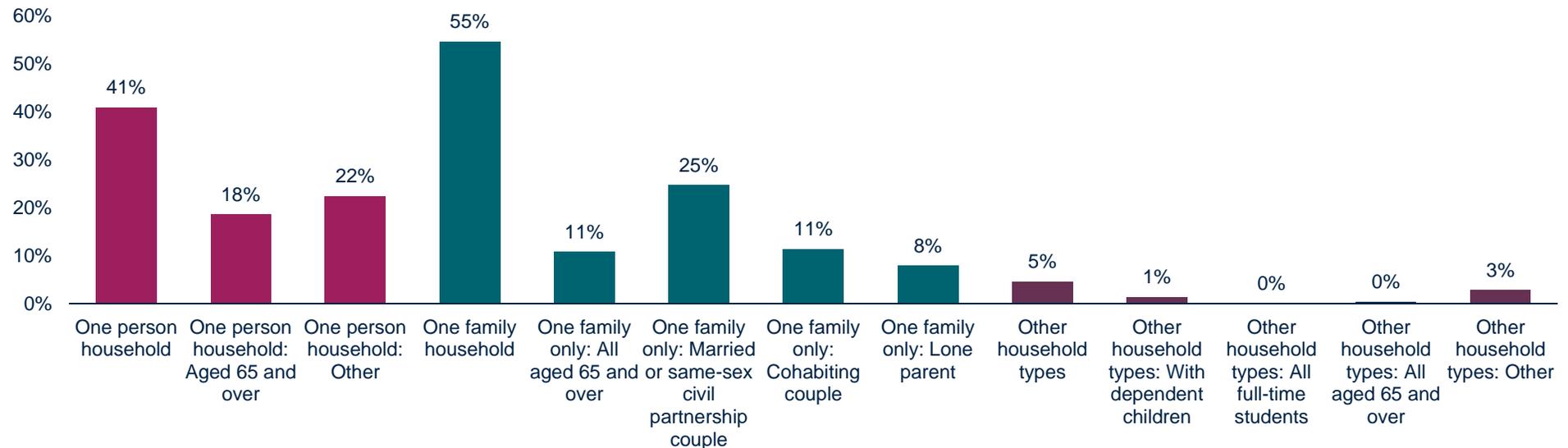18% of 1-person households were home to residents aged 65+ (256). 11% of households consisted of one family that were all aged over 65.

25% of households contained a married couple and 11% co-habiting couples.

8% of households contained one family with a lone parent.

Source: Census, 2021

Porthmadog BUA Household Size (2011)

| 41% | 32% | 13% | 9% | 4% | 2% |

- 1 person in household
- 2 people in household
- 3 people in household
- 4 people in household
- 5 people in household
- 6 people in household
- 7 people in household

Porthmadog BUA Household Composition (2011)

Category	Value
One person household	41%
One person household: Aged 65 and over	18%
One person household: Other	22%
One family household	55%
One family only: All aged 65 and over	11%
One family only: Married or same-sex civil partnership couple	25%
One family only: Cohabiting couple	11%
One family only: Lone parent	8%
Other household types	5%
Other household types: With dependent children	1%
Other household types: All full-time students	0%
Other household types: All aged 65 and over	0%
Other household types: Other	3%

Socio-Economic Baseline

Healthy Life Expectancy at Birth

In general, across the most recent figures in 2018-2020, Gwynedd has a higher healthy life expectancy than the UK average.

At birth, males are expected to have a healthy life expectancy of 65 and females of 68.1. The average in the UK is 62.8 for males and 63.6 for females, and in Wales is 61.5 for males and 62.4 for females.

At age 65, males in Gwynedd have a healthy life expectancy of 12.2 years. This is above the UK average after performing in line with, or below average since 2011-2013.

Females at age 65 have a healthy life expectancy well above the UK average at 13.9 years and this has been consistent in the study period.

All females and males at age 65 outperform the surrounding local authority areas for healthy life expectancy.

Source: Health state expectancies for local areas, ONS

Gwynedd Healthy Life Expectancy (2018-2020)

Males at Birth
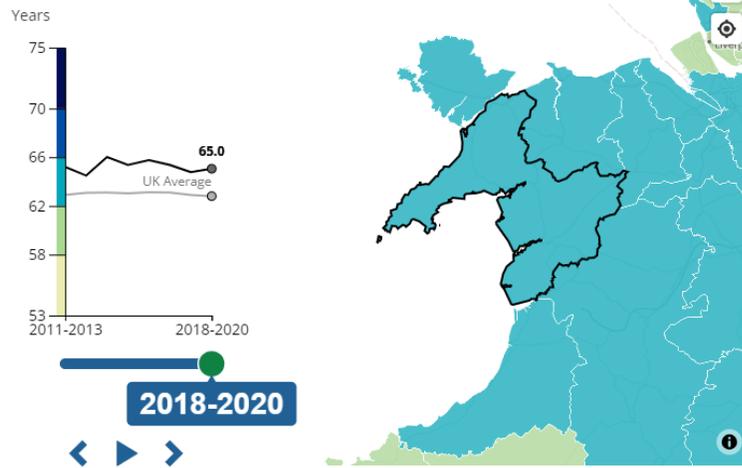
Females at Birth
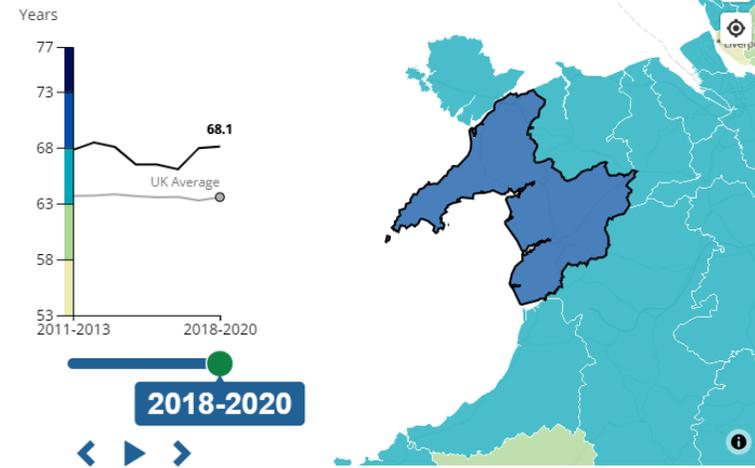
Males at Age 65
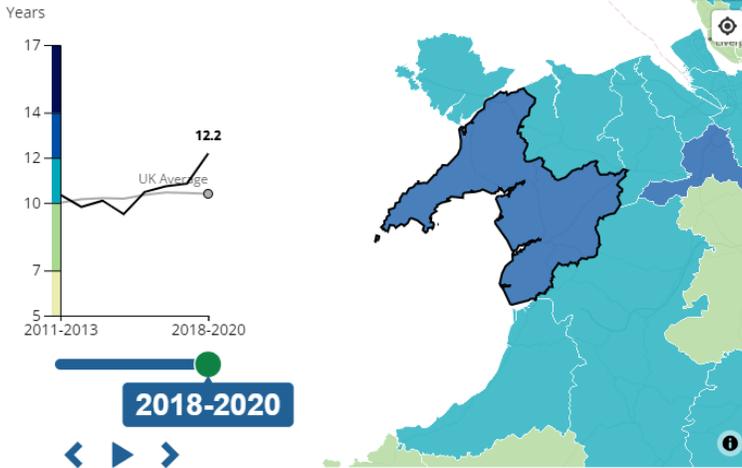
Females at Age 65
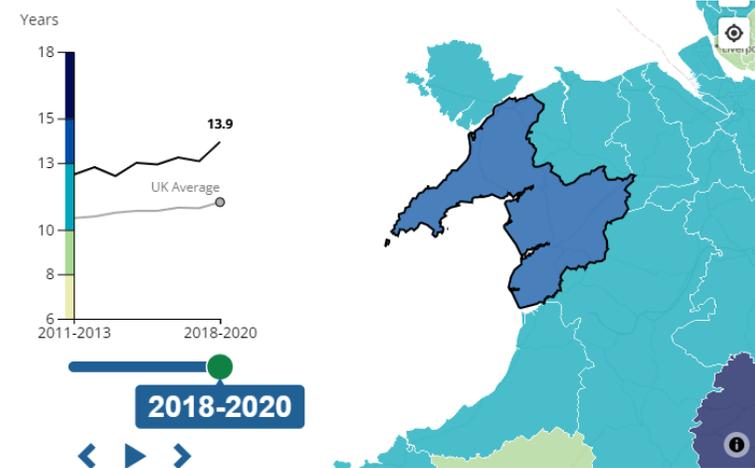
Socio-Economic Baseline

Personal Wellbeing

Life satisfaction in Gwynedd is slightly above average with a score of 7.6 vs 7.5 in the UK. This has dropped in recent years.

Feelings of life being worthwhile earned a score of 7.8 out of 10 in Gwynedd. This is in line with the UK average, but lower than some surrounding areas. This has also dropped in recent years.

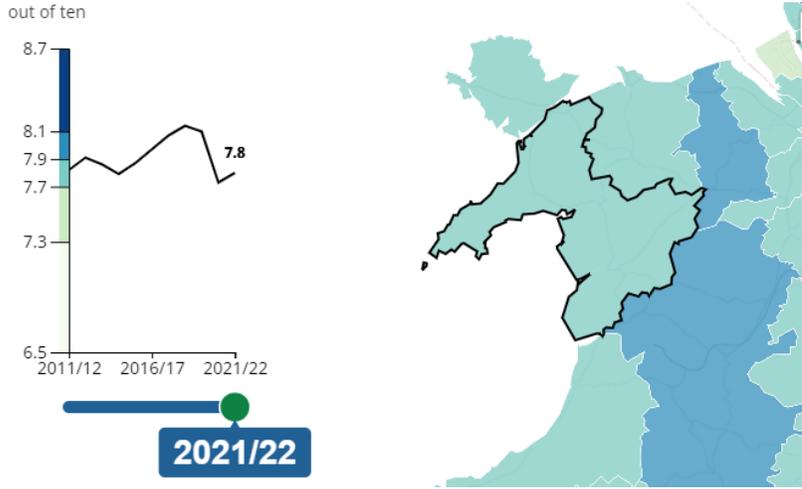Gwynedd scored 7.6 out of 10 for happiness, which is higher than the UK average of 7.5.

Anxiety in Gwynedd was previously very low but has increased sharply in recent years. Anxiety most recently scored 3.1 out of 10 which is in line with the UK average.
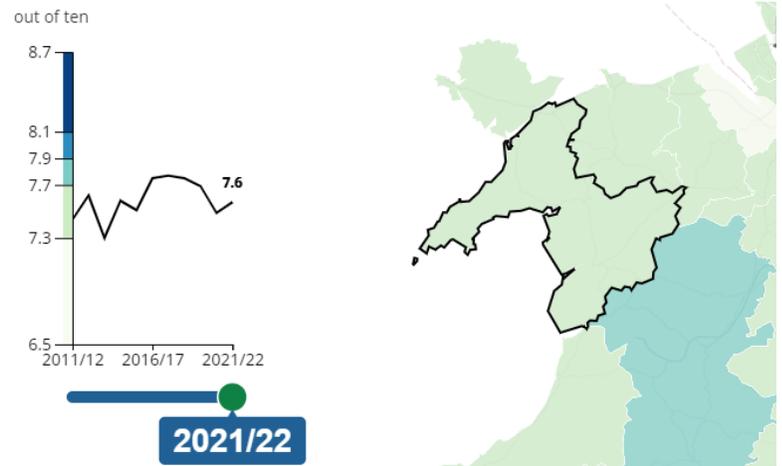
Source: Source: Personal wellbeing in the UK: April 2021 to March 2022, ONS

Gwynedd Personal Wellbeing (2021/22)

Life Satisfaction
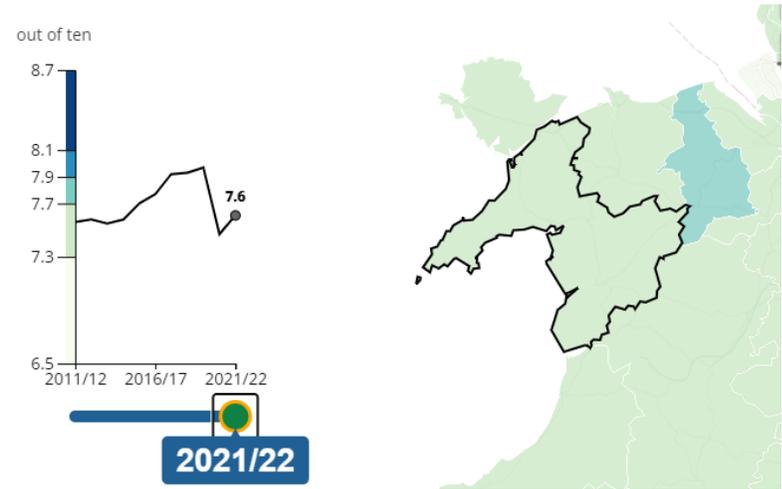
Worthwhile

Happiness

Anxiety

Socio-Economic Baseline
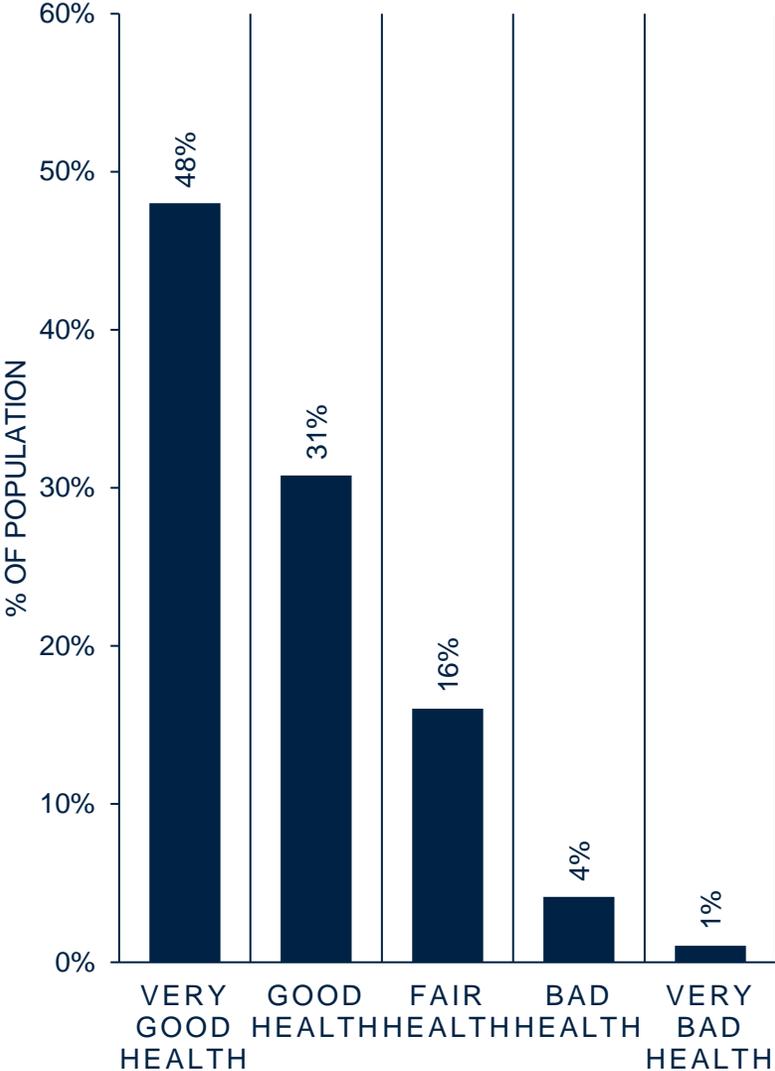
Porthmadog BUA Health

79% of the population in the Porthmadog BUA stated that they have either good or very good health in the 2011 Census. 5% stated that they had bad or very bad health.

For context, 81% of the population in England and Wales claimed to have good or very good health in the 2011 Census.

78% of the population claimed that they did not have a long-term health problem or disability that limited their day-to-day activities. However, 11% said that a health problem limited their day-today activities a little, and 11% were limited a lot.

82% of the population in England and Wales said that their daily activities were not limited by long-term health problems or disability.

Source: Census, 2011

Porthmadog BUA Health (2011)

% OF POPULATION

- VERY GOOD HEALTH: 48%
- GOOD HEALTH: 31%
- FAIR HEALTH: 16%
- BAD HEALTH: 4%
- VERY BAD HEALTH: 1%

Porthmadog BUA Long-term Health Problem or Disability (2011)

% OF POPULATION

- DAY-TO-DAY ACTIVITIES LIMITED A LOT: 11%
- DAY-TO-DAY ACTIVITIES LIMITED A LITTLE: 11%
- DAY-TO-DAY ACTIVITIES NOT LIMITED: 78%
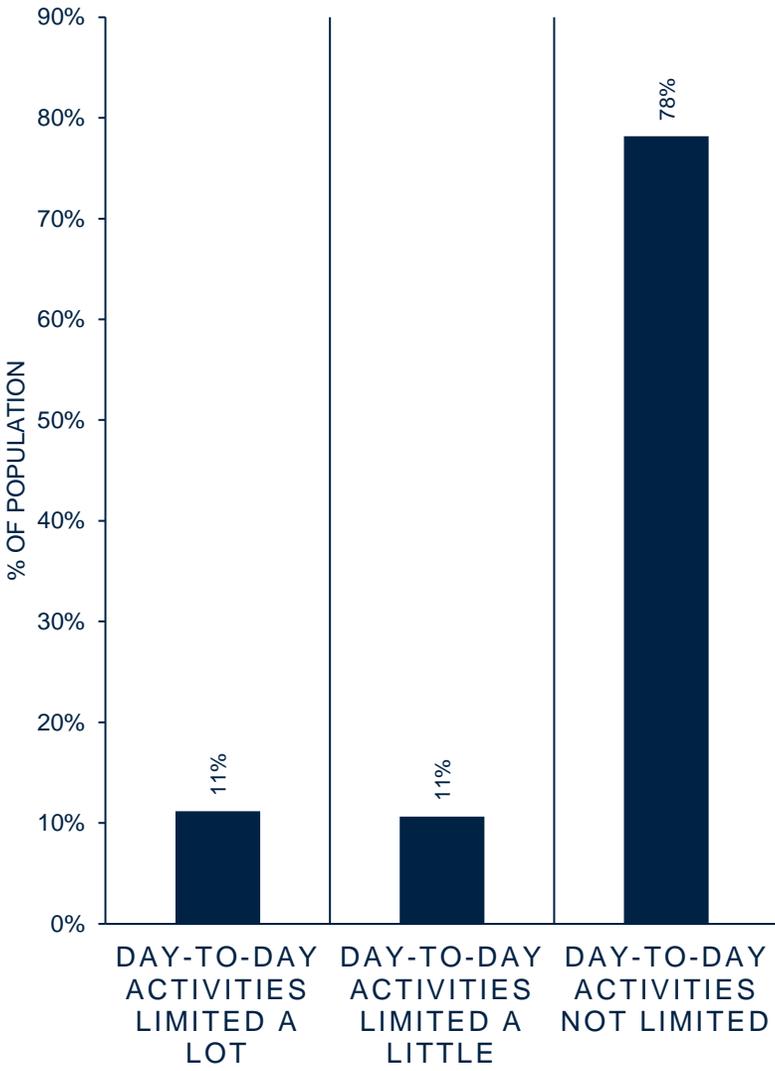
Socio-Economic Baseline

Porthmadog Crime

Porthmadog town centre area is covered by two police force neighbourhoods: Porthmadog East and Porthmadog West.

In the last 12 months to August 2023, there were 157 crime incidents in Porthmadog East and 173 in Porthmadog West.

In Porthmadog East, 48% of these incidents were violence and sexual offences, and 26% were for anti-social behaviour. Most crime incidents occurred along the main high street or close to the railway station.

In Porthmadog West, 24% of incidents were violence and sexual offences, 23% were anti-social behaviour and 18% were shoplifting. Most incidents occur around the Tesco Superstore and close to the railway station.
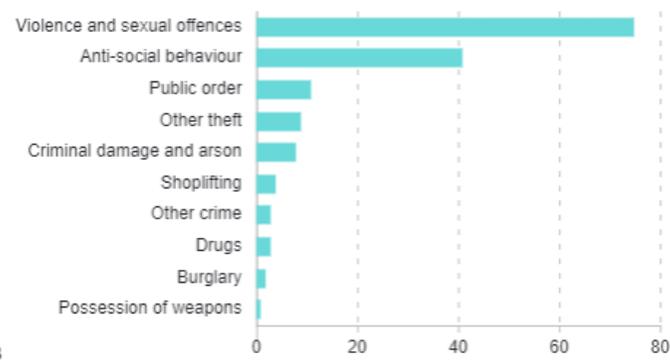
Source: Police.UK

Porthmadog East Crime Statistics

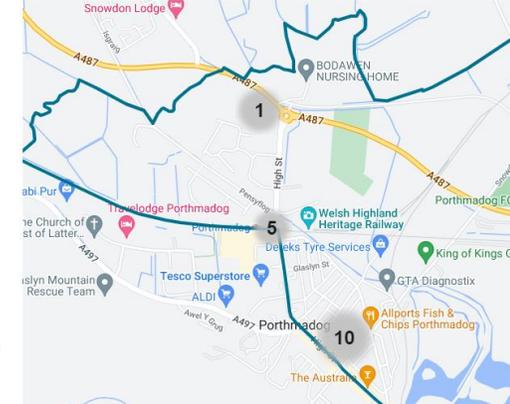**Crime per quarter (2020-2023)**
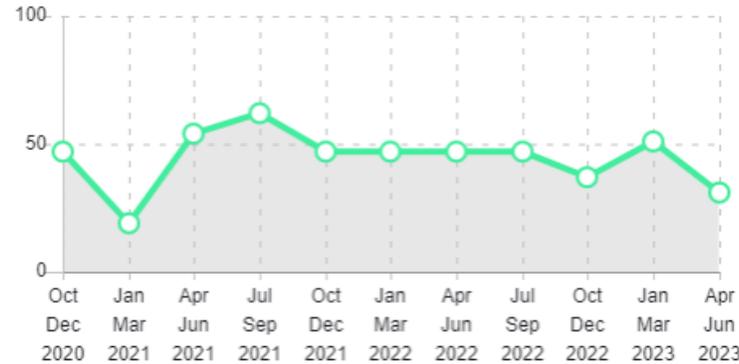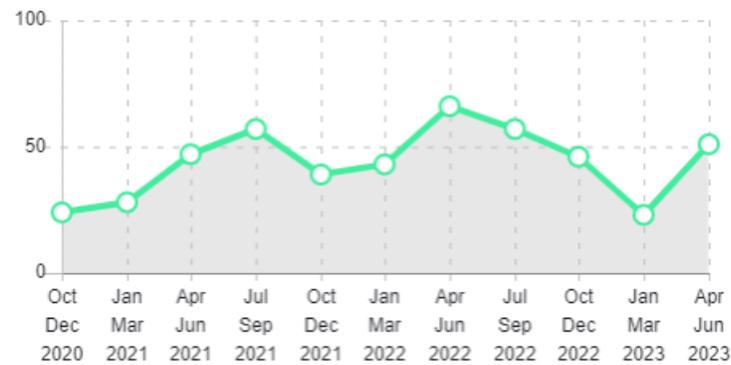

Crime types (Sept 2022-Aug 2023)
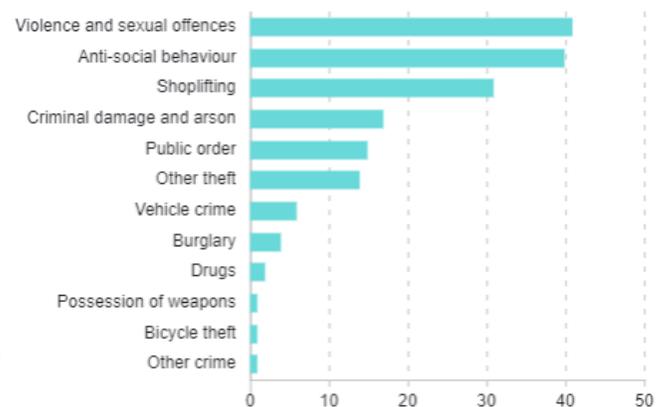

Crime map (August 2023)

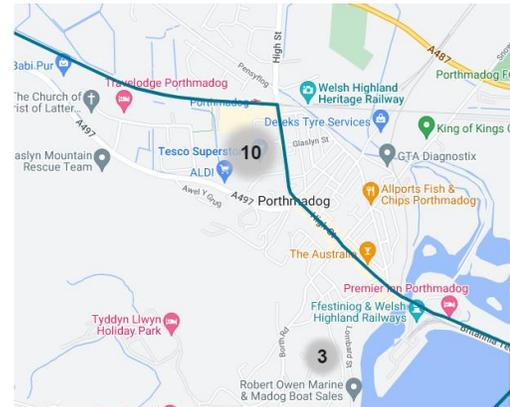## Porthmadog West Crime Statistics

Crime per quarter (2020-2023)

Crime types (Sept 2022-Aug 2023)

Crime map (August 2023)

Socio-Economic Baseline

Earnings

Median gross annual earnings are lower in Gwynedd than in Wales and the UK.

There is an £807 difference between resident and workplace earnings in Gwynedd, suggesting that people who commute into Gwynedd for work are typically earning more than residents.

Residents in Gwynedd earn 18% less than the UK average and 10% less than the Welsh average.

Workplace earnings in Gwynedd are 14% less than the UK average and 6% less than the Welsh average.

Resident earnings in Gwynedd have grown by 18% in the last decade. However, this is slower than the 22% growth in the UK and 26% growth in Wales.

In contrast, workplace earnings have grown 31% which is much faster growth than the national averages.

Source: Annual Survey of Hours and Earnings, Nomis

Gwynedd Resident vs Workplace Earnings (2022)

■ Resident ■ Workplace

FULL-TIME MEDIAN GROSS ANNUAL PAY

	Resident	Workplace
GWYNEDD	£28,014	£28,821
WALES	£30,821	£30,596
UK	£33,000	£33,000
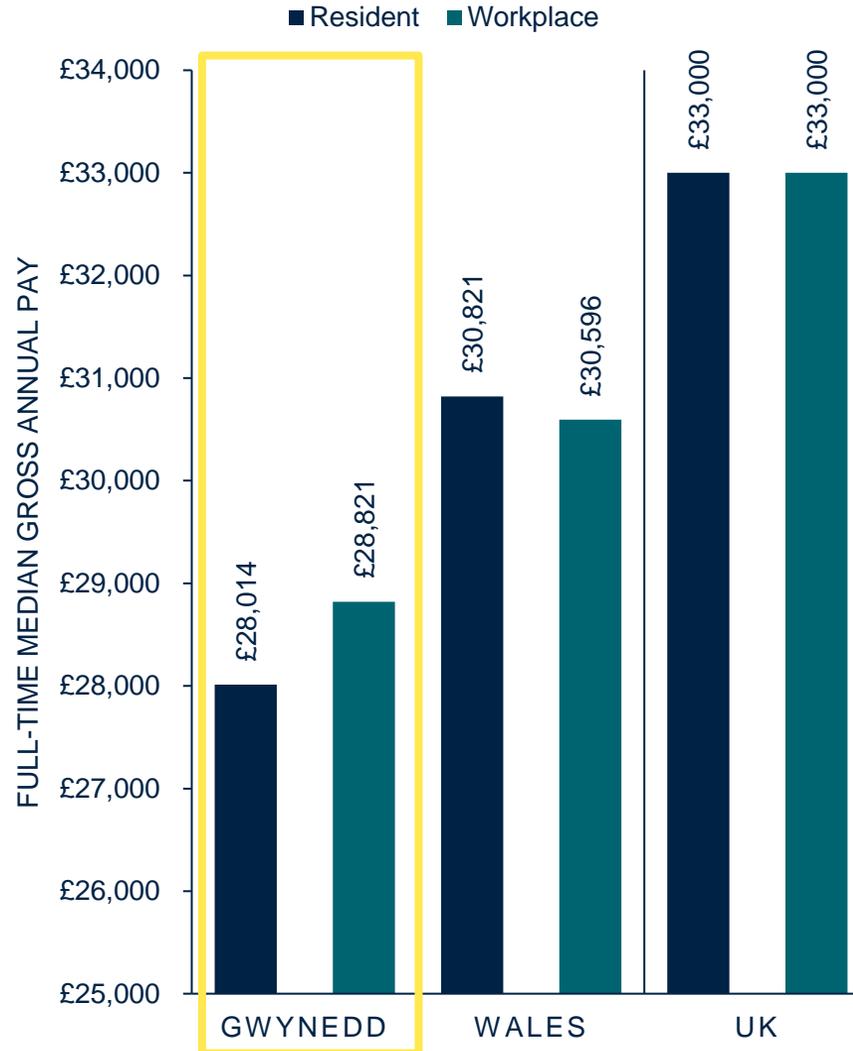
Change in Gwynedd Resident and Workplace Earnings (2013-2022)

■ Resident ■ Workplace

% CHANGE IN FULL-TIME MEDIAN GROSS ANNUAL PAY

	Resident	Workplace
GWYNEDD	18%	31%
WALES	26%	27%
UK	22%	22%
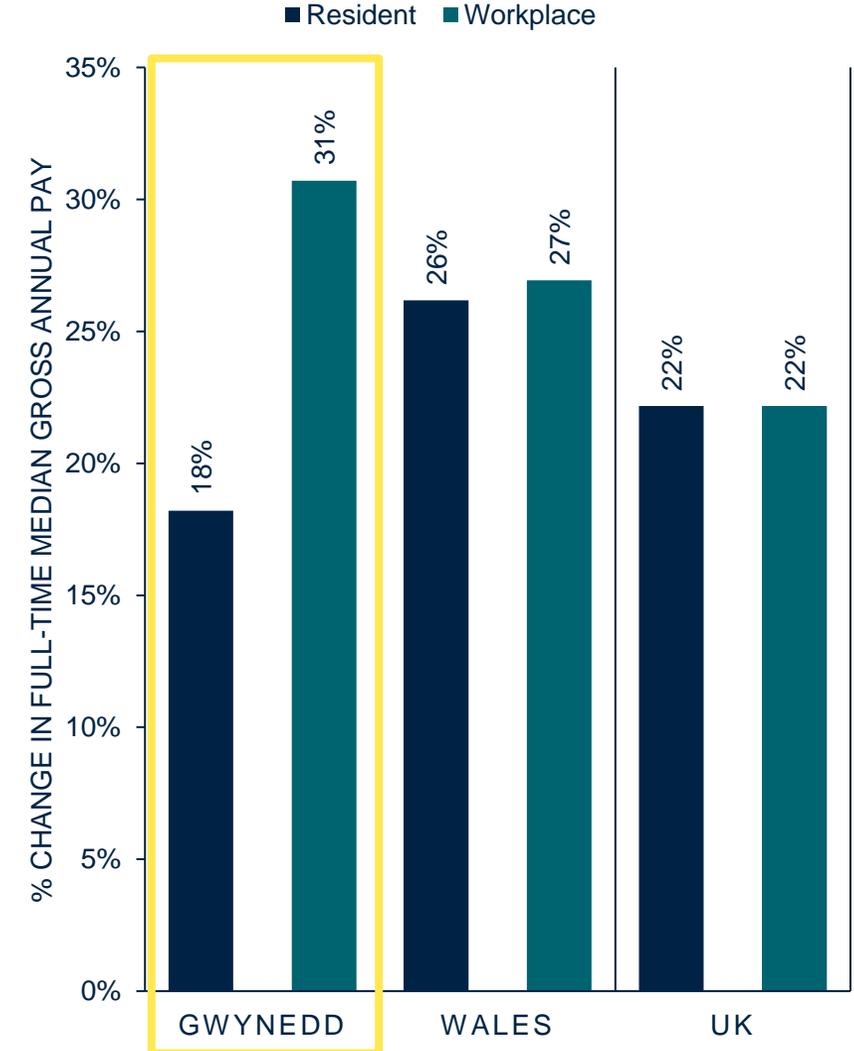
Socio-Economic Baseline

Deprivation

There are 73 LSOAs in Gwynedd, representing 3.8% of all LSOAs in Wales. The Welsh Index of Multiple Deprivation (WIMD) ranks each LSOA in terms of overall deprivation, consisting of 8 factors to understand where the most and least deprived areas are.

Overall, there are just 2 LSOAs in the 10% most least deprived in Wales, but 0 in the 10% most deprived. However, 66% of the LSOAs in Gwynedd fall within the 50% least deprived in Wales.

Gwynedd performs well in the Health category, with 10% of LSOAs in the 10% least deprived, and only 1 LSOA in the 10% most deprived. In addition, 32% of the LSOAs in Gwynedd are in the 10% least deprived for Physical Environment.

However, 22% of Gwynedd LSOAs are in the 10% most deprived for Housing, and only 25% in the 50% least deprived. Also, 27% of Gwynedd LSOAs are in the 10% most deprived for Access to Services, and only 26% in the 50% least deprived.

Source: Welsh Index of Multiple Deprivation (WIMD), 2019

Gwynedd LSOA WIMD (2019)
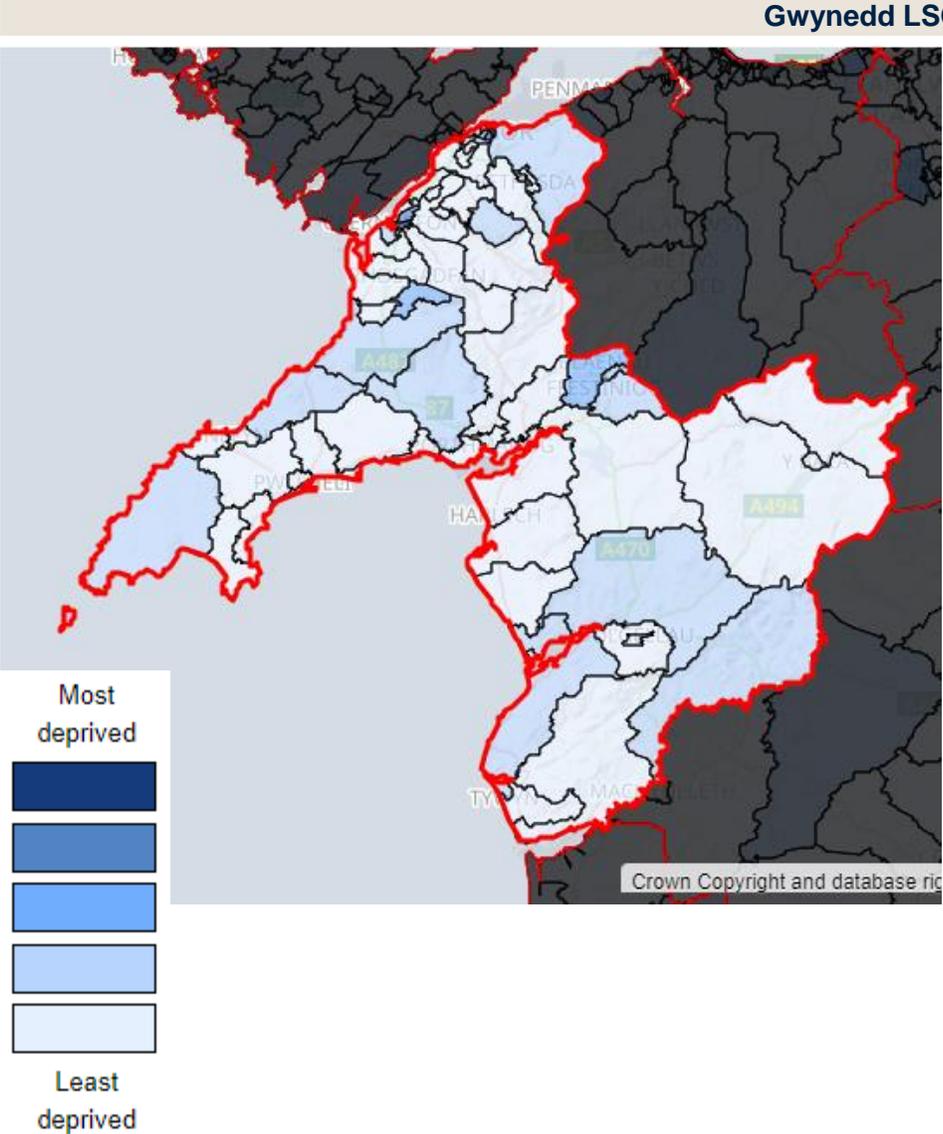
Most deprived

Least deprived

Domain	10% Most Deprived		50% Least Deprived		10% Least Deprived	
	LSOAs	% of LA	LSOAs	% of LA	LSOAs	% of LA
Overall	2	3%	48	66%	0	0%
Income	3	4%	48	66%	1	1%
Employment	2	3%	54	74%	4	5%
Health	1	1%	58	79%	7	10%
Education	1	1%	54	74%	4	5%
Access to Services	20	27%	19	26%	0	0%
Community Safety	1	1%	43	59%	5	7%
Physical Environment	1	1%	61	84%	23	32%
Housing	16	22%	18	25%	0	0%

Socio-Economic Baseline

Deprivation

The Porthmadog BUA is encompassed by two LSOAs in Gwynedd: Porthmadog East and Porthmadog West.

The following table shows each LSOAs ranking compared to the 1909 Welsh LSOAs. The higher the ranking, the less deprived the area.

Porthmadog East ranks overall 1141/1909, placing it in the 40-50% least deprived in Wales. It is the least deprived in Gwynedd for access to services and is in the 10-20% least deprived overall. However, the area scores relatively low for Education and Physical Environment. The worst category in this area is Housing, ranking just 269 and placing it in the 10-20% most deprived in Wales.

When comparing to Porthmadog West, it is clear there are large differences in deprivation either side of the town centre. This area is least deprived in Gwynedd overall.

Almost all measures fall within the 10-20% least deprived category, including being the 4th least deprived in Gwynedd for Income. The only measures with lower scores are Access to Services, and Community Safety (which scores lower than Porthmadog East).

Source: Welsh Index of Multiple Deprivation (WIMD), 2019

Porthmadog East and Porthmadog West WIMD (2019)

Most deprived
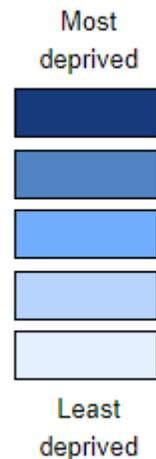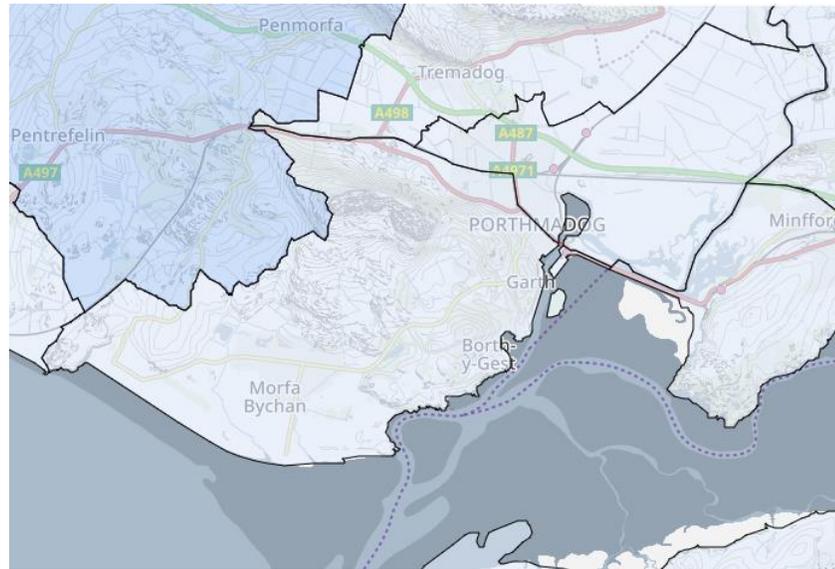
Least deprived

Domain	Porthmadog East		Porthmadog West	
	Welsh Ranking	Deprivation Category	Welsh Ranking	Deprivation Category
Overall	1141	40-50% least deprived	1661	10-20% least deprived
Income	1157	30-40% least deprived	1535	10-20% least deprived
Employment	1245	30-40% least deprived	1662	10-20% least deprived
Health	1119	40-50% least deprived	1623	10-20% least deprived
Education	701	30-40% most deprived	1615	10-20% least deprived
Access to Services	1705	10-20% least deprived	967	40-50% least deprived
Community Safety	979	40-50% least deprived	559	20-30% most deprived
Physical Environment	673	30-40% most deprived	1654	10-20% least deprived
Housing	269	10-20% most deprived	1372	20-30% least deprived

Socio-Economic Baseline

In Gwynedd there are a higher-than-average proportion of 1-person households, including above average 1-person households where the household member is aged over 65. Gwynedd also has a below average proportion of 3 and 4-person households, and a below average proportion of households that contain a couple with dependent children.

The 2011 Census also showed that a large proportion of households in the Porthmadog BUA were 1-person households (41%), with 18% of all households being 1-person households aged over 65. In addition, 11% of one family households were made up of residents all aged over 65. This signifies that Porthmadog and, on a wider scale, Gwynedd, are more likely to be home to smaller houses with older residents and less dependent children.

Gwynedd has got a relatively positive health outlook. In most recent measures, the local authority had an above average healthy life expectancy in all genders and both age categories, particularly for females. The healthy life expectancy for males over 65 has improved to surpass the UK average in recent years.

Wellbeing is also relatively positive in Gwynedd. The county scores above the national average for life satisfaction and happiness. Feeling life is worthwhile and anxiety score in line with the average, although levels of anxiety have spiked sharply in recent years.

In 2011, 79% of residents in the Porthmadog BUA said that they were in good health, and 5% had bad health. This is in line with the average in England & Wales at the time of the Census. However, only 78% of residents responded that their day-to-day activities are not limited by health or disability, which is lower than the national average at the time.

Across the two LSOAs that cover the Porthmadog BUA, there were a total of 330 incidents in the last 12 months. These mostly involved problems with violence and sexual offences, anti-social behaviour, and shoplifting. These incidences continuously occurred in the same clusters along the main high street, around the Tesco Superstore and near the train station.

Annual gross earnings in Gwynedd are below the national average of £33,000. The gap is wider for resident earnings compared with workplace earning (£28,014 vs £28,821) suggesting that the higher paid jobs in Gwynedd are more often taken up by those that live outside of the local authority area. Furthermore, there is disparity in the growth of resident vs workplace earnings. Resident earnings have grown by 18% in the last decade which is below the national average of 22%. However, workplace earnings have grown much faster at 31%.

In general, Gwynedd performs well compared to other local authorities in Wales when

analysing the Indices of Multiple Deprivation. 66% of the local authority area are in the 50% least deprived and only 2 LSOAs are in the 10% most deprived in Wales.

Gwynedd's strengths are in measures for Health and Physical Environment. 10% of LSOAs are in the top 10% for Health and 32% are in the top 10% for Physical Environment. Gwynedd is falling behind in Housing and Access to Services where 22% and 27% of LSOAs respectively are in the top 10% most deprived in Wales.

There are large disparities in deprivation measures in the two LSOAs that cover the Porthmadog BUA. Porthmadog East is more deprived, ranking overall in the 40-50% least deprived in Wales. Only one measure (Access to Services) ranks as high as the 10-20% least deprived, which contrasts with the general picture in Gwynedd. Porthmadog East is actually the least deprived LSOA in Gwynedd for Access to Services. Areas of concern are Education and Physical Environment, which rank in the 30-40% most deprived, and Housing which is in the 10-20% most deprived.

However, the other side of the town in Porthmadog West ranks overall in the 10-20% least deprived, along with 5 of the measures. This LSOA is the 4th least deprived in Gwynedd for Income. The only measures with lower scores are Access to Services, and Community Safety (which scores lower than Porthmadog East). It is interesting to note that each side of Porthmadog scores so differently for Access to Services.

Retail, Visitation & Tourism

Retail, Visitation & Tourism

This section provides analysis of the retail, leisure and hotel property market, as well as an overview of the Porthmadog tourism industry. This covers:

- Retail property market
    - Co-Star data on the current retail property market in the Porthmadog BUA
    - Retail development pipeline
- Hospitality property market
    - Hotel properties in Porthmadog, including occupancy rates, inventory and rates per room.
    - Hotel and leisure development pipeline
- Visitation and Tourism
    - Visitor numbers, days and economic impact
    - Visitor type and frequency of visit
    - Reason for visiting and most popular activities
    - Accommodation and accommodation business type

Retail Property Market

Retail Property Market Map

An overview of Co-Star data on the Porthmadog area reveals 26 retail properties, making up an inventory of 88,800 SF.

The majority of these are located along the main high street in the town centre. These have not been included in the map as they sit outside of the BUA.

The following list provides examples of some of the larger retail properties in Porthmadog.

Some key properties to note include Lidl, Aldi, Coliseum Cinema and Site, and Purple Moose Brewery.

There are currently no new retail units under construction, with the last unit being constructed in 2018. However, there are 2 projects that are proposed. These include the redevelopment of the Coliseum Cinema Site into a 6,300 SF 3-star retail storefront, and 29,515 SF of 2-star retail units at Penamser Industrial Estate.

Due to the small sample size, this analysis provides a high-level overview of the retail property market in Porthmadog. This market has been compared with Gwynedd, North Wales and the UK in the analysis.

Source: CoStar, 2023

Porthmadog BUA Retail Properties (2023)

Examples of Porthmadog Retail Properties (2023)

136-140 High St
Porthmadog, LL49 9NT

10,774 SF · Retail

★★☆☆☆ + VIEW MORE

8-12 High St
Porthmadog, LL49 9LP

9,445 SF · Storefront Retail · Built 1989

★★★☆☆ + VIEW MORE

Family Restaurant
Penamser Rd, Porthmadog, LL49 9NY · Family Re...

5,000 SF · Restaurant · Built 2019

★★★☆☆ + VIEW MORE

Purple Moose Brewery Ltd
31-35 High St, Porthmadog, LL49 9LR · Purple Mo...

4,962 SF · Bar/Nightclub

★★★☆☆ + VIEW MORE

Rear of 154 - High St
Porthmadog, LL49 9NU

4,461 SF · Retail · Built 1980

★★★☆☆ + VIEW MORE

Retail Property Market

Retail Rent & Vacancy

Porthmadog has a total retail property inventory of 88,800 SF. This has reduced by 3% since 2013.

The average rent per SF of retail property in the Porthmadog BUA in the year to date is £12.14. This has reduced by 25% since 2013.

Whilst marginally cheaper than Gwynedd and North Wales as a whole, this is significantly cheaper than the UK average (97%). Average rent has decreased similarly by 26% in Gwynedd and North Wales, compared with just 2% in the UK.

In the year to date, there is a 0% vacancy rate for the 26 retail properties in the Porthmadog BUA. Vacancy rates were sitting at around 19% until 2017, when they rapidly dropped, and have stayed low since.

This is compared to vacancy rates of 4% in Gwynedd, 4% in North Wales and 3% in the UK.

Source: CoStar, 2023

Porthmadog BUA Retail Average Rent per SF and Vacancy Rate (2013-2023)

Average Rent values: 2013 £16.16, 2014 £15.70, 2015 £15.18, 2016 £14.45, 2017 £14.02, 2018 £13.25, 2019 £12.75, 2020 £12.60, 2021 £12.34, 2022 £12.22, 2023 YTD £12.14

Legend: Average Rent, Vacancy Rate

Retail Average Rent per SF and Vacancy Rate (2013-2023)

Average Rent values: Porthmadog £12.14, Gwynedd £12.64, North Wales £12.88, UK £23.88
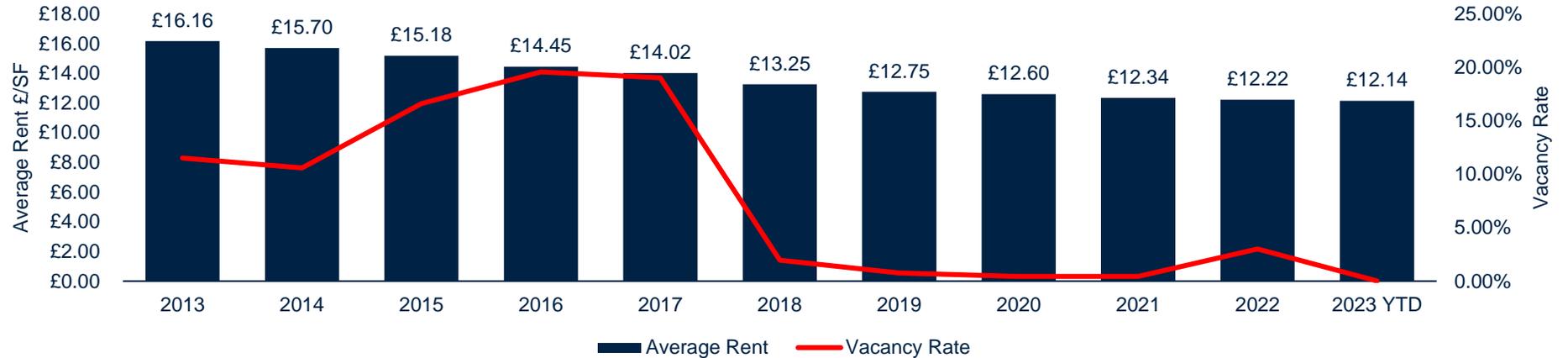
Legend: Average Rent, Vacancy Rate
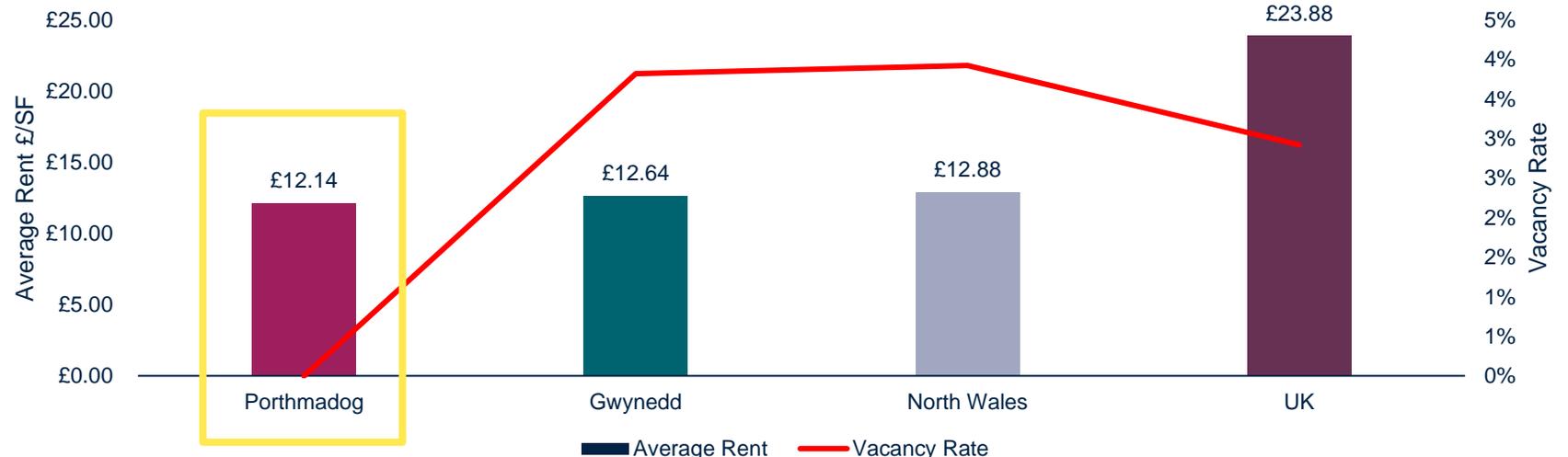
Retail Property Market

Retail Net Absorption & Market Yield

Net absorption is the sum of the floorspace newly occupied and the floorspace recently vacated.

It the YTD, net absorption in the Porthmadog BUA retail market was 2,673 SF, which indicated increasing demand in the retail property market, although only by a small amount. This is bouncing back after 3 years of low and negative net absorption during the Covid-19 pandemic.

The market yield indicated whether the retail property market is good return on investment.

In the YTD, the market yield in the Porthmadog BUA is 8.5%. This is higher than the UK average suggesting the town has a stronger return on investment on retail property. However, this is below the market yield in Gwynedd and North Wales as a whole and has been consistently since 2015.
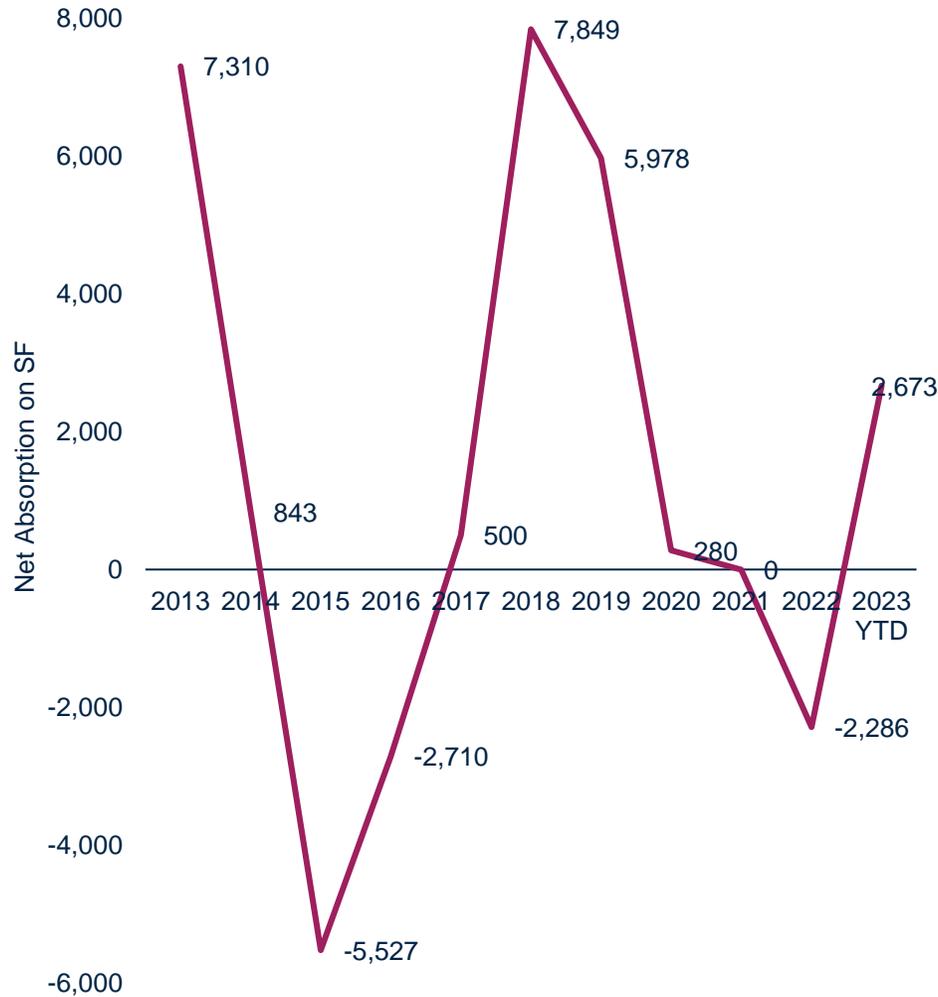
Source: CoStar, 2023

Porthmadog BUA Net Absorption 2013-2023 YTD

Line chart of Net Absorption on SF, 2013–2023 YTD:
7,310 (2013), 843 (2015), -5,527 (2015), -2,710 (2017), 500 (2017), 7,849 (2018), 5,978 (2019), 280 (2020), 0 (2021), -2,286 (2022), 2,673 (2023 YTD)

Market Yield 2013-2023 YTD

Line chart of Market Yield, 2013–2023 YTD. Porthmadog: 7.8%, 7.6%, 7.3%, 7.3%, 7.1%, 7.0%, 7.6%, 7.5%, 7.7%, 8.1%, 8.5%. Lines for Porthmadog, Gwynedd, North Wales, UK.

Legend: Porthmadog — Gwynedd — North Wales — UK
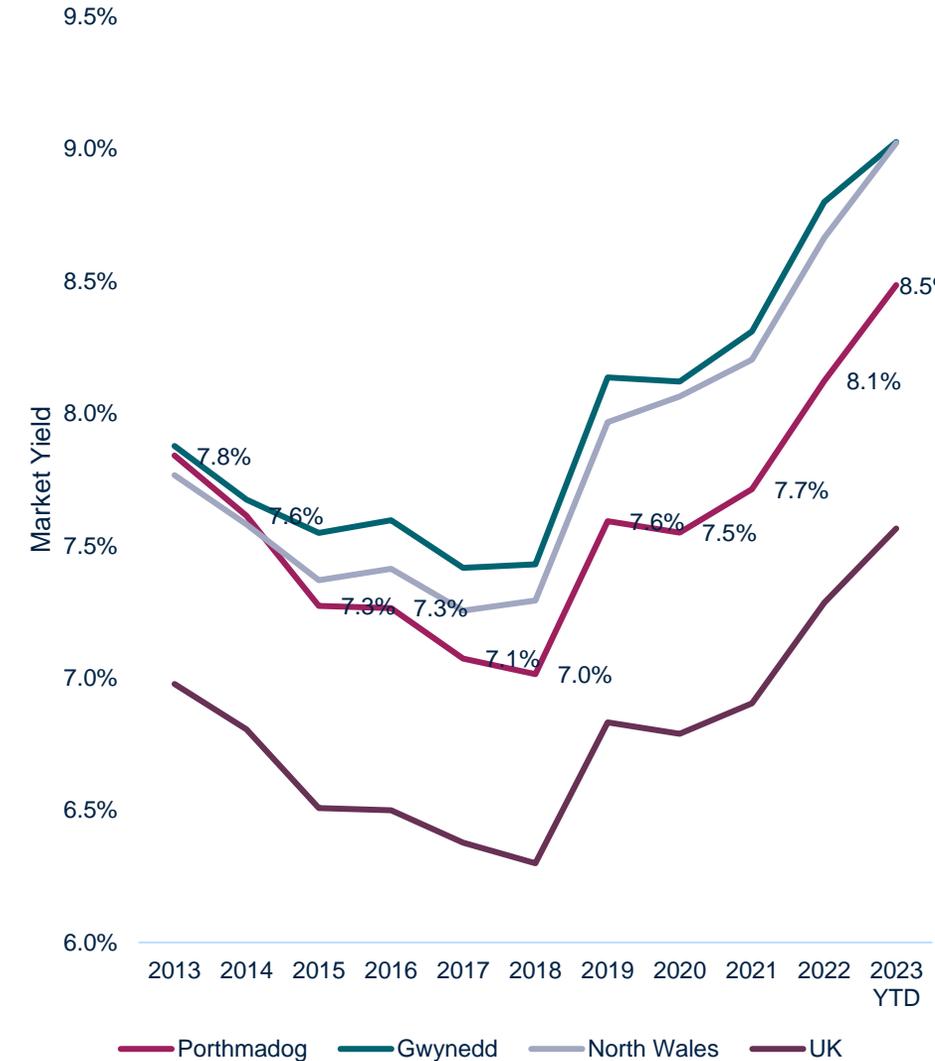
Retail Property Market

Retail Development Pipeline

Glenigan data provides access to a large database of construction projects across the UK. This database does not capture all projects but gives a high-level overview of what is happening in the Porthmadog area.

1. **2 Non-Food Retail Units and 1 Hotel (£6.25 million)**
   - Site area: 1.24ha
   - Floor area: 6,800sqm
   - End date: August 2025 (guideline)
   - 60-bedroom hotel, garden centre & café
   - Outline plans granted

2. **Supermarket (Refurbishment) (£500,000)**
   - Complete.

3. **Supermarket (Alterations) (£50,000)**
   - New refrigeration plant at the Aldi supermarket.
   - Detail plans granted.

4. **Shopfront (Alterations)**
   - Detailed plans submitted.

5. **Storage/Workshop & Office (New/Alterations) (£530,000)**
   - Renovation of existing office building, demolition of buildings and rebuild new units.
   - Detail plans granted.

6. **Shop (Conversion/Alterations)**
   - Change of use of former Barclays Bank unit to optician.
   - End date: October 2023 (guideline)
   - Detail plans granted.

Source: Glenigan, 2023

Porthmadog Built Up Area
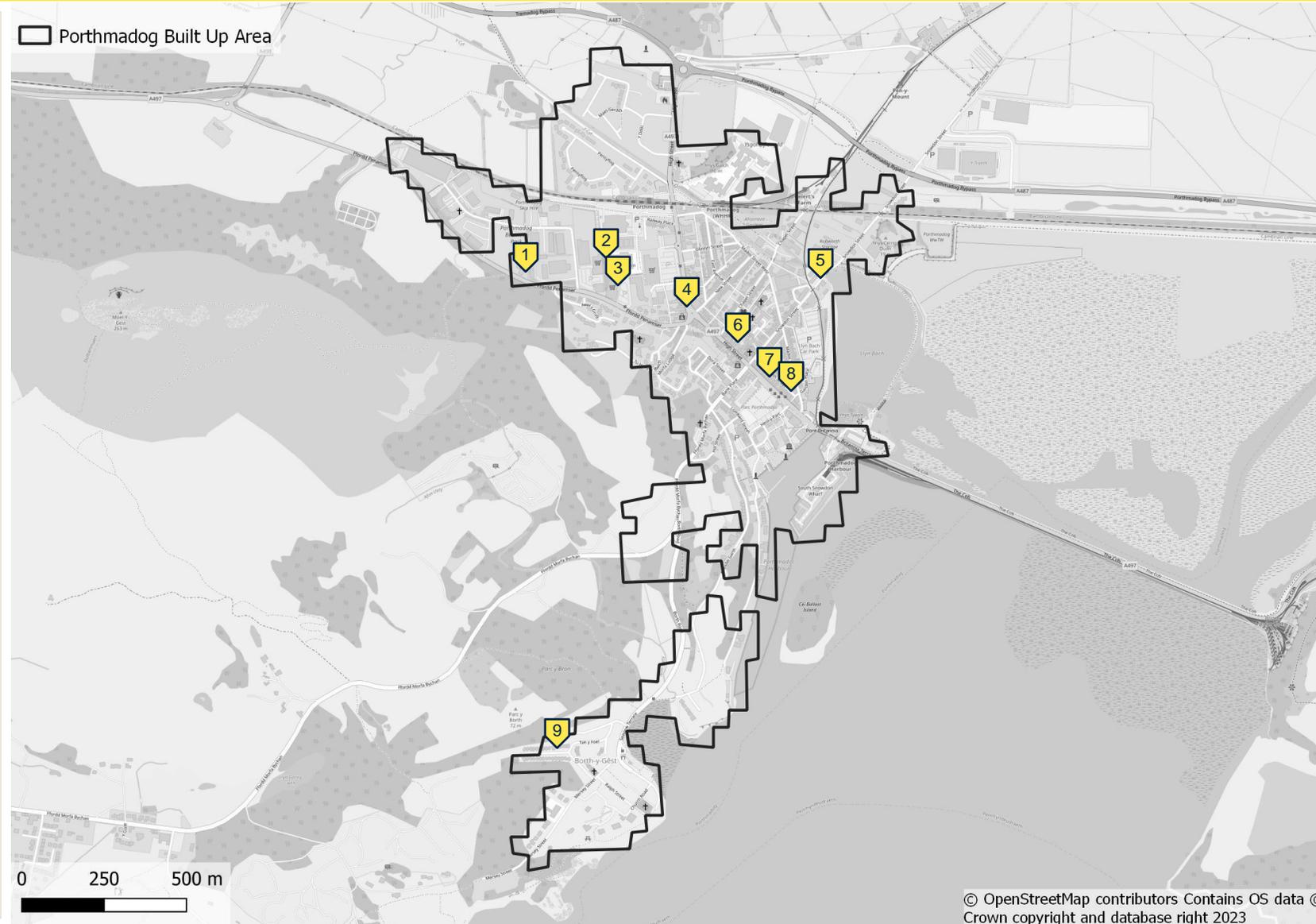
© OpenStreetMap contributors Contains OS data © Crown copyright and database right 2023

Retail Property Market

Retail Development Pipeline

7. **Shop Front (Alterations)**
   - Alterations to shop front of the Pet & Aquatics Centre.
   - Detail plans submitted.

8. **Pet Grooming Area (Conversion) (£30,000)**
   - Change of use of part of the Pet & Aquatics Centre to include a dog grooming area.
   - Detail plans granted.

9. **Dog Grooming Salon (Conversion)**
   - Conversion of garage to dog grooming salon business.
   - Detail plans granted.
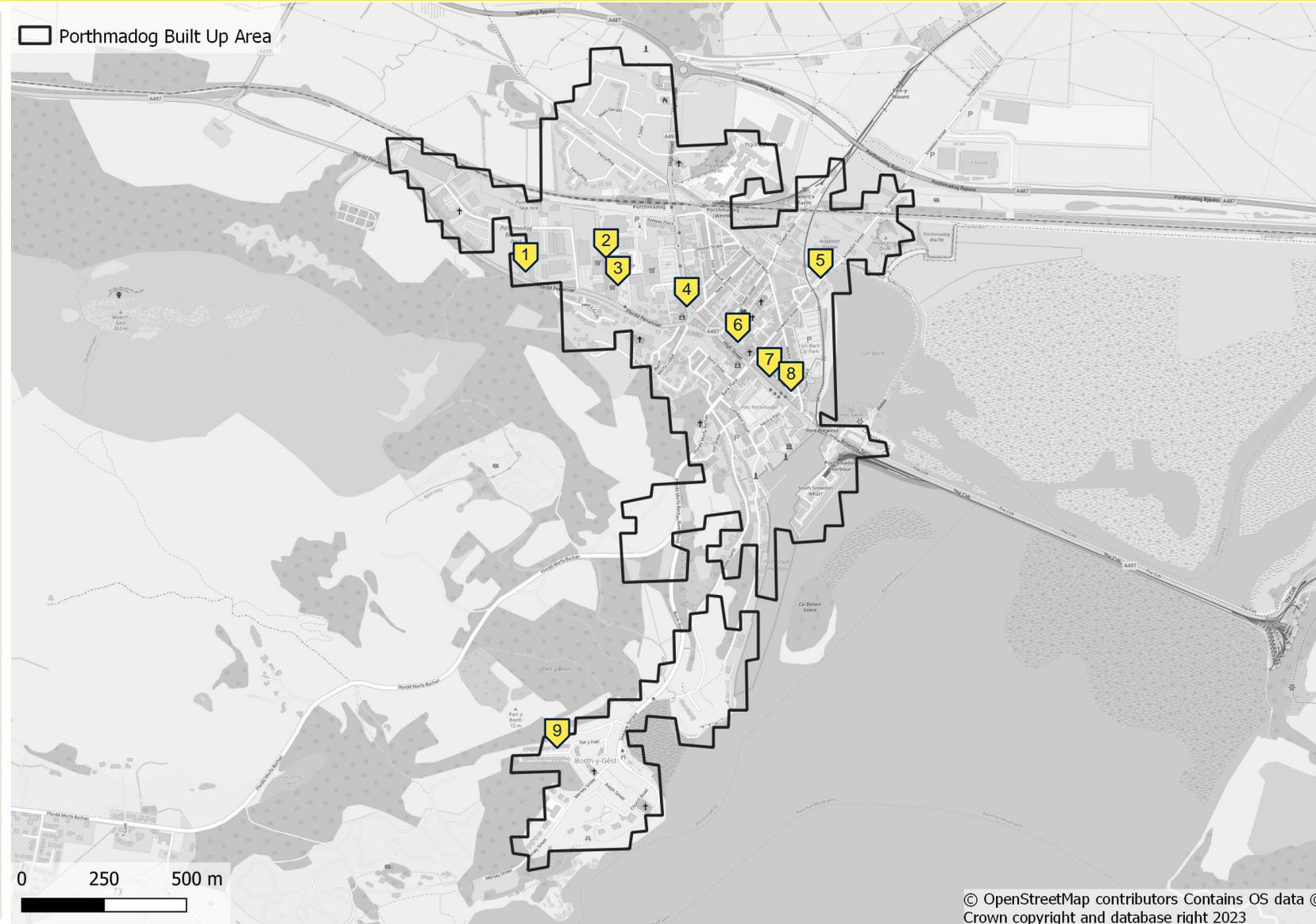
Source: Glenigan, 2023

Porthmadog Built Up Area

© OpenStreetMap contributors Contains OS data © Crown copyright and database right 2023

Hospitality Property Market

Hospitality Property Market Map

There are 4 hotels in the Porthmadog BUA.

In total, there is an inventory of 168 rooms. This has increased from 88 rooms in May 2022, and 37 rooms in December 2007. There is an average of 42 rooms per building.

2 of the hotels are mid-scale and 2 are economy. The mid-scale hotels are all well-known chain hotels (Premier Inn and Travelodge) and the economy hotels are independent.

There is also a 5th hotel in final planning which will be an independent, economy hotel with 60 rooms.

Source: CoStar, 2023

Porthmadog BUA Hospitality Properties (2023)
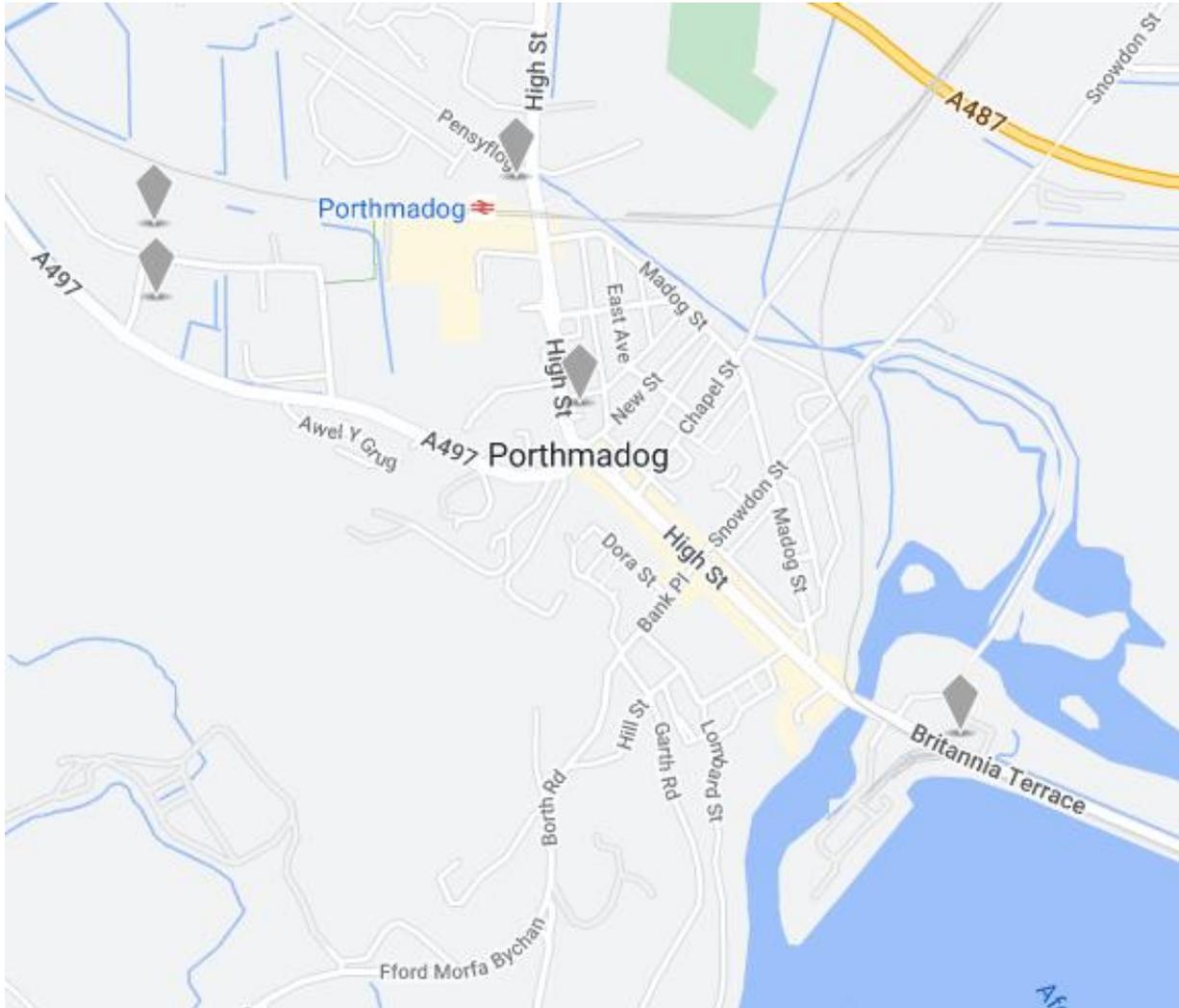
Porthmadog Hospitality Properties (2023)

Premier Inn Porthmadog
Britannia Ter, Porthmadog, LL49 9NF
80 Rooms · Economy Hotel Opened 2022
Premier Inn Since 2022 · Franchise
Submarket Occ 81% · ADR £75 · RevPAR £61
Premier Inn
+ VIEW MORE

The Royal Sportsman Hotel
113 High St, Porthmadog, LL49 9HB
28 Rooms · Midscale Hotel Opened 1862
Independent
Submarket Occ 81% · ADR £75 · RevPAR £61
+ VIEW MORE

Travelodge Porthmadog
Travelodge Porthmadog - Penamser Business Park...
51 Rooms · Economy Hotel Opened 2008
Travelodge, UK Since 2008 · Chain Management
Submarket Occ 81% · ADR £75 · RevPAR £61
Travelodge
+ VIEW MORE

Penamser Estate
Penamser Rd, Porthmadog, LL49 9HG
60 Rooms · Economy Hotel
Independent
Submarket Occ 81% · ADR £75 · RevPAR £61
+ VIEW MORE

Queens Hotel
Station Rd, Porthmadog, LL49 9HT
9 Rooms · Midscale Hotel
Independent
Submarket Occ 81% · ADR £75 · RevPAR £61
+ VIEW MORE

Hospitality Property Market

Hospitality Property Market

Of the 4 hotels that are open for business in Porthmadog town centre, according to CoStar they have had a 12-month occupancy rate of 81.5%. This has increased by 0.7% on the previous period. This is compared to occupancy of 80% in North Wales and 76.7% in the UK.

The average daily rate (ADR) in Porthmadog was £70. This is cheaper than in North Wales (£77) and significantly cheaper than the UK average (£110). In Porthmadog, this has increased from £44.35 in 2013.

The revenue per available room (REVPAR) in the 4 hotels in Porthmadog is £57. This has increased by 1.5% in the last 12 months. This is also cheaper than North Wales (£61) and significantly cheaper than the UK (£85). The UK has had a 20.5% increase in REVPAR in the last 12 months.

REVPAR in Porthmadog was £32.49 in 2013.

Market sale price per room is also significantly cheaper in Porthmadog. At £81,200 this is 24% less than in North Wales and 151% less than the UK.

Market yield is relatively in line with the average at 5.8%.

Source: CoStar, 2023

Porthmadog Hospitality Property Statistics October 2022-September 2023

12 MO OCC RATE	12 MO ADR	12 MO REVPAR	MARKET SALE PRICE/ROOM	MARKET YIELD
81.5% +0.7%	**£70** +0.8%	**£57** +1.5%	**£81.2K** +5.8%	**5.8%** +0.2%
Prior Period 80.9%	Prior Period £69	Prior Period £56	Prior Period £76.8K	Prior Period 5.6%

North Wales Hospitality Property Statistics October 2022-September 2023

12 MO OCC RATE	12 MO ADR	12 MO REVPAR	MARKET SALE PRICE/ROOM	MARKET YIELD
80.0% +7.2%	**£77** +0.7%	**£61** +7.9%	**£101K** +5.9%	**5.7%** +0.3%
Prior Period 74.6%	Prior Period £76	Prior Period £57	Prior Period £94.9K	Prior Period 5.4%

UK Hospitality Property Statistics October 2022-September 2023

12 MO OCC RATE	12 MO ADR	12 MO REVPAR	MARKET SALE PRICE/ROOM	MARKET YIELD
76.7% +8.2%	**£110** +11.4%	**£85** +20.5%	**£204K** +11.4%	**5.5%** +0.2%
Prior Period 70.9%	Prior Period £99	Prior Period £70	Prior Period £183K	Prior Period 5.3%

Hospitality Property Market

Hospitality Property Market

Of the 4 hotels that are open for business in Porthmadog, the total revenue in the year to date is £2.9 million.

The hotel industry was hit by the Covid-19 pandemic in 2020, with revenue reducing by 48% on the previous year. However, the industry bounced back strongly, with revenues increasing year on year. This is now 183% higher than pre pandemic levels.

The are differences in revenue each month. This is lowest in January where in 2023 it was £160,526, This then increased to reach a peak of £444,215 in August. In the most recent month of September 2023 revenue was £348,256.

Source: CoStar, 2023

Porthmadog BUA Hospitality Revenue YTD 2014-2023
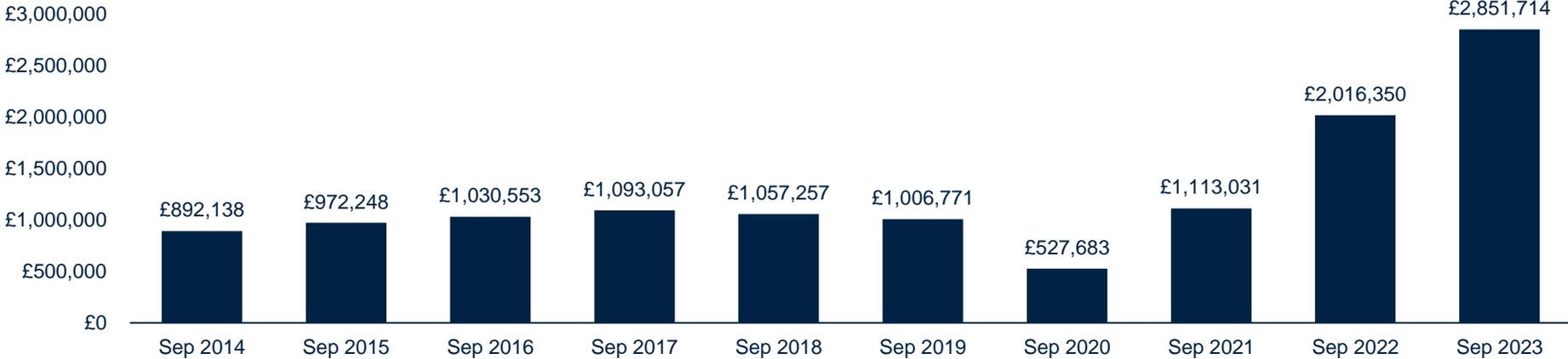
Porthmadog BUA Hospitality Revenue October 2022-September 2023
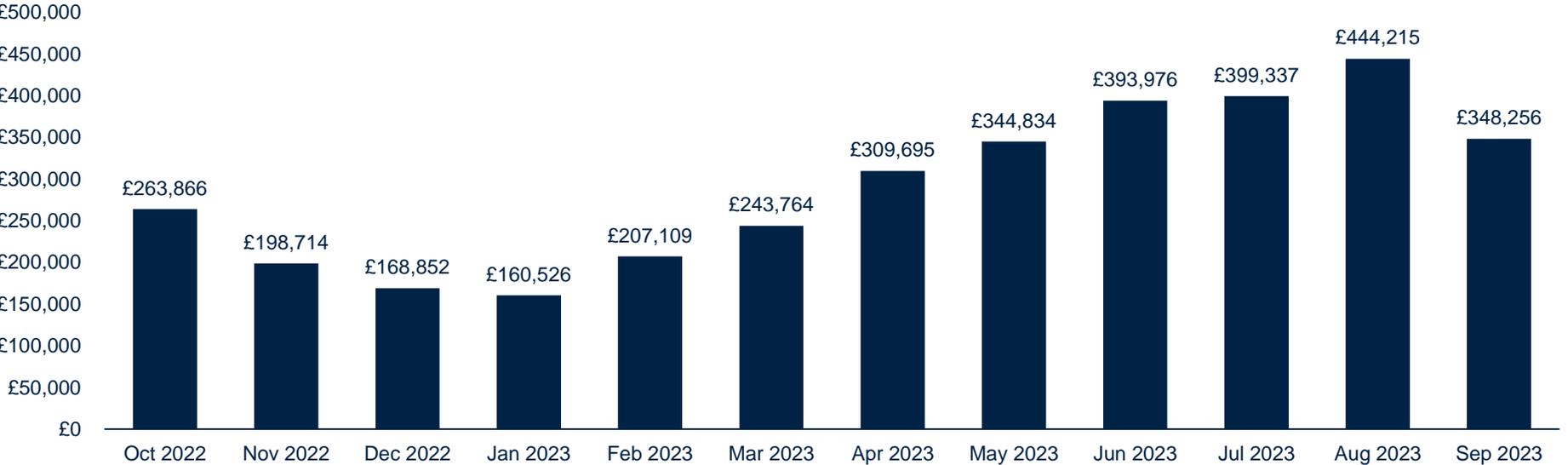
Hospitality Property Market

Hotel & Leisure Development Pipeline

1. **2 Non-Food Retail Units and 1 Hotel (£6.25 million)**
   - Site area: 1.24ha
   - Floor area: 6,800sqm
   - End date: August 2025 (guideline)
   - 60-bedroom hotel, garden centre & café
   - Outline plans granted

2. **Café (Conversion/Extension) (£150,000)**
   - Small extension to existing café on Penamser Industrial Estate.
   - Detail plans submitted.

3. **Hotel (Extensions/Alterations) (£100,000)**
   - Internal alterations to existing Queens Hotel to create additional rooms and improve external features.
   - Detail plans granted.

4. **Childrens Play Area (Conversion)**
   - Conversion of the Salem Chapel to an indoor children's soft play area.
   - Detail plans granted.

5. **Restaurant (Alterations)**
   - Internal alterations to restaurant and creation of addition B&B bedrooms.
   - End date: June 2024 (guideline)
   - Detail plans submitted.

6. **Holiday Unit (Conversion) (£80,000)**
   - Conversion of ground floor office into additional space in existing holiday unit.
   - Detail plans granted.

Source: Glenigan, 2023

Porthmadog Built Up Area

0   250   500 m

© OpenStreetMap contributors Contains OS data © Crown copyright and database right 2023
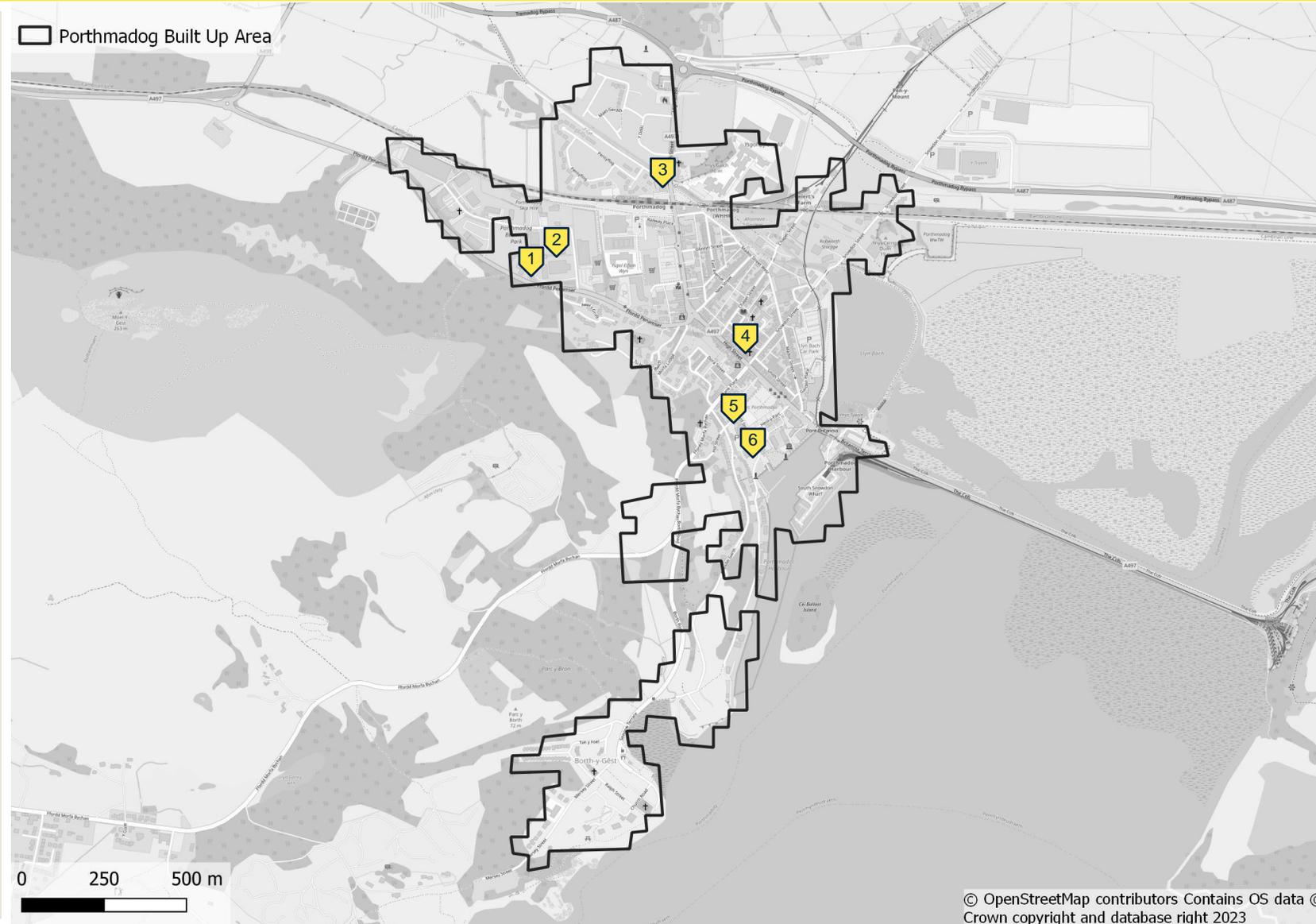
Visitation and Tourism

Gwynedd Visitation Statistics

2022 STEAM data indicates that the visitor economy in Gwynedd has recovered and surpassed pre COVID-19 visitor numbers, days and its overall economic impact.

The total economic impact of tourism in Gwynedd in 2022 was £1.5 billion, 13% higher than 2019, having increased by an average of £474 million per annum during its recovery from COVID-19, between 2020 and 2022.

Similarly, in 2022, total visitor days (24.2 million) and visitor numbers (7.9 million) are both 1% higher than 2019 levels.

STEAM data indicates that tourism in Gwynedd is in a very strong position, attracting more visitors and increasing the per visitor economic impact markedly.

Source: Cyngor Gwynedd, STEAM

Gwynedd Visitor Numbers 2008-2022
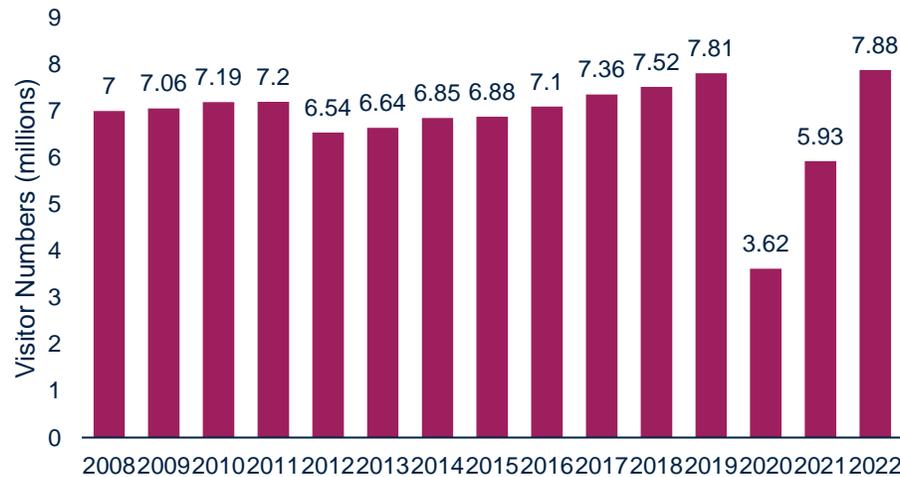
Gwynedd Visitor Days 2008-2022
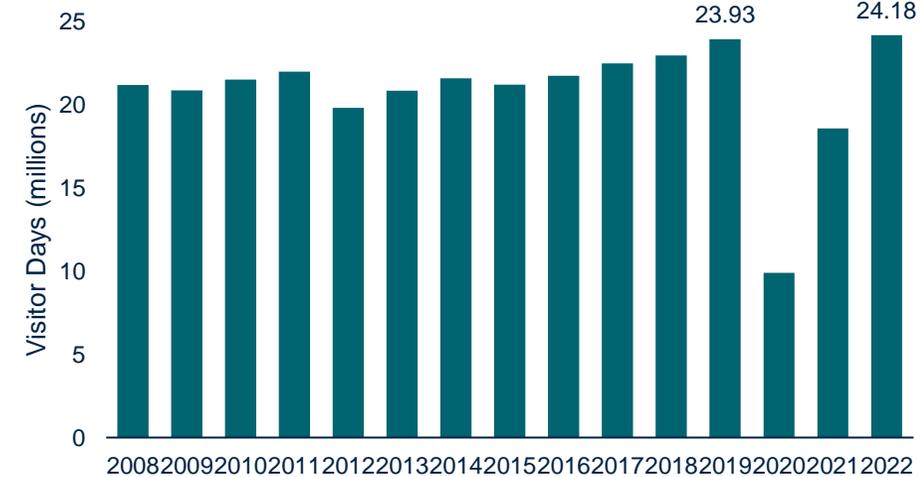
Gwynedd Visitor Economic Impact 2008-2022
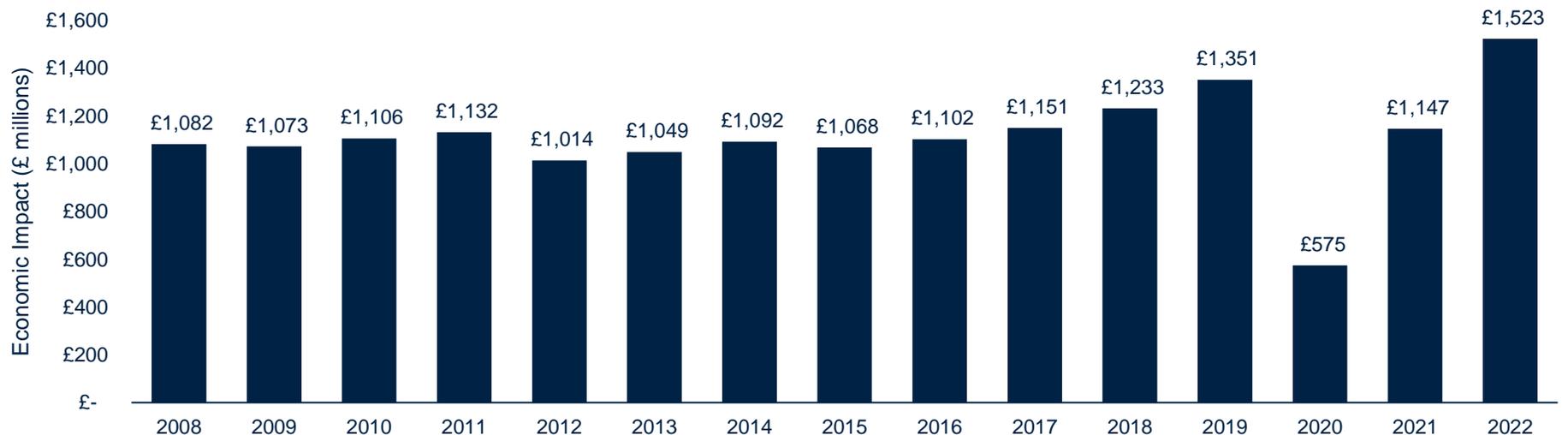
Visitation and Tourism

Gwynedd Visitation Statistics

The Wales Visitor Survey published by Cyngor Gwynedd in 2019 showed that 46% of visitors to Gwynedd were Welsh residents, and 50% from the rest of the UK. This is compared to 69% of visitors being from Wales nationally.

The most common age group to visit Gwynedd was 45-54 years (24%) and 35-44 years (22%). These are higher percentages than Wales as a whole.

Gwynedd attracted a higher proportion of fluent and non-fluent Welsh speakers (22%) than Wales overall (19%) in 2019.

The most common type of visiting party were couples (29%). This is compared to 27% of visitor parties to Wales being couples. Second to this was families with young children (24%). This is slightly lower than Wales but Gwynedd received a higher proportion of families with older children than the national average. There was also a higher proportion of visits made up of groups of friends (14% vs 11%).

There was an average total number of people per visit of 4.3 (compared to 3.7 in Wales).

37% of staying visitors only visited once in the last 3 years prior to 2019. This is higher than Wales (30%). 29% visited 2-3 times). 13% visited more than 10 times.

Source: Wales Visitor Survey, Cyngor Gwynedd, 2019

Demographic Profile of Visitors (2019)

	Gwynedd Visitors %	ALL WALES %
Area of residence		
Wales	46	69
Rest of the UK	50	27
Overseas	4	4
Gender		
Male	42	39
Female	58	61
Age		
16 - 24 years	3	7
25 – 34 years	18	17
35 – 44 years	22	20
45 – 54 years	24	19
55 - 64 years	18	16
65+ years	15	21
Social grade		
AB	43	35
C1	32	35
C2	16	18
DE	10	11
Welsh speaking		
Fluent	12	9
Non-fluent	10	10
Non-Welsh speaker	78	81
Ethnicity		
White Welsh / British	89	90
White other	6	7
Non-white / other	5	3

Bases = Stage 1 2019: Gwynedd total (667), all Wales (7,683).
NB percentages may not add to up to 100% due to rounding.

Group Type and Frequency of Visiting (2019)

	Gwynedd %	ALL WALES %
Type of visiting party		
Alone	6	11
Couple	29	27
Family – young children	24	28
Family – older children	12	8
Family – young and old children	7	4
Family – no children	5	8
Friends	14	11
Organised group	3	2
Other	-	<1
Refused	-	1
Average size of party		
Average number of adults	3.4	2.8
Average number of children	0.9	0.9
Average total number of people	4.3	3.7
Frequency of visiting in last three years (staying visitors)		
Stage 2 bases in brackets	(Base =301)	(Base = 1,880)
Once	37	30
2 – 3 times	29	28
4 – 6 times	18	20
7 – 10 times	4	6
More than 10 times	13	16
Don't know	-	<1
Frequency of visiting in last year (day visitors)		
Stage 2 bases in brackets	(Base =44)	(Base = 2,029)
Once	14	9
2 – 3 times	16	11
4 – 6 times	9	13
7 – 10 times	7	10
11 – 20 times	14	14
More than 20 times	41	42
Don't know	-	1

Bases = Stage 1 2019: Gwynedd (667), all Wales (7,683).
NB percentages may not add to up to 100% due to rounding. Small base sizes in red

Visitation and Tourism

Gwynedd Visitation Statistics

The most common reason for visiting Gwynedd in 2019 was to enjoy the landscape/countryside/beach (63%). This was also the most popular reason for visiting Wales overall but only 55% responded with this at a national level.

2nd most popular was to take part in outdoor or sporting activities (58%). This response was far more popular than at a national level (31%).

3rd was to visit places / historical and religious sites / attractions (39%).

Only a small amount visited for a city break / to visit a large town or for day trips.

The most popular individual activity undertaken in Gwynedd in 2019 was walking more than 2 miles. 37% of respondents took part in this activity, compared to 19% in Wales.
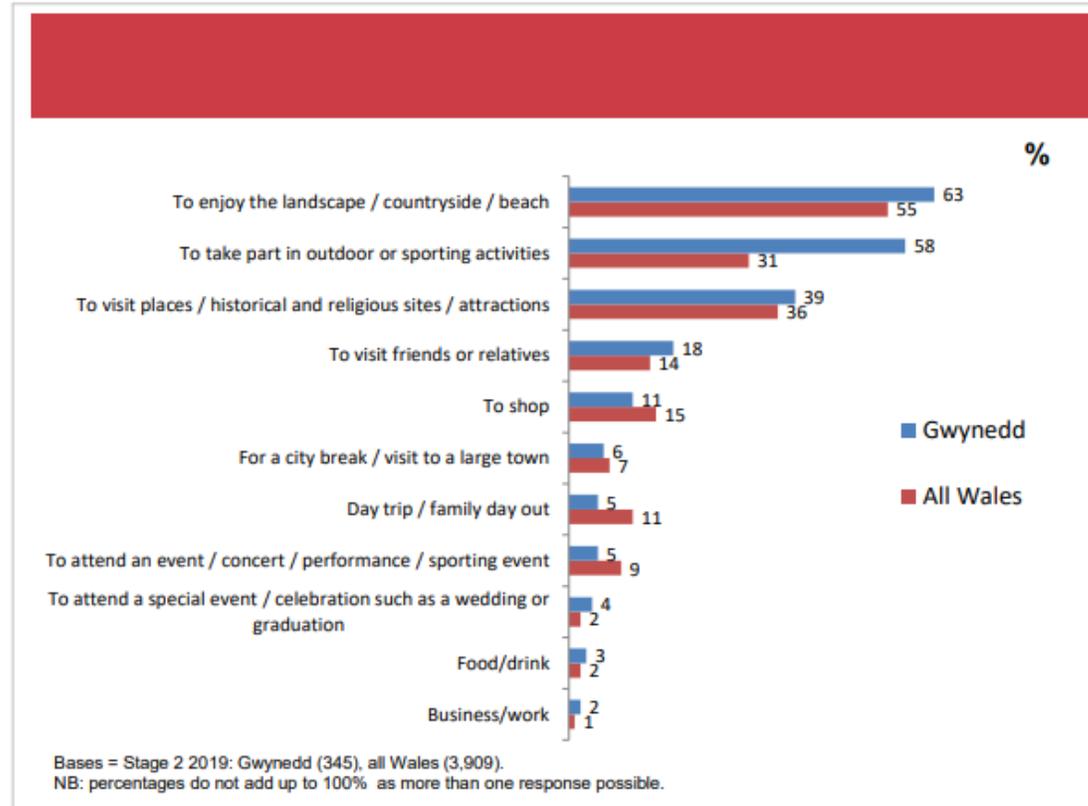
2nd most popular was to visit country parks / forest parks (33% vs 23% in Wales).

Also most popular (and all more popular than the national average) were general sightseeing, visiting the beach, and wildlife watching).

Significantly more people visiting Gwynedd took part in the following activities than on average in Wales: mountain biking, scenic / steam / historic railway, adventure sports, swimming, cycling, and visiting specific attractions.

Source: Wales Visitor Survey, Cyngor Gwynedd, 2019

Reasons for Visiting (2019)

%

Reason	Gwynedd	All Wales
To enjoy the landscape / countryside / beach	63	55
To take part in outdoor or sporting activities	58	31
To visit places / historical and religious sites / attractions	39	36
To visit friends or relatives	18	14
To shop	11	15
For a city break / visit to a large town	6	7
Day trip / family day out	5	11
To attend an event / concert / performance / sporting event	5	9
To attend a special event / celebration such as a wedding or graduation	2	4
Food/drink	3	2
Business/work	2	1

Bases = Stage 2 2019: Gwynedd (345), all Wales (3,909).
NB: percentages do not add up to 100% as more than one response possible.

Most Popular Individual Activities Undertaken (2019

	Gwynedd %	ALL WALES %
Walking (more than 2 miles)	37	19
Visit country parks / forest parks	33	23
General sightseeing	29	23
Visit the beach	28	22
Wildlife watching	18	13
Visit a castle or other historic attraction	17	16
Mountain biking	16	3
Scenic/steam/historic railway	15	4
Nature based attraction	13	11
Museum or heritage centre	13	11
Adventure sports	12	2
Visit a wildlife attraction / nature reserve	10	11
Walking (less than 2 miles)	10	8
Swimming	10	3
Cycling	9	3
Visit gardens	8	13
Industrial heritage attraction	8	5
Specific attraction (castle, museum, zoo..)	7	1

Bases = Stage 2 2019: Gwynedd (345), all Wales (3,909).
NB percentages do not add to up to 100% as more than one response possible.

Visitation and Tourism

Porthmadog Visitor Statistics

Cyngor Gwynedd published a Tourism Bed Stock Survey for the period 2018/19. This showed that in 2019 Porthmadog saw 1.2 million visitors. This accounted for 16% of the total visitors to Gwynedd.

In addition, there were a total of 4.2 million visitor days, which represented 17% of the total visitor days across Gwynedd.

The visitor economic impact in Porthmadog in 2019 was £228.6 million. This accounted for 17% of the total tourism impact in Gwynedd.

Visitor numbers and days, and subsequently economic impact, were hit by Covid, as was the rest of the country. However, the most recent figures released in 2021 were already showing a recovery.

Source: Cyngor Gwynedd Tourism Bedstock Survey, 2018/19

Porthmadog Visitor Numbers and Days 2018-2021
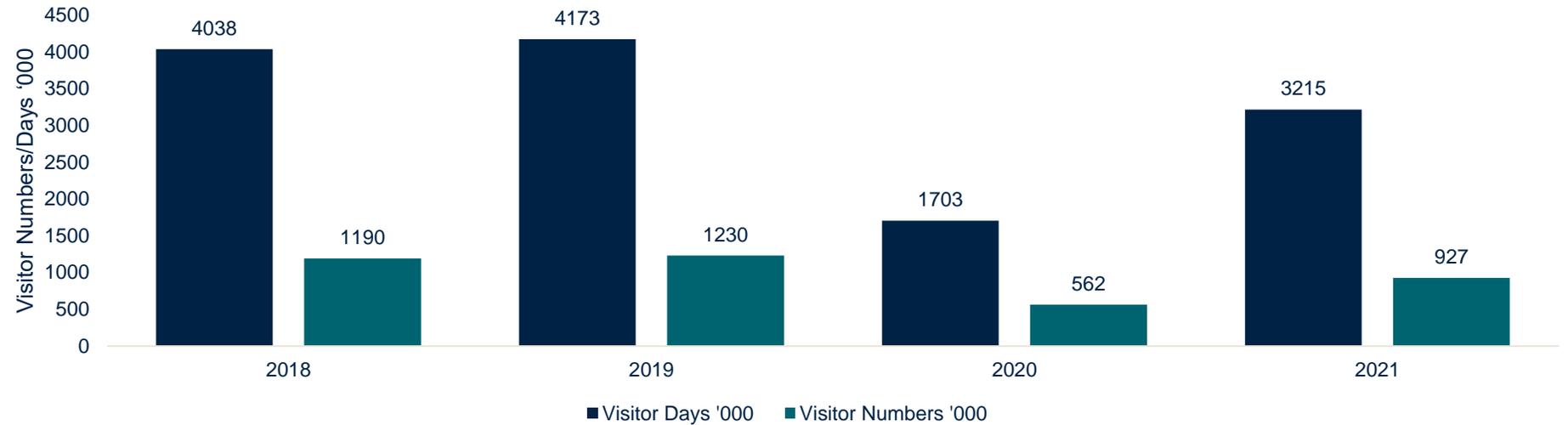
Porthmadog Visitor Economic Impact 2018-2021
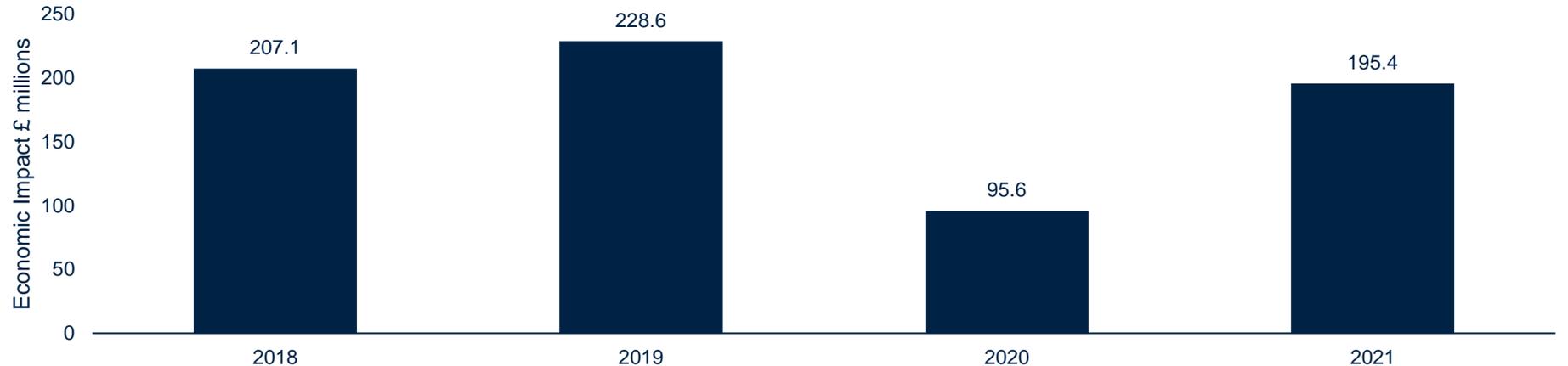
Visitation and Tourism

Porthmadog Tourism vs Gwynedd Regeneration Areas

The following charts show the top 5 regeneration areas in Gwynedd for visitor numbers, visitor days and economic impact.

The top 5 are the same for all 3 measures, despite some differences in order. These are Ardal Pen Llŷn, Bro Dysynni, Dalgylch Pwllhel and Dalgylch Pwllhel.

Porthmadog had the highest number of visitors, visitor days and the highest visitor economic impact of all locations in Gwynedd that were looked at in the STEAM summary. This was in comparison to 13 areas.

Source: STEAM summary, 2018-2021

Top 5 Gwynedd Locations: Visitor Numbers (2019)

Location	% Gwynedd visitor numbers
Ardal Porthmadog	16%
Ardal Pen Llŷn	14%
Bro Dysynni	11%
Dalgylch Pwllhel	11%
Bro Ardudwy	10%
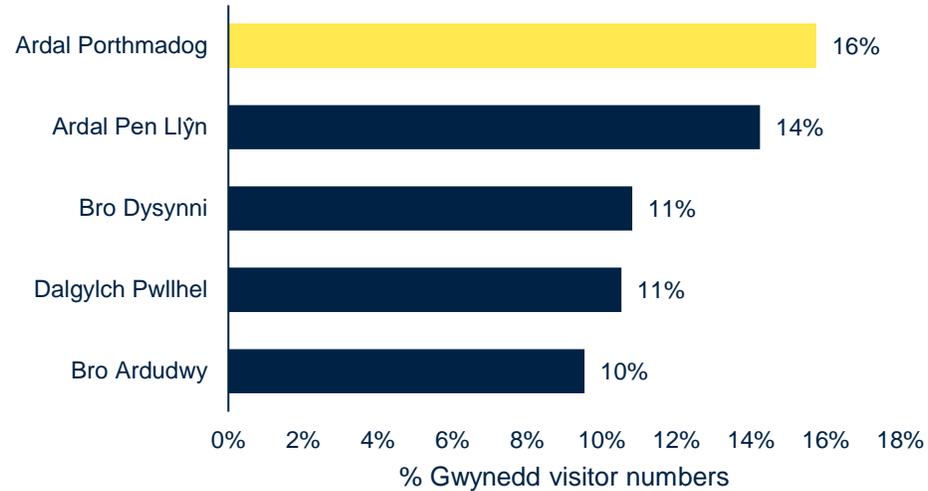
Top 5 Gwynedd Locations: Visitor Days (2019)

Location	% Gwynedd visitor days
Ardal Porthmadog	17%
Ardal Pen Llŷn	17%
Bro Dysynni	12%
Dalgylch Pwllhel	12%
Bro Ardudwy	10%
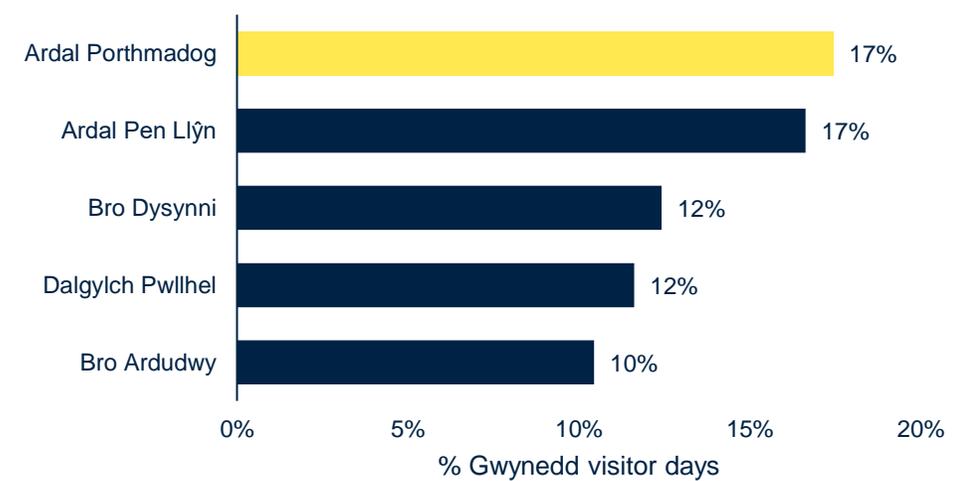
Top 5 Gwynedd Locations: Visitor Economic Impact (2019)

Location	% Gwynedd visitor economic impact
Ardal Porthmadog	17%
Ardal Pen Llŷn	17%
Bro Dysynni	12%
Bro Ardudwy	11%
Dalgylch Pwllhel	10%

Visitation and Tourism

Accommodation and Business Type

The Cyngor Gwynedd Tourism Bed Stock Survey recorded 13,490 bedspaces across Porthmadog in 2018/19, which accounted for 10% of the Gwynedd total.

The majority of these (over 12,000) were caravan and camping bedspaces, totalling 93% of all bedspaces. This is compared to 79% on average in Gwynedd. Porthmadog has a smaller proportion of serviced (2%, 230 beds) and self-catering (4%, 597) bedspace options than the average for Gwynedd. Both services and self-catered accommodation make up just 4% of the bedspaces in the local authority.

In the period, there were 94 Airbnb bedspaces, making up just 3% of the total in Gwynedd.

72% of accommodation businesses in Porthmadog (126) are self-catering businesses. This is a higher proportion than in Gwynedd.

Only 4% of accommodation businesses in Porthmadog are for services accommodation, compared with 9% in Gwynedd. The 7 serviced accommodation businesses in Porthmadog account for just 2% of the Gwynedd total.

Source: Cyngor Gwynedd Tourism Bed Stock Survey, 2018/19

Accommodation Type (2018/19)

Gwynedd: Serviced 5%, Self Catering 11%, Caravan & Camping 79%, Hostel/Bunkhouse/Campus Acc. 2%, Airbnb 3%

Porthmadog: Serviced 2%, Self Catering 4%, Caravan & Camping 93%, Airbnb 1%

% of bedspaces

Legend: ■ Serviced ■ Self Catering ■ Caravan & Camping ■ Hostel, Bunkhouse or Campus Acc. ■ Alternative ■ Airbnb

Accommodation Business Type (2018/19)

Gwynedd: Serviced 9%, Self Catering 61%, Caravan & Camping 9%, Airbnb 19%

Porthmadog: Serviced 4%, Self Catering 72%, Caravan & Camping 9%, Airbnb 14%

% of accommodation businesses

Legend: ■ Serviced ■ Self Catering ■ Caravan & Camping ■ Hostel, Bunkhouse or Campus Acc. ■ Alternative ■ Airbnb

Retail, Visitation & Tourism

The retail offering in Porthmadog is mostly clustered down the centre of the town and includes 2 large supermarket chains. Whilst the number of properties is not huge, there are signs that there is an increasing demand for an expansion in the retail offer in Porthmadog. There has been a large drop in vacancy rates since 2018 to now 100% occupation, and a positive net absorption. Porthmadog could also be an attractive location to invest in retail property due to low rents compared to the UK average and a healthy market yield of 8.5%.

CoStar property data shows that there are currently 4 hotels in Porthmadog, providing 168 rooms. This increased significantly with the opening of a Travelodge in 2008 and a Premier Inn in 2002. There are also 2 mid-scale hotels including one that opened in 1862. The Queens Hotel is in the planning process for a refurbishment and extension. There is currently not a high-end offer in the town.

The Porthmadog hotel market is relatively attractive. Occupancy is above average at 81%, rooms are affordable, the properties are cheap to buy and there is a good market yield. Across the 4 hotels, there was a total annual hospitality revenue of £2.8 million which has increased by 183% on pre-pandemic levels. This is highest during the summer months. Overall, there are signs that there is increasing demand for hotel rooms in Porthmadog.

The pipeline of retail, leisure and tourism properties across Porthmadog is small. The projects tend to be small in value and are mostly conversions or refurbishments of existing properties. The largest project to note is a £6.25 million development of a 60-bedroom hotel, a café and a garden centre.

In terms of tourism in general, Gwynedd attracted 7.81 million visitors in 2019. This increased by 9% on the previous 10 years and accounted for 26% of the North Wales total. There was also a 22% increase in the tourism economic impact in the local authority area in 2019 to £1.4 billion and accounted for 42% of the North Wales total.

Visitors to the area are almost equally from Wales or from the UK, with only 4% travelling from overseas, and 22% have some Welsh speaking ability. Gwynedd tends to attract couples, families of all ages, and is also popular with friends. The area is also attractive for larger groups than Wales as a whole.

Visitors are coming to Gwynedd for the areas of outstanding natural beauty, the beaches and the countryside, for walking and other outdoor sports such as mountain biking, swimming, and cycling. Gwynedd also has a specialism in attracting visitor for scenic, steam and historic railways which is a popular activity to partake in in Porthmadog. However, not many visitors travelled to Gwynedd just to visit large towns, but instead for more active activities.

There were 1.2 million visitors to Porthmadog in 2019 which accounted for 17% of all Gwynedd visitors, creating a tourism economic impact of £228.6 million (also 17% of the Gwynedd total), and the town is showing good recovery post-pandemic in the early 2021 figures. Porthmadog is also the best performing area in Gwynedd out of 13 regeneration areas for visitor numbers, visitor days and tourism economic impact.

The majority of visitors staying in caravans or camping sites in 2019. This was a higher proportion than in Gwynedd on average. There was also a relatively low number of people staying in self-catering or serviced accommodation, despite there being a large proportion of self-catering businesses in the town. There is a very low number of serviced accommodation businesses in the town, representing just 4% of accommodation businesses compared with 9% across Gwynedd.

This analysis shows that Porthmadog is a popular tourist destination with features to offer that link well to the attractions for Gwynedd visitors such as a beach nearby, heritage railways and proximity to outdoor sporting activities. There are indications that there is demand for a larger retail and hospitality offering in the town, to capture more overnight visitors. It would be important to market the sales pitch in a way that portrays the town as an attractive base to eat, drink, shop and explore whilst being local to a host of nature and outdoor activities across the local authority.

Porthmadog Businesses and Opportunities

Porthmadog Land Constraints

Porthmadog Land Constraints

There is one conservation area in the Porthmadog BUA. Conservation areas exist to manage and protect the special architectural and historic interest of a place.

The conservation area covers the port area and the high street, including Parc y Dref.

There are also two local nature reserves, both in the Borth-Y Gest area of the Porthmadog BUA. The largest of these is Pen Y Banc which covers the coastal area.

There are also several listed buildings situated throughout Porthmadog. The majority of these are clustered within the conservation area, close to the harbour.

Source: Savills Maps

Conservation areas

Constraints: Conservation areas

Listed buildings

Listed buildings GB

Local nature reserves

Local nature reserves in Great Britain

Porthmadog Land Constraints

Porthmadog Land Constraints

Due to proximity to the harbour, Porthmadog has flood risks that cover a large proportion of the town. This is most severe directly by the harbour, but there are pockets of high-risk areas further inland. Most notably, all the way along Madoc Street around the edge of the town.

The rest of the town is mostly covered by a low-risk flood warning. This may cause issues with developing opportunity sites.

Flood risk
- Very Low
- Low
- Medium
- High
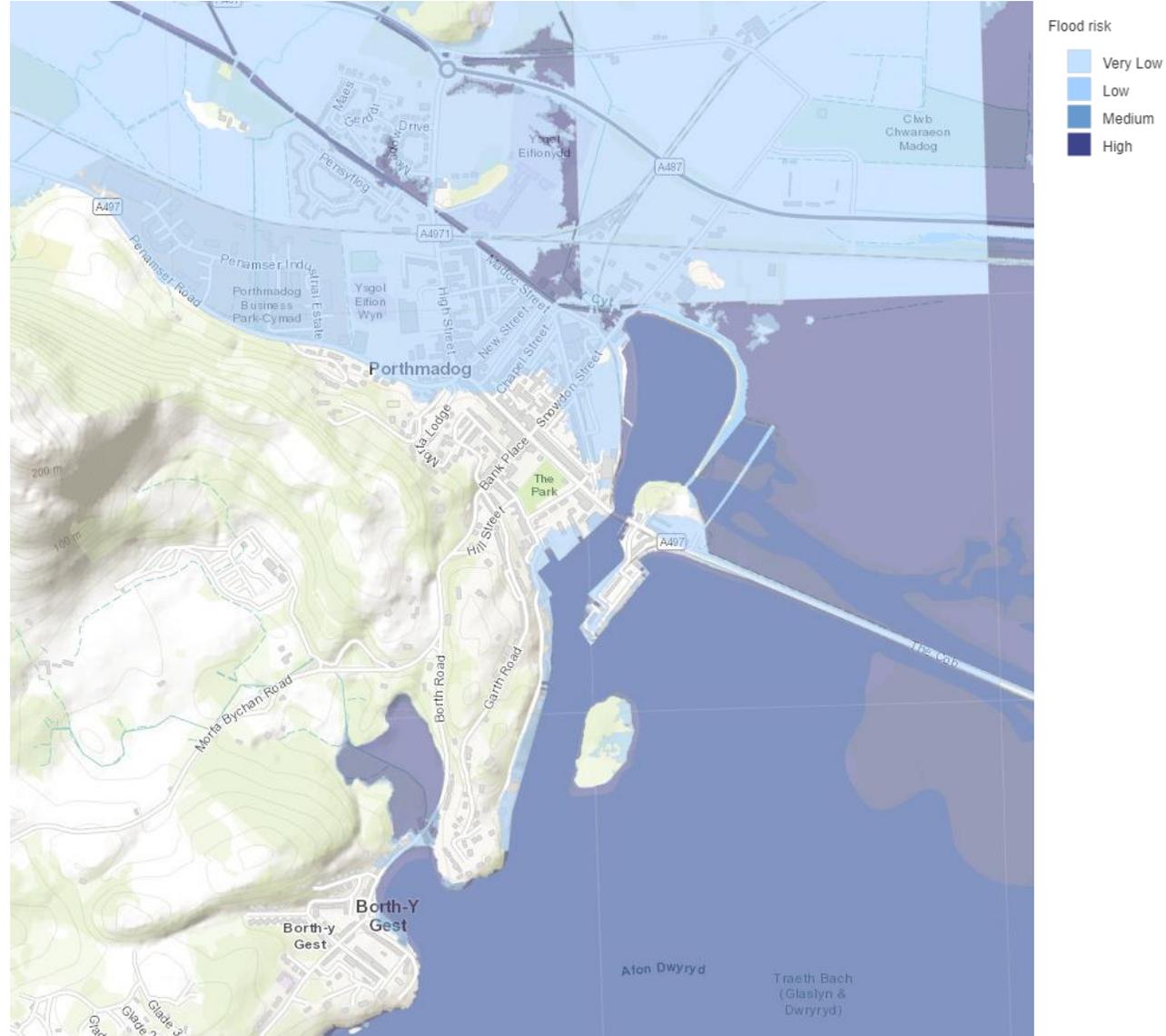
Source: Savills Maps

Porthmadog Land Use

Porthmadog Land Use

The majority of the land in Porthmadog town is made up of low density residential with amenities.

There is some industrial land use at the Penamser Industrial Estate and clustered to the East of the town, as well as Penamser Industrial Estate.

Along the high street there is some land used for retail and a plot of recreational land used for a town park.

The town is surrounded by deciduous woodland and agricultural land, with some inland water.

Source: Savills Maps

UK Land Classification 2023

Land use

landuse_text

- Agriculture - mainly crops
- Agriculture - mixed use
- Business parks
- Coastal dunes
- Coastal water
- Coniferous and undifferentiated woodland
- Deciduous woodland
- Farms
- Glasshouses
- High density residential with retail and commercial sites
- Industrial areas
- Inland Water
- Large complex buildings various use (travel/recreation/ retail)
- Low density residential with amenities (suburbs and small villages / hamlets)
- Medium density residential with high streets and amenities
- Mining and spoil areas
- Natural rockscapes
- Open or heath and moor land
- Orchards
- Principle Transport
- Recreational land
- Retail parks
- Urban centres - mainly commercial/retail with residential pockets
- Vineyards and hopyards
- Wetlands

Porthmadog Land Ownership

Porthmadog Land Ownership

There are pockets of land under corporate body ownership in Porthmadog BUA. This includes land around the Penamser Industrial Estate owned by the Welsh Government, land around the secondary school owned by Betsi Cadwaladr University Health Board Charity and the Welsh Ministers, as well as land owned by the Ffestiniog Railway Company, the Representative Body of the Church of Wales, and the National Trust for Places of Historic Interest of Natural Beauty.

There are a few plots of land in the town that are owned by the Grŵp Cynefin Housing Association.

Most of the land in the town is owned by private enterprises, particularly around the Penamser Industrial Estate. The largest of these is a caravan park owned by Tyddyn Llwyn Limited. Other private enterprise owners include Lidl, Tesco, Aldi, Sports Direct and British Telecommunications.

Furthermore, an extensive amount of the housing across Porthmadog is privately owned.

Cyngor Gwynedd own large sections of the land in the town. This includes the land used for the secondary school, the land along the embankment and Harbour, Parc y Dref, and a large proportion of the land at Borth-Y-Gest.

Source: Savills Maps

Legend:
- Corporate body
- Housing association
- Private enterprise
- Privately owned
- Public body
- Unlimited company

Economic, Socio-Economic and Market Baseline

Key findings

Like most of Gwynedd, the vast majority of Porthmadog residents speak Welsh. Similarly, the town has an ageing and contracting population with a higher proportion of its population aged 65+, than the Welsh average. There is also a significantly above average proportion of single-person households.

Healthy life expectancy in Gwynedd is above the UK average and health deprivation in Porthmadog is relatively low, but rates of childhood obesity and adult inactivity are higher than the national average. Overall deprivation is close to the Welsh average in the east of town and significantly below average in the west.

Residents of Gwynedd are increasingly highly qualified (growing proportion NVQ4+), and the area has seen significant employment growth over the past decade. Average earnings in Gwynedd are relatively low and behind the Welsh and UK averages.

The local economy appears to be in a strong position with the high street vacancy rate close to 0% and the quality and amount of commercial floorspace is increasing with conversions and improvements to existing buildings. Occupation of industrial estates is also at a high level and there is significant interest in the development of vacant plots. Businesses in Porthmadog are primarily micro in size and in the retail, accommodation and food service sectors, reflecting the prominent role of tourism in the local economy.

The hospitality market has performed very strongly in recent years, likely linked in part to Covid-19, with high occupancy rates and growing revenue. The development of the Premier Inn on the site of the former site of the former DWP offices is another positive indicator for the health of the visitor economy in Porthmadog.

Whilst there is significant local need for housing, the town faces significant development constraints that significantly limit the number of houses that could be built. Most prominent of these constraints is flood risk, which may be exacerbated over time by climate change. Many potential development sites are owned by public bodies and housing associations.

3

Engagement & Vision

Stakeholder Engagement

This section of the report sets out the consultation and engagement that has been undertaken ahead of and during the preparation of this Plan. Feedback from consultations and engagement has shaped the Vision Statement, presented in this section, and this in turn frames and guides the Options Analysis and Action Plan, presented in the following sections.

A Placemaking Plan must be oriented around the needs and priorities of residents alongside the other physical, cultural, and social features that form each place's unique character. Engagement is a critical part of the process, ensuring that the perspectives of residents, businesses, community organisations and other stakeholders feed into a shared vision and plan for the town.

Ahead of the Placemaking Plan, Cyngor Gwynedd and Menter Môn (a local regeneration agency) ran large-scale consultations targeted at residents and visitors, to gather their views on Porthmadog. This work has been a key building block for understanding local and visitor perspectives on the strengths, weaknesses and needs of the town – building on the baselines set in the previous section.

Complimenting consultations, detailed one-on-one discussions with stakeholders, an in-person Visioning Event and a site visit have been conducted as part of the preparation of this Plan. Key local and regional stakeholders were identified through regular engagement with Cyngor Gwynedd.

Ardal Ni

The Ardal Ni consultation of residents ran from February to June 2022. There were 334 respondents from the Porthmadog and Penrhyndeudraeth Area, of which 71 were from Porthmadog town. Of the 334 respondents, around 70% had at least some form of Welsh language abilities.

72% of respondents identified the area's natural environment as a positive feature of the local area. Half of respondents identified the area's heritage and language as a positive features, whilst a third identified the area's ability to attract tourism for economic benefit as a positive. There was a clear consensus amongst respondents that the lack of affordable housing for local people was a negative feature of the local area (identified by 60%). Similarly, the number of second homes (52%), lack of full-time jobs (52%), and the lack of provision for young people in

the area (43%) were negatives.

The changes that respondents would like to see happen include schemes to ensure suitable housing for the needs of local people (66%), plans to create high value work and jobs and to attract money and investment to the area (62%) and plans to provide more facilities and skills for young people (51%).

Helo Port

The Helo Port consultation primarily captured the views of visitors and ran from the end of July to December 2022, The consultation used the Hello Lamppost digital platform and received 552 respondents. Around two thirds of respondents were visitors to the town, of which families were most the common visitor group, and the main language of 72% respondents was English.

An evaluation of the scheme found that there was an overwhelmingly positive response from users on how their experience in Porthmadog was with most users complimenting how beautiful the town is. However, most respondents stated that they felt that more places to at night would really benefit the local community as well as more places for entertainment such as a cinema and mini golf. This suggests that growing the night-time economy and greater place activation is a priority for both visitors and residents.

Stakeholder Engagement

Site visit and stakeholder interviews

In October 2023 we visited Porthmadog, meeting with officers from Cyngor Gwynedd's regeneration and housing departments as well as Town Councillors and County Councillors. During the site visit, officers and councillors provided a tour of key sites around the town centre including the Harbour, high street, The Cob, Y Ganolfan, DWP Car Park and the Cut. The site visit highlighted a range of priority sites as well as the barriers to delivering change.

Affordable housing for local residents was consistently raised as a top priority for residents and local stakeholders. Adra Housing Association reported that the town has a waitlist of more than 350 people for social housing in the town.

Visioning Event

A Visioning Event was held in November 2023 as part of the preparation of this Plan. A total of 15 stakeholders attended, representing:

- Porthmadog Town Council
- Cyngor Gwynedd
- Adra Housing Association
- Betsi Cadwaladr University Health Board
- Welsh Highland Railway
- Menter Môn

Feedback from the event emphasised the critical need for affordable housing in the local area, importance of Welsh in the community, and the development potential of key sites (e.g. Old Coliseum site). In addition, a wide array of projects were proposed, including an expanded local active travel network, new heritage and cultural projects, and improved interpretation in the town centre.

Whilst the success of the visitor economy was recognised, public consultations highlight the need for a wider range of employment opportunities, particularly year-round employment.

Porthmadog is amongst the top 1% of areas in Wales in terms of proportion of Welsh speakers, and engagement with stakeholders and residents reflected the importance of language to the town's contemporary character and heritage. The WHS designation presents a clear opportunity to promote the town's heritage and language.

There is interest in developing the town's active travel network and local stakeholders highlighted where improvements could be made to existing routes (e.g. the Cut) and new routes could be developed (e.g. Llyn Bach).

Key findings

Engagement and consultation reflected the key trends identified during the review of baseline data, particularly around the topics of housing and employment. A summary of the findings is shown in the column opposite:

Engagement with local and regional stakeholders frequently highlighted the importance of local governance and the need for a constituted local organisation to drive forward smaller local initiatives, such as improvements to interpretation across the town.

SWOT Analysis

savills

STRENGTHS

▪ High level of Welsh speakers

▪ Surrounded by special landscape areas and beautiful views of Snowdonia

▪ Unique cultural and industrial heritage; strong local identity

▪ Strong local economy, specialized in tourism with no vacancies and growing hospitality revenues

Relatively strong retail offer

▪ Low levels of deprivation

WEAKNESSES

▪ Quality of public realm of key sites (e.g. Harbour and park)

▪ High rates of childhood obesity and adult inactivity

▪ Earnings and skill levels are below UK average

▪ Local economy oriented around tourism, linked to the limited number of quality year-round employment opportunities

SWOT

OPPORTUNITIES

▪ Designation of Porthmadog Harbour and the Cob as part of World Heritage Site

▪ Small number of brownfield sites in town, potentially suitable for housing

▪ Plans to expand active travel network and initiatives to improve health and well-being

▪ Place activation of key sites, particularly outside of peak visitor season

THREATS

▪ Lack of affordable housing – over time a shortage could negatively impact the local economy, public services and the Welsh language

▪ Local capacity to deliver place-based interventions in the town, following the end of the Partnership and Chamber

Loss of young people and families

Vision

A vision has been developed based on the views and feedback from residents, stakeholders and visitors, to guide the regeneration of Porthmadog town centre:

> *'A sustainable town with a unique landscape rich in wildlife and a world-class industrial, cultural, and linguistic heritage – with affordable housing and high-quality jobs for local people alongside an authentic and sustainable tourism offer that extends year-round.'*

Framework of the vision

World-class heritage & environment

Affordable housing

Porthmadog

Quality employment & sustainable tourism

Welsh language

Measures of success

The following measures have been developed to help assess whether each aspect of the vision is achieved. The vision will have been achieved if the following measures are delivered over the next five years:

- More social and affordable housing in the town
- A new health centre
- More employment floorspace and year-round employment opportunities for residents
- An established and active local partnership driving regeneration in the community
- The Welsh language will remain in a strong position as a living language within the community
- Greater promotion and interpretation of local heritage and culture
- A strong visitor economy with footfall more evenly distributed throughout the year
- A local active travel network, connecting residents and visitors, and reducing pressures on the road network

4

Options Analysis

Options Analysis

In this section we present some 'Big Ideas' on what the future of Porthmadog could look like, focusing on five key sites in and around the town centre. For some sites, a range of options are included in their analysis whilst others focus on a single option.

None of these options have been developed in detail. The options in this section are presented as initial Plans, setting out recommended actions to further consider and develop these options and high-level ideas of what future delivery could look like. The Action Plan, in the subsequent section, turns the recommended actions in the Options Analysis into a deliverable strategy. This includes the need to develop local capacity to lead on and deliver some initiatives, further site-specific community and stakeholder consultation to consider options in detail, and detailed feasibility and cost analysis to take forward some options.

Five opportunity sites are identified in the town centre based on public and stakeholder consultation, previous plans and original research. These sites are shown on the map opposite:

1. Old Coliseum
2. Porthmadog Harbour and Pen Cei Square
3. DWP Car Park
4. Parc y Dref
5. Cob Crwn

The Options Analysis outlines the key opportunities and constraints of each site, including how different site-specific interventions could capitalise on the strengths and opportunities and mitigate threats and weaknesses identified in the SWOT analysis. Previous chapters have highlighted two central issues for Porthmadog the availability of affordable housing and the number of year-round, full-time jobs.

Options Analysis
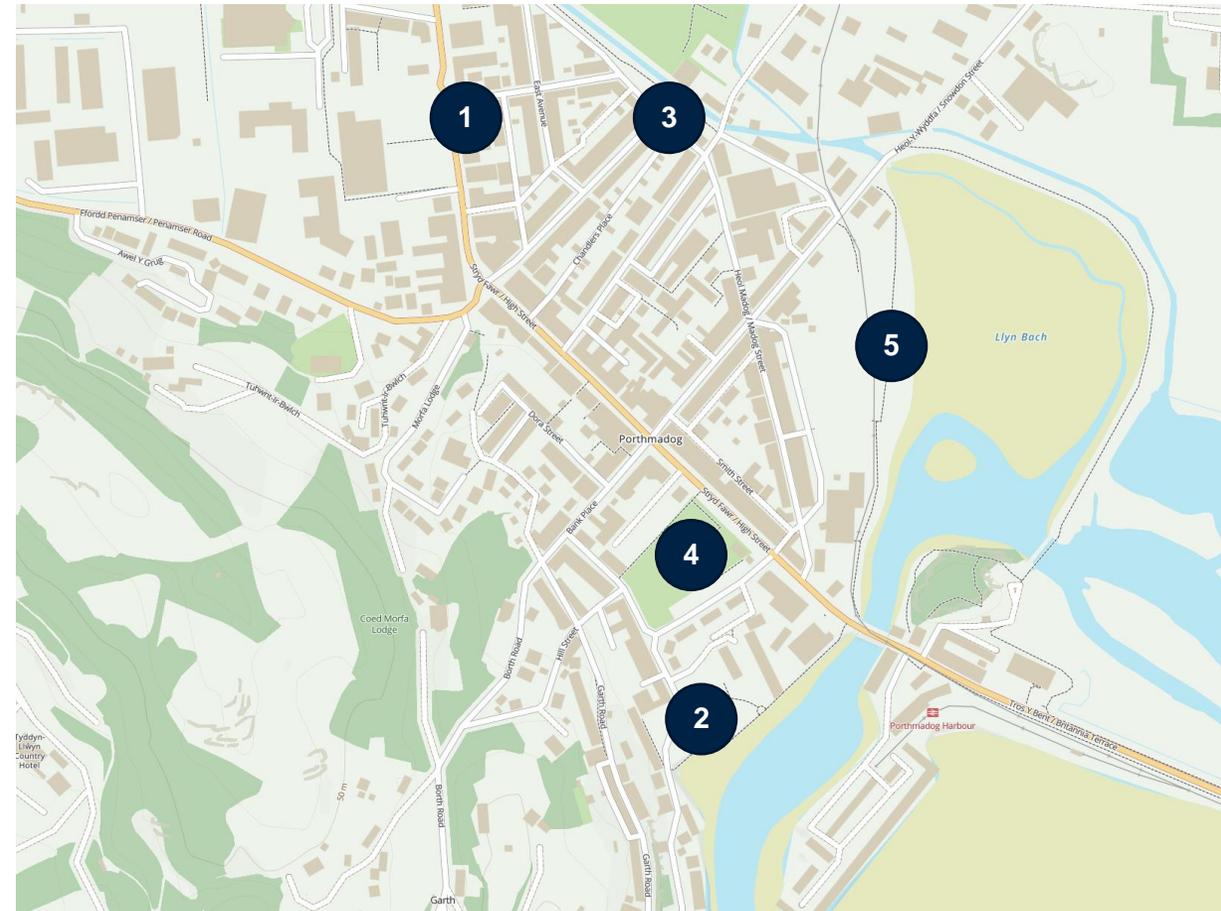
Old Coliseum Site, High Street

Description

The Old Coliseum Site is a brownfield site located on High Street and represents one of the strongest development opportunities in Porthmadog. The site was formerly occupied by the Coliseum Cinema, which has since been demolished. Located on High Street, the site is in a central location and is protected by the town's flood defences.

Residential development in Porthmadog is recognised to often be challenging and complex due to flood risk and other environmental factors. As this site is located in a C1 Flood Zone, development can only take place on the site subject to a justification test.

Opportunity

Betsi Cadwaladr University Health Board are currently conducting an options appraisal to determine where a new health centre should be located in Porthmadog. Early indications are that the Old Coliseum site cannot deliver a large number of residential units as well as a new health centre. Therefore, the opportunity for the site is likely either the development of a health centre with a small number of residential units or an exclusively residential scheme.

Impact

The delivery of a residential or healthcare-led scheme would bring significant social and economic benefits to Porthmadog.

2021 Census data shows that, like much of the region, Porthmadog has an ageing population which is leading to greater need for healthcare services. In addition, data from Welsh Index of Multiple Deprivation (2019) shows that small areas reliant on the town for services, such as Tremadog and Prenteg, are amongst the deprived in Wales for access to public services. As such, a new and modern healthcare facility would meet growing demand and help ease pressures on the health service in the region.

Porthmadog also has a significant deficit of affordable and social housing, with Adra reporting

that more than 300 people are currently waiting for social housing in Porthmadog. The delivery of new housing for local residents would have a significant positive impact, reducing the number of people forced to move from the area and reinforcing the position of the Welsh language in the community. In addition, retention of residents is also key for growing a year-round economy, less reliant on peak season in the summer.

Delivery

• Betsi Cadwaladr complete options appraisal, confirming whether the site will be developed as a new health centre

• If Betsi Cadwaladr decide not to develop the site, arrangements should be put in place for affordable or social housing to be developed on the site

Options Analysis

Old Coliseum Site, High Street

Top-down visualisation of a development on the Old Coliseum Site

Visualisation of new affordable housing in Llanberis (Saer Architects)

Options Analysis

Porthmadog Harbour, Lombard Street

Description

Porthmadog Harbour was constructed in the 1820s by William Madocks following the development of The Cob which deepened Glaslyn River. In the 1820s the Harbour was the main export point of slates from Ffestiniog quarries and because of this connection to the slate industry, the site now forms part of The Slate Landscape of Northwest Wales WHS. Adjacent to the site is Pen Cei Square, public space by the waterfront which is composed of an area of grass and a paved area along with a small number of benches. Opposite the Square is Tafarn Pen Cei (public house) and nearby, along the waterfront, is the Maritime Museum.

Opportunity

The site has significant potential as designated WHS and a public space by an attractive waterfront, however, at present it is nondescript and underutilised. Steps that could be take include extending the Maritime Museum with outdoor seating overlooking the Square and Harbour, linking the two spaces. Opportunities for public realm enhancements include improved walking and cycling routes through the Square alongside new and improved street furniture, such as benches and lighting.

Alongside linking the space with the Maritime Museum, there is an opportunity to engage local artists through the installation of public art and information boards which promote the area's unique heritage and culture. In addition, in its present form, the space is underutilised for public events – there is potential for open air cinemas and temporary food vans to be hosted in this space to grow the evening and night-time economy.

Impact

These proposals would help create a thriving space that is used year-round and leverages its unique status as a WHS to celebrate local heritage and drive economic development. Results from the Helo Port consultation showed a desire amongst residents and visitors for more public activities in the town, particularly in the evening and night-time.

Stakeholder and resident feedback during public consultations and engagement has regularly shown a desire for greater recognition and promotion of local heritage. Integrating interpretation and promotion of heritage into the site will strengthen the area's sense of place and unique identity. In addition, as noted previously, social factors including the overall quality of life are key for retaining and attracting young people and families, which ensures that the Welsh language continues to thrive.

Delivery

- Identify and deliver 'quick wins' (low-cost projects deliverable in short-term), such as installing new information boards (which promote heritage and local art, linking with WHS) in accordance with the Town Council's local interpretation plan, introducing additional greenery, refurbishing existing street furniture, and using the space for food trucks and events.

- Develop a full programme of public realm improvements, based on the vision and proposals set out in this Plan, including a full set of costings, detailed design vision for the space and prioritisation of key actions.

- Commission a feasibility study to explore the opportunities to improve linkages between the Maritime Museum, including public seating and canopies, costing and evaluating different options.

Options Analysis

Porthmadog Harbour, Lombard Street

Illustration of Pen Cei Square featuring temporary food vans, an open-air cinema and improved street furniture

Illustration of improved linkage between the Square and Maritime Museum, featuring additional greenery, interpretation boards, and canopies along the waterfront

Options Analysis

DWP Car Park, Madoc Street

Description

The Department for Work and Pensions (DWP) car park is located north of the town centre and is owned by Department for Levelling Up, Housing and Communities (DLUHC), aside for an electricity substation owned by Scottish Power (SP Manweb PLC). The site is surrounded by housing and is currently used for car parking by staff of the nearby DWP offices. Feedback from local stakeholders suggests that the Car Park is currently underutilised due to its distance from the DWP offices and changing work patterns.

Similar to the Old Coliseum, this site is located in a C1 Flood Zone, development can only take place on the site subject to a justification test.

Opportunity

The car park is protected by flood defences and located within the development boundary, indicating that it is a viable development site. However, the plot is relatively small, and the electricity substation reduces the amount of land available for development and increases the complexity of developing the site.

The DWP car park is one of a small number of sites in the town with potential for residential development. Porthmadog faces significant development constraints due to tidal flood risk and its rural location. As a result, there is an extremely limited amount of land suitable for highly vulnerable developments (e.g. housing and emergency service centres).

In this context, there is an opportunity to investigate the feasibility of developing the site, despite the potential complexities. Development would intensify its use and has potential to ensure that the site better meets the needs of the local community, particularly for affordable housing and employment space.

Impact

The shortage of affordable housing and lack of year-round employment opportunities were registered as top concerns by residents during the Ardal Ni 2035 consultation. This may be considered a growing priority for the town as demographic trends show that the population is ageing and contracting. The development of housing or employment space on the site has potential to retain more residents in the local area which has significant social and economic benefits, including sustaining the Welsh language as a community language. In addition, a larger resident is key to diversify the local economy and increasing spend outside of the visitor season, more evenly distributing spend throughout the year.

Delivery

• Engage with the UK Government to establish if there is interest in redeveloping the site

• Investigate the viability of developing the site, considering the site-specific development constraints (e.g. electricity substation) and the of future uses, recognising that two of the areas of greatest need in the town are housing and employment space

Options Analysis

DWP Car Park, Madoc Street

Top-down visualisation of a development with parking on the site (highlighted)

Visualisation of a new development in Pwllheli (Adra Housing Association)

Options Analysis

Parc y Dref, High Street

Description

Parc y Dref is located between Lombard and High Street. To the south of the park is Heol-y-Parc pay and display car park, a mid-sized car park with 44 spaces. The park is owned by Cyngor Gwynedd and contains a children's playground, Golff Giamocs crazy golf course, Grade II listed fountain in memorial of William Madocks, public toilets, and an ice cream shop.

Opportunity

The site is an important community asset in the centre of town and as a result future interventions should be oriented around the needs of the community. The park is spacious and well looked with a large number of benches and a popular children's play area. Feedback from stakeholder suggests that there are a wide range of opportunities for improving the site's green spaces, recreational and play facilities, and active travel links. Opportunities include:

- Install a natural play area and outdoor gym equipment alongside additional outdoor seating
- Dedicate an area of the park to a community garden, creating an 'edible landscape' that promotes local food production and healthy lifestyles
- Develop new East-West and North-South shared cycling and walking paths through the park
- Improve the existing crazy golf course with more holes, new and refurbished courses, and more planting along the boundary
- Establish weekend markets, introducing more activity to the town across the year

Impact

Data in the baseline highlights that, whilst quality of life in Porthmadog is very high, there are challenges related youth obesity (which is amongst the highest in Wales) and high levels of inactivity amongst adults. The opportunities identified above, particularly improvements to play areas and active travel routes, would promote physical exercise and activities in the town for both children and adults, by providing more opportunities to travel on foot or by bike and more reasons to visit the park and engage with the local environment.

Similarly, as the town's existing allotments are oversubscribed, a community garden has potential to enable more residents to grow food, which would in turn help improve well-being and promote healthy and sustainable lifestyles. Improvements to the golf course, active travel routes and establishing a market also have potential to increase activity in the park and provide amenities and attractions for residents outside of peak visitor season.

Delivery

- Develop a Landscape and Play Strategy for the park to help coordinate and develop the range of opportunities identified in greater detail, particularly new play facilities, community garden, additional planting and new active travel routes. The Strategy creates an opportunity to further consult with local stakeholders and residents, providing an opportunity for greater community involvement, as well as consider the feasibility of different options.
- Engage with traders and local businesses to explore the interest and feasibility of establishing a market and whether additional facilities would be needed to host a market.

Options Analysis

Parc y Dref, High Street

Illustration of Parc y Dref with a community garden, new active travel routes and other improvements

Draft masterplan of the site based on the opportunities identified

Options Analysis

Cob Crwn

Description

Cob Crwn is a circular embankment surrounding Llyn Bach. Cob Crwn is located east of the town centre and neighboured by Llyn Bach Pay & Display Car Park and Gorseddau Tramway (route of the Ffestiniog Railway) to the west and Ynys Tywyn and Britannia Bridge to the south. Cob Mawr, the larger embankment and route of the A497, is located immediately south of Cob Crwn and extends across the length of Traeth Mawr (the estuary). Llyn Bach and Cob Crwn are owned by Cyngor Gwynedd and the area of forest on Ynys Tywyn is owned by the National Trust.

Cob Crwn forms a 1.5km loop via a footpath along the north and east banks and passing through a small forest on Ynys Tywyn. There is no path along the western bank and therefore to complete the loop the route follows the edge of the Llyn Bach Car Park.

Opportunity

Cob Crwn is a popular area among residents as an easily accessible waterfront location with a dedicated footpath and impressive views of Snowdonia, however, there are opportunities to improve the area further. The main opportunity identified by stakeholders is the development of a new footpath along the western bank which would complete the circular loop around Cob Crwn. Alongside a new footpath, there is an opportunity to build piers with seating along the banks (visualised on the next page) and add additional interpretation, communicating the significance of the area for the slate industry and its unique natural features.

Impact

Like the opportunities linked to the Parc y Dref, the actions identified for Cob Crwn would create more opportunities for residents to access the local environment and engage in physical exercise and activities. These interventions would support the well-being of local residents as well as encourage visitors to stay longer in Porthmadog, increasing the benefits of the visitor economy for the town.

Delivery

- Cyngor Gwynedd have proposed developing a shared path on the western bank, completing the loop around Llyn Bach (reference Gwyn-Porth-IMU001 in Gwynedd's Active Travel Network Map)
- Secure funding to design and develop the path
- Explore opportunities to combine funding pots to deliver piers, additional interpretation, and wider public realm improvements alongside the path on the western bank

Map of proposed walking and cycling paths near Cob Crwn in the Gwynedd Active Travel Network Map

Options Analysis

Cob Crwn

Draft masterplan for Cob Crwn depicting a new path and piers

Aerial view of the north of Cob Crwn (Ian MP)

5

Action Plan

Action Plan

Introduction

This section presents next steps and the actions needed to implement this Plan. Over the following three pages, a prioritised list of actions are presented, beginning with those which are feasible within the next 12 months. Each action is characterised by priority, timescale, cost, and themes. Notably, it may be that as feasibility and options analysis continues these actions need to be revisited and re-prioritised and there should be an ongoing review of this actions list – they are presented here as a starting point.

Prioritisation

Actions have been prioritised based on public consultations (Ardal Ni and Helo Port), engagement with key stakeholders, policy context and the baseline economic, socio-economic and market data. The highest priority has been allocated to actions which directly help to meet directly meet housing and employment needs.

Timescales

Timescales refer to the period in which projects and actions can feasibly delivered:

- Short – 12 months or less
- Medium – 12 to 24 months
- Long – 2 years or more

Costs

Costs presented here are initial high-level estimates that have been developed based on discussions with stakeholders and comparable projects, they are uncertain and could change considerably, but provide a rough indicative initial estimate.

- Low – £0 to £10,000
- Medium – £10,000 to £50,000
- High – £50,000 or more

Themes

Affordable housing

Quality employment

Welsh language

Governance

Historic landscape and greenspaces

Local connectivity and well-being

Sustainable tourism

Action Plan

Project	Description	Timescale	Cost	Responsible bodies	Priority	Main theme	Supporting themes
Coliseum Site	Complete options appraisal for the Coliseum site to establish whether a health centre or housing should be built on the site	Short	Low	Betsi Cadwaladr, Cyngor Gwynedd and housing partners	High	Affordable housing	Welsh language
Parc y Dref	Develop a Landscape and Play Strategy to enhance recreation facilities and promote local heritage and culture. Engage with traders and local businesses to establish interest and feasibility of hosting a market at the park.	Short	Medium	Cyngor Gwynedd, Town Council and local community groups	Low to medium	Historic landscapes and greenspaces	Sustainable tourism, Welsh language
Local heritage and walking trails	Explore opportunities to develop new walking trails in and around green spaces in the local area.	Short	Low	Cyngor Gwynedd, Town Council, and local community groups (including Highlands Railway)	Low	Historic landscapes and greenspaces	Local connectivity and well-being, sustainable tourism, Welsh language
Interpretation in town centre	Additional and improved interpretation of Porthmadog's heritage and culture in the town centre, linking with ongoing work to improve signage	Short	Low	Cyngor Gwynedd, Town Council and local community groups	Medium	Historic landscapes and greenspaces	Sustainable tourism, Welsh language
Town Centre Manager	Hire a permanent Town Centre Manager to coordinate local stakeholders and drive local placemaking and place activation initiatives	Short to medium	Medium	Cyngor Gwynedd and Town Council	High	Governance	
Town Centre Partnership	Establish a Town Centre Partnership formed of local stakeholders, to coordinate and catalyse placemaking initiatives in the town; led by and working closely with the Town Centre Manager	Short to medium	Low	Cyngor Gwynedd, Town Council, Adra, Betsi, businesses and other local partners	High	Governance	

Action Plan

savills

Project	Description	Timescale	Cost	Responsible bodies	Priority	Main theme	Supporting themes
Synthetic pitch and play facilities	Prepare study evaluating the options for a new synthetic pitch and new play facilities in Porthmadog.	Short to medium	Low	Cyngor Gwynedd	Medium	Historic landscapes and greenspaces	Local connectivity and well-being, sustainable tourism
DWP Car Park	Study assessing the feasibility of developing the site and assessing viable development options.	Short to medium	Low to medium	DWP and Cyngor Gwynedd	Medium	Affordable housing	Welsh language
Porthmadog Harbour and Pen Cei Square	Activate the space with 'quick wins' (refurbish street furniture, additional greenery, food trucks and events) whilst developing a public realm strategy for the area that assess the feasibility of improving linkages with the Maritime Museum.	Medium	High	Cyngor Gwynedd, Town Council and World Heritage Site	High	Historic landscapes and greenspaces	Quality employment, Local connectivity and well-being, sustainable tourism
Penamser Industrial Estate	Complete preparation of the empty plot to enable the development of new business floorspace, addressing the historic undersupply in the local area.	Medium	High	Welsh Government	High	Quality employment	Welsh language
Town Centre Property Improvement Grant	Support town centre businesses to apply for the Grant to upgrade their premises, helping to enhance the appearance of the high street.	Medium	Medium	Cyngor Gwynedd and Welsh Government	Low	Quality employment	Welsh language
Empty shopfront scheme	Ensure funding is available for vinyl signs to cover any shops which become vacant, to maintain the appearance and vibrancy of the high street.	Medium	Low	Cyngor Gwynedd	Low	Local connectivity and well-being	Quality employment, sustainable tourism

Action Plan

Project	Description	Timescale	Cost	Responsible bodies	Priority	Main theme	Supporting themes
Active travel network	Fill gaps in the local Active Travel Network to connect residential areas with the town centre and employment sites on foot and by bike; exploring opportunities for additional cycle facilities in the town centre.	Medium	Medium to high	Cyngor Gwynedd and Town Council	Medium	Local connectivity and well-being	Quality employment, sustainable tourism
The Cut	Explore opportunities to integrate the Cut as part of the local active travel network, formalising an existing linkage between Porthmadog and Tremadog.	Medium	Medium	Cyngor Gwynedd and Town Council	Medium	Local connectivity and well-being	Quality employment, sustainable tourism
Llyn Bach and Cob Crwn	Develop new shared path and piers alongside west of Llyn Bach, creating a full circuit around the lake, and integrate greater interpretation of local heritage (particularly of Madoc).	Medium	Medium	Cyngor Gwynedd, Town Council and local community groups (including Highlands Railway)	Medium	Historic landscapes and greenspaces	Local connectivity and well-being, sustainable tourism, Welsh language
Cultural offer	With increased local capacity, explore opportunities to develop the town's cultural offer including developing a defined and active event programme, public art programme, and expanding the use of Y Ganolfan.	Medium to long	Medium to high	Town Council and local community groups with support from Cyngor Gwynedd	Medium	Local connectivity and well-being	Welsh language, quality employment, sustainable tourism
Chamber of Trade	Support businesses to form a Chamber of Trade to ensure they are fully represented in local decision-making and can support the delivery of local placemaking initiatives.	Medium to long	Low	Local business community, Town Council, and Cyngor Gwynedd	Low	Governance	
Transport gateway	Maximise the town's location as a gateway to Eryri and reduce pressure on road network by increasing train frequencies on the Cambrian Line and improvements to Porthmadog Station.	Long	High	Transport for Wales with support from Cyngor Gwynedd and Town Council	Medium	Local connectivity and well-being	Quality employment, sustainable tourism

6

Governance and Delivery

Governance and Delivery

Governance has been identified by a range of local and regional stakeholders as the 'missing link'. Whilst there has been significant local interest and ambition for change, many of the actions and projects proposed in previous plans have not been delivered.

Effective local governance models support local stakeholders to coordinate and deliver local initiatives. Two key benefits of adopting a defined governance model in a town are providing accountability by defining and allocating responsibilities for its members and partners, and, secondly, providing an entity that can receive funding and own and lease land and other assets.

Welsh Government's 2023 Town Centre Position Statement confirmed that local capacity is an important consideration for the targeting of regeneration and economic development funding, with a preference for towns with greater, proven capacity to deliver. As such, there is a clear policy requirement to boost capacity and build up a track record of success in order to secure public funding and resources.

Governance in Porthmadog
At present, there is a Town Council which is responsible for the maintenance of Cae Pawb (allotments), Bryn Coffa (war memorial) and Bodawen Park and Playing Fields alongside some public rights of ways in the town. The Town Council also allocates funding to community groups, such as Caru Port, and Christmas lights and decorations.

Porthmadog Chamber of Trade & Commerce, formed of traders in the town, has ceased operating – there is currently no business group in Porthmadog. The Porthmadog Town Centre Partnership, formed to develop and deliver the 2014 Action Plan, is no longer active.

There is long-standing recognition of the importance of governance for delivering positive local change in Porthmadog. The 2014 Action Plan highlighted governance as a key theme and identified the need for a Town Centre Manager and in the preparation of this Plan, stakeholders cited the need for a new local governance model. Feedback from local stakeholders at the Visioning Event indicated that a formal governance model with paid staff was a preferred model for the town, as the pressures of the visitor season left many unable to commit time year-round to a voluntary governance model.

Governance models
There are a wide range of governance models and variations on existing models. Models can be differentiated based on the role of the public and private sector, and their formality, with formalised models associated with more rigorous responsibilities for its members. The main models are summarised below:

- *Town Partnership / Town Board* – A voluntary partnership typically composed of stakeholders from local community, public and private sector organisations. As a voluntary model the emphasis is typically placed on coordinating existing activity, particularly between different organisations within the town, and strengthening the voice of local stakeholders.

- *Chamber of Commerce* – A not-for-profit company established and run by businesses, with members typically contributing an annual membership fee. As a business-led organisation, Chamber of Commerce are designed to promote the views of the local business community, lobbying government for change, and organising activities within the community. Smaller Chambers of Commerce are often run on a voluntary basis with no or few paid staff.

- *Business Improvement District (BID)* – BIDs are also business-led not-for-profit companies. A majority of businesses by number and rateable value must vote to establish a BID in a ballot. BIDs run for a 5-year term and charge an annual levy of around 1-3% of rateable value (on top of business rates) which is used to hire full-time staff. BIDs are formed, on average, by at least 300 businesses with an annual income of around £200,000. BIDs focus on the priorities of their members and typically deliver marketing and events as well as street cleaning and physical improvements to the high street.

Governance and Delivery

- **Community Regeneration Company** – Community-led not-for-profit company (often formed as a Community Interest Company or Community Benefit Society) work to manage and improve an area. Whilst they are often community-led, some also incorporate representatives from public sector bodies and other organisations. As a registered company (or society), community regeneration companies are often better positioned, than un-constituted voluntary bodies, to function as accountable bodies and lever in funding to an area or scheme. In Gwynedd, there have been several successful community regeneration companies including Cwmni Bro Ffestiniog and Galeri Caernarfon.

- **Public-private partnership** – A formal partnership between public and private bodies. For example, between a Local Authority and developers. These partnership are often set up in the form of joint venture companies with the sole purpose of developing specific sites or other contractual relationships. The model is typically used for delivering large-scale urban regeneration projects and major infrastructure schemes.

Case studies

Cardigan, Ceredigion

- Cymdeithas Cynnal a Cefnogi Cefn Gwlad (4CG) was established in 2010 to revitalise the town centre and support the local community.

- 4CG purchased and developed a town centre into a car park, funded through a community share offering.

- Revenues from the car park are invested into the town centre and formerly vacant properties have been purchased, refurbished, and reopened. An eco-shop, local museum, and a day care centre have opened in former vacant units the group is working to open new accommodation in the town centre.

- 4CG have also developed a town app and installed a public Wi-Fi system in the town centre to generate visitor analytics, which are used by businesses to inform trading hours and marketing, and as an evidence base for funding applications.

Treorchy, Rhondda Cynon Taf

- Following a successful and active Chamber of Trade, a BID, named Love Treorchy, was established by high street businesses in 2020.

- Love Treorchy is formed of around 110 businesses (the vast majority of whom are independent businesses) and generates around £27,000 per annum, making it one of the smallest in the UK. As a small BID, Love Treorchy focuses on leveraging in external funds into the town centre (e.g. Welsh Government, UK Government and a local wind farm community fund) as well as working with local partners.

- Since its establishment, the BID has organised the town's first food festival as well as Christmas parades and other events, aiming to increase footfall throughout the year.

- Funding from Welsh Government has been used to develop video and social media marketing content for the town centre and Love Treorchy have partnered with a digital platform to deliver a digital loyalty scheme for town centre businesses.

Governance and Delivery

Diagram comparing five governance models based on their formality and leadership

Governance and Delivery
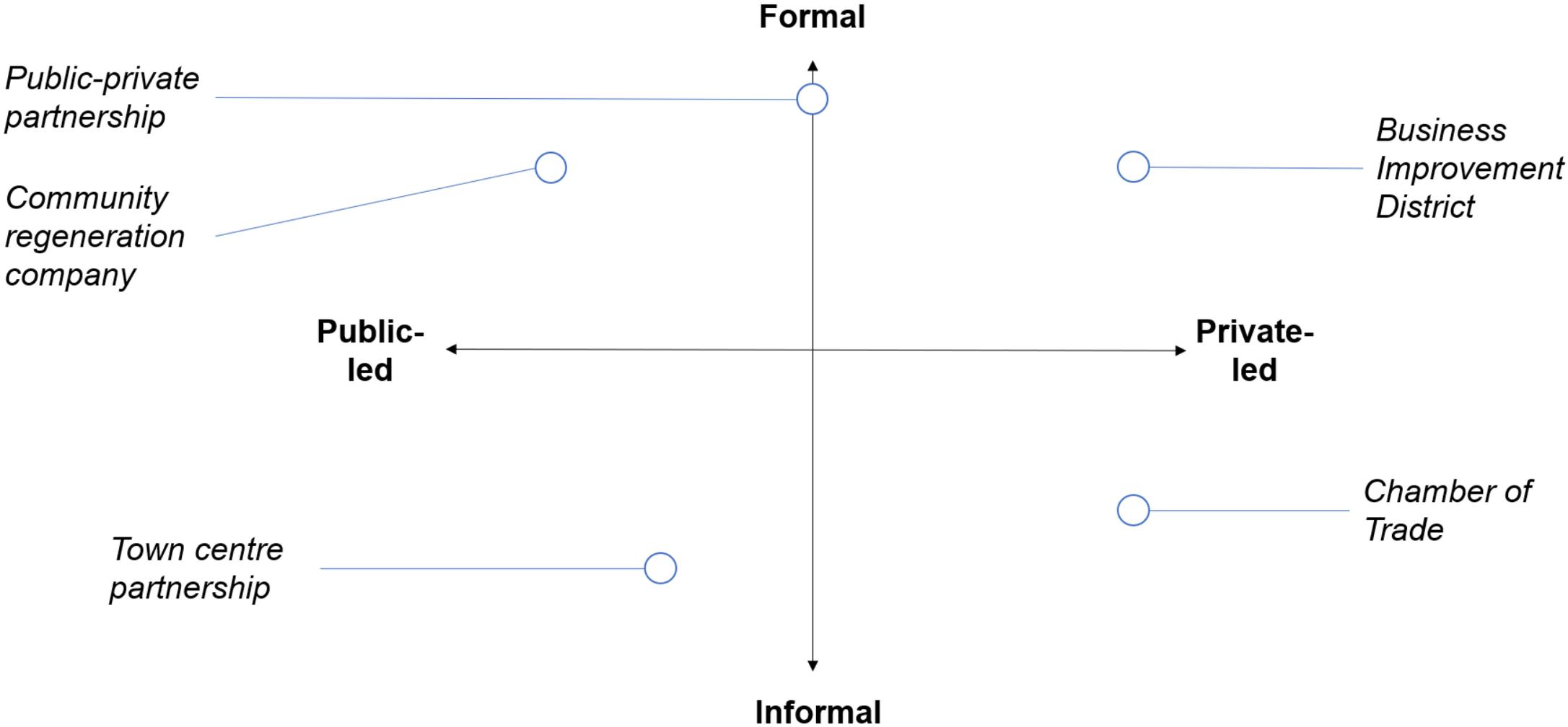
Three complimentary governance options have been identified for Porthmadog, recognising both the local ambition for change and capacity challenges. Whilst each of the governance options can be implemented independently, together they form a robust, representative and dynamic governance model with strong potential to attract funding and support the delivery of this Plan.

Town Centre Partnership

A key finding of this Plan is the absence of a local constituted group eligible to apply for grant funding and own, lease or otherwise manage assets in the town – beyond the Town Council. This is considered key to attracting funding (for instance Adra and North Wales Housing Association both offer community grants to local groups with a bank account and constitution) and driving change in the town centre.

As such, one of the first steps to successfully delivery local change must be establishing a Town Centre Partnership, formed as a community company (e.g. Community Interest Company, Community Benefit Society or similar). A constituted Partnership would bring together local public, private and community stakeholders and provide an effective vehicle for local stakeholders to lead on and contribute to local placemaking initiatives.

This Plan provides a catalyst for establishing such a Partnership, with a clear set of key sites and actions identified in the Options Analysis and Action Plan helping to guide the Partnership's initial focus. However, the main drawback would be the need for stakeholders to volunteer time to run the Partnership and contribute to local initiatives, which stakeholder feedback has suggested is not feasible year-round. Therefore, additional support is likely needed to build up capacity and experience in the near-term.

Town Centre Manager

The Town Centre Manager would be a paid role with responsibility to coordinate local stakeholders, liaise with regional partners and lead on initiatives in the town. As a paid role, it would significantly increase local capacity, particularly during visitor season, and in turn this would facilitate the delivery of new projects and initiatives in the town centre.

A Town Centre Manager could provide the resource necessary to set up and run a Partnership, and in the process deliver smaller scale projects that help to grow the track record of local delivery over time. There is a need for wider community buy-in and leadership and therefore a Town Centre Manager, without a Partnership, is not likely to be sustainable in the long-term.

Porthmadog Town Council

Town Councils perform a different role to local regeneration companies and are important for delivering local initiatives, particularly by providing a robust accountability framework. Like many other Town and Community Councils across the country, Porthmadog Town Council does not have a full cohort of members. Supporting the Town Council to recruit new members would complement the establishment of a Partnership and Town Centre Manager, helping to further increase local capacity.