



savills

Pwllheli Placemaking Plan

June 2024



Llywodraeth Cymru
Welsh Government



Trawsnewid Trefi
Transforming Towns



CYNGOR
GWYNEDD
COUNCIL



Table of contents



SECTION 1
Introduction

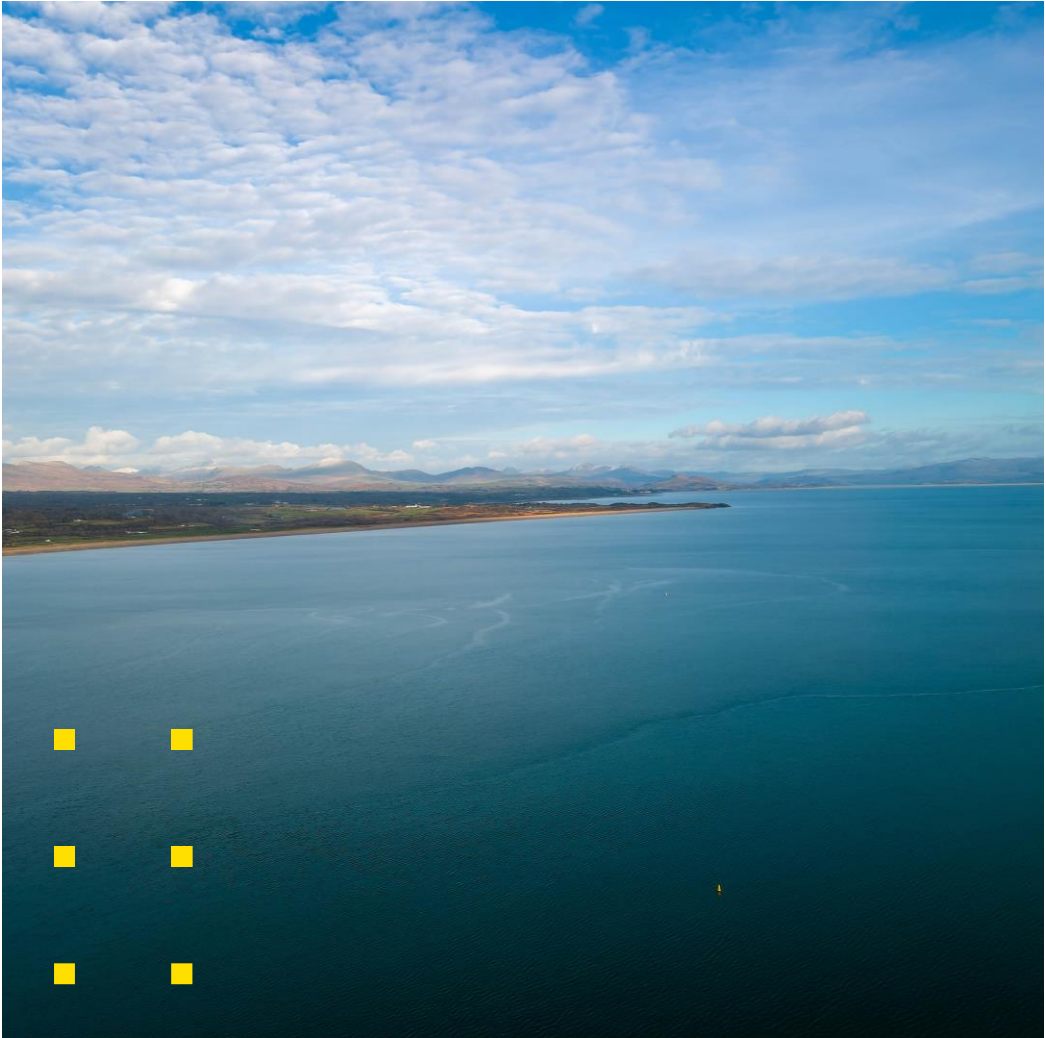
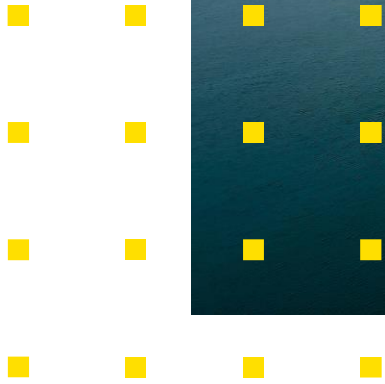
SECTION 4
Engagement &
Vision

SECTION 2
Baseline

SECTION 5
Options Analysis

SECTION 3
Built & Natural
Environment

SECTION 6
Action Plan &
Delivery





01 Introduction

Purpose and Context

Purpose

Cyngor Gwynedd has commissioned Savills to develop a Placemaking Plan for Pwllheli town centre.

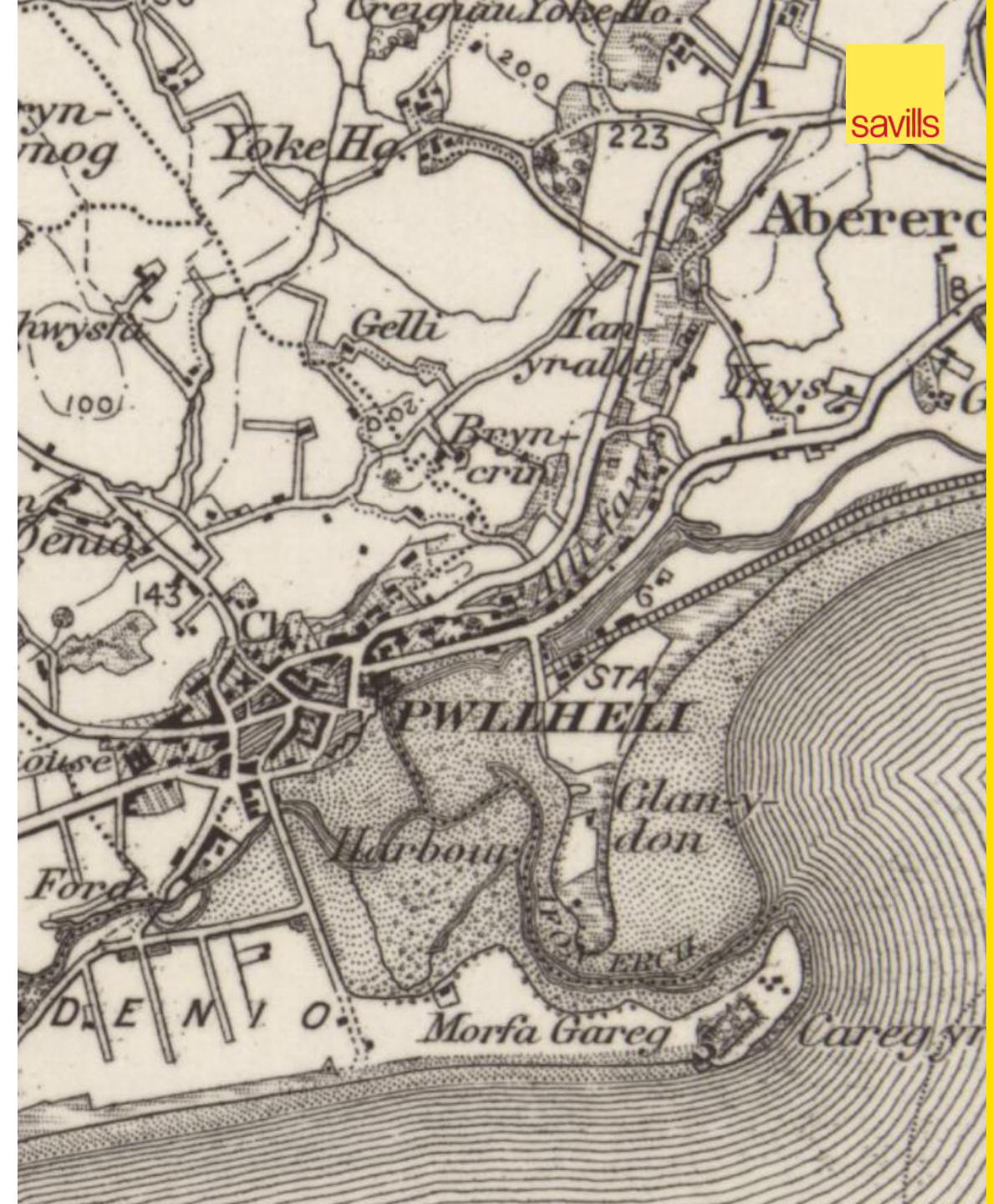
This Plan establishes a definitive vision and strategic priorities to guide the regeneration of Pwllheli town centre. The Plan also identifies priorities for improving and protecting Pwllheli's green spaces, supporting the future development of a Nature Plan for the town.

Context

Pwllheli is one of the largest urban centres in Gwynedd with a population of 3,622 residents (in its built-up area) in 2021, a slight decline on its population in 2011. The town is the primary site of employment and services for the Llŷn Peninsula, a large rural area in the west of Gwynedd, and serves the residents of the town and an extensive rural hinterland.

The town is recognised as the main hub for the Llŷn Peninsula's large-scale tourism industry due to the outstanding natural landscape in the town and surrounding region, the town's international sailing offer (driven by Plas Heli), proximity to visitor attractions, and range of amenities. Within the town, there are estimated to be around 1,100 bedspaces, the majority of which are caravan and camping (e.g. Gimblet Rock Holiday Park).

Whilst Pwllheli is a highly successful visitor destination, the town faces economic and regeneration challenges linked to its rural location and seasonality of the visitor economy. Residents have consistently highlighted in public consultations (e.g. Ardal Ni) housing, employment, and transport as some of the most significant long-standing issues facing the community.



Study Area

This Plan focuses on the town centre but recognises the importance and links with the wider town and surrounding area.

Pwllheli has a unique layout due to its harbour and, as a result, several of the key sites that effect the performance and character of the town centre are located outside of the centre. This includes the Promenade, Yr Ynys, Plas Heli (National Sailing Academy), Marina and the North Quay.

In response to this unique geography, this Plan has adopted a wider definition of the town centre which includes a 'core' and 'periphery'.

The core is composed of the town's historic centre, including High Street, and extends west to the Old Clinic site and east to the North Quay. The North Quay is an important linkage between the core of the town centre and the interlinked areas in the periphery.

The periphery is composed of sites of direct importance to the core and the town as a whole. This includes green spaces (Yr Hen Ynys and Lôn Cob Bach), industrial sites to the east (Glan-y-Don Industrial Estate, Plas Heli, and the Marina), and the promenade in South Beach.

The promenade, which provides access to the beach, lacks modern amenities and has ageing infrastructure in need of investment.



Sustainable development and the Welsh language

Welsh is the community language of Pwllheli and is used by the vast majority of residents in their daily lives. Data from the 2021 Census indicates that 76% of Pwllheli 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 Pwllheli requires good quality jobs, affordable housing, and a high quality of life to retain local residents and attract former residents back to the area.

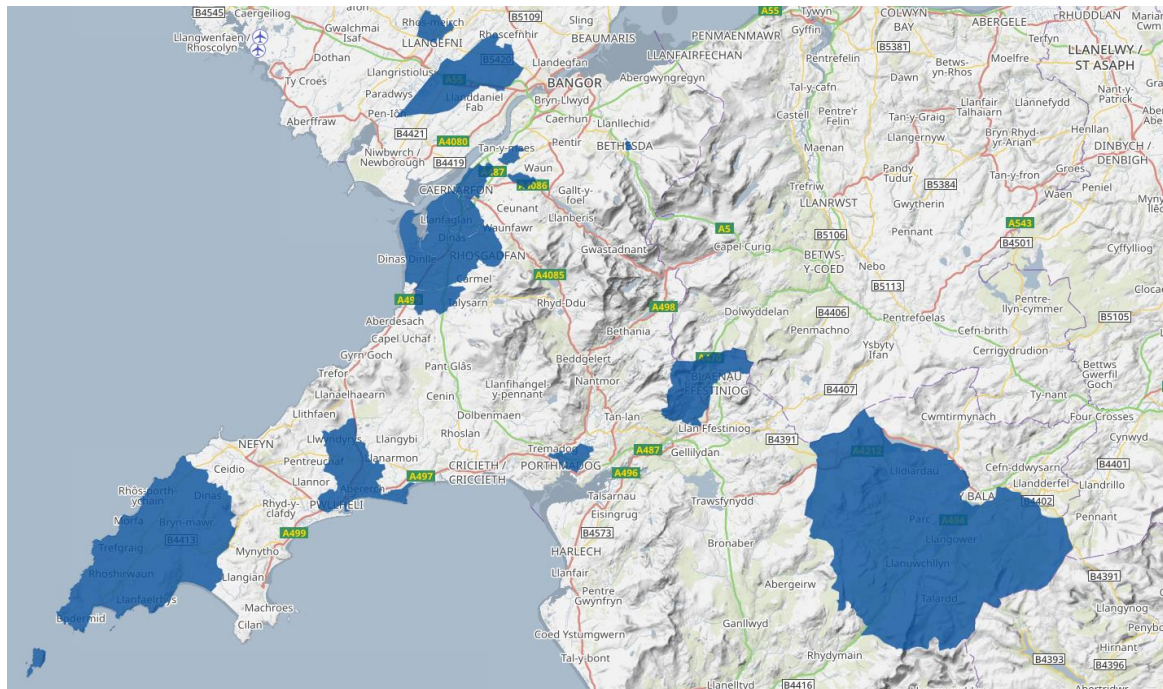
Recent projects covering the local area, Arfor I and Llwyddo'n Lleol, have successfully harnessed economic development to increase the use of Welsh¹. The Arfor II programme, which is due to be expanded, identifies the economic opportunities of young people and families as central strengthening the Welsh language in the region².

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 residents³.

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, in Pwllheli, this may involve enhancing community green spaces and improving the public realm of the town centre.

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 transport 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

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 Statement¹ 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.’



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

Placemaking

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 Pwllheli 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 Pwllheli 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, Cyngor Tref Pwllheli and Ffrindiau Pwllheli

2 - Social, Economic & Market Baseline

- Review of policy and strategy documents for Pwllheli, 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 and integrate results from recent public consultations (e.g. Ardal Ni 2035, Cyngor Tref survey and consultation event, and Marina consultation)
- Visioning Event with stakeholders
- Supplementary one-on-one meetings

5 - Vision

- Establish a definitive vision for Pwllheli, 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

Policy and strategy review

This section reviews relevant policy and strategy documents covering placemaking, regeneration, land use, and economic development in Pwllheli, Gwynedd and North Wales. Documents are summarised, features relevant to Pwllheli 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.

Pwllheli is located in the west of the North Wales region, south of the North Wales Coastal Towns Regional Growth Area. The North Wales Metro, a corridor of improvement to the public transport and active travel network, is located 35km 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).

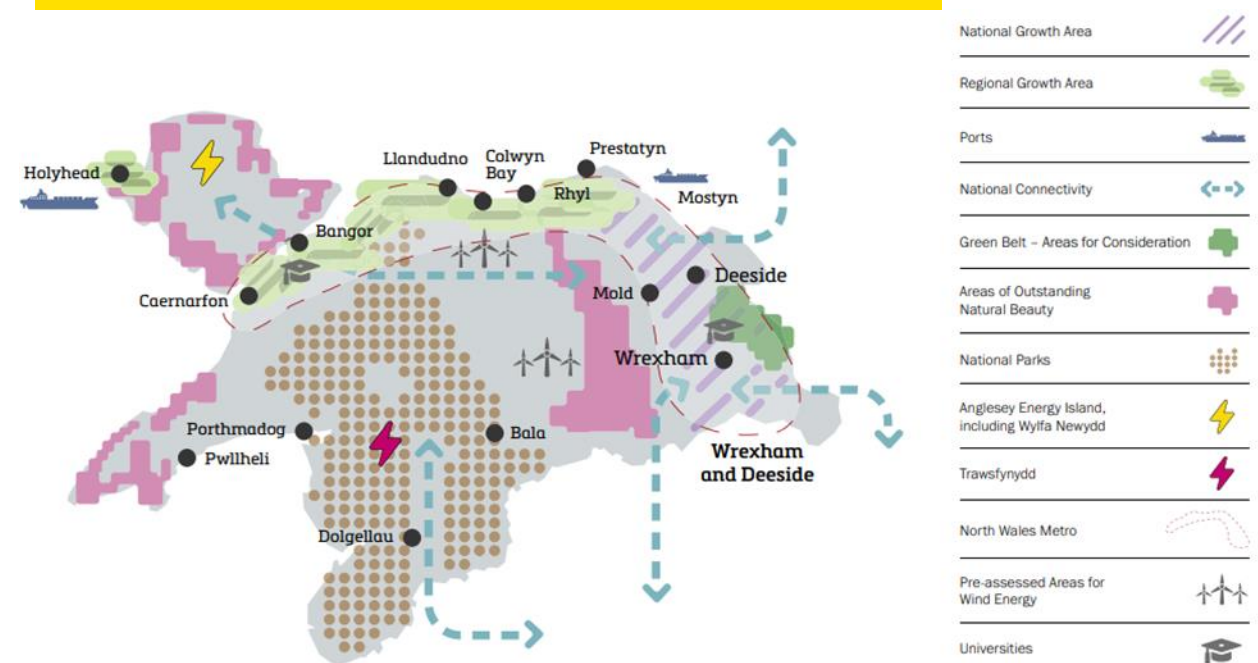
Pwllheli is identified as the “main centre for housing, commerce and employment in western Gwynedd” and “an international destination for sailing and water activities.”

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. This is the same tier as Caernarfon and Porthmadog, and beneath the regional centre of Bangor.

The LDP also highlights significant development constraints which reduce the number of sites viable for residential or employment developments in Pwllheli. The town is constrained by flood zones, the Western Llŷn Special Landscape Area (adjacent to the west of the town), and the north of the town is bounded by a steep hill.

The LDP allocates three sites for residential development (references: T28, T29 and T30) in Pwllheli. The sites are expected to deliver a total of 181 units – thus far none have been delivered. Under Policy TAI 15, new developments of 2 or more units in Pwllheli are expected to deliver 30% affordable housing.

North Wales Regional Strategic Diagram (Future Wales)



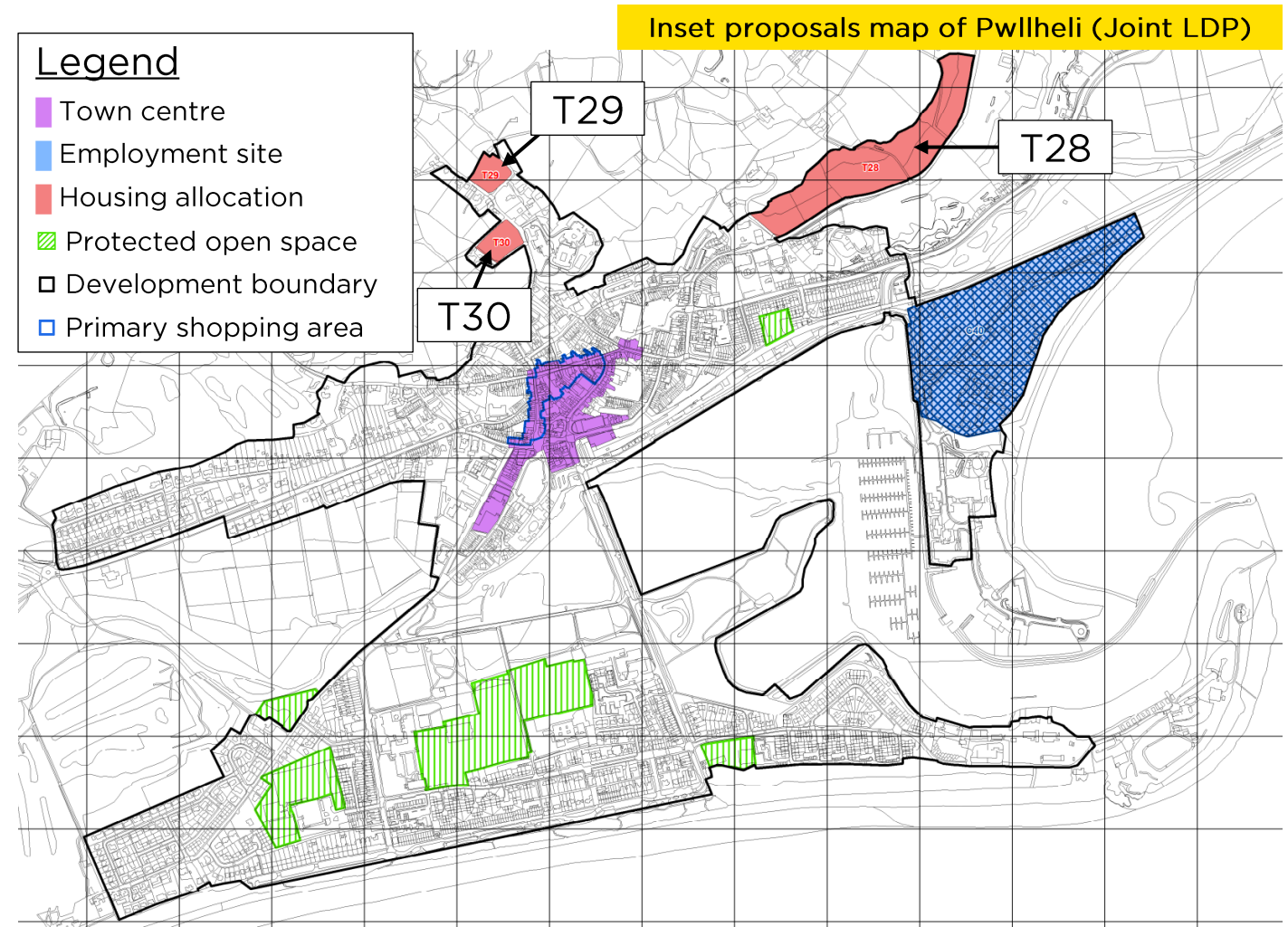
Policy and strategy review

Outline planning permission was granted for 15 units at T30 in 2019 and for 14 units at T29 in 2022. An Aldi is currently being built at T28 and outline planning applications have been submitted for 38 units across the remainder of the allocation.

There is a single designated employment site in Pwllheli, Glan-y-Don Industrial Estate. The site is within a C2 Flood Zone and Policy CYF 2 of the LDP limits the scope for new development at the site. The LDP also identifies the need for an additional employment site between Pwllheli and Porthmadog, due to the lack of employment land in the south of Gwynedd.

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 new large-scale residential or employment allocations in Pwllheli due to the highlighted development constraints currently facing the town (e.g. flood risk in parts of 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 from the 1st of September 2024.



Policy and strategy review

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
- Improved housing offer
- Modernise town centres
- Protect the rural economy

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.

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.

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 Ambition North Wales and aims to boost productivity and deliver sustainable economic and inclusive prosperity. Three core themes for the region are defined within the REF : social and community well-being, 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.

Policy and strategy review

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

- Leverage benefits of the public sector
- Low carbon energy
- Language, culture, place & heritage
- Skills & Workforce
- Food & Drink Industry
- Connectivity (transport & digital)
- Balanced support for indigenous & inward investors
- Foundation Economy & a vibrant Micro/SME base
- Investment in magnets, hubs, supply chains, R&D, innovation & entrepreneurship
- Empowering communities for the benefit of our future generations

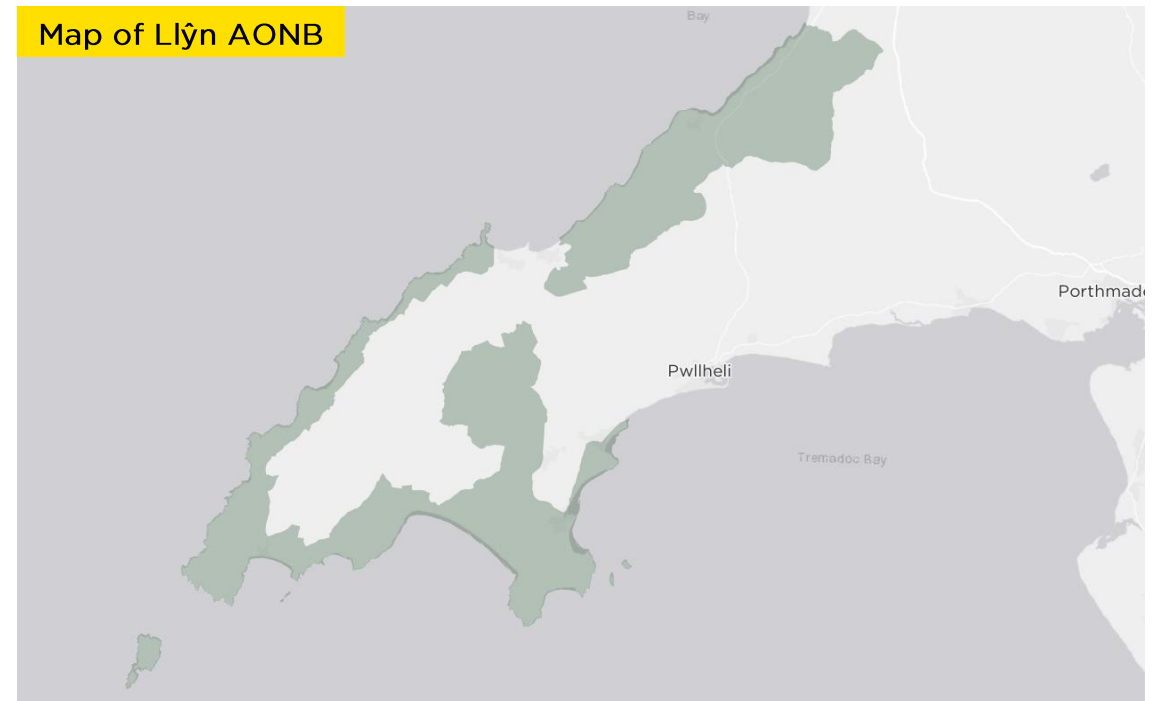
Llŷn Area Of Outstanding Natural Beauty Management Plan (2015)

Pwllheli is located 5km north of the Llŷn Area Of Outstanding Natural Beauty (AONB) which extends from Llanbedrog along the coast to Aberdesach. The AONB is managed by Cyngor Gwynedd its sole purpose is to “conserve and enhance the natural beauty of the designated area”.

The Management Plan primarily focuses on the area’s ecology and historic environment including coastline management and preserving the area’s unique wildlife habitats. Services in Pwllheli (e.g. buses and shops) are recognised as critical for residents and visitors to the AONB and traffic congestion in the town in peak season is identified as a key issue. A “multi-purpose path” for walkers and cyclists between Pwllheli and Llanbedrog is proposed.

Gwynedd and Eryri Sustainable Visitor Economy 2035 (2023)

The Strategic Plan, produced by Cyngor Gwynedd and the Eryri National Park Authority (NPA), sets a vision and three Sustainable Visitor Economy Principles 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 NPA signed a Memorandum of Understanding 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.



Policy and strategy review

The following section outlines existing plans for the town and maps the key sites identified within the plans.

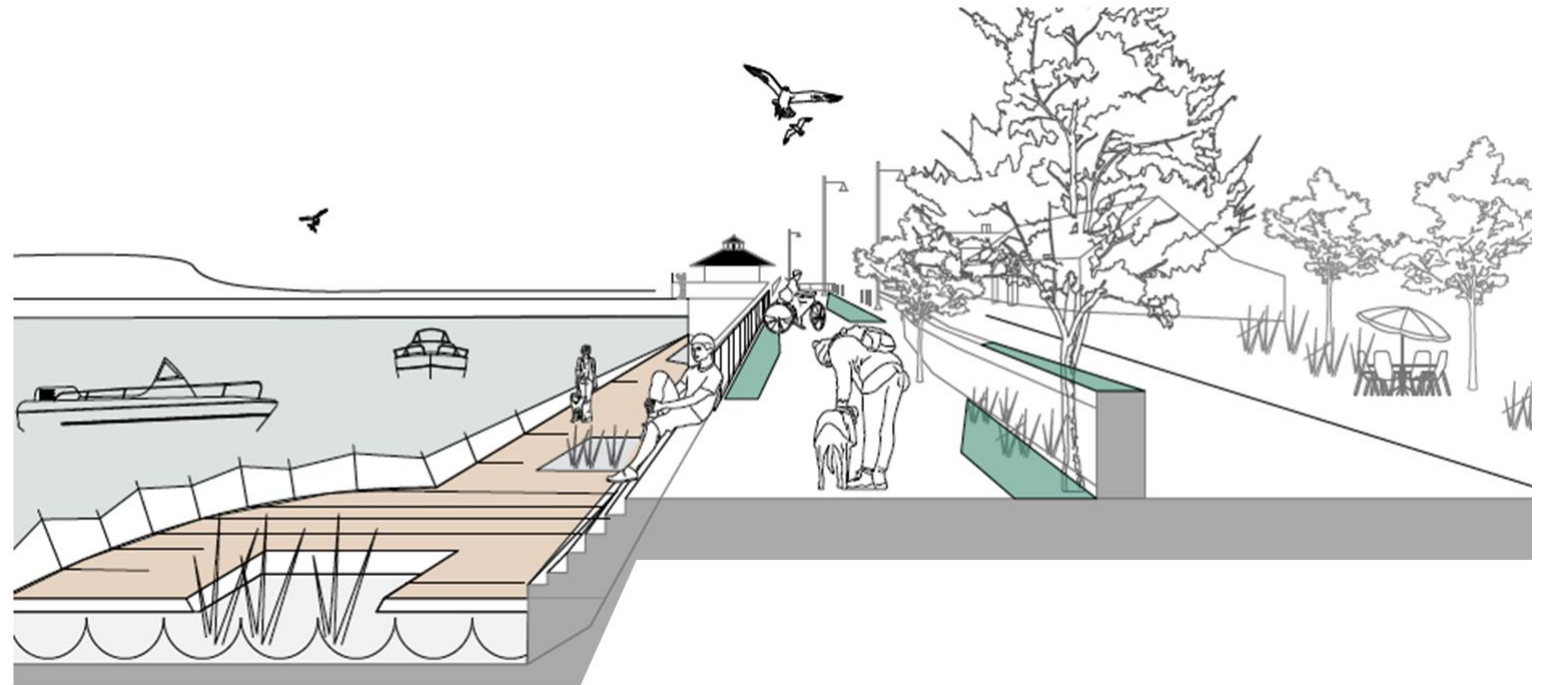
Marina Long Term Strategic Plan (2024)

Pwllheli Marina supports a total of 800 boats and 50-70 jobs across 18 marine businesses, making it one of the largest marinas in the UK. The Marina is owned and managed by Cyngor Gwynedd. The Plan has been prepared on behalf of Cyngor Gwynedd and focuses on regeneration of the harbour area and improving the linkage between the town and Marina.

Key sites and recommendations from the Plan:

- **Marina (including Plas Heli)** – Improved access and signage, particularly at the entrance, and opportunities to introduce accommodation, retail, and food and drink offer – creating a defined visitor attraction.
- **North Quay** – Opportunities to improve movement corridor between the town and harbour, through public realm improvements along the North Quay (e.g. improved lighting and seating) and an active travel link. The Plan also identifies potential for a water park and a water taxi berth.
- **Outer Harbour** – Improved active travel links and additional pontoons in the channel to expand range of pontoon berth for visitors and residents.

Concept sketch of future development of the North Quay



- **Inner Harbour and Yr Ynys** – Opportunity to develop a water park, water taxi berth, and nature-based community play and leisure facilities. The Plan also notes potential for more significant development in the long-term at Yr Ynys.

The Plan emphasises that whilst Cyngor Gwynedd has an important role to play, the “full potential of the area will only be released through a partnership between the public bodies, business and community”.

Policy and strategy review

Pwllheli Area – Local Regeneration Plan (2024)

The Local Regeneration Plan was prepared by Cyngor Gwynedd based on the Ardal Ni public consultation held in 2022 and covers the centre of the Llŷn Peninsula (see map opposite).

The Plan finds that the area has significant strengths, the most prominent of these being the natural environment, language and culture, and its safety. The area also faces significant challenges. Those highlighted by the Plan include the lack of affordable housing, quality employment opportunities, and above average rates of childhood obesity. The Plan highlights that only 4.1% of jobs in Pwllheli are ‘high value’ which is far lower than Gwynedd (11%) and Wales (13%).

Based on the public consultation, the Plan identifies the following priorities for the area:

1. Delivery of affordable housing (119 residents)
2. Bring vacant commercial units back into use (113 residents)
3. Support local businesses to create high value jobs (96 residents)

As part of the Plan, an Action Plan has been developed based on consultation findings and aims to deliver across 12 key issues, including:

- Affordable housing
- Bringing vacant properties into use
- Local business support
- Developing a new hotel (on a vacant site at Glan-y-Don Industrial Estate)
- Sustainability

Area covered by the Local Regeneration Plan

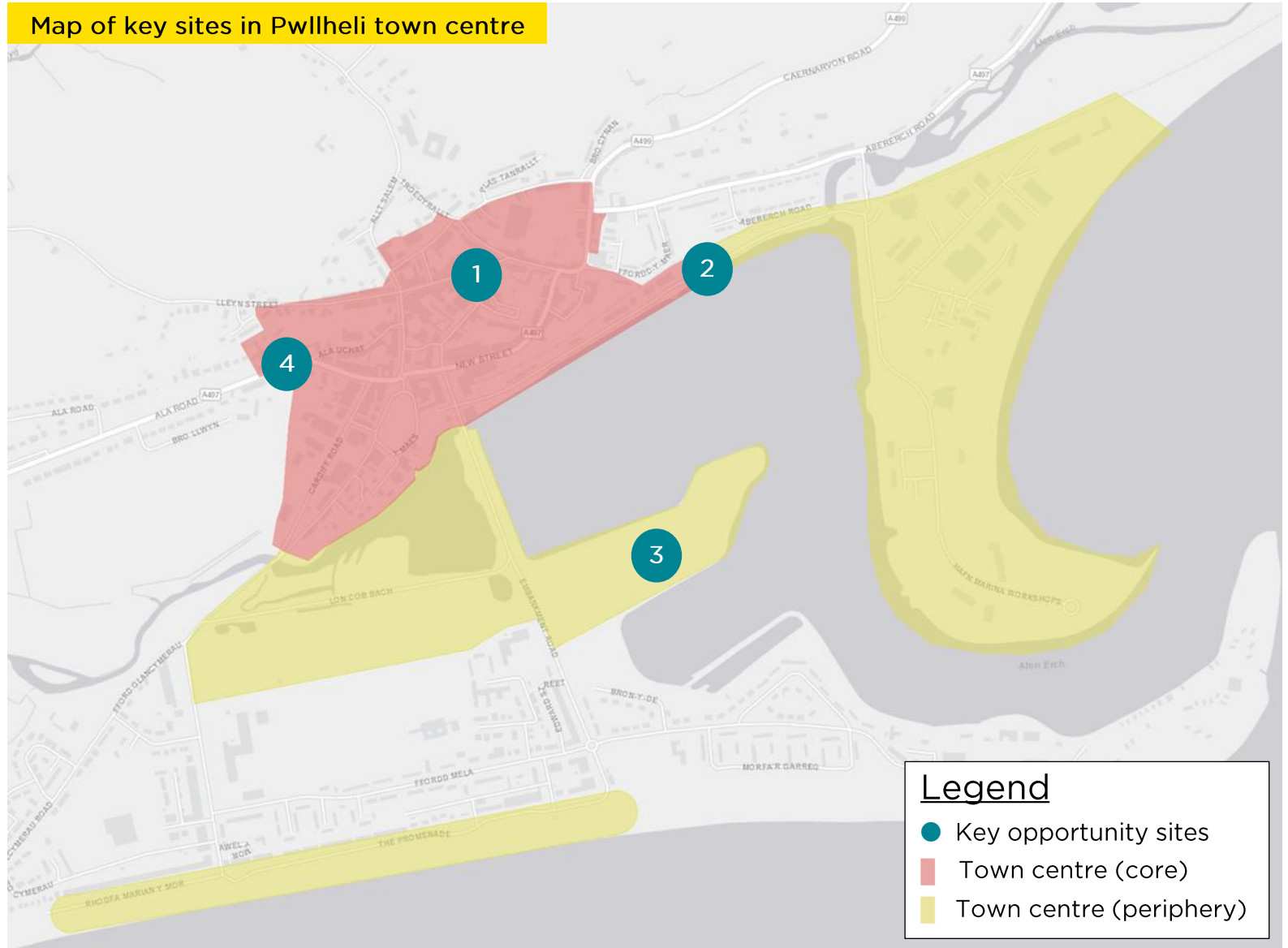


Key Sites

Based on the review of the plans and strategies covering Pwllheli, four defined sites in the town centre have been identified as key opportunity sites for this Placemaking Plan.

Key opportunity sites:

1. **High Street** – The historic centre of Pwllheli with potential for public realm improvements that can support the vibrancy and economic performance of the area year-round.
2. **North Quay** – Attractive waterfront and important linkage between the town centre and Marina. Significant potential for commercial development, active travel, and public realm enhancements that can create jobs and improve well-being.
3. **Yr Hen Ynys** – Green space that can deliver enhanced community facilities and long-term development potential.
4. **Old Clinic and Vet Sites** – Opportunity to deliver affordable housing, potentially through a housing association, in a sustainable location.



Key findings



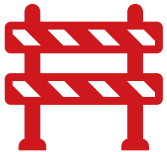
From the local to the national level, plans and strategies show an **ambition for change**. Plans for Pwllheli highlight the significant opportunities in the area as well as the challenges that must be addressed (housing, employment, and transport).



The **links between the town centre and surrounding sites** (particularly the Marina) are a key issue. Improvements to the North Quay has significant potential to improve the connection between the town centre and Marina (and wider harbour).



Pwllheli is situated in and around **natural environments of national significance** (e.g. Llŷn AONB). Local plans shows that the natural environment and easy access to green and blue spaces are defining features of the town and surrounding area.



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.



Plans and strategies related to the visitor economy of the Llŷn Peninsula 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.



Plans and strategies emphasise **partnership working** as key to driving economic regeneration in Pwllheli and the wider region (e.g. Marina Strategic Plan). This is particularly important in Pwllheli where there has been a growth in social enterprises and community groups in the run up to and wake of the 2023 National Eisteddfod, hosted nearby in Boduan.



Whilst there is recognition of the key opportunities and challenges, there is no clear **plan to drive regeneration and placemaking in the town centre**. This Plan provides a means to bring together a series of new, planned, and ongoing initiatives to drive the greatest positive social and economic change in the town centre and wider community.



02 Baseline

Introduction

This section establishes the following baselines for Pwllheli:

2.1 Economic – Analysis of current and historic economic trends in Pwllheli, compared to regional and national statistics

2.2 Socio-economic – Analysis on the demographic, social, and deprivation baseline of Pwllheli

2.3 Commercial market and visitation – Analysis of the retail, leisure and hotel property market as well as an overview of Pwllheli’s tourism industry.

The baselines are intended to capture the town’s current structure, including the key challenges and opportunities it is facing, and provide a benchmark for future performance to be compared against.

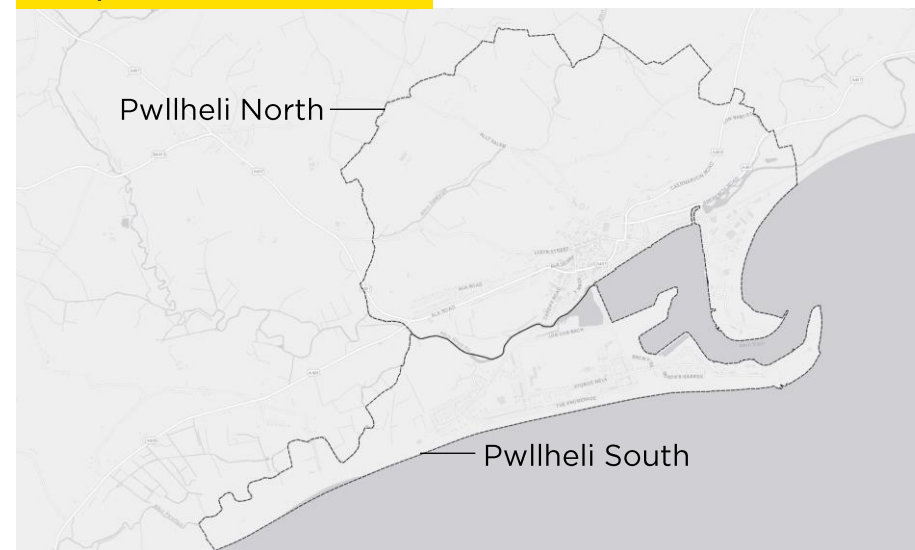
Geography

Where available, data for Pwllheli has been sourced utilising the Lower Layer Super Output Areas (LSOAs) of Pwllheli North (reference: W01000108) and Pwllheli South (ref: W01000109).

In some cases, data is only available at the Middle Layer Super Output Area (MSOA) level – in this case an area covering Pwllheli and Nefyn has been used (ref: W02000021).

Where possible we have backed up the data with Gwynedd comparator. Similarly, where Pwllheli LSOA and MSOA level data is unavailable, Gwynedd has been used compared to Welsh and UK averages.

Map of Pwllheli LSOAs



Map of Pwllheli and Nefyn MSOA



2.1 | Economic Baseline

Economic Baseline

Pwllheli Population and Population Growth

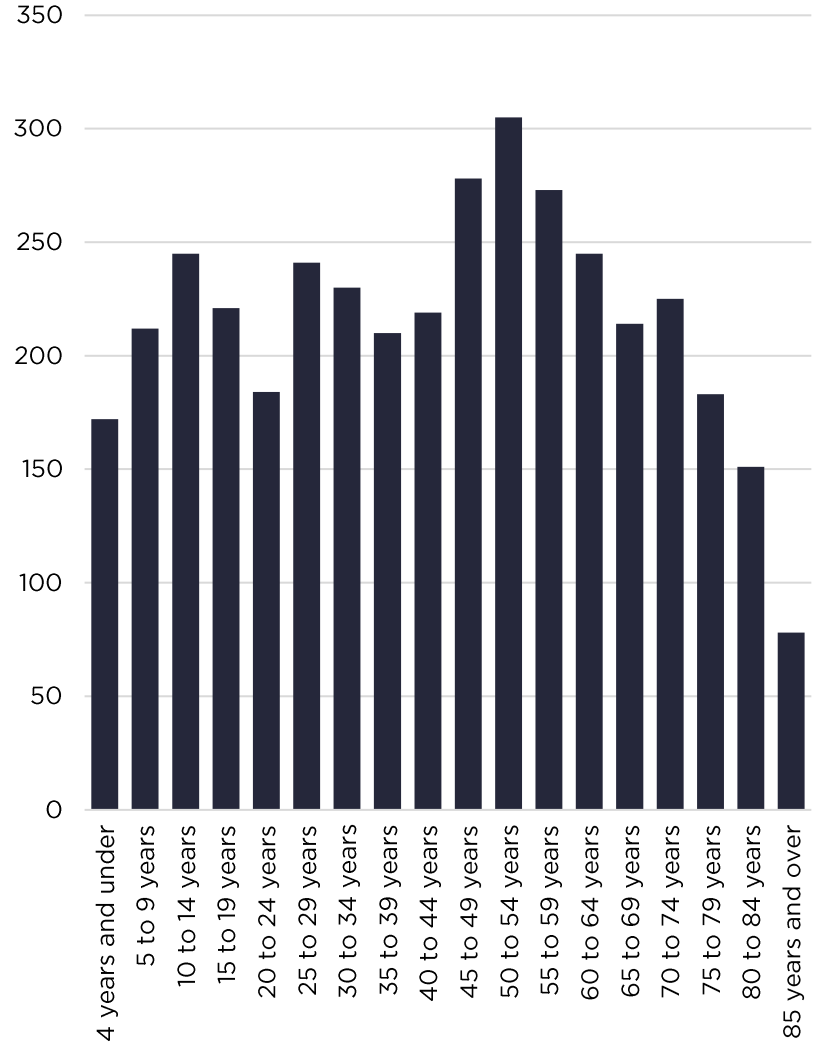
The 2021 Census shows that the community of Pwllheli has a population of 3,947 residents, of which 3,622 lived in the town's built-up area (92% of residents).

62% of Pwllheli's residents are aged between 15 - 64 years, which is higher than both the Gwynedd and Welsh average. Pwllheli also has 22% of resident's aged 65 and over, which is in line with Gwynedd and above the Welsh and UK average.

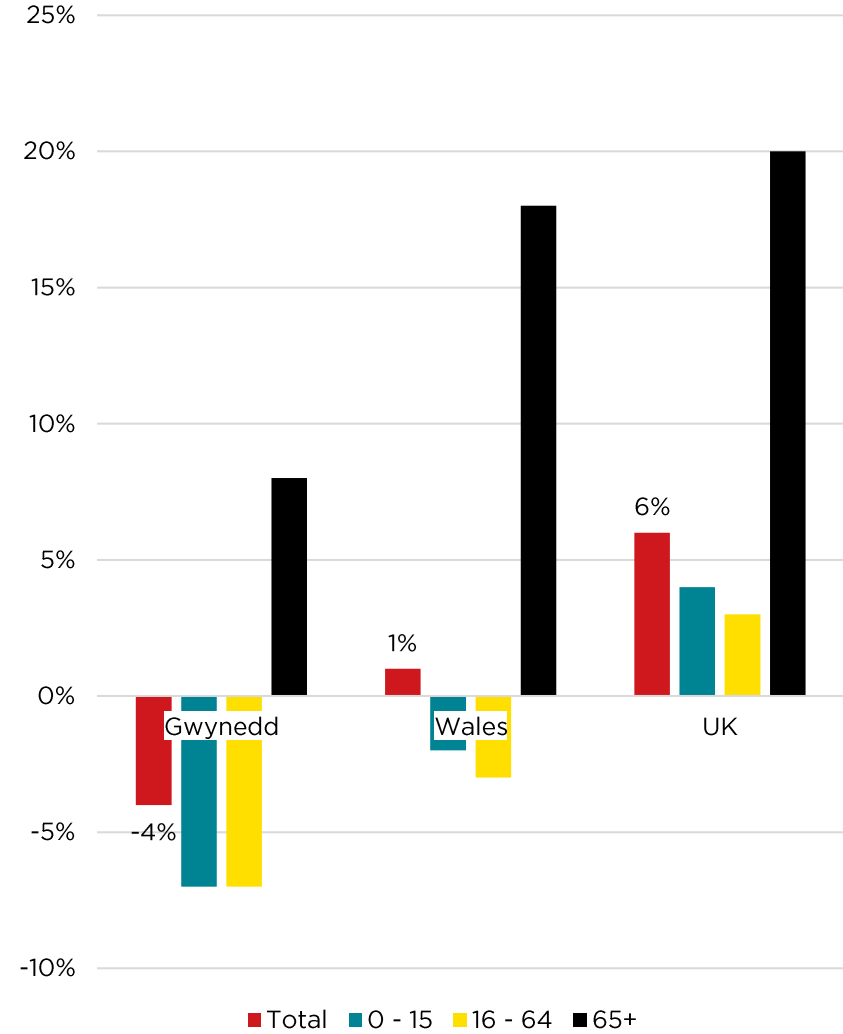
17% of the population in Gwynedd are aged 0-15. 63% are of working age (16-64). This is slightly lower than the national average. However, Gwynedd has a higher-than-average population aged 65 and over (23%).

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.

Pwllheli age by 5-year bands (2021)



Population growth by age % (2011-2021)



Economic Baseline

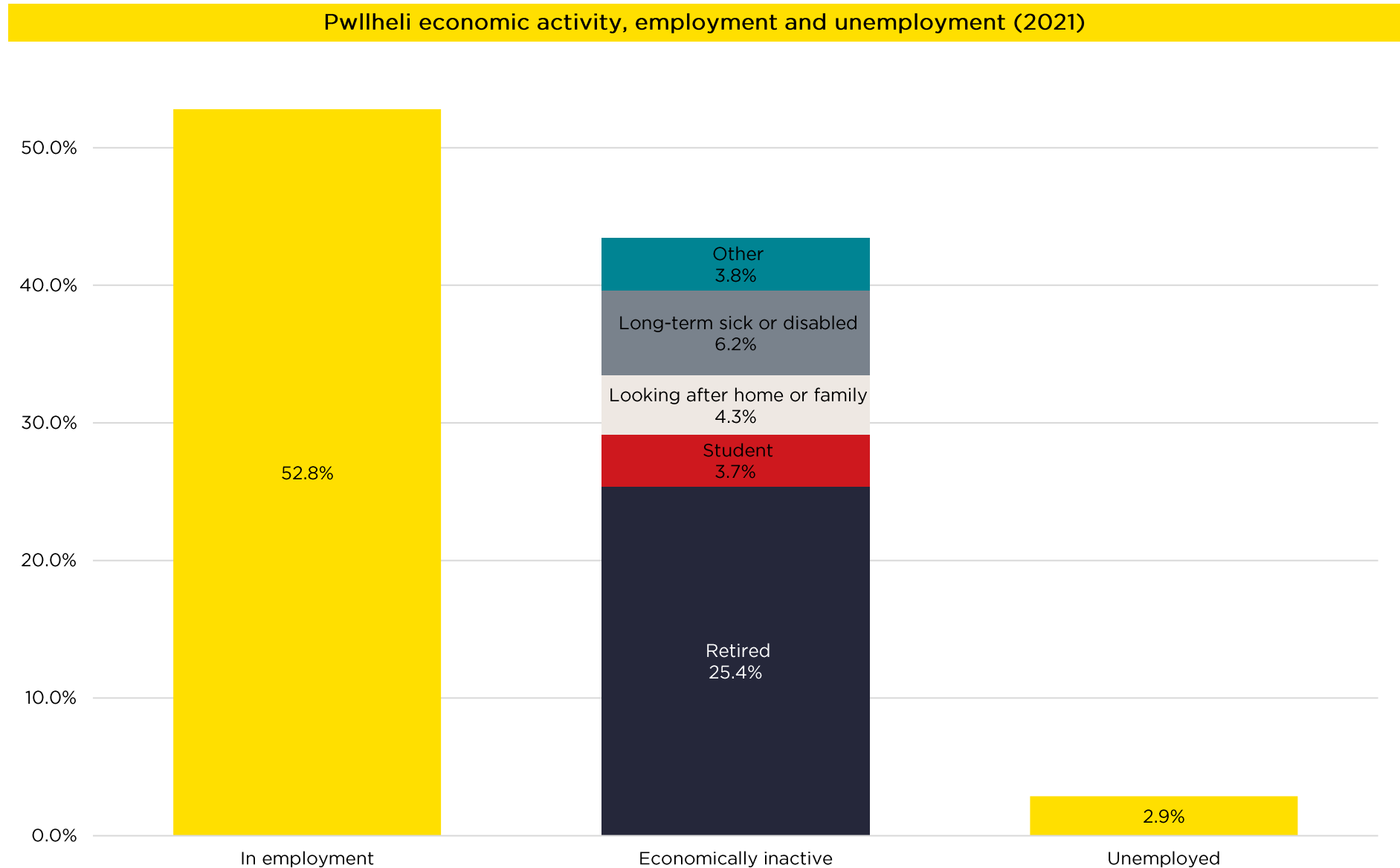
Employment in Pwllheli

In the 2021 Census, 56% of Pwllheli's population aged 16 and over was economically active. This is in line with the Wales and Gwynedd averages.

The majority of economically active residents were in employment - 1,718 residents.

3% of residents aged 16 and over were unemployed which is higher than the Gwynedd average but in line with Wales and the UK averages.

43% of residents aged 16 and over were economically inactive, the majority of whom were in retirement. The proportion of economically active residents was marginally lower than the Wales and Gwynedd averages.



Economic Baseline

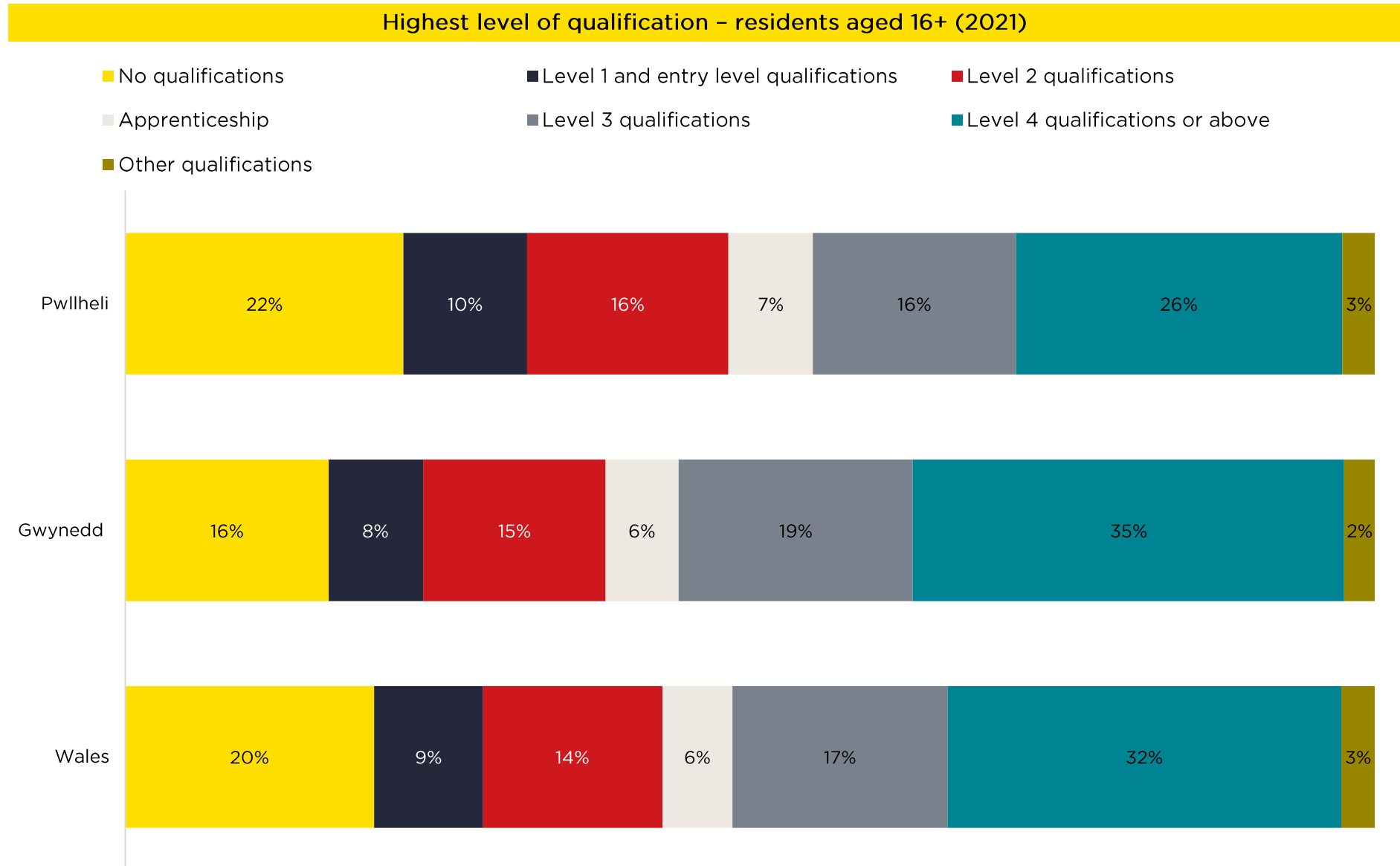
Skills and Qualifications

In the 2021 Census, the highest qualification of 26% of Pwllheli residents (851 residents) was Level 4 (undergraduate degree) and above. This is around 10% lower than the Gwynedd and Welsh average.

Conversely, there were 22% of residents with no qualifications (725 residents) – a higher proportion than Gwynedd and slightly higher than Wales.

The proportion of residents in Pwllheli with Level 1, 2, 3 or Apprenticeship is in line with the Gwynedd and Welsh averages.

At the local authority level, Gwynedd has seen a large rise in the proportion of residents with NVQ4+ qualifications between 2011 and 2021 – rising from 32% to 41%.



Economic Baseline

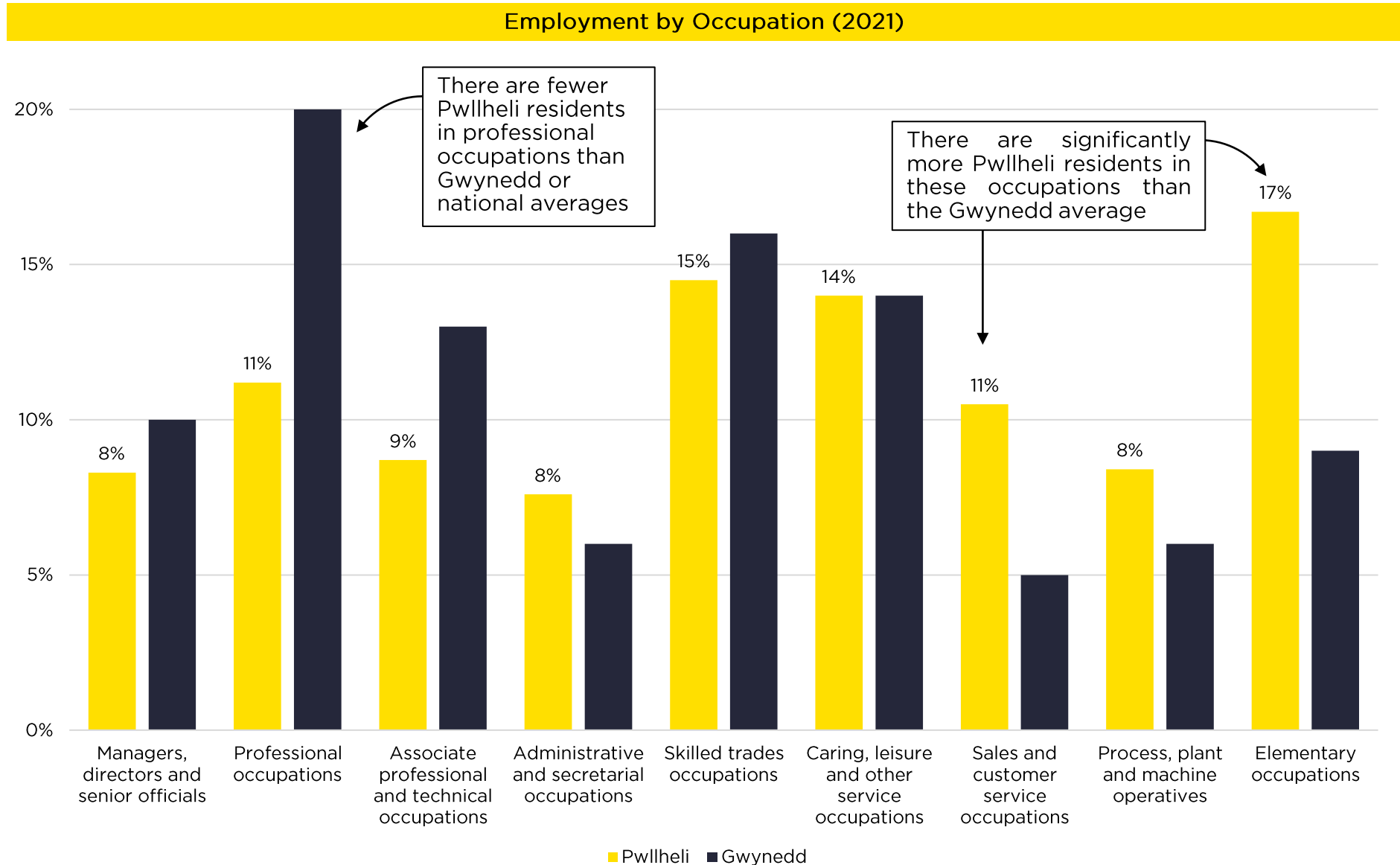
Occupations in Pwllheli

Residents in Gwynedd are more likely to be in elementary and customer service occupations.

17% of residents in employment were in elementary occupations and 11% are in customer service occupations. This is significantly higher than the Gwynedd, Wales, and UK averages.

Compared with Gwynedd, Wales, and the UK there were also far fewer residents in professional occupations than average at 11%.

A similar proportion of residents are in skilled trades (15%) and caring and leisure (14%) relative to the Gwynedd average. This is far higher than the Wales and UK averages, and likely driven by a high proportion of residents working agricultural, vehicular, and construction trades.



Economic Baseline

Businesses in Pwllheli

Business count data is only available at the Middle Layer Super Output Area (MSOA) level; area covering Pwllheli and Nefyn.

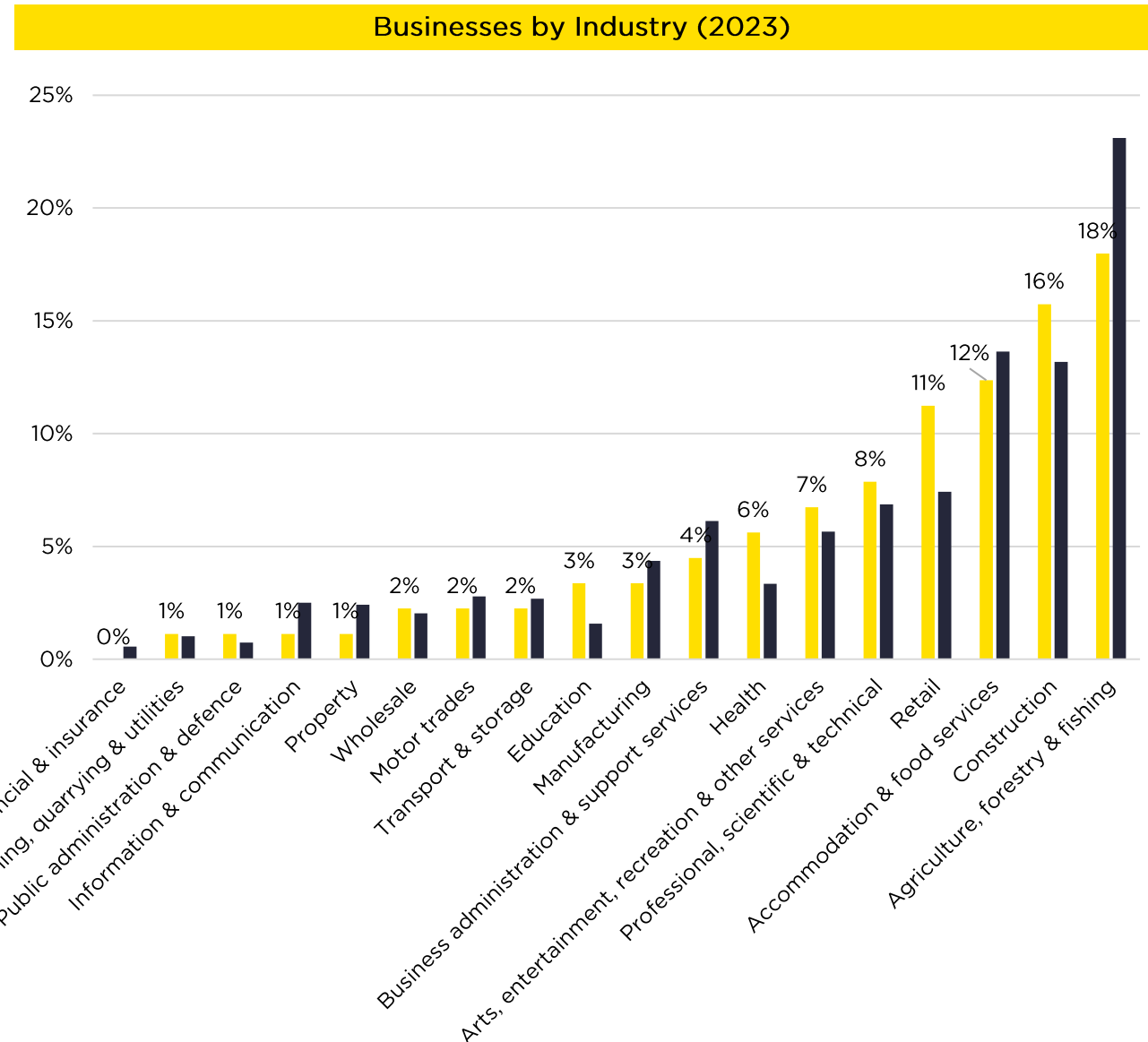
In this area the main industries, by Number of businesses, are agriculture (80 businesses – 18% of total businesses), Construction (70), and Retail (50). These industries are important parts of the ‘foundational economy’ – the area of the economy providing basic goods and services everyone relies on.

This is broadly in line with the Gwynedd average, although there are fewer Agriculture businesses and more Retail businesses.

There are also a high number of Accommodation & Food businesses (55) – accounting for 12% of total businesses in the area. The high number of Retail and Accommodation & Food reflects the large size of the visitor economy in the area.

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 high numbers of Agriculture businesses in both Pwllheli and Gwynedd. This compares to the industry only being the 11th largest for employee numbers in Pwllheli and 9th in Gwynedd.



Economic Baseline

Business Count by Size

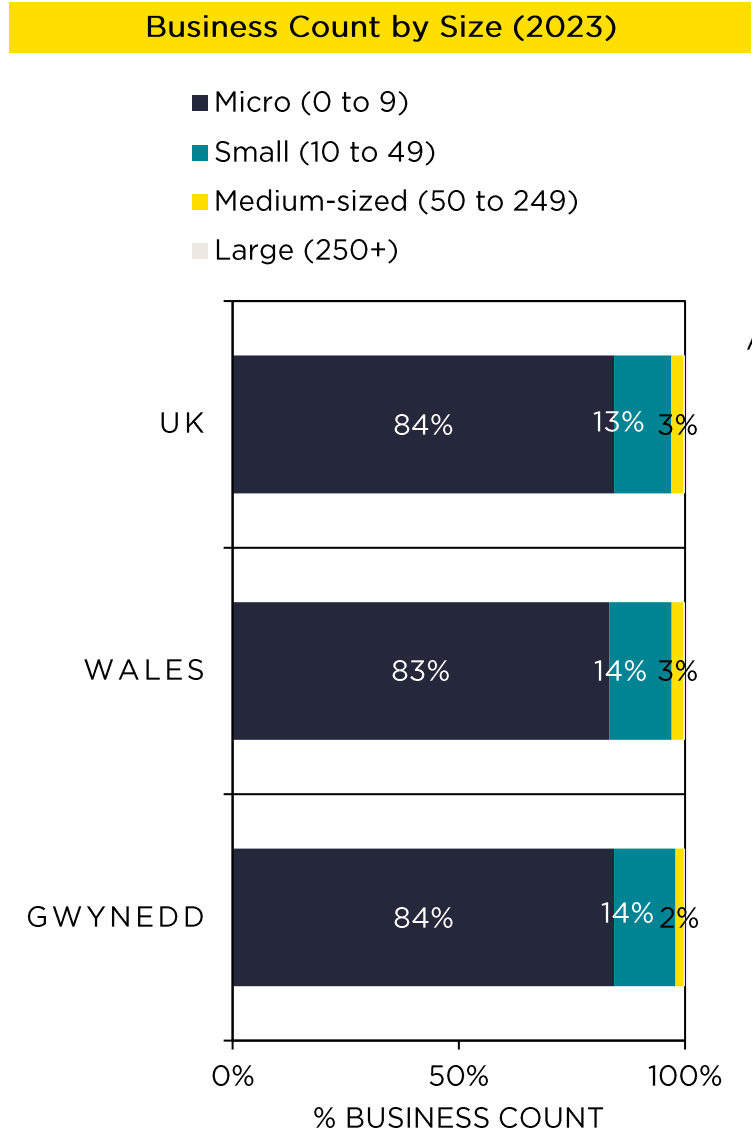
84% of Gwynedd businesses are micro in size, 14% are small, and 2% are medium. This is largely in line with the Welsh and UK average. There are only 15 large businesses in Gwynedd, representing just 0.2%.

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.

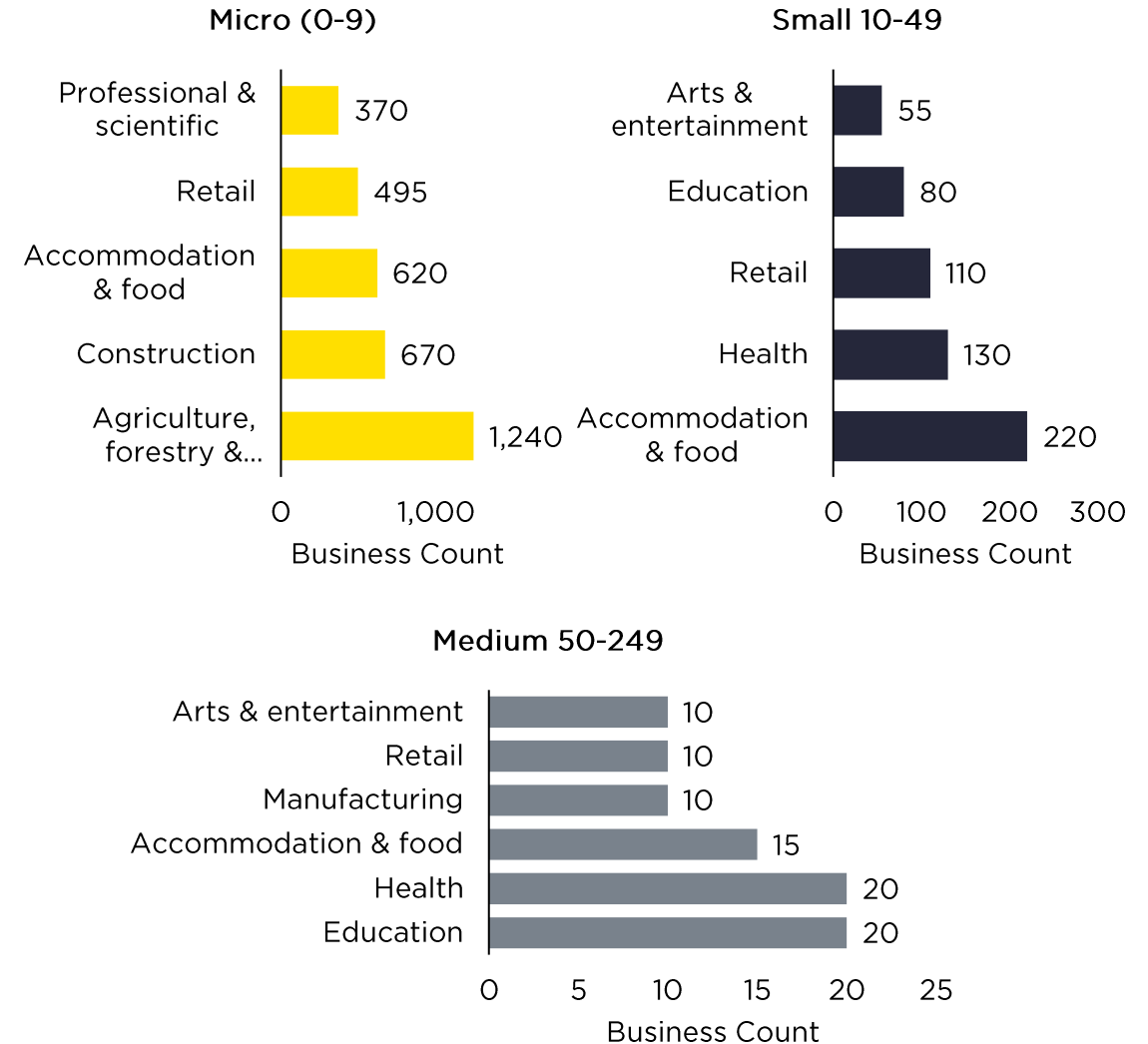
There are 1,240 micro agriculture businesses in Gwynedd. This account for 22% of all micro businesses and 99% of all Agriculture businesses in Gwynedd. There are also a high proportion of Construction and Accommodation & Food businesses.

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.



Gwynedd Business Count by Size and Industry (2023)



Economic Baseline

Jobs by Sector

Jobs by sector from the 2021 Census is only available at the MSOA level (Pwllheli and Nefyn).

The proportion of jobs by sector in Pwllheli is similar to Gwynedd. There are two areas of difference: more jobs in wholesale and retail in Pwllheli, and fewer jobs in health and social care.

The largest sector in Pwllheli by number of jobs was Wholesale & Retail accounting for 16% of jobs (544 residents in employment). Whilst the largest sector in Gwynedd by number of employees in was Health, accounting for 17% of Gwynedd employees.

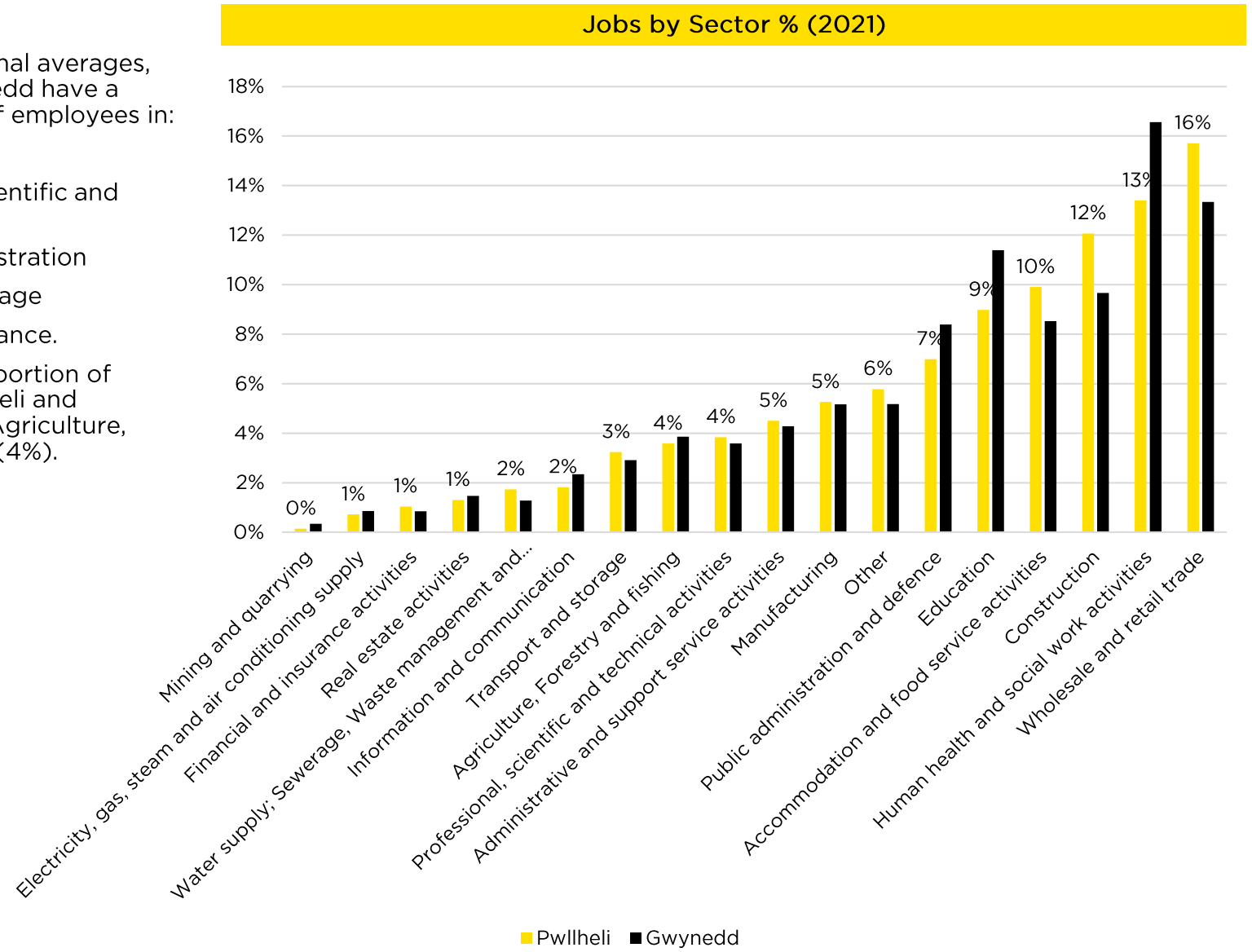
In Pwllheli, this was followed closely by Health & Social Work at 13% (464 employees) and Construction 12% (418 employees). As such, jobs data reflects business counts data for the local area and highlights the strength of the foundational economy.

Similarly, 10% jobs are in Accommodation & Food Services which is higher than the Wales average - likely a reflection of the area's visitor economy.

Compared to national averages, Pwllheli and Gwynedd have a lower proportion of employees in:

- Manufacturing
- Professional, Scientific and Technical
- Business Administration
- Transport & Storage
- Financial & Insurance.

Whilst a larger proportion of employees in Pwllheli and Gwynedd work in Agriculture, Forestry & Fishing (4%).



Economic Baseline

Sectors by Employees and LQ

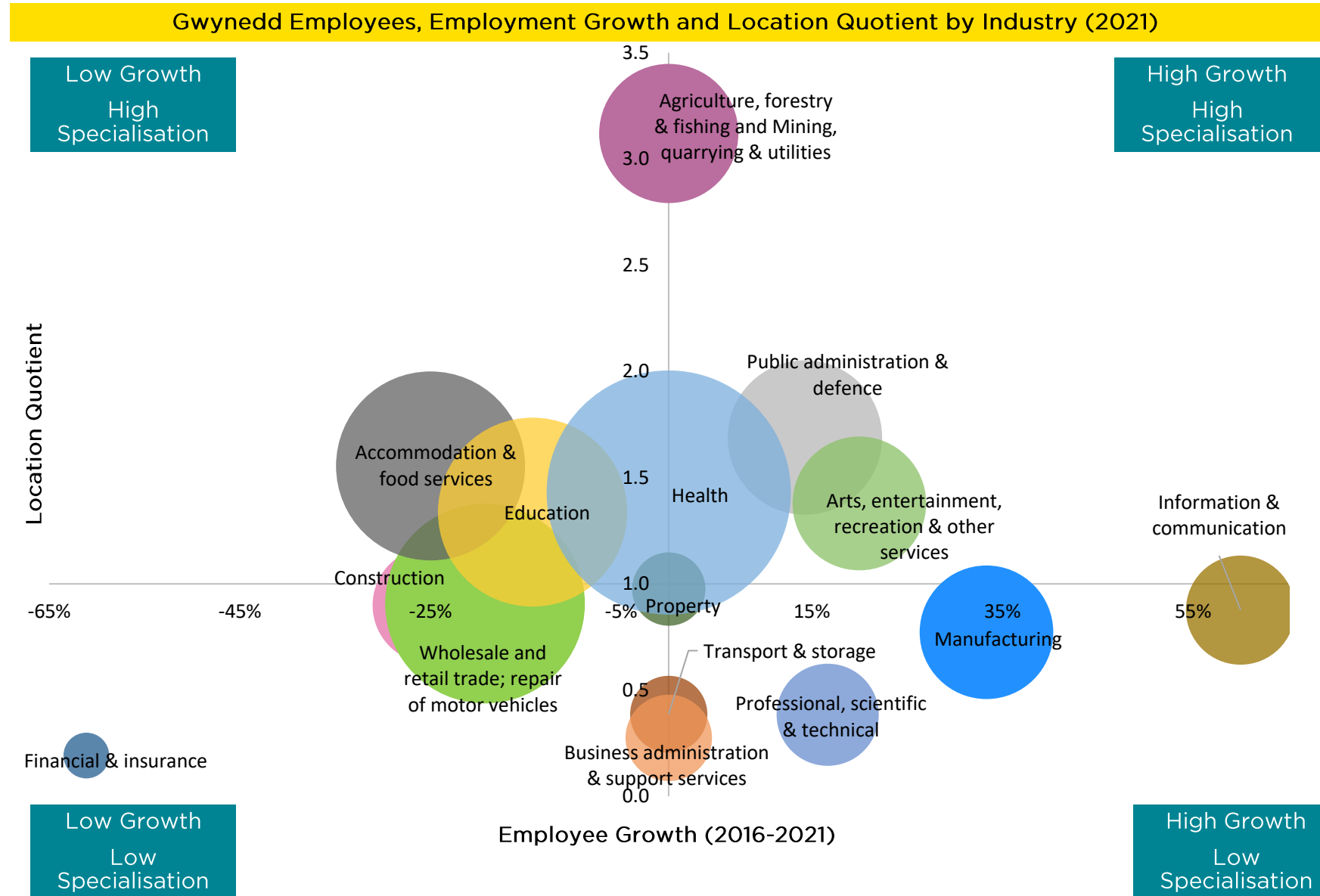
The following graph shows Gwynedd's industries by employment growth and location quotient. The size of each bubble represents the number of employees.

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%.



Economic Baseline

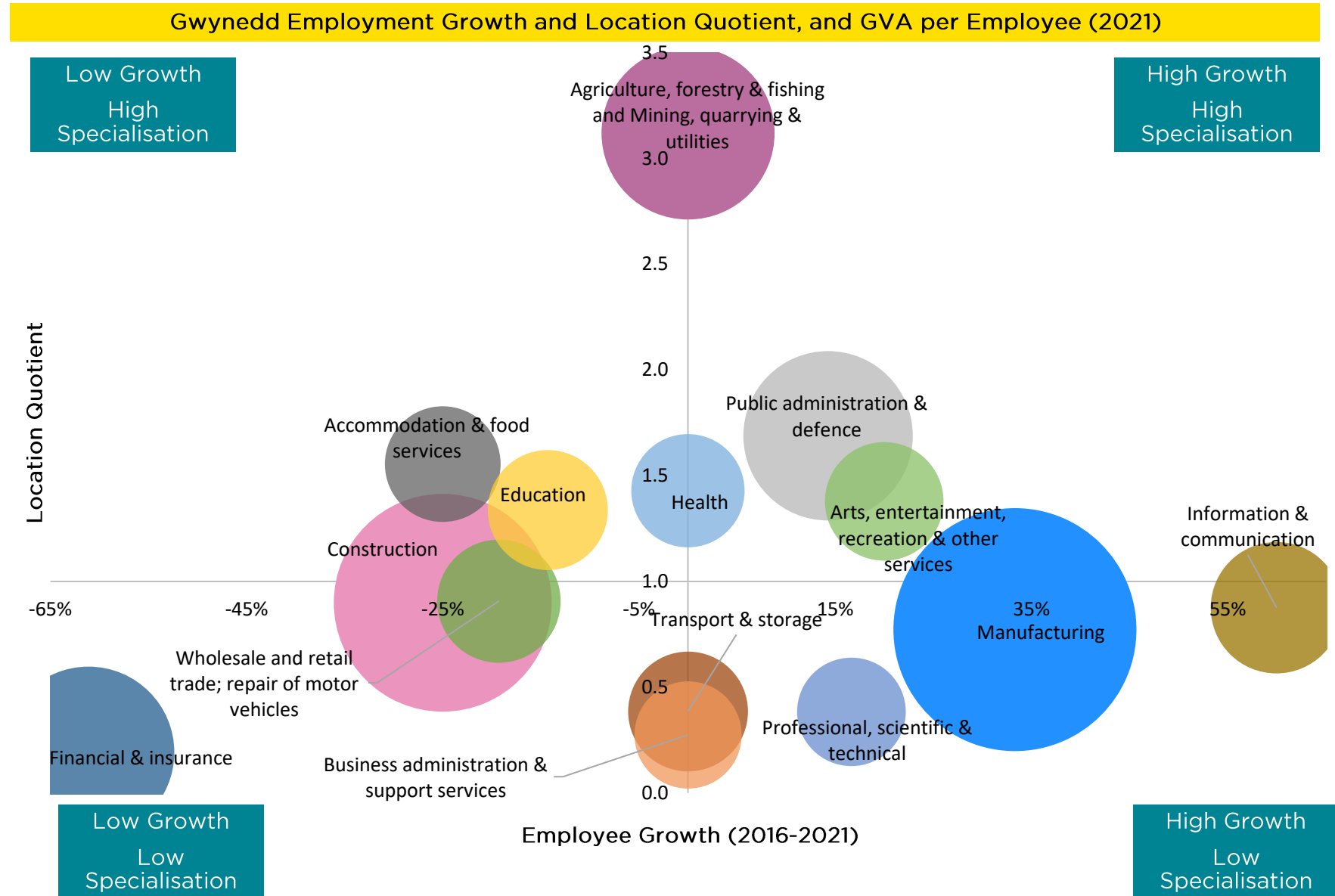
Sectors by GVA per Employee and LQ

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.



Economic Baseline

Summary

At the time of the 2021 Census, the community of Pwllheli had a population of 3,947 of which 53% were in employment and 3% were unemployed, the remaining 43% being economically inactive. Whilst slightly above the Gwynedd average, this is a relatively low unemployment rate. Gwynedd as a whole experienced a 10% increase in employment between 2011 and 2021.

The qualification of residents aged 16+ in Pwllheli was differentiated from the Gwynedd average, by the proportion of residents without qualifications – around a third higher in Pwllheli than Gwynedd. The proportion of residents in Pwllheli with a degree level qualification (Level 4) was 26%, 10% lower than the Gwynedd average.

Occupations in Pwllheli also differed with 17% of residents in elementary occupations, relative to the average of around 10% in Gwynedd and Wales. A high proportion of residents were in skilled trades (15%) in line with the Gwynedd average and 11% were in professional occupations, which is around half of the Gwynedd and Wales average. This suggests that there are fewer employment opportunities for professional occupations in Pwllheli relative to other locations in Gwynedd and Wales.

Business and employment data indicate that economic activity in Pwllheli and Nefyn is primarily driven by the foundational economy (provision of essential goods and services) and tourism. Reflecting this, there are a large number of businesses and jobs in retail, health and social care, and construction. The importance of tourism is reflected in the high proportion of accommodation and food service businesses (12% of total businesses) and jobs (10% of total jobs), in line with the rest of Gwynedd and above the Wales and UK averages.

At both the town and local authority level, micro businesses are extremely important. 19% of businesses in Gwynedd are agriculture businesses, with almost all being micro. Similarly, there are many small and micro construction, retail, accommodation and food service businesses in both Pwllheli and Gwynedd.

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.

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. There is also a large base of construction businesses (an industry with a high GVA per worker). These are both areas where there could be opportunity for growth in Pwllheli and Gwynedd more widely.

Other sectors to see growth in the last 5 years but without specialisation are information & communication, manufacturing, and professional & scientific activities. Information & Communication has had the highest growth in employment of all sectors at 60%. Manufacturing has the 2nd highest GVA per employee in Gwynedd but the proportion employed in the local authority is significantly below the Welsh average. There is opportunity to improve specialisation in these growth areas.

2.2 | Socio-economic Baseline

Socio-Economic Baseline

Pwllheli Household Size & Composition

A higher rate of smaller households can lead to an increased demand for housing and the cost and complexity of delivering public and social services (e.g. home-based social care).

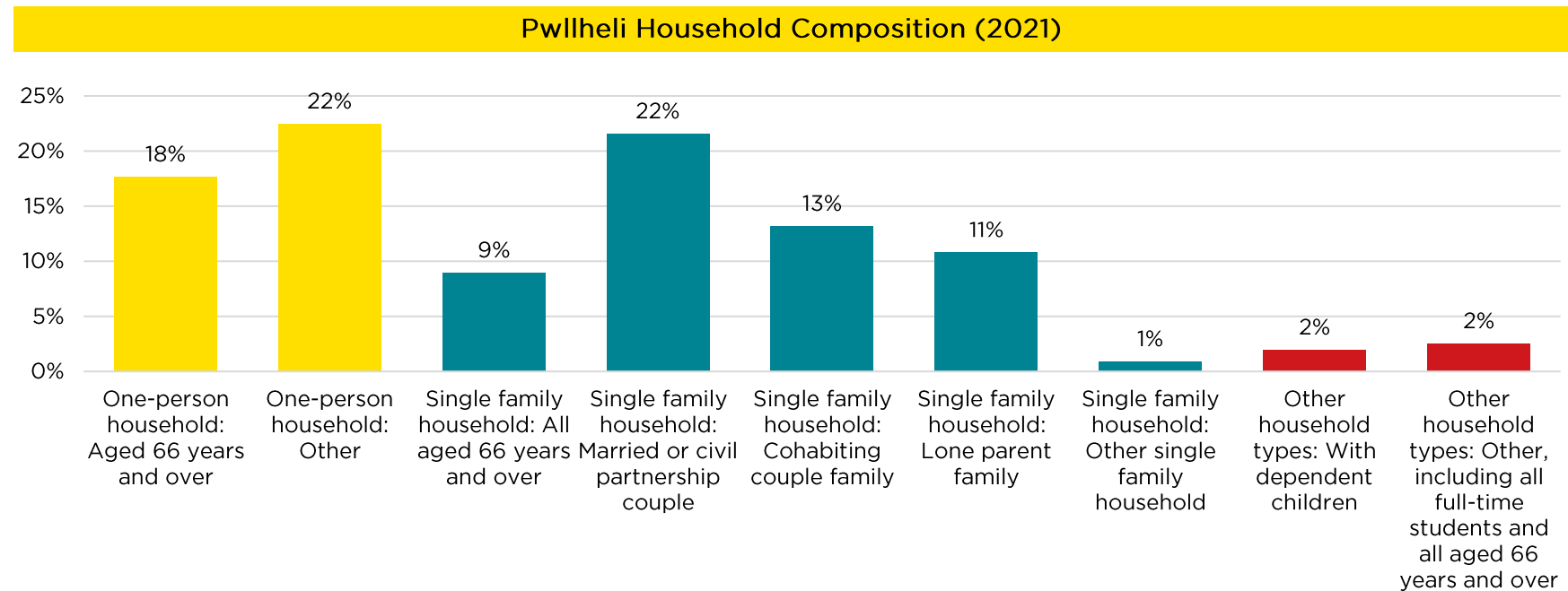
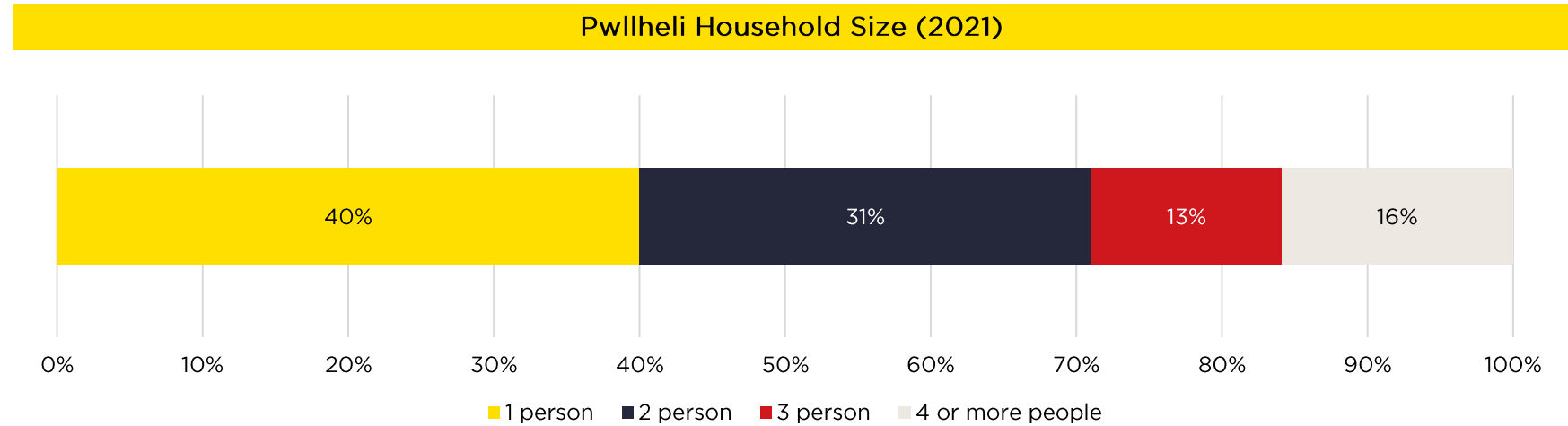
In 2021, 40% of households in Pwllheli were 1-person, compared to the Wales average of 32%. Of these households, slightly under half were 1-person aged 66 years and over – 18% of total households in Pwllheli.

The most common household type in Pwllheli is one-person households (aged under 66 years old) who represent 22% of total households. Whereas in Wales the most common type was married or civil partnership couples at 29%.

31% of households were 2-person, 13% were 3-person and the remaining 16% were 4-person and above.

22% of households were a single-family household with a married/civil partnership couple and a further 13% were cohabiting couples, representing a total of 35% of households.

11% of households contained one family with a lone parent.



Socio-Economic Baseline

Pwllheli health

2021 Census respondents were to assess their health on a scale from “Very Good” to “Very Bad”. This data may have been influenced by the COVID-19 pandemic.

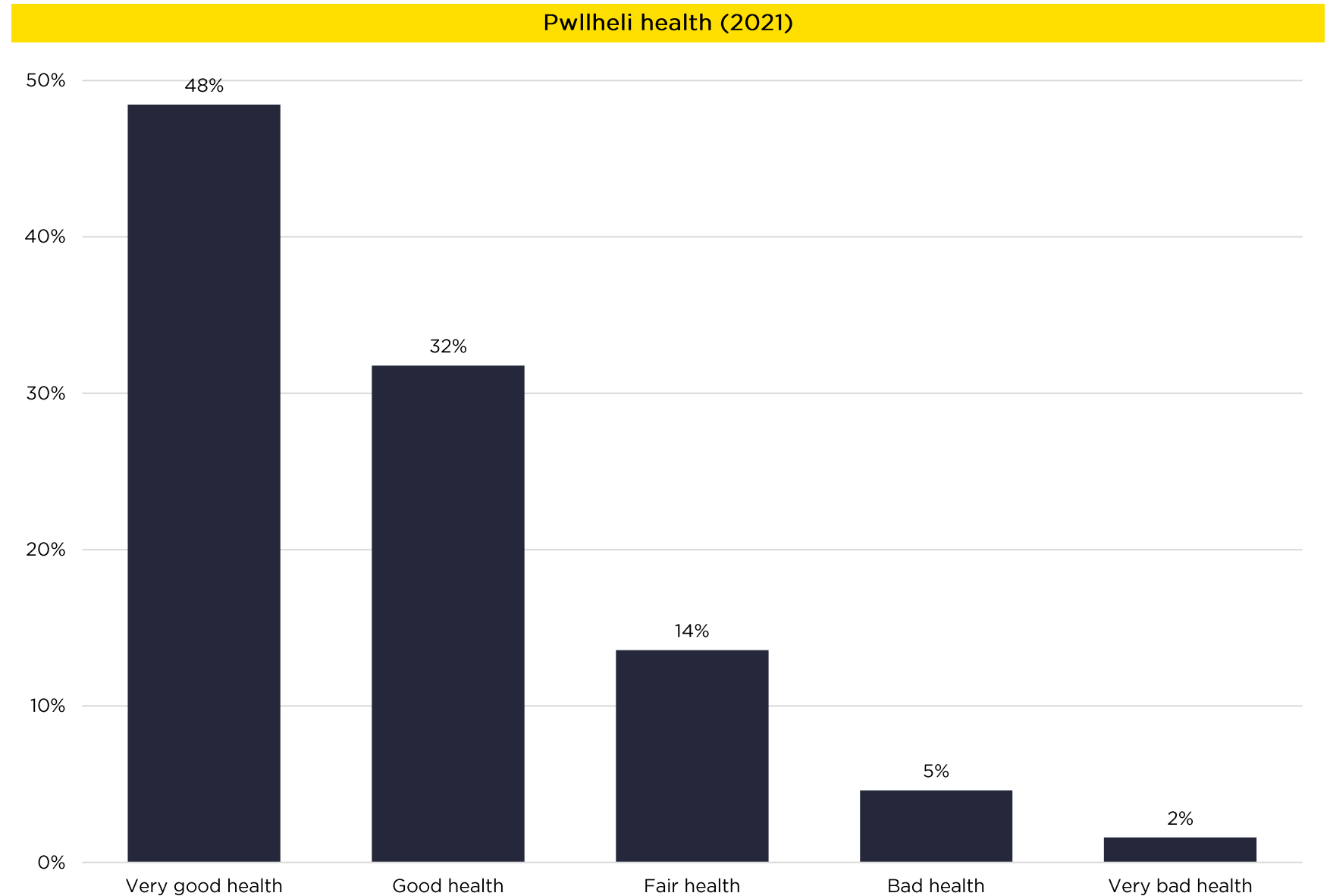
A total of 80% of residents in Pwllheli are in good or very good health. This is marginally better than the Welsh average of 79%.

Similarly, the proportion of residents in fair, bad, or very bad health is closely in line with the Welsh Average.

The **Local Regeneration Plan** also highlights that rates of childhood obesity in Pwllheli are higher than average than average, with 14% of children aged 4-5 overweight.

20% of residents are disabled under the Equality Act (2010) which is slightly higher than the Gwynedd average of 18% and lower than the Welsh average of 21%.

Of those who are disabled in Pwllheli, the day-to-day activities of slightly under half were limited a lot. Accounting for around 10% of the town’s residents and higher than the Gwynedd average of 8%.



Socio-Economic Baseline

Pwllheli Crime

Pwllheli town centre area is covered by two police force neighbourhoods: Pwllheli North and South. In this analysis, these neighbourhoods have been combined.

In the last 12 months to January 2024, there were a total of 646 crime incidents, of which 70% occurred in Pwllheli North (the area covering the town centre).

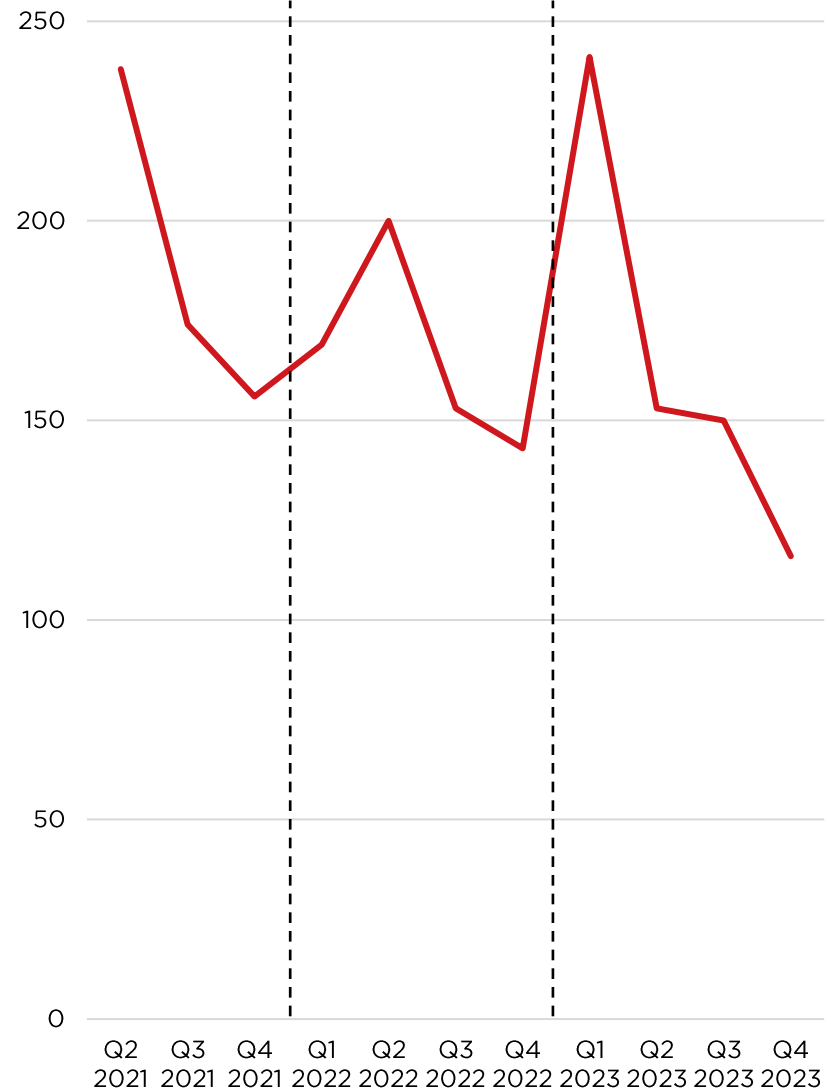
The main crime types were:

- 36% of incidents, violence and sexual offences
- 24% of incidents, anti-social behaviour,
- 11% of incidents, criminal damage and arson

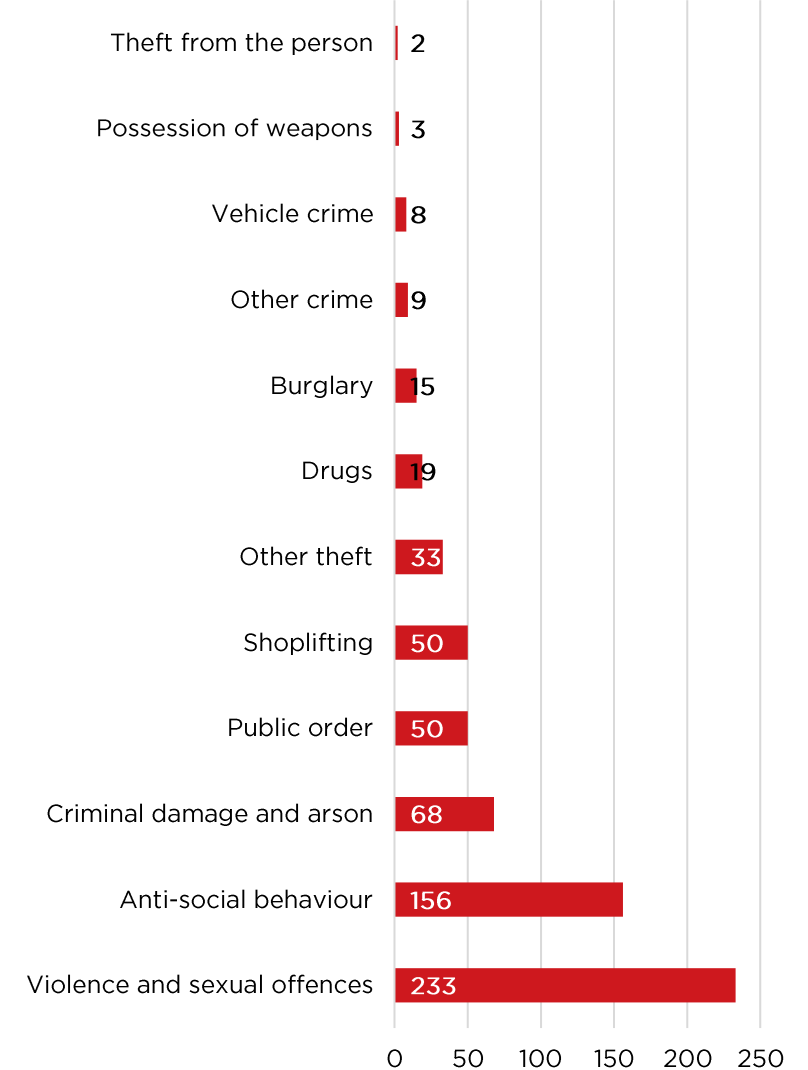
The three main crime types account for 71% of total incidents in Pwllheli in the period.

In 2021 and 2022, crime incidents peaked in the 2nd quarter (April – June) and in 2023 incidents peaked in the 1st quarter (January – March).

Pwllheli crime by quarter (2021 – 2023)



Pwllheli crime types (2023 – 2024)



Socio-Economic Baseline

Earnings

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

This is reflected in the average estimated annual household income for the Pwllheli and Nefyn area of £35,100. Amongst the bottom 15% of areas in England and Wales for household income and the lowest of all areas in the Llŷn Peninsula.

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 – 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.

Gwynedd Resident vs Workplace Earnings (2022)



Estimated annual household income (2023)



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.

The deprivation profiles of the two LSOAs comprising the town (Pwllheli North, area north of the Cob, and Pwllheli South, South Beach and the surrounding area) are similar.

Both areas are slightly above the national average for overall deprivation – as measured in the Welsh Index of Multiple Deprivation (2019). Reflecting this, Pwllheli North and South rank close to the median in most forms of deprivation.

However, both areas are amongst the 50% most deprived for income deprivation, showing that an above average proportion of residents are in receipt of income-related benefits. This likely indicates that there a high proportion of local jobs are part-time and/or low pay.

Both areas are also amongst the 50% most deprived areas in Wales for housing deprivation – this is higher in Pwllheli North, which ranks amongst the 40% most deprived areas in Wales. This indicates that higher than average proportions of local residents are living in inadequate housing (i.e. overcrowded or poor quality housing).

Pwllheli North is amongst the 25% most deprived areas for community safety, indicating that there are higher rates of fire incidents and police recorded crime than the national average.

Deprivation in Pwllheli North & South (2019)

Domain	Pwllheli North		Pwllheli South	
	Welsh Ranking	Deprivation Category	Welsh Ranking	Deprivation Category
Overall	1,078	40-50% least deprived	1,042	40-50% least deprived
Income	859	40-50% most deprived	722	30-40% most deprived
Employment	962	40-50% least deprived	880	40-50% most deprived
Health	1,070	40-50% least deprived	1,139	40-50% least deprived
Education	1,062	40-50% least deprived	1,044	40-50% least deprived
Access to Services	1,350	20-30% least deprived	1,174	30-40% least deprived
Community Safety	450	20-30% most deprived	1,028	40-50% least deprived
Physical Environment	1,186	30-40% least deprived	806	40-50% most deprived
Housing	710	30-40% most deprived	868	40-50% most deprived

Socio-Economic Baseline



Housing affordability

The Gwynedd Local Housing Market Assessment (2018) found that the Llŷn Peninsula is the area with the least affordable housing in Gwynedd.

69% of households were estimated to fall below the income needed to buy a home at a lower quartile house price (£132,500). This is the highest lower quartile house price in Gwynedd by more than £15,000 and 20% higher than the Gwynedd average.

Whilst house prices have changed since 2018, responses to the Ardal Ni consultation, conducted in 2023, reflect that housing affordability, in tandem with quality employment opportunities, remains a significant concern for residents.

Households priced out of market in Gwynedd – Local Housing Market Assessment (2018)				
Area	Median House Price	Lower Quartile House Price	Households priced out of market (No.)	Households priced out of market (%)
Llŷn Peninsula	£195,000	£132,500	6,060	69.3
Dolgellau	£142,500	£115,000	3,248	63.9
Porthmadog	£167,000	£115,500	3,489	61.6
Tywyn	£142,000	£106,875	2,295	61.2
Bangor	£150,000	£110,000	6,769	59.8
Penllyn	£155,000	£94,500	1,117	55.2
Caernarfon	£141,500	£100,000	7,635	53.6
Ffestiniog	£89,000	£70,000	1,467	48.4
Gwynedd	£150,000	£107,000	31,803	59.0
Wales	£147,500	£105,000	757,752	56.2

Socio-Economic Baseline



Summary

In 2021, Pwllheli the most common household types were single-person households (aged under 66) and single-family households with a married/civil partnership couple – both accounting for 22% of total households.

1-person households accounted for 4 in 10 households in Pwllheli and slightly under half of which were 1-person aged 66 years and over. A further 35% of households were single-family households with a married, civil partnership or cohabiting couple.

This signifies that households in Pwllheli and, on a wider scale, Gwynedd, are more likely to be smaller with older residents and less dependent children.

Gwynedd has 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. However, the Ardal Ni Local Regeneration Plan (2024) highlights a higher rate of youth obesity in Pwllheli than the Gwynedd and Wales averages.

Well-being 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.

80% of residents in Pwllheli reported being in good or very good health in the 2021 Census. 20% of residents are disabled under the Equality Act (2010) which is slightly higher than the Gwynedd average of 18% and lower than the Welsh average of 21%.

Crime data for the last 12 months to January 2024 shows that there were a total of 646 crime incidents, of which 70% occurred in Pwllheli North (the area covering the town centre). In 2019, Pwllheli North ranked amongst the 25% most deprived areas in Wales for crime. In the last 12 months to January 2024, the main crime types were violence and sexual offences, anti-social behaviour, and criminal damage and arson.

Median gross annual earnings are lower in Gwynedd than in Wales and the UK. The average estimated annual household income for the Pwllheli and Nefyn area of £35,100, amongst the bottom 15% of areas in England and Wales for household income and the lowest of all areas in the Llŷn Peninsula.

WIMD (2019) data shows that both Pwllheli North and South rank around the Wales average for overall deprivation. However, both areas are amongst the 50% most deprived areas in Wales for income and housing deprivation.

The Gwynedd Local Housing Market Assessment (2018) finds that the Llŷn Peninsula is the area with the least affordable housing in Gwynedd, with nearly 7 in 10 households priced out of the market. Responses to the Ardal Ni consultation, conducted in 2023, reflect that housing affordability, in tandem with quality employment opportunities, remains a significant concern for residents.

2.3 | Commercial Market & Visitation Baseline

Land ownership

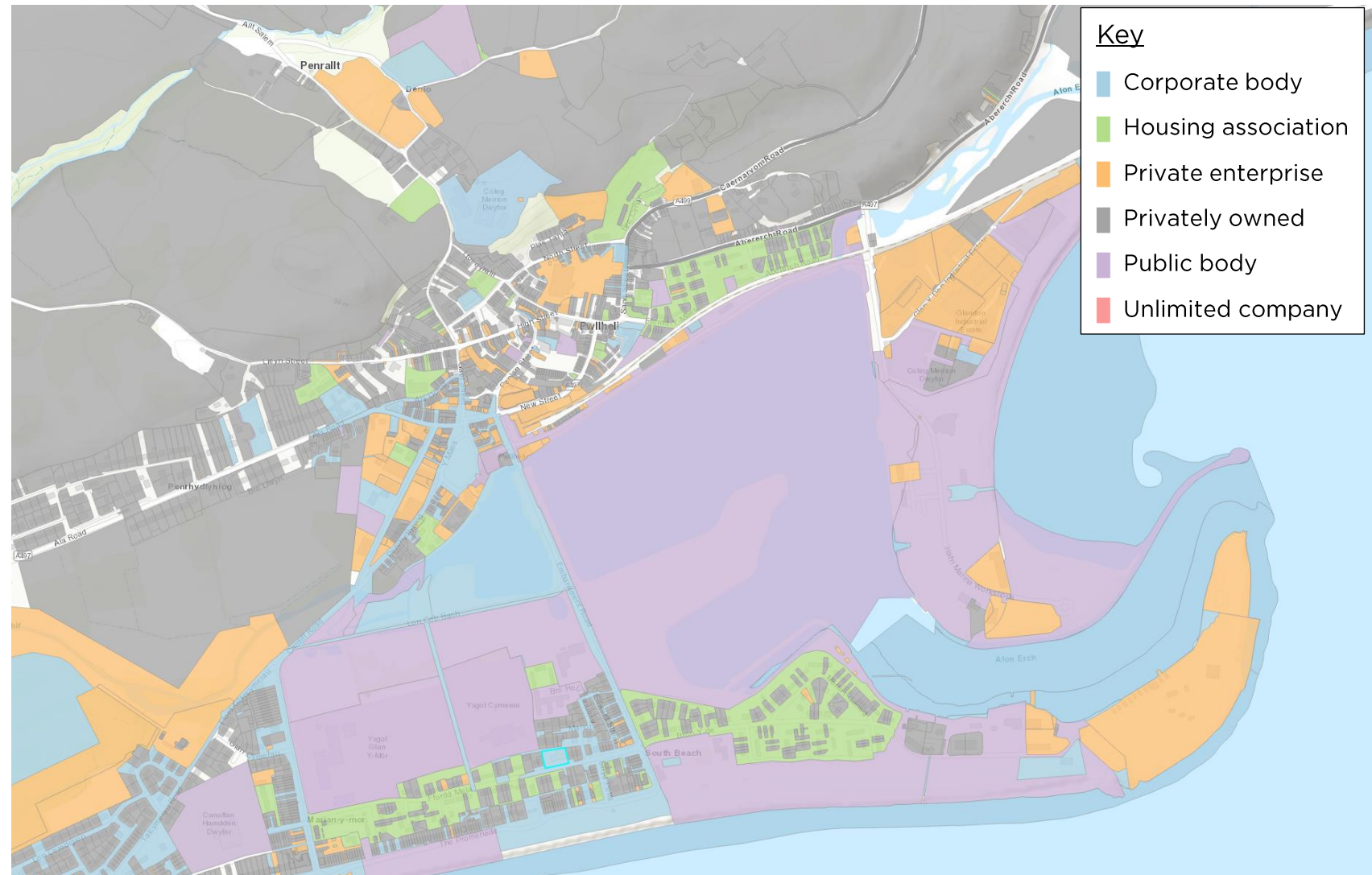
The majority of the land in the town is owned by private individuals, enterprises, housing associations, Crown Estate, and Cyngor Gwynedd.

Cyngor Gwynedd own significant amounts of land in the town, including the harbour and Marina. Cyngor Gwynedd also own much of the green and social infrastructure in the town, including Yr Ynys, the Lôn Cob Bach nature reserve, Ysgol Glan-y-Môr, Ysgol Cymerau and Dwyfor Leisure Centre.

The Crown Estate own much of the foreshore (land between mean high and mean low water mark), including the area south of the Promenade and entrance to the harbour.

Adra Housing Association own around four sites in Pwllheli, including: Bro Cynan, south of Abererch Road, Frondeg, and Ystad Ffordd Mela. Adra also own the former hockey fields at the north of the town, a housing allocation (reference: T30).

Grŵp Cynefin Housing Association own a similar number of sites in the town including: Cesail Y Bryn, Cae Dafis, by St Peter's Church and Glan Rhyd.



Retail Property Market

Retail Property Market

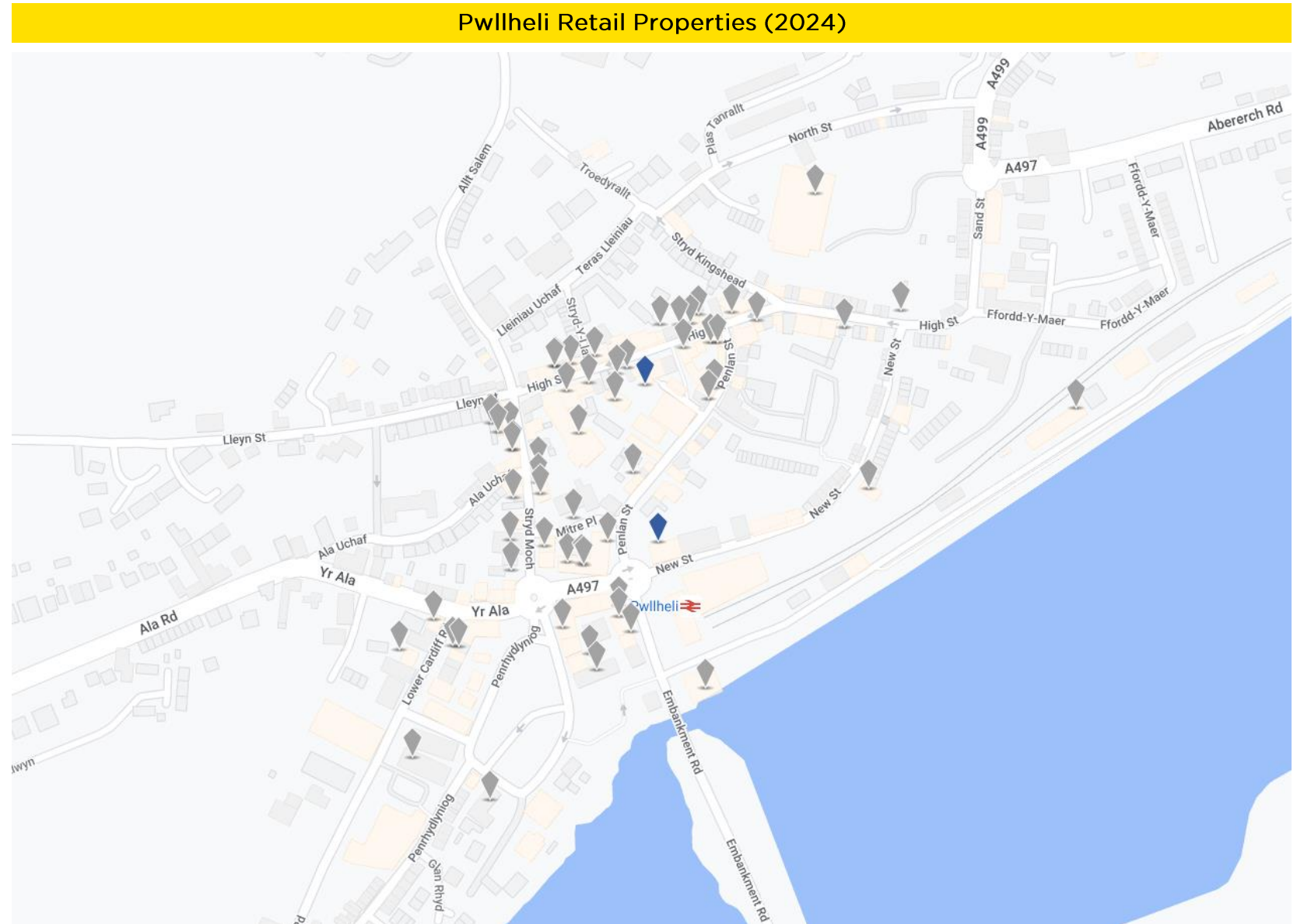
CoStar data shows that there are 59 retail properties in Pwllheli town centre with a total floorspace of 166,615 sqft.

The majority of retail properties are located along High Street, Stryd Moch and Penlan Street, forming a central retail core.

There are three supermarkets in the town centre (Lidl, Iceland, and Asda) which reflects the town's role as an urban service centre and hub for the region's visitor economy.

Larger units (5,000 sqft and above) in the town centre are primarily occupied by national multiple retailers (e.g. Home Bargains), however, most of the units in the town centre are occupied by independent retailers.

There are currently no new retail units under construction in the town centre, with the last unit being constructed in 2012 (Asda on Sand Street). An Aldi is currently under construction on the edge of the town, located north of Caernarfon Road (A499). At 19,420 sqft, the Aldi will be the 3rd largest retail property in Pwllheli, following Asda and the Colonnade Building (Costa).



Retail Property Market



Retail Property Market

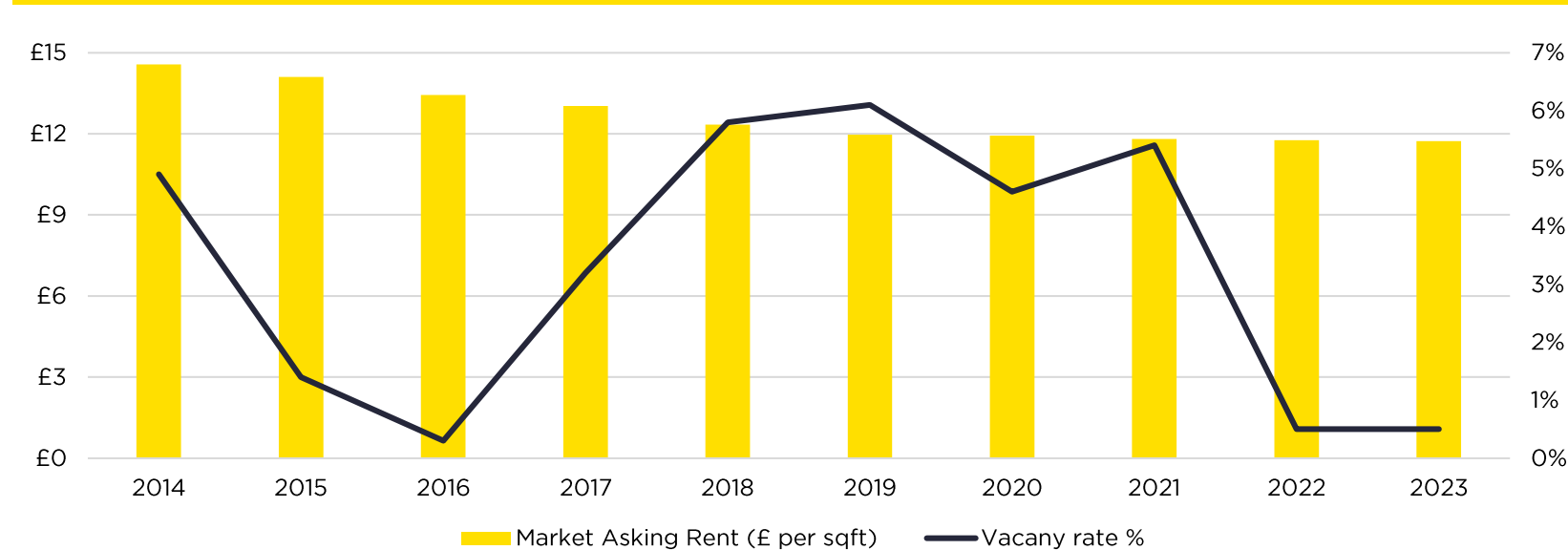
CoStar data shows that between 2014 and 2023, retail market rents have declined by around £2.80 per sqft but the vacancy rate has remained consistently low. As of year-end 2023, the vacancy rate was nearly 0%, having dropped from a peak of 6% in 2019. The Local Data Company reported that the Wales average vacancy rate was 17% in 2023.

This likely indicates a balancing in demand and supply in the local market with rents reducing to meet demand. Investment in the area by Aldi and the presence of three supermarkets also indicate that the local market is performing well.

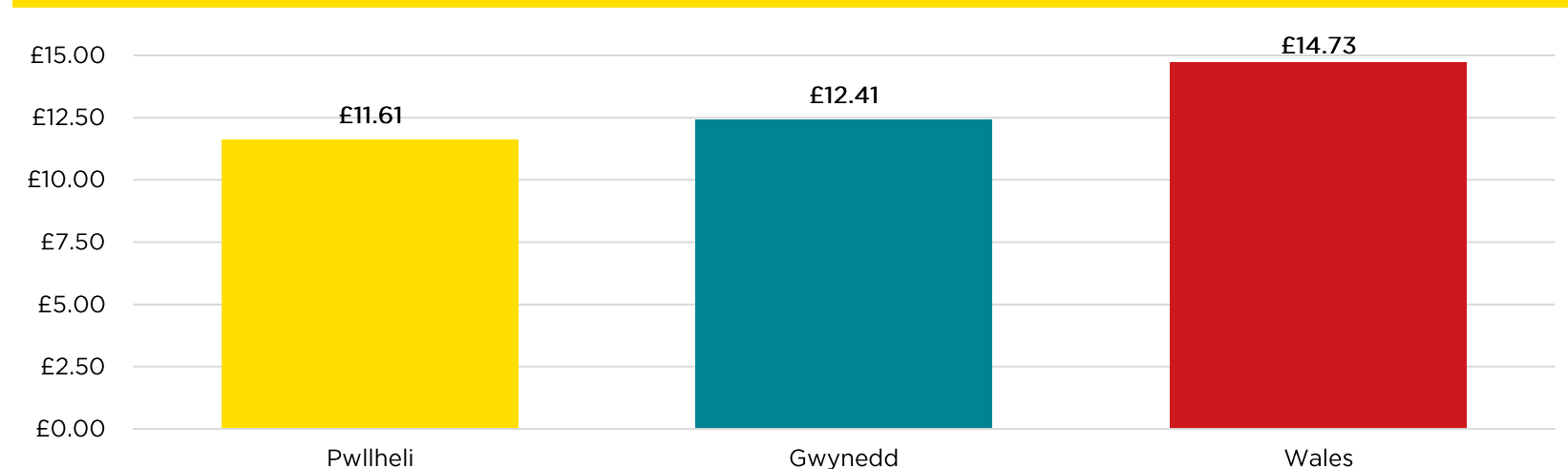
Year-to-date data for 2024 indicates that there has been a significant uptick in vacant floorspace in Pwllheli, with around 14,500 sqft of retail floorspace becoming vacant. This is a significant amount, accounting for close to 10% of total retail floorspace. This has been primarily driven by the closure of Wilko and may be partly accounted for by some properties undergoing renovation (which may be categorised as vacant).

Market rents for retail properties in Pwllheli are marginally lower than the Gwynedd average and by around £3 per sqft less than the Welsh average. Average rents in Gwynedd have decreased by a similar proportion to Pwllheli.

Pwllheli Retail Market Rent and Vacancy Rate (2014-2023)



Retail Market Asking Rent - £ per sqft (2024)



Retail Property Market

Retail Development Pipeline

Glenigan data provides access to a large database of construction projects across the UK. Whilst the database does not capture all projects it provides an accurate high-level overview of what is happening in Pwllheli.

Glenigan data shows that there are two developments in the retail pipeline, delivering an additional 21,440 sqft of retail floorspace to the town.

Both developments are investments by large supermarket chains and indicate that the local retail market is performing well and driven by visitors, particularly when considering the town's rural location and declining population.

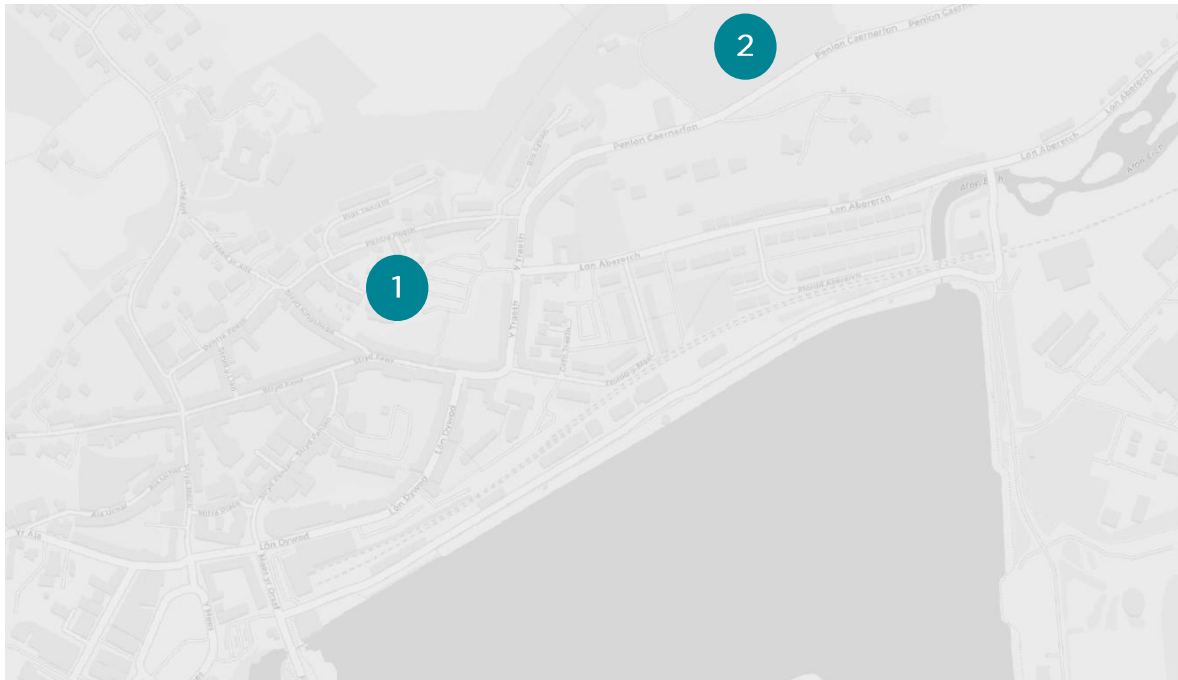
1. Extension of Asda

Extension of supermarket on Sand Street to accommodate an additional 2,020 sqft of retail floorspace, of which 1,090 sqft is for convenience good sales and 600 sqft for comparison good sales.

2. Construction of new Aldi

Construction of a 19,420 sqft supermarket with car park and access on a residential allocation adjacent to the A499 (Caernarfon Road). The supermarket is currently under construction and involves the construction of a new shared cycle and foot path.

Map of Retail Development Pipeline



Visualisation of new Aldi (Vector Design)



Hospitality Property Market



Hospitality Property Market

There are four hotels within the town, all of which are smaller scale pub accommodation:

- Crown Hotel (11 rooms)
- Victoria Hotel (9 rooms)
- Y Castell
- Y Tŵr (currently closed for renovation)

In addition, Pen Cob (Wetherspoons) has received planning permission to convert its upper floors to a hotel, bringing an additional 15 rooms to the market. (See the Visitation and Tourism section below for analysis of the town's accommodation market).

There is no mid- or large-scale hotel. Responses to the Ardal Ni consultation highlighted demand for a larger hotel in the town (see Section 4 for further details).

A Travelodge hotel has been previously proposed for a vacant plot at Glan-y-Don Industrial Estate, owned by Cyngor Gwynedd, adjacent to Plas Heli.

Designs produced, indicate that the hotel would have accommodated 55 beds across two floors. In 2018, an investment of around £5.8 million was sought to finance the development of the hotel. As of April 2023, Pwllheli remains on Travelodge's list of target locations for expansion.

CoStar data is available for two hospitality properties in Pwllheli.

This data shows a 12-month occupancy rate of 81% - an increase of 3.5% on the previous period. This is higher than both North Wales (80%) and the UK (77%).

The average daily rate (ADR) in Pwllheli was £76, the same as the North Wales average but £35 less than the UK average of £111. ADR in Pwllheli has increased by £26 since 2014.

The revenue per available room (REVPAR) in Pwllheli is £62. This has increased by 5.8% in the last 12 months. This is higher than North Wales (£61) and significantly less than the UK (£86). Whilst growth in REVPAR in Pwllheli has been almost double the regional average, it is below the UK growth rate of 10.1%.

REVPAR in Pwllheli has increased by £23, from £38 in 2014.

Market sale price per room in Pwllheli is very similar to North Wales and significantly cheaper than the UK average.

Market yield is in line with the regional average at 5.7% and above the UK average of 5.5%.

Pwllheli Hospitality Statistics (March 2023 – March 2024)

12 MO OCC RATE	12 MO ADR	12 MO REVPAR	MARKET SALE PRICE/ROOM	MARKET YIELD
81.1% +3.5%	£76 +2.2%	£62 +5.8%	£104K +6.7%	5.7% +0.3%
Prior Period 78.4%	Prior Period £74	Prior Period £58	Prior Period £97.6K	Prior Period 5.4%

North Wales Hospitality Statistics (March 2023 – March 2024)

12 MO OCC RATE	12 MO ADR	12 MO REVPAR	MARKET SALE PRICE/ROOM	MARKET YIELD
79.6% +1.0%	£76 +2.7%	£61 +3.7%	£105K +8.1%	5.8% +0.3%
Prior Period 78.8%	Prior Period £74	Prior Period £58	Prior Period £96.8K	Prior Period 5.5%

UK Hospitality Statistics (March 2023 – March 2024)

12 MO OCC RATE	12 MO ADR	12 MO REVPAR	MARKET SALE PRICE/ROOM	MARKET YIELD
77.2% +2.4%	£111 +7.5%	£86 +10.1%	£211K +14.6%	5.5% +0.2%
Prior Period 75.4%	Prior Period £103	Prior Period £78	Prior Period £184K	Prior Period 5.3%

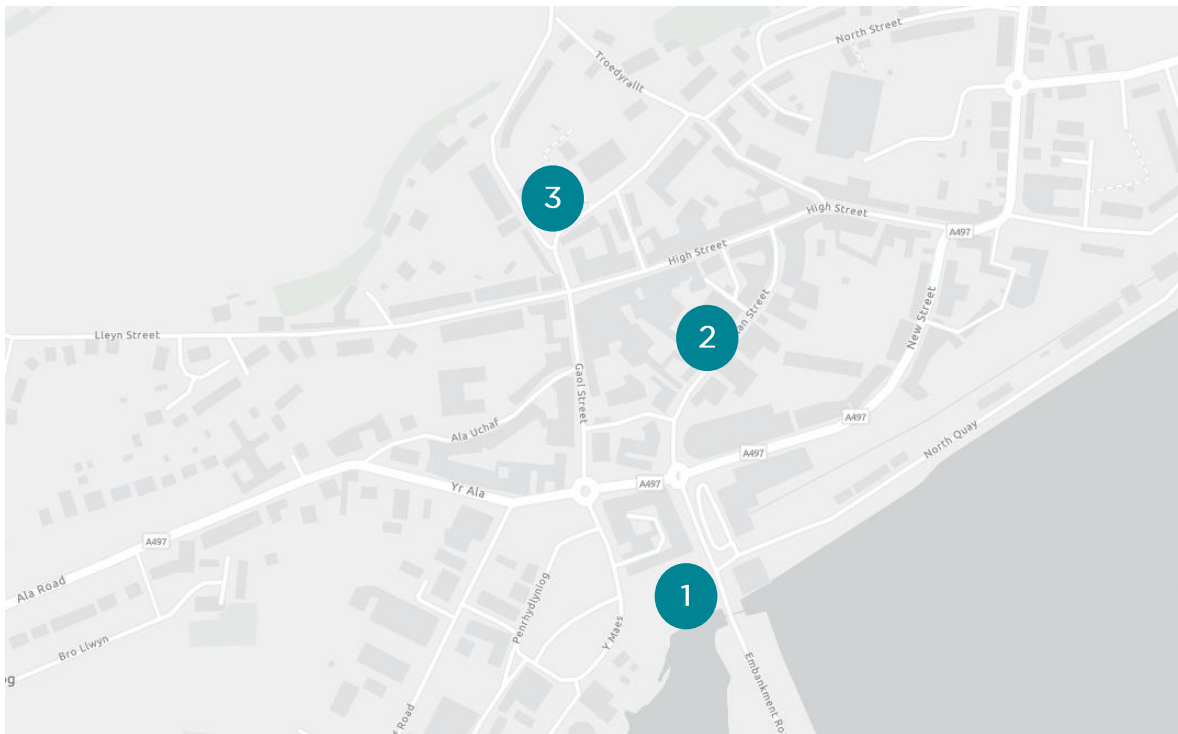
Hospitality Property Market

Hospitality Development Pipeline

There has been a range of investment in hospitality in Pwllheli including by the public and third-sector as well as the private sector. The completion of renovations to Neuadd Dwyfor tied with the future delivery of a new hotel and pottery studio, are likely to make a significant positive impact to the vibrancy and economic performance of the town centre.

Improvements to the public realm of the town centre will also help to maximise the positive impact of these investments.

Map of Hospitality Development Pipeline



1. Extension and change of use of Pen Cob (Wetherspoons)

Extension of public house to create a beer garden and change of use of upper floors to hotel (15 rooms). The development involves part demolition and conversion of warehouse to rear of the Pen Cob.

2. Theatre renovation

Neuadd Dwyfor, an art and community facility, reopened in 2023 following a 2.5-year programme of renovation funded by Cyngor Gwynedd, worth £1.5 million. The renovation involved essential maintenance and modernised the building's library facilities. Further funding secured from the Arts Council of Wales is being used to deliver an expanded range of live events (e.g. music, comedy and theatre shows).

3. Pottery studio

Conversion of Capel Salem, located on Goal Street on the edge of the town centre, into a pottery studio. Capel Salem is currently vacant, and the conversion will deliver a new pottery studio which will be home to The New Potter Community Interest Company, providing paid apprenticeships for local young people.

Visitation and Tourism

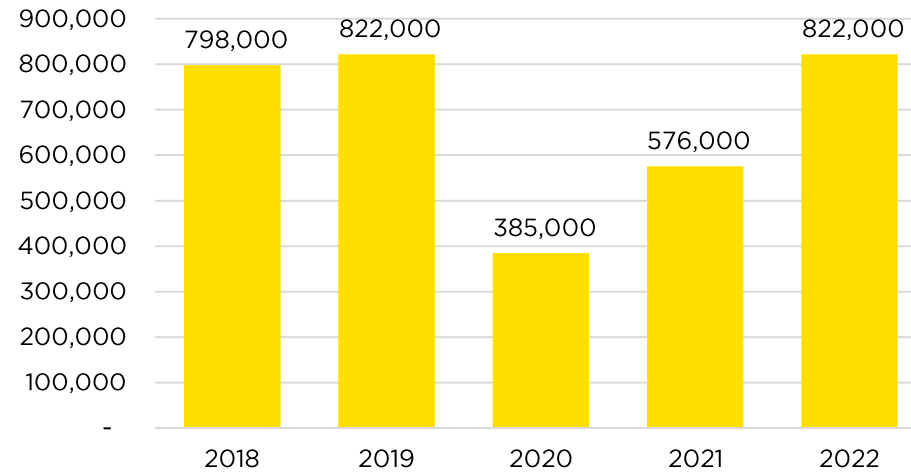
Pwllheli Visitor Statistics

STEAM data from 2018 to 2022 shows that Pwllheli saw 822,000 visitors in 2022 - equalling its peak, before the COVID-19 pandemic, in 2019.

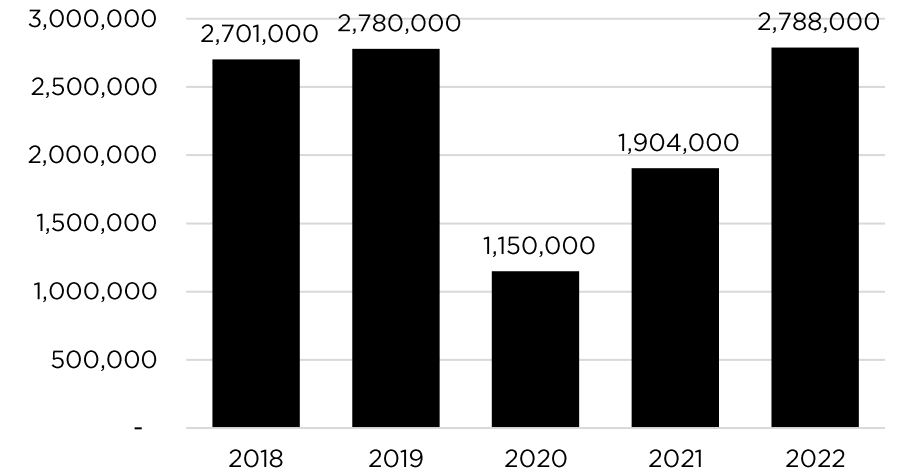
Across all metrics (visitor numbers, days, and economic impact), Pwllheli has recovered to the same level or higher than before the COVID-19 pandemic.

In terms of economic impact, Pwllheli reached a total of £152 million in 2022, more than 10% higher than in 2019. This suggests that the town's performance as a visitor destination has improved since 2019 and is capturing a higher level of visitor spending.

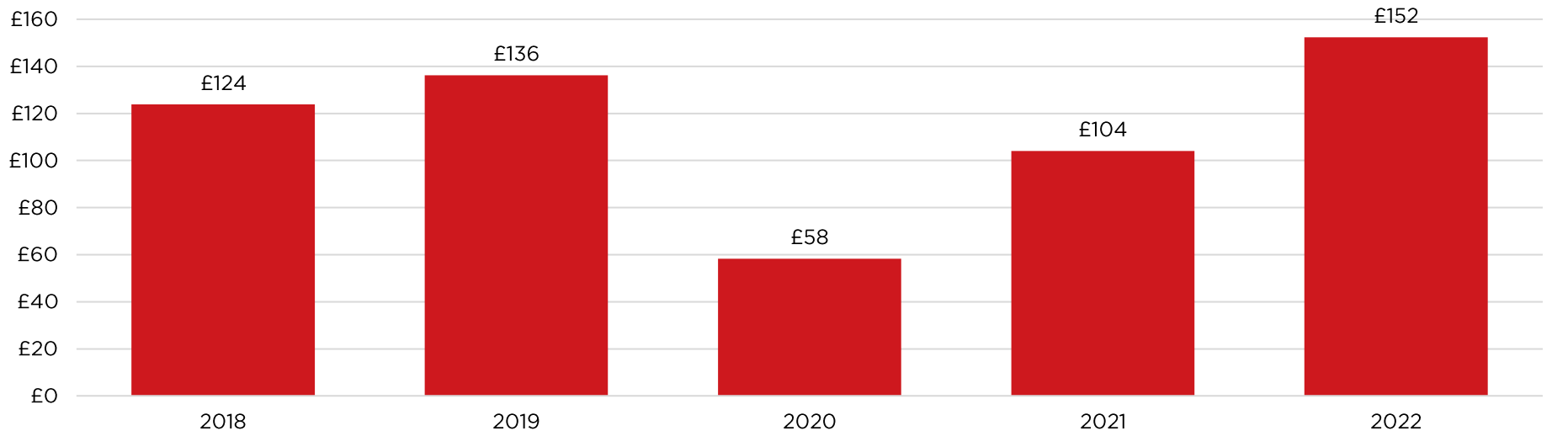
Pwllheli Area – Number of Visitors



Pwllheli Area – Days Spent in the Area by Visitors



Pwllheli Area – Visitor Economic Impact (£ millions)



Visitation and Tourism

Pwllheli Visitor Statistics

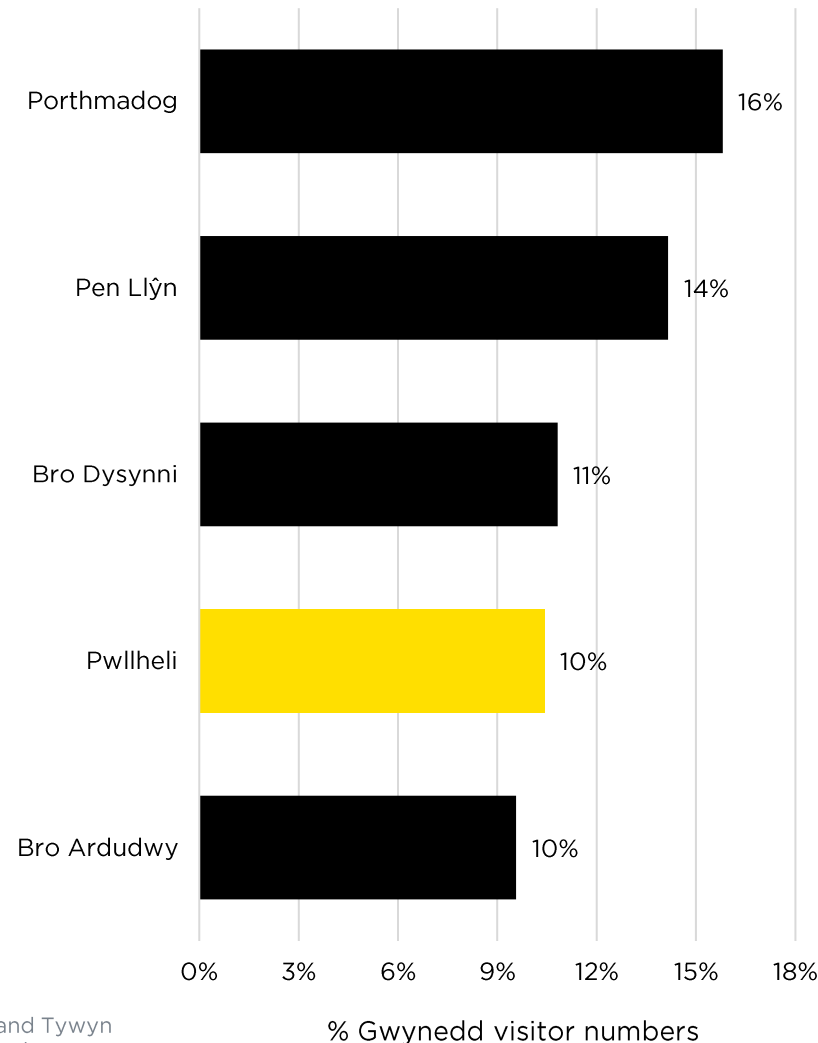
Out of a total of 13 areas in Gwynedd, Pwllheli placed 4th for visitor numbers and 5th for economic impact in 2022. This shows that Pwllheli has one of the largest visitor economies in the region.

However, Pwllheli performs worse in terms of economic impact per visitor compared to the Gwynedd average and areas with comparable numbers of visitors (such as Bro Dysynni¹ and Bro Ardudwy²) or neighbouring areas (such as Pen Llŷn³). If Pwllheli performed at the Gwynedd average, it would generate an additional £6.5 million economic impact from visitors.

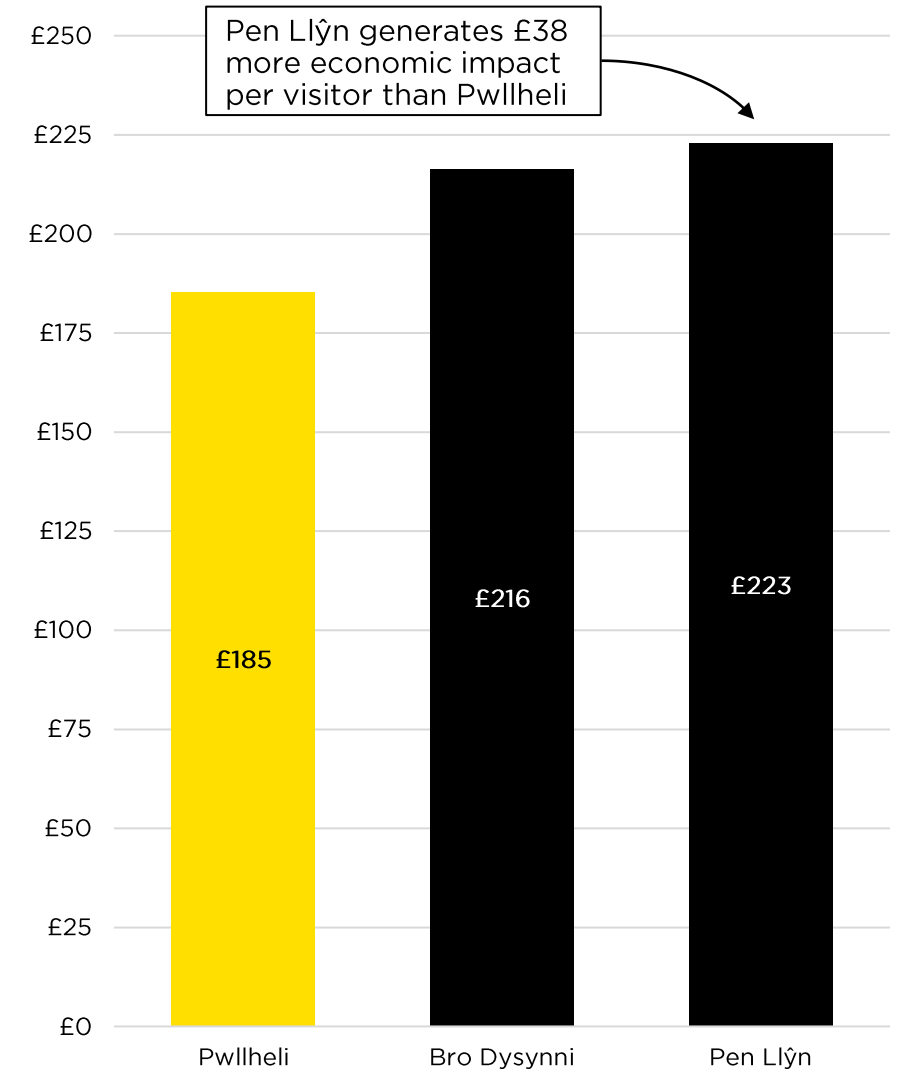
Whilst Pwllheli is successful at attracting visitors and tourism is a substantial share of the local economy. This data indicates that Pwllheli attracts less spending per visitor and as a result is receiving less economic benefit.

This is likely driven, in part, by the area receiving fewer visitors staying overnight (who spend significantly more in the local area). Which in turn this may be caused by the absence of a mid-sized hotel or similar accommodation in the town.

Top 5 Gwynedd Locations by Visitor Numbers (2022)



Economic Impact by Visitor (2022)



1) Bro Dysynni includes Aberdyfi, Abergynolwyn, Llwyngwril, and Tywyn
 2) Bro Ardudwy includes Barmouth, Harlech, Llanaber, and Llandecwyn
 3) Pen Llŷn defined as the area west of Pwllheli, including Llanbedrog and Nefyn

Visitation and Tourism

Pwllheli Accommodation Type

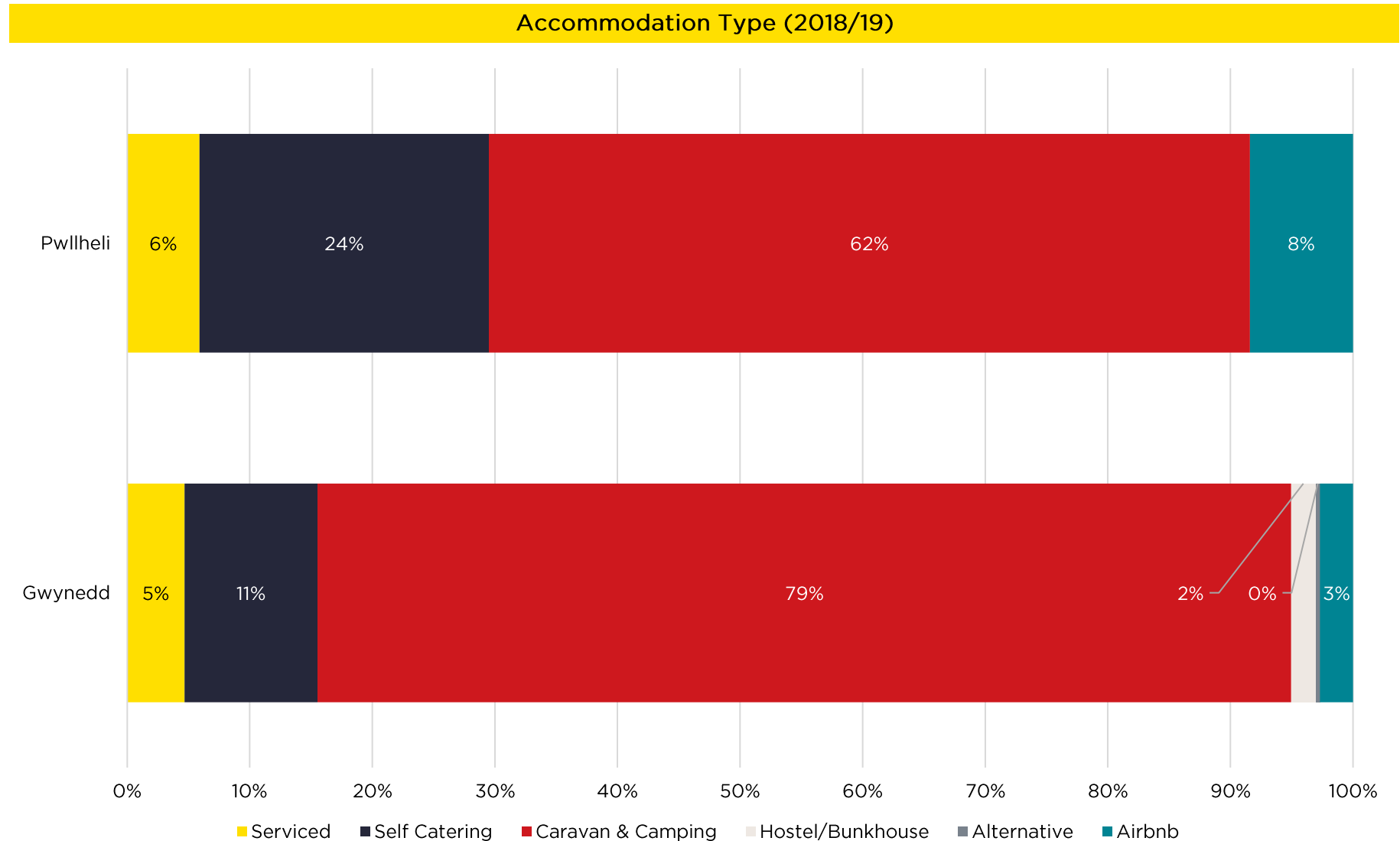
Cyngor Gwynedd's Tourism Bed Stock Survey recorded 1,092 bedspaces across Pwllheli in 2018/19, accounting for 1% of the Gwynedd total. Around 80% are in Pwllheli South.

The majority of the town's bedspaces (around 700) were caravan and camping, totalling 62% of all bedspaces – compared to 79% on average in Gwynedd. This is largely comprised of the Gimblet Rock Holiday Park.

Pwllheli has a higher number of self-catering and Airbnb accommodation relative to Gwynedd. Around a quarter of the town's bed stock (258 beds) is comprised of self-catering compared to the Gwynedd average of 11%. Similarly, 8% (92 beds) is comprised of Airbnb, compared to an average of 3%.

Serviced accommodation (e.g. hotels) forms 6% of the town's bed stock (64 beds) which is in line with the Gwynedd average of 5%.

There are no hostels or alternative forms of accommodation in Pwllheli.



2.4 | Key Findings

Key findings



76% of Pwllheli residents speak Welsh, amongst the highest in Wales. The size of the town's population has remained stable between 2001 and 2021, and the town has a larger working age population (16 - 64) and population aged 65+ than the Wales average. There is also a significantly above average proportion of single-person households (40% of total households).



Healthy life expectancy in Gwynedd is above the UK average and health deprivation in Pwllheli is relatively low, but rates of childhood obesity in Pwllheli are higher than the national average. Whilst overall deprivation is close to the Welsh average, there is significant housing and income deprivation.



There are a lower proportion of residents with Level 4 and above qualifications in Pwllheli and average household incomes in the area are amongst the 15% lowest in the country. There are a lower proportion of residents in professional occupations and the lack of quality employment opportunities has been identified as a concern by residents. At the local authority level, residents are increasingly highly qualified with a growing proportion of residents NVQ4+.



The town centre economy appears to be in a strong position with the quality and volume of commercial floorspace increasing through conversions and extensions of existing buildings. The vacancy rate is low although there are early signs of an uptick. Businesses in Pwllheli 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 strongly in recent years, likely partly linked to COVID-19, with high occupancy rates and growing revenue. Investments into the hospitality market by the public and private sector (e.g. Pen Cob hotel conversion) are another positive indicator for the health of the area's visitor economy.



There is no mid-sized hotel in Pwllheli, instead, serviced accommodation is largely comprised of pub accommodation. Public consultation suggests that there is demand for a hotel in the town and the Local Regeneration Plan (2024) identified the development of a new hotel (at Glan-y-Don Industrial Estate) as a key action.



Housing affordability is one of the most significant issues facing residents, with most residents unable to afford a home in the area. The town faces substantial development constraints (e.g. flood risk) that reduce the number of viable development sites; potential for conversions of vacant properties.

03

Built & Natural Environment

Introduction

This section provides an overview of Pwllheli's natural and built environment, including the uniquely varied range of natural environments within its boundaries, including beaches, woodland, and wetlands.

The section is intended to provide a baseline that supports the future development of a Nature Plan for Pwllheli. The Nature Plan will be focused on enhancing and protecting nature and will be developed with the local community.

The following aspects of the town's built and natural environment are covered in this section:

- Local, regional, and national environmental designations
- Flood risk and flood risk mitigation
- Listed buildings and conservation area



Environmental designations

Pwllheli is situated on the southern coast of the Llŷn Peninsula, an area of great environmental importance due to its biodiversity, landscape, and microclimate. This is reflected in the significant number of protected habitats in the town and wider Peninsula.

Historic Landscapes are intended to recognise and promote the historic value of an area and may be used in planning and development decision-making. Pwllheli is situated within the **Llŷn and Bardsey Island Historic Landscape**. The area was designated in 2001 for its “great and unparalleled wealth and diversity of, smaller scale archaeological and historic features.”

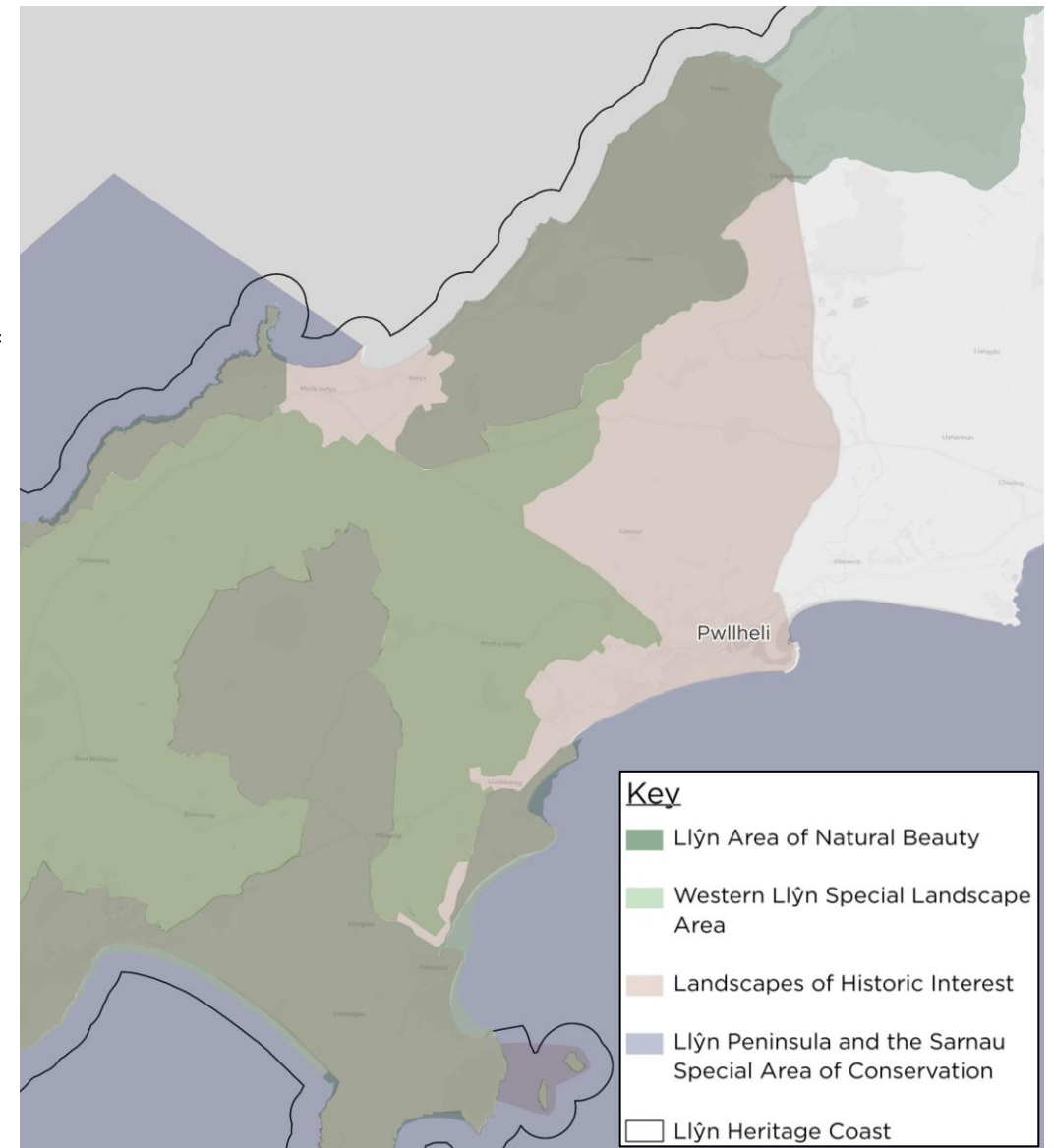
Pwllheli is located adjacent to the **Llŷn Peninsula and the Sarnau Special Area of Conservation (SAC)** which covers a marine area from Nefyn to near Aberystwyth, making it one of the largest in the UK. SACs are intended to provide protection to animals, plants and habitats of national and international importance.

Llŷn Peninsula and the Sarnau has been designated because of its varied and unusual underwater landscapes. The NRW have judges the SAC as one of the best areas in the UK for reefs, inlets, sandbanks, estuaries and coastal lagoons.

Pwllheli is also located close to the edge of the **Western Llŷn Special Landscape Area (SLA)**. SLAs are non-statutory designations by local planning authorities to identify and protect landscapes of high physical, environmental, visual, cultural and/or historical value from inappropriate development. Western Llŷn has been designated because of its landscape’s rural and historic character and as the setting of SSSIs and an AONB.

Beyond the area of the town of Pwllheli is the **Llŷn Area of Natural Beauty (AONB)** which includes much of the Peninsula’s coastline to the north and west. The area was designated in 1957 (the third in the UK) and is one of five in Wales. The Peninsula has been long-recognised as an area of great natural beauty and the designation is intended to preserve and enhance its natural beauty. Cyngor Gwynedd are responsible for the management of the AONB.

Llŷn Heritage Coast extends around the Peninsula from Llanbedrog (5km south of Pwllheli) to Aberdesach on the northern coast, and reflects the significant historic and environmental value of the Llŷn Peninsula’s coast.



Local Environment

Pwllheli is home to a wide range of habitats due to its coastal location in the Llŷn Peninsula. Within the town are several areas with significant environmental value, including Sites of Special Scientific Interest (SSSIs), Local Nature Reserve (LNR), and ancient woodland.

Lôn Cob Bach Nature Reserve is located west of the embankment and is one of only a few LNRs which exists within a town in the UK. The LNR is maintained by Ffrindiau Pwllheli and is composed of wet pasture, salt marsh, intertidal mud and reed beds. This makes the area an important habitat for many species (e.g. otter). A 1995 survey of the LNR proposed extending the Reserve westward to Afon Penrhos.

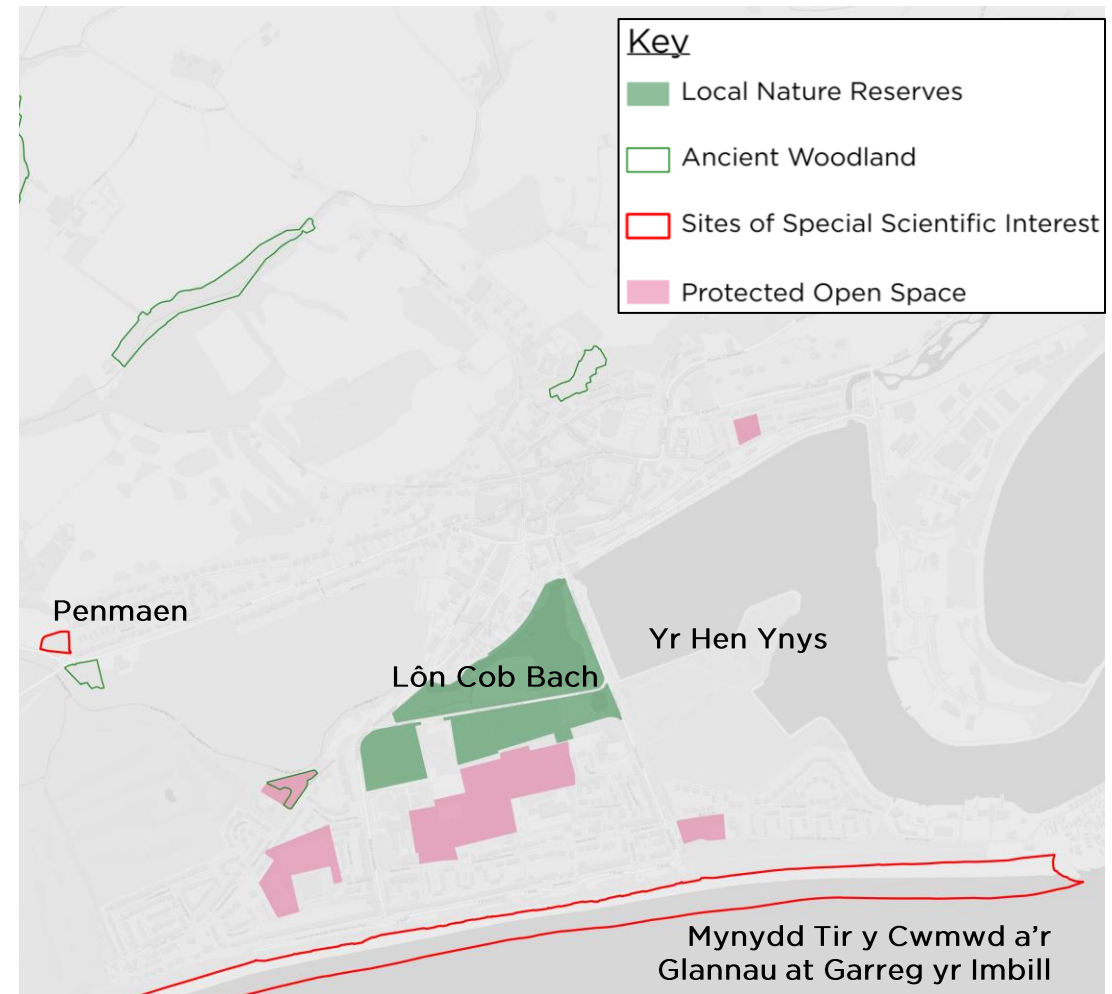
SSSIs are conservation designations designed to protect areas of biological and/or geological interest. There are two SSSIs in and around Pwllheli:

- **Penmaen** – 0.3-hectare woodland site adjacent to the A497 designated in 1981 for its biological interest.
- **Mynydd Tir y Cwmwd a'r Glannau at Garreg yr Imbill** - 164-hectare site, designated in 2001, that extends along the coastline from Llanbedrog.

Ancient woodland refers to woodland that has existed continuously since 1600. There are three areas of ancient woodland in the town: **Ffordd Talcymerau, Coleg Meirion Dwyfor, and Yr Ala.**

Yr Hen Ynys is a popular green space, used regularly by local residents, and maintained by Ffrindiau Pwllheli. The site is designated as a “Local Wildlife Site” in the LDP and This is a non-statutory designation that recognises the high nature conservation value of the site.

Ffrindiau Pwllheli are currently developing plans for Yr Ynys and are consulting with the local community and Cyngor Gwynedd. Initial proposals include introducing amenities (e.g. benches, tables etc.) at the ‘amphitheatre’ to create a community space that could host local live events. Ffrindiau Pwllheli have also commissioned an ecological survey of Yr Ynys to identify the habitats and species located within the site.



Flood risk

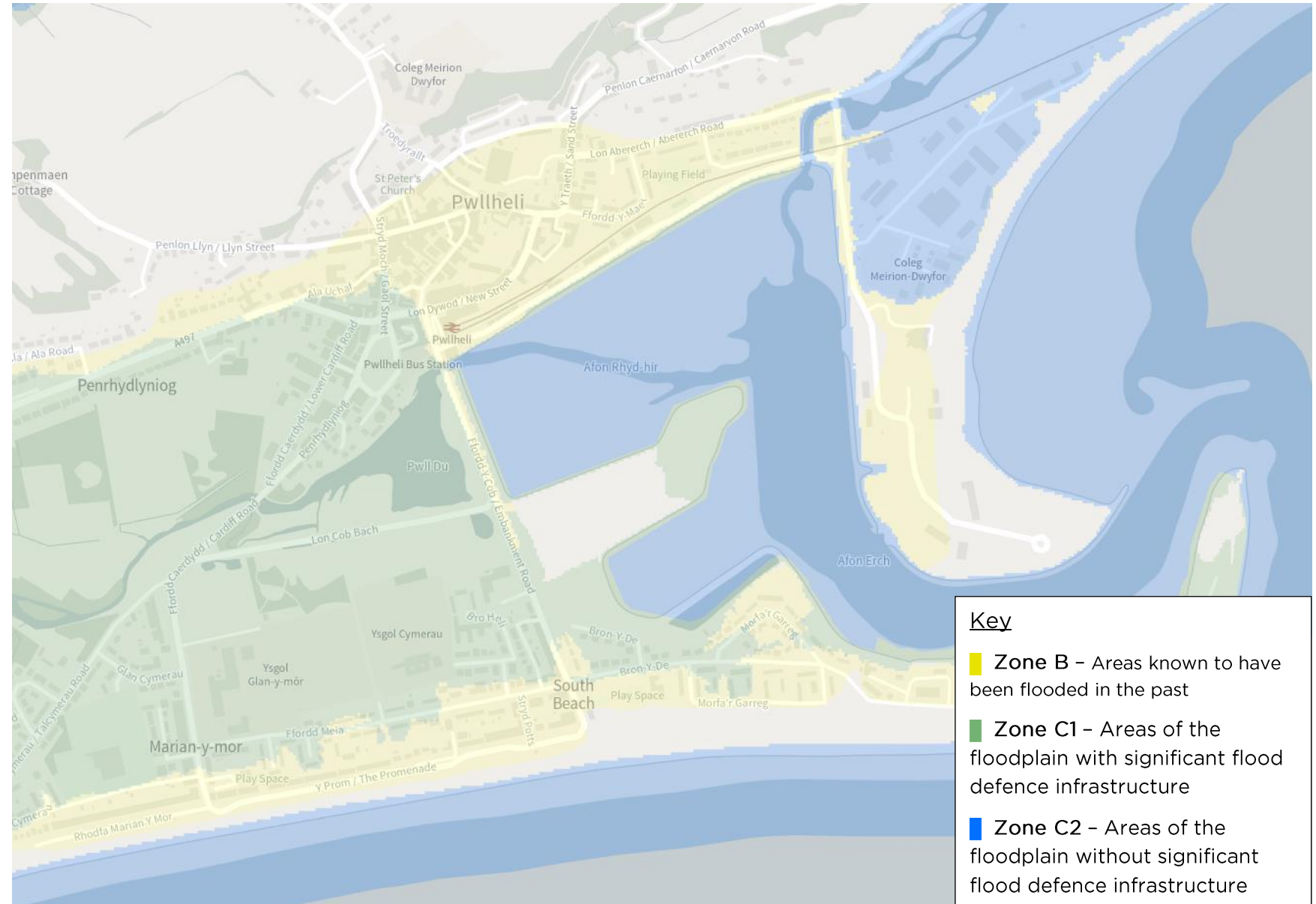
Natural Resources Wales' Development Advice Map (shown opposite) is the current framework for assessing flood risk to and from new development. Once the revised Technical Advice Note 15 (TAN15) has been implemented, it will be replaced by the Flood Map for Planning.

The majority of the town is protected by flood defences and is located within Flood Zones B and C1.

TAN15 (2004) states that:

- Flood Zone B - Site levels should be checked against the extreme (0.1%) flood level as part of the planning process for proposed developments.
- Flood Zone C1 - Proposed development should be subject to a justification test that demonstrates the necessity of the location.

Small portions of the town are within a Flood Zone C2, including Glan-y-Don Industrial Estate. TAN15 specifies that vulnerable development (e.g. housing or emergency services) should not be considered in this Zone.



Flood risk

Natural Resources Wales (NRW) is responsible for managing flooding from main rivers and the sea.

NRW is currently developing long-term flood risk management solutions for Pwllheli as future flood risks are anticipated to increase as the climate changes. The purpose of the project is to reduce flood risk from rivers and seas to people and homes in the area.

Whilst flood defences there are already flood defences in Pwllheli (see NRW's diagram opposite), these will need to be improved and adapted.

A long list of options has been presented and NRW is in consultation with the community and other stakeholders to develop a shortlist.

Options being considered for Pwllheli include diverting Afon Rhyd-hir, new coastal defences, raising the harbour walls, and installing a new harbour gate.

Flood defence structures

Several flood defences exist in the Pwllheli study area. These include embankments, harbour wall and mechanical gates at key locations.

Through this study, we are developing our understanding of the flood risk and the function of the defences so we can continue to protect homes and businesses in the long-term.

1 Carreg y Defaid Sea Defences

2 Dunes with Rock Armour by Golf Course

3 Rhyd-hir flood wall

4 Rhyd-hir Tidal Doors

5 Ffordd y Cob Embankment

6 Afon Erch Tidal Doors

7 Abererch Dunes & Piles

8 Afon Erch - Embankment

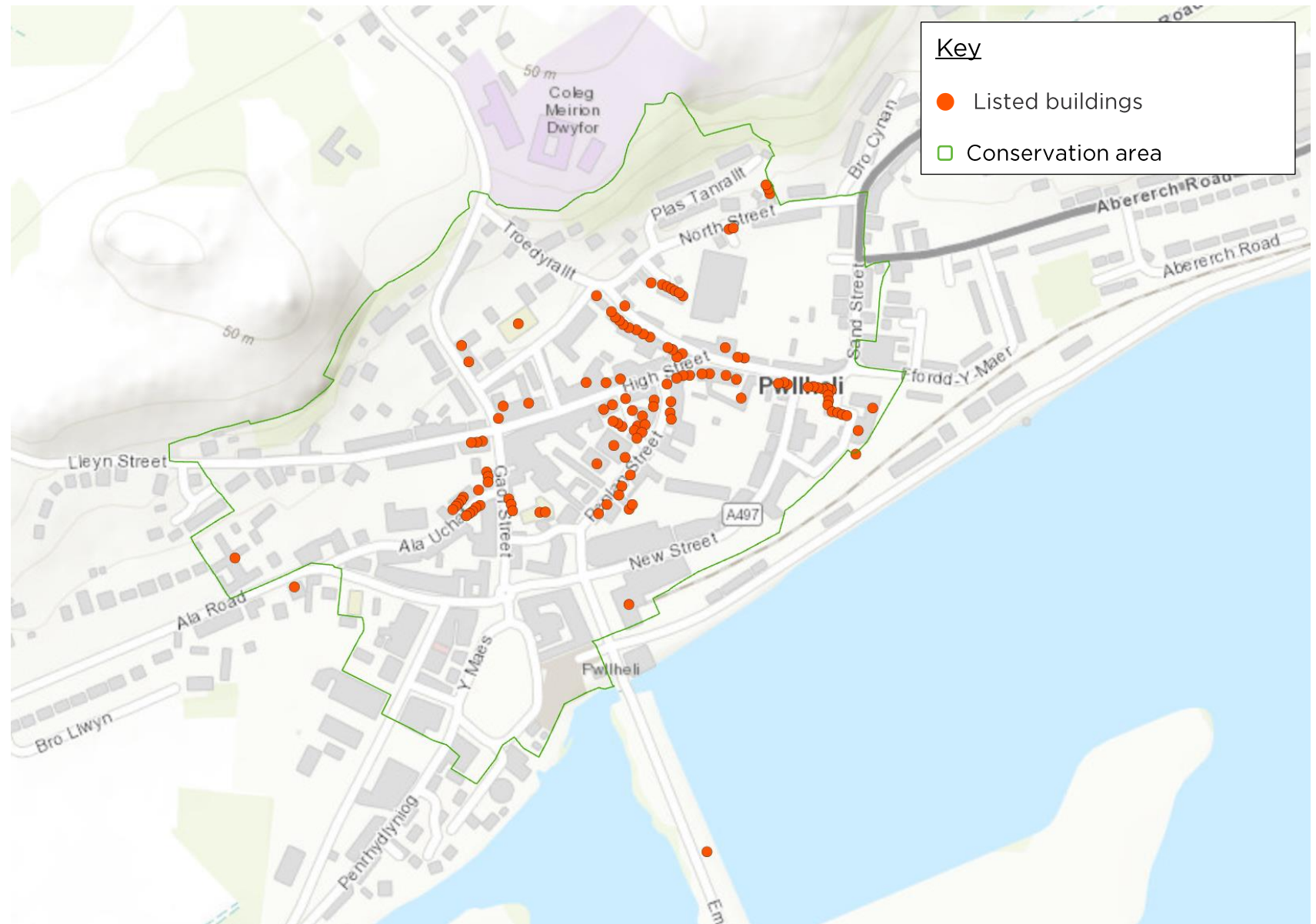
Historic built environment

Pwllheli is a historic town which hosted the Princes of Gwynedd's court in the 13th century. The town was historically centred north of the harbour along High Street, Kings Head Street, and Penlan Street.

The Pwllheli embankment was completed in 1813, connecting the town centre with South Beach. The area around South Beach was developed later than the rest of the town, largely in the 20th century.

There is one conservation area in the Pwllheli. Conservation areas exist to manage and protect the special architectural and historic interest of a place. The area covers much of the town centre, extending from Y Maes to Troed-yr-Allt and from the Old Clinic site to Sand Street.

There are also several listed buildings in Pwllheli, primarily located in the town centre. The majority of these buildings are clustered within the historic core of the town centre. Many of these buildings date from the 18th century during a period of significant growth for the town. Pwllheli's oldest surviving building, Penlan Fawr Inn, dates from the 16th century and is Grade II listed.



Key findings

This section has focused on Pwllheli's natural and built environment and establishes a baseline of national and local designations, local environmental initiatives, and the key opportunities and challenges related to the environment. This baseline aims to support and facilitate the development of a future Nature Plan for Pwllheli, providing a baseline of environmental data and initiatives as well as highlighting the key issues that the Plan could focus on.

Below are the key findings of this section:



Pwllheli is in one of the most **environmentally and ecologically rich areas of the country**, situated within and near a range of national environmental designations. Such as the Llŷn Peninsula and the Sarnau Special Area of Conservation and Llŷn Area of Natural Beauty.



Flood risk is an important consideration for the future development of the town with much of the town within a flood zone. NRW has identified potential for increasing flood risk from the rivers and the sea and are developing plans to manage this risk.



The town of Pwllheli has a **unique range of green and blue spaces within its boundaries**. This includes, uniquely, a large-scale SSSI (Carreg yr Imbill and the South Beach) as well as ancient woodland, and a range of community green spaces. There is an opportunity to promote this further, ensuring that all residents and visitors are aware of natural spaces within the town.



Pwllheli is a **historic town**, which is reflected in its street layout (including its narrow streets and market square) as well as its buildings (which date from the 16th century). The town's built environment contributes to the town centre's unique character but also present challenges for traffic flow and accessibility.



Yr Ynys and Lôn Cob Bach are popular interlinked green spaces within the town owned by Cyngor Gwynedd. Ffrindiau Pwllheli are developing plans to introduce new amenities that aim to encourage more people to use the sites and facilitate a wider range of uses of the site.

04

Engagement & Vision

Engagement

This section 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 later in this section, and 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, a series of consultations targeted at residents and visitors have been run to gather their views on Pwllheli and key sites in the town. 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.

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

Consultations

There are several ongoing and recently completed consultations in Pwllheli focusing on a range of areas and issues within the town. This includes those focused on specific sites and buildings within the town (e.g. survey on future uses of Y Tŵr – community owned pub and hotel) and on specific topics (e.g. consultations on community safety and green spaces).

A summary is provided of the key findings of the following consultations:

- **Ardal Ni** – Cyngor Gwynedd
- **High Street Survey** – Menter Môn
- Consultation of residents, businesses, and other users of the harbour as part of the **Marina Long Term Strategic Plan** – Blue Sea Consulting
- **Resident Survey** – Cyngor Tref Pwllheli

Ardal Ni

The Ardal Ni consultation of residents ran from February to June 2022. There were 257 respondents from the Pwllheli area, of which 89 were from the town. Of the 257 respondents, excluding 'Prefer not to say', slightly under 70% were Welsh speakers.

74% (189 residents) of residents surveyed identified the natural environment and its accessibility as one of the area's strengths – which is reflected in the area's range of environmental designations and popularity as a visitor destination.

The significance of Welsh is reflected in survey responses, with 52% (133 residents) identifying the language and culture as one of the area's strengths. 76% of residents are Welsh speakers, well above the national average of 19% and Gwynedd average of 65%.

Engagement

The safety of the local area was also commonly identified as a strength, 49% of respondents (126 residents) and the Plan finds that rates of anti-social behaviour are below the Gwynedd and national average.

However, the area also faces significant challenges, and those highlighted by the Plan include:

- The lack of affordable housing for local residents was raised by 42% of respondents (109 residents) – 33% also raised concerns about 2nd homes
- The lack of high paying, full-time jobs was also raised as a concern by around a third of respondents (79 residents)
- Above average rate of child obesity
- Lack of opportunities to retain young people in the area – raised by 47% of respondents (122 residents)

The consultation also found that residents’ top priorities are:

1. Delivery of affordable housing (119 residents)
2. Bringing vacant commercial units back into use (113 residents)
3. Supporting local businesses to create high value jobs (96 residents)

High Street Survey

In 2020, Menter Môn commissioned a survey of businesses, residents, and visitors to assess public opinion on pedestrianizing High Street. The consultation received 170 responses, of which 165 were received from the online and paper surveys.

The Survey found that 61% (104 respondents) supported the High Street becoming traffic free.

The highest levels of support was amongst residents, workers, and town centre businesses (all around 60% in favour) – whilst most visitors were not in support. The main reasons given in support were improving the quality of the shopping experience (e.g. opportunity for tables outside of cafes and market stalls) and safety for people using the pavements (particularly pushchairs and wheelchairs).

A history of accidents where pedestrians have fallen into traffic was raised by Cyngor Gwynedd Highways during engagement for this Plan.

Respondents against pedestrianisation raised concerns about a lack of parking, decreasing accessibility, and detracting people from High Street.

Several respondents commented on the opportunity to implement pedestrianisation on a trial basis, providing an opportunity to evaluate its impact after a trial period.

Responses to High Street Pedestrianisation Survey by Group

	Businesses	Residents	Workers	Visitors	Other	Total
In favour	60%	63%	61%	47%	71%	61%
Against	40%	37%	39%	53%	29%	39%
Respondents	40	70	23	16	21	170

Engagement



Marina Long Term Strategic Plan

Central to the preparation of the Strategic Plan was the public consultation process, which ran from 2023 – 2024. This included three public meetings, one-on-one meetings with key stakeholders (e.g. Berth Holder’s Association), and an online survey which attracted 154 responses.

Consultation informed the overall approach (focus on generating employment through a service-led Marina, rather than residential development) and the key options proposed (e.g. delivering a hotel development at vacant Gland-y-Don site).

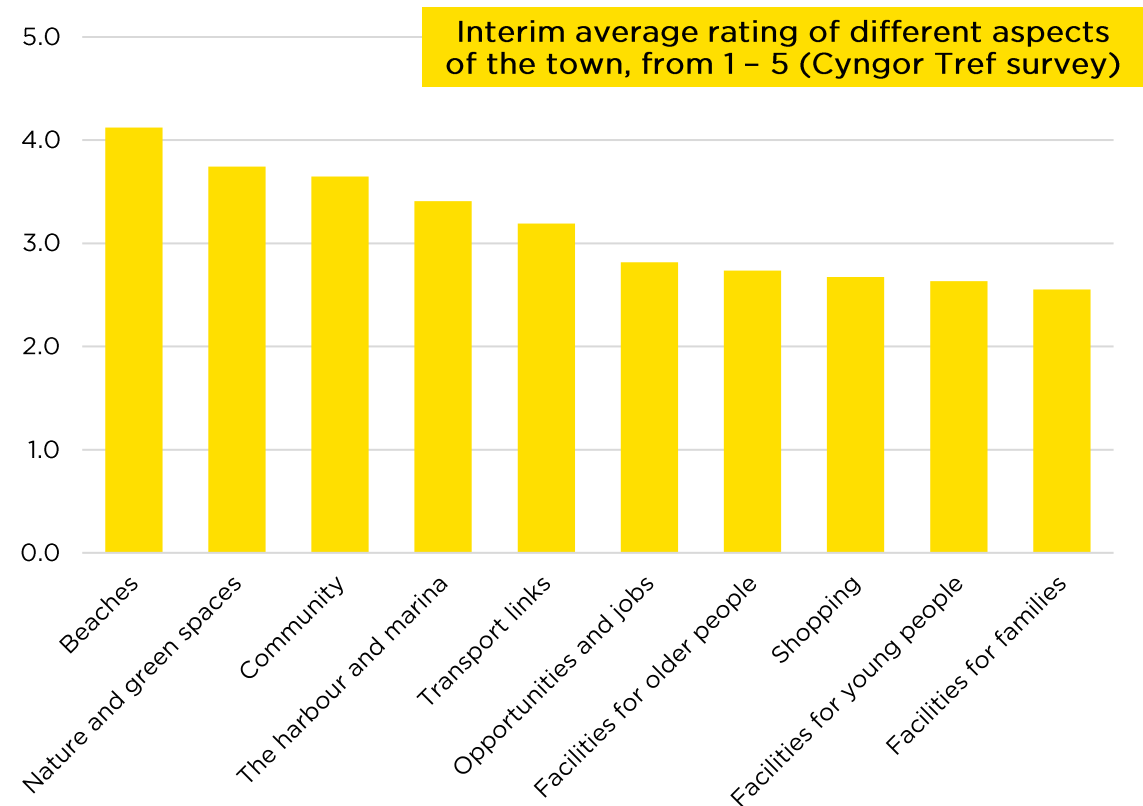
Consultation for the Strategic Plan highlights that the Marina and town centre function as separate entities, closely aligning with the consultation for this Plan. Similarly, it recognises the opportunity to unify the two hubs and regenerate the North Quay through commercial development and investment in public realm and active travel links. These opportunities are detailed in the Options Analysis of this Plan.

Cyngor Tref survey

Cyngor Tref Pwllheli launched a survey of residents, businesses, and those working in the town in mid-April 2024. Interim results from the start of May show that the survey had attracted 50 responses, of which 72% were residents, 6% work in the town, 4% are businesses, and other categories account for 6%.

Respondents were most positive about the town’s beaches, nature and other green spaces which were highly rated by all groups. Similarly, most respondents highly rated Pwllheli’s sense of community.

Concerns were raised about the facilities for young people and families in the town. Several respondents commented that there are opportunities to use community spaces to provide more facilities for young people and families. Concerns were also raised about the shopping offer of the town and a number of comments were made regarding the need to invest in High Street and North Quay to improve the public realm and trading environment.



Engagement

Site visit

In March 2024 we visited Pwllheli, meeting with officers from Cyngor Gwynedd and representatives from Cyngor Tref Pwllheli and Ffrindiau Pwllheli. During the site visit, officers and councillors provided a tour of key sites in the town centre including High Street, Old Hospital and Old Vet sites, Lôn Cob Bach, North Quay, and Yr Hen Ynys. The site visit highlighted a range of priority sites as well as the barriers to delivering change.

Visioning Event

A Visioning Event was held in April 2024 as part of the preparation of this Plan. A total of 17 stakeholders attended, representing: Cyngor Tref Pwllheli, Cyngor Gwynedd (regeneration, tourism, and Marina), Adra Housing Association, Transport for Wales, Betsi Cadwaladr University Health Board, Ffrindiau Pwllheli, Canolfan Felin Fach, and Cyfle.

Feedback from the event emphasised the need and opportunity to create quality employment opportunities in the town, critical need for affordable housing, importance of Welsh language and culture, and importance of transport links. A range of projects and interventions were discussed, including the delivery of a new hotel, addressing traffic issues in the town centre, projects to celebrate the town's distinctive culture and identity, and opportunities to support local businesses and producers.

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 is shown opposite:



The lack of affordable housing is a long-standing issue that has potential to undermine the town's sustainability in the long-term. Stakeholders noted the need to identify more sites for affordable housing and explore different approaches to delivery (e.g. repurposing vacant buildings).



A hotel development has broad support from stakeholders and frequently identified as one of the town's top economic priorities with potentially significant economic benefits.



Stakeholder regularly emphasised the North Quay's potential to tie Pwllheli's main hubs together (town centre and Marina) whilst creating new business and employment opportunities for residents.



Few quality employment opportunities for young people making it challenging to stay in the area and access housing, a long-term threat to the town's sustainability.



Welsh language and culture are defining features of local identity (e.g. home of the poet Cynan and three-time host of the National Eisteddfod, most recently in 2023).

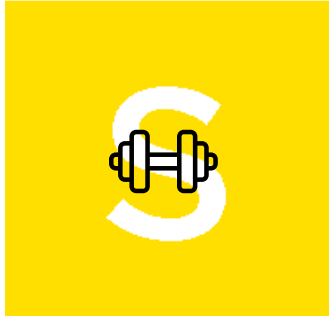


Engagement highlighted the importance of transport links for the area's economy (e.g. Pwllheli's is the terminus of the Cambrian Coast Railway) and the potential to improve local active travel links.



Local community groups emphasised the quality and unique range of green spaces within the town and the opportunity to introduce community facilities to improve accessibility and well-being.

SWOT Analysis



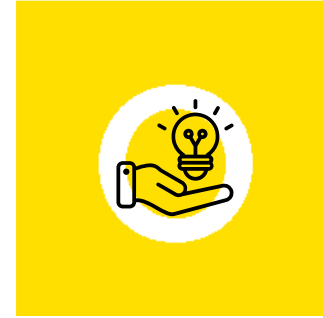
STRENGTHS

- Welsh as a community language and defining part of the town's heritage
- Natural beauty and environment in town and surrounding area
- Specialist marine industry anchored by the Marina and Plas Heli
- Resilient and growing retail and visitor economies in the town centre



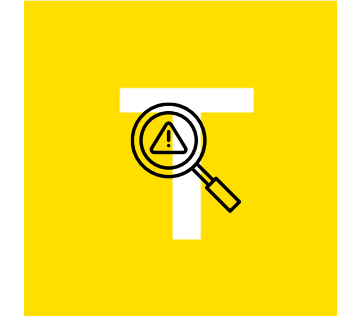
WEAKNESSES

- Lack of local year-round employment opportunities
- Above average levels of housing and income deprivation
- Town centre road network struggles to handle traffic during peak season
- Accessibility of the town centre is limited by pinch points and narrow pavements
- Visitor economy attracts less spend per visitor than neighbouring areas



OPPORTUNITIES

- Better link the Marina and town centre and introduce vibrancy to North Quay
- New hotel in the town centre with potential to drive higher spend per visitor
- Rejuvenate High Street through investment in public realm and community initiatives
- Potential to develop the Old Clinic and Vet Sites
- Develop community facilities and enhance biodiversity at Yr Hen Ynys



THREATS

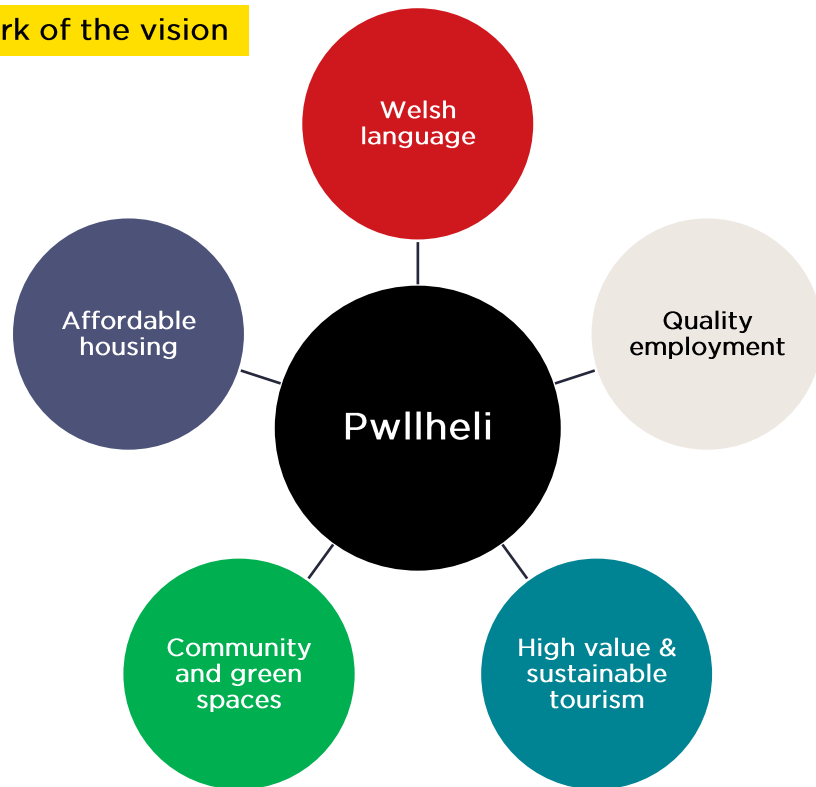
- NRW have highlighted heightened flood risk in because of climate change
- Housing affordability is the lowest in Gwynedd and has potential to undermine the local economy, services and the Welsh language

Vision Statement

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

'A thriving town with high-quality year-round employment and affordable housing for the community, underpinned by promotion and celebration of language and culture, a strengthened sustainable tourism offer, and accessible green spaces with greater biodiversity.'

Framework of the vision



Measures of success

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
- Welsh remains in a strong position as a living language within the community
- A new hotel is delivered – visitors spend more time and money in the town
- More footfall along the North Quay alongside new uses of commercial buildings and improvements to public realm
- More employment floorspace and year-round employment opportunities for residents
- Greater use and increased awareness of community green spaces
- Promotion of local heritage and culture in future regeneration initiatives
- Improved transport links into and within the town centre, particularly active travel, reducing pressures on the road network



05 Options Analysis

Options Analysis

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

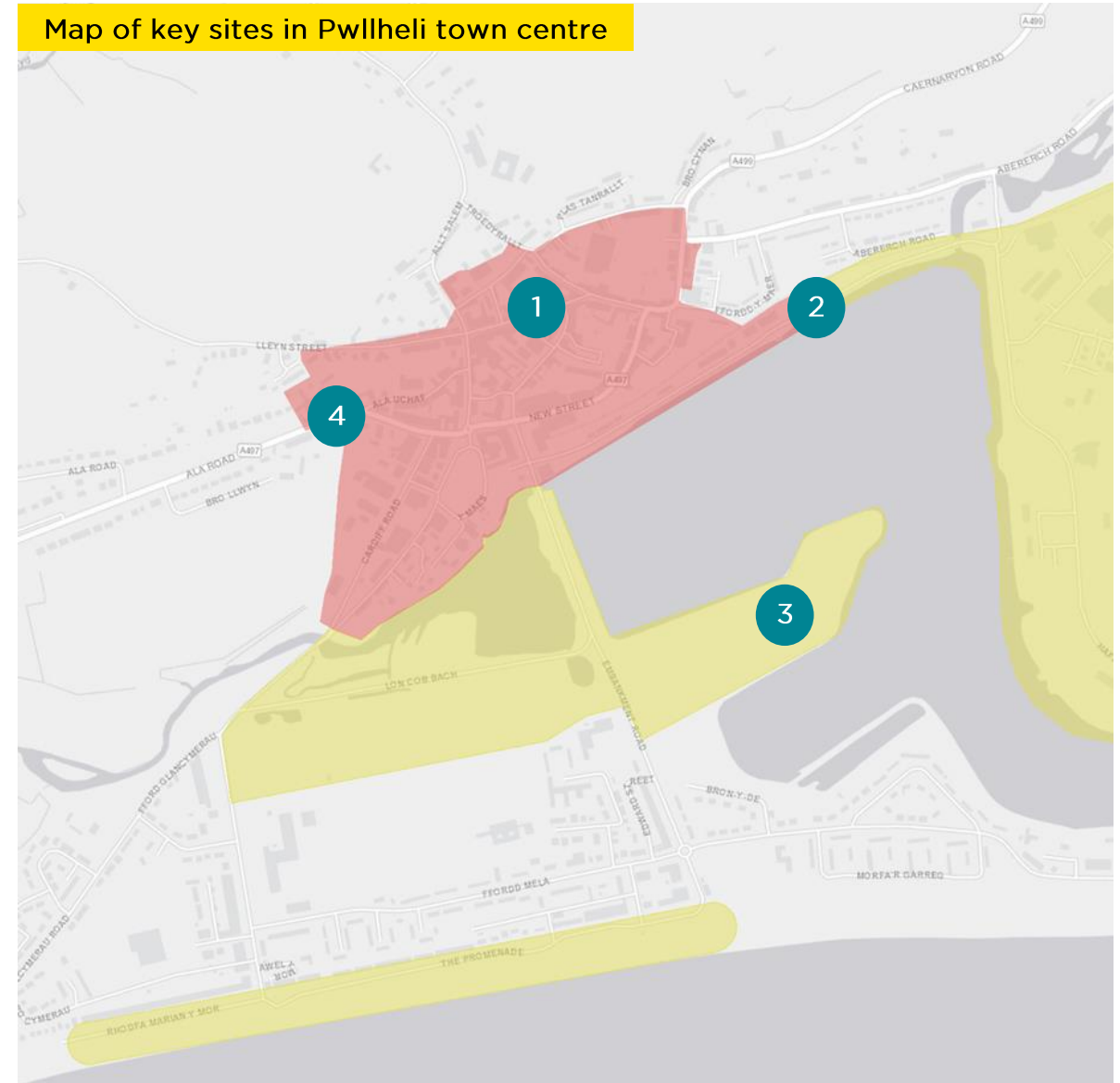
None of these options have been developed in detail. The options in this section are presented as initial Plans, setting out recommended actions to further consider and develop these options and high-level ideas of what future delivery could look like. The Action Plan, in the subsequent section, turns 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.

Four 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. High Street
2. North Quay
3. Yr Hen Ynys
4. Old Hospital and Vet sites

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 that absence of quality employment opportunities and affordable housing are the defining issues for Pwllheli.

Map of key sites in Pwllheli town centre



High Street

CORNER OF HIGH STREET



DESCRIPTION

High Street is the historic commercial centre of Pwllheli and most of the premises dating back to the 19th century and remains a commercial centre of the town. The street is composed of shops, restaurants/takeaways, and two hotels (Y Castell and Y Tŵr). Y Tŵr was bought by the community (via Menter y Tŵr) in 2023 and is currently under renovation. The hotel is one of the most prominent buildings on the street and features a large courtyard.

The street struggles with traffic due to its narrow width and a lane of cars parked on one side – this is exacerbated in peak season when traffic volumes spike. In tandem with relatively narrow pavements, this can also lead to a negative experience for pedestrians.

Connected to High Street is Market Square, a small and unique historic square. All buildings around the square are Grade II listed, although at present most are vacant.

Y TŴR



OPPORTUNITY

Issues related to traffic can discourage people to visit and spend time in the area. As a key commercial centre, there is an opportunity to alleviate these issues and enhance the public realm, improving the pedestrian experience. In turn, this has potential to attract more people, encourage people to dwell longer, and spend more at high street businesses.

This could be achieved through a partial pedestrianisation of the street, extending from Market Square to Stryd Moch. This has potential to create a more welcoming and pedestrian-friendly street, whilst retaining a road link to Stryd Penlan, and enable the use of the street for festivals and events. It could also improve the connection with Market Square and help drive footfall and retail occupancy in this area.

These interventions are depicted in an illustration on the next page.

There has been long-standing discussion about pedestrianisation of High Street. Previous consultation on the topic by Menter Môn shows that most residents support pedestrianisation but businesses and visitors are divided in opinion. To address these challenges, the scheme could be implemented on a temporary basis (e.g. 6-month trial) utilising a Temporary Traffic Regulation Order (TTRO) and use a low-cost solution (e.g. planters). This would enable the impact on businesses, traffic flow, and public opinion to be tested at a low-cost. If the results of the tests are positive, High Street could be pedestrianised permanently.

A pedestrianisation trial should be implemented alongside environmental improvements (e.g. decorative lighting, seating, street furniture and planting) that helps create a space that encourages people to meet with friends, socialise or just take a break and enjoy the area between work, shopping, dining, etc.

The community buyout of Y Tŵr represents a significant community success, and its renovation and re-opening should be supported as part of the wider revitalisation of the area. Menter y Tŵr has developed plans to re-open the bar, restaurant, and guest rooms between 2024 – 25 and provide hotdesking and workshop spaces for local businesses between 2025 – 26.



NEXT STEPS

To deliver the pedestrianisation scheme will require engagement with Cyngor Gwynedd Highways department, local businesses, and relevant community organisations (e.g. Cyngor Tref Pwllheli) to design a suitable TTRO. Alongside obtaining a TTRO, an evaluation framework should be designed, setting out the baseline conditions and key measures to understand the full impact of the scheme. A robust framework will help inform the decision on whether to retain the scheme and if/how its design should be amended over time.

A Design Scheme detailing the environmental improvements can be developed based on the recommendations of this Plan and illustration (on the next page). The Design Scheme can set out in detail the full range of improvements and include an accurate costing.

Menter y Tŵr's renovation of the building and courtyard can play a critical role in revitalising the street. Engagement by local officers with the enterprise will help identify what support is needed and can be provided and help secure funding to deliver on its vision and business plan.

Illustration of High Street following environmental improvements and partial pedestrianisation



The illustration shows what High Street could look like when it is partly pedestrianised with decorative lighting, seating, street furniture, and planting. The street has the potential to be a vibrant hub of the community that is used more often by residents and visitors alike.

Plan of proposed interventions around High Street

Y Tŵr Courtyard
Brought into use hosting pop ups and small businesses

Planters used to filter traffic

Access from Stryd Penlan retained

Improved connection and signage to Market Square

New greenery and street trees

North Quay

VIEW FROM NORTH QUAY



DESCRIPTION

North Quay is an attractive waterfront link between the town centre and Marina, two of Pwllheli's main hubs. The freehold of most of the Quay is owned by Cyngor Gwynedd. Along the northern side of the Quay are a series of commercial buildings which includes a mix of local retail (e.g. surf shop and Y Sied Laeth) and industrial uses.

Consultation found a strong sentiment amongst stakeholders that the area is not making the most of its waterside location and lacks an attractive streetscape, and as a result is underused. This is recognised in the **Marina Long Term Strategic Plan** which recommends improving public realm and active travel links.

Cyngor Gwynedd has secured funding from UK Government to replace ageing street furniture along the Quay and the bandstand which is closed due to safety issues. An 'Aros Fan' (overnight bays for motorhomes) is also being developed by Cyngor Gwynedd beside an existing car park at the Quay and will accommodate 5 motorhomes.



OPPORTUNITY

The North Quay can be more than a thoroughfare to the Marina and has potential to be a waterfront destination that hosts a cluster of local retail, leisure, and hospitality businesses, driving job creation and business growth in Pwllheli.

To achieve this requires suitable commercial premises along the Quay and enhancements to the street which encourage people to visit the area and stay longer. Cyngor Gwynedd's investment into replacing street furniture and development of motorhome accommodation represent the first steps to realising this vision.

Building on this, Cyngor Gwynedd's storage building (see image opposite) can be refurbished and transformed into a commercial premise, integrating an outdoor balcony looking towards the harbour that provides beautiful sunset views for tourists and residents who visit. The premise would be suitable for retail and/or hospitality uses.

Adjacent to the storage building is vacant land (also owned by Cyngor Gwynedd) which may be a suitable for an additional commercial premise. In the meantime, the site could host 'pop ups' for local small businesses. In tandem with the repurposing of the storage building, this has potential to drive footfall and create vibrancy in the area. In turn this has potential to catalyse further commercial development along the Quay, creating a critical mass of venues that turns the area into a destination for food, drink, and retail.

Alongside commercial development, there is an opportunity to improve the public realm which, at present, is predominantly hardstanding with no soft landscaping. The introduction of new trees and shrubs alongside public art celebrating the town's heritage and culture will help create a place for social interaction and enhance biodiversity.

As an important transport link between the town centre and Marina, there is potential to improve the active travel provision through a clearly defined cycle path; in alignment with Cyngor Gwynedd's Active Travel Network Map. This would provide more opportunities to travel on foot or by bike (bringing local health and well-being benefits) whilst reducing pressure on the road network.



NEXT STEPS

A comprehensive series of interventions have been proposed, designed to reinvigorate the area and fully utilise its waterside location.

To achieve the maximum positive impact requires delivering the interventions together as a package. This can be achieved through the development of a Design Scheme which sets out detailed designs of the public realm improvements and repurposed storage building and yard. This would also form part of the pathway between the proposed interventions in this Plan and the longer-term ambitions for the area from the **Marina Long Term Strategic Plan**.

The designs of public art can be informed through engagement with community and cultural bodies, ensuring that it celebrates the town's maritime heritage and relationship with the Welsh language.

COUNCIL STORAGE BUILDING

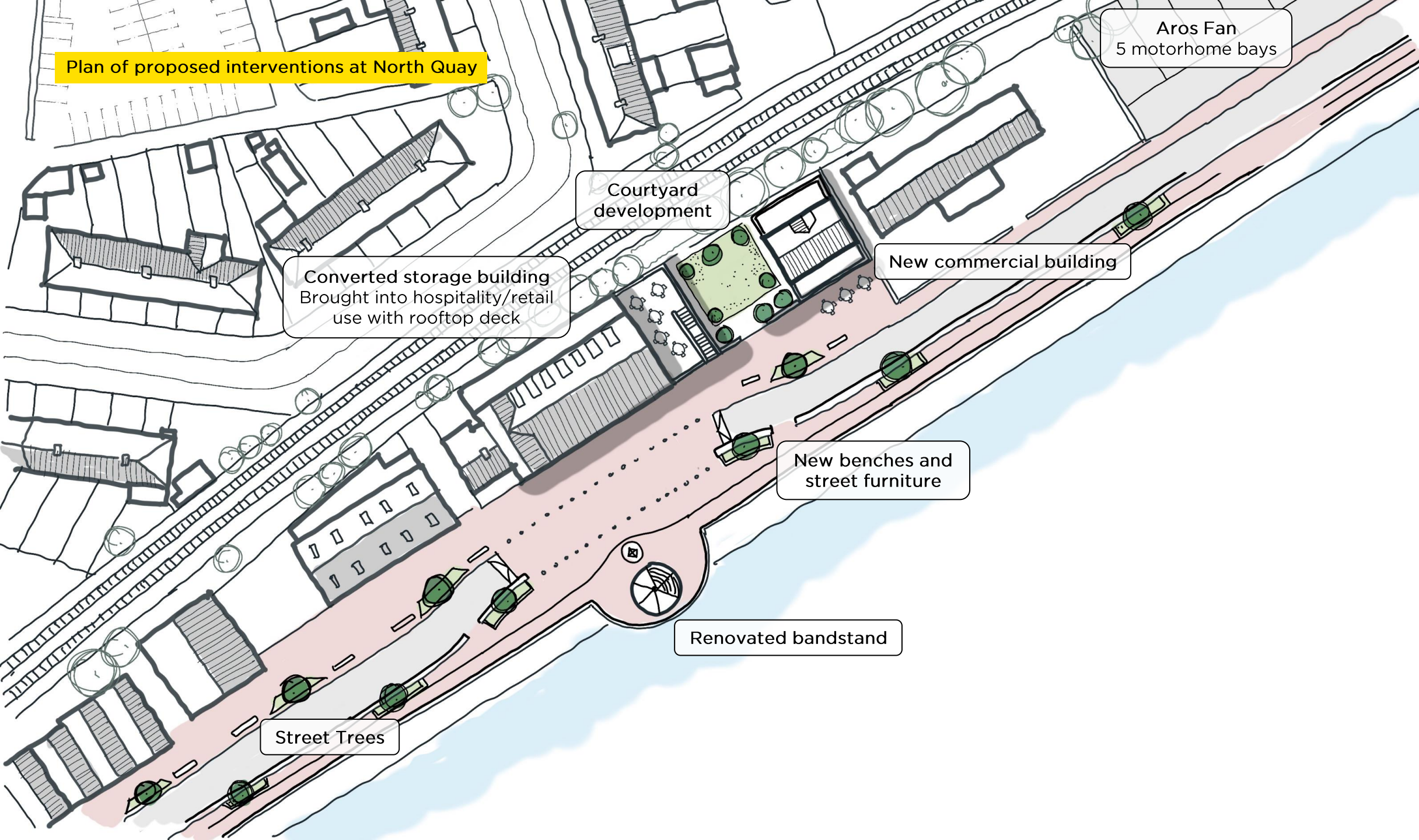


Illustration of North Quay with new commercial developments and public realm improvements



The illustration shows how the North Quay could look with new trees, shrubs, walking and cycling routes, public art, and commercial buildings brought back into use. This builds on Cyngor Gwynedd's existing investments and links with the long-term ambitions set out in the **Marina Long Term Strategic Plan**.

Plan of proposed interventions at North Quay



Converted storage building
Brought into hospitality/retail
use with rooftop deck

Courtyard
development

New commercial building

New benches and
street furniture

Renovated bandstand

Street Trees

Aros Fan
5 motorhome bays

Yr Hen Ynys

VIEW ALONG YR HEN YNYS



DESCRIPTION

Yr Hen Ynys was formerly an island which was connected to the mainland by the deposit of dredging materials during the construction of the Marina. The site adjoins the south of the Cob and is located within 400m of the town centre and promenade.

Today, Yr Hen Ynys is a green space with a circular gravel path and sparse vegetation. The site has fantastic views of the harbour and town and has become a popular community space, well-used by dog walkers and other groups.

There are relatively few community amenities, such as benches, that would make the site more accessible and better serve the needs of residents.

Cyngor Gwynedd are in the early stages of developing a pump track (a small-scale cycling facility) in consultation with Welsh Cycling. The facility will support greater use of the space by residents of all ages and has the potential to promote well-being and health by reducing rates of physical inactivity.

Alongside plans to promote and facilitate greater use of the site, Ffrindiau Pwllheli has commissioned an ecological survey to identify key habitats and species. The survey is currently ongoing and will help inform future decision-making related to Yr Hen Ynys.

Relatedly, Cyngor Gwynedd are also developing a Management Plan for Yr Hen Ynys which will set out a plan for the use and development of the site going forwards, helping to coordinate the range of planned initiatives.

AMPHITHEATRE



OPPORTUNITY

There is an opportunity to promote greater use of the site, particularly given its proximity to the north and south of the town, whilst enhancing its biodiversity.

Cyngor Tref Pwllheli are currently developing plans to transform the natural amphitheatre, located at the west of the site, into a community space suitable for small-scale live events. This includes introducing seating, benches, and other amenities.



NEXT STEPS

The next steps for the site will be heavily informed by the ecological survey and Cyngor Gwynedd's Management Plan; decision-making related to the site will need to balance key habitats and future development.

As such, the initial next steps will be to complete ecological survey and Management Plan, providing an evidence base and a clear plan for the site. Subsequently, working with partner organisations (e.g. Sports Wales) will be essential to securing the necessary funding to deliver the community initiatives set out above.

In addition, a decision should be made regarding the development of Yr Hen Ynys in the long-term, confirming if it will be considered or promoted as a site for commercial or development.

Old Clinic and Vet Sites

OLD CLINIC SITE



DESCRIPTION

The Old Clinic Sites and Old Vet Sites are two separate sites on Ala Road (A497), located close to each other, on opposite sides of Ala Road, at the western edge of the town centre.

The Old Clinic Site is the former home of the Pwllheli Health Centre and was historically a workhouse. It is 0.4 hectares in size, owned by the Local Health Board, and has been disused since 2018.

The Old Vet Site is 0.3 hectares in size, owned by Elgol Developments Ltd, and has been disused for more than 15 years. Planning permission was granted for 30 units of retirement housing in 2016 (ref: C14/1118/45/LL) but the housing was not delivered.

OLD VET SITE



OPPORTUNITY

The sites present opportunities to deliver affordable housing and/or important social infrastructure (e.g. community and care facilities). Therefore, the sites can, independently, make an important contribution to addressing the town's affordable housing shortage and changing demographics.

Both sites are in sustainable town centre locations, located near a range of services and amenities. In addition, the Old Vet Site is currently on the market and the Old Clinic Site was brought to public auction in May 2024.

There are, however, complexities associated with bringing either site back into use and this will likely increase development costs and reduce the viability of development. This is reflected by the previous attempt to deliver retirement housing at the Old Vet.

Examples of the complexities include:

- Both sites have been disused for many years and are likely in a poor state of repair (e.g. vandalism and water damage at Old Clinic).
- The Old Vet Site is within a Flood Zone C1 (requires a proposed development to pass a justification test that demonstrates necessity) and Old Clinic Site is within a Flood Zone B (site levels checked against extreme flood level).
- The main building at the Old Clinic Site is Grade II listed due to its architectural and historic value, limiting the physical changes that can be made to the structure.
- Potential access issues from the A497.

These complexities are likely to make development the process costly and lengthy. Despite this, development of the sites should still be pursued and supported due to the very high need for affordable housing in the town means that residential.



NEXT STEPS

Due to the complexities associated with both sites, the public and private sector will likely need to work in partnership to deliver housing and/or social infrastructure on either site. A partnership approach enables funding and expertise to be brought from both sectors, increasing the deliverability of the sites.

As such, the next steps for either site is for local officers to engage with potential delivery partners (e.g. Housing Associations). The engagement process will help establish the interest in and the support needed to deliver the sites. This process could form part of a feasibility study that precisely establishes the viability gap and the feasibility of developing the sites.



06

Action Plan & Delivery

Action Plan

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, and cost. 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 (e.g. Ardal Ni), 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



Action Plan



Project	Description	Timescale	Cost	Responsible bodies	Priority	Potential Impact
Link with Marina Plan	Deliver the recommendations of the Placemaking Plan and Marina Long Term Strategic Plan in unison (e.g. essential dredging, repairs and public realm improvements at the Marina alongside investment in the town centre).	Short	High	Cyngor Gwynedd and Cyngor Tref	High	Efficiently coordinate investments across the town, ensuring they complement each other and avoid duplication.
QRBoxx	Support the launch and use of the QRBoxx by the town's business community.	Short	Low	Business Forum and Cyngor Tref	Medium	Promote local businesses via a new digital channel (increasing footfall and spend) and build the capacity of the Business Forum.
High Street Pedestrianisation Trial	Secure a Temporary Traffic Regulation Order for a trial pedestrianisation of High Street. Consult with key local stakeholders on implementation to ensure that all users considered.	Short	Medium to high	Cyngor Gwynedd in consultation with Business Forum and Cyngor Tref	High	Assess public opinion and establish the efficacy of the scheme (i.e. whether it address traffic-related issues to create a more welcoming environment that encourages more people to visit and use High Street).
Pwllheli Business Forum	Support the recently formed Business Forum by ensuring that it is used by public sector bodies to engage and communicate with local businesses on relevant issues.	Short (ongoing)	Low	Business Forum, Cyngor Tref, and Cyngor Gwynedd	High	Improve engagement and collaboration within the business community and further integrate businesses into regeneration initiatives.
North Quay and High Street Public Realm Enhancement	Develop and implement designs for improving the public realm along the North Quay (an opportunity to integrate public art that celebrates local heritage and culture and transform the Council's Storage Building) and High Street (improving frontages, introducing new greenery, and street furniture).	Short to medium	High	Cyngor Gwynedd	High	Create greener and more pleasant environments with greater active travel infrastructure that's attracts more people to the town centre, increases spending, and improves residents' well-being.
Y Tŵr	Support Menter y Tŵr to secure funding to complete the renovation of the hotel building and courtyard.	Short to medium	High	Menter y Tŵr and Cyngor Gwynedd	High	Create opportunities for new jobs and to start new enterprises for residents, an anchor in the visitor economy (with the delivery of new high-quality accommodation), and new community spaces.

Action Plan

Project	Description	Timescale	Cost	Responsible bodies	Priority	Potential Impact
Hotel Development	Engage with prospective hotel investors, developers, and operators to deliver a hotel; providing support where suitable to secure investment.	Short to medium	High	Cyngor Gwynedd and Ambition North Wales	High	Build a hotel that attracts more visitors to stay in Pwllheli (rather than travel through), increasing the economic impact of tourism which in turn creates local jobs and business opportunities.
Canolfan Felin Fach	Support Canolfan Felin Fach to secure funding for essential repairs to the community centre and development of a new training facility.	Short to medium	High	Canolfan Felin Fach and Cyngor Gwynedd	Medium to high	Secure the future of a community hub and provide the facilities for residents to develop new skills.
Yr Hen Ynys	Complete the Management Plan and ecological survey to set a plan for the use and development of the site and deliver new community amenities.	Short to medium	Medium	Cyngor Gwynedd, Cyngor Tref, and Ffrindiau Pwllheli	Medium to High	More residents using the area, greater local well-being, enhancement of its biodiversity, and a clear guide for future decision-making and investment related to the site.
Pump Track	Continue collaborating with Welsh Cycling to design and deliver a pump track at Yr Hen Ynys, creating a facility for outdoor sports for young people and families.	Medium	Medium to high	Cyngor Gwynedd	Medium	Encourage participation in outdoor sports, helping to tackle challenges related to inactivity and encouraging young people and families to remain in or come to the area.
Town Centre Property Improvement Grant and Empty Shopfront Scheme	Support town centre businesses to apply for the Grant to upgrade their premises and ensure funding is available for vinyl signs to cover any shops which become vacant.	Medium	High	Cyngor Gwynedd and Welsh Government	Low	Improve properties and enhance the appearance and vibrancy of the town centre, attracting more residents and visitors.
Nature Plan	Develop a Nature Plan for Pwllheli, using the environmental baseline set out in this Plan.	Medium	Low to medium	Ffrindiau Pwllheli and Cyngor Tref	Medium	Set a clear plan which informs the management of Pwllheli's green spaces, increases awareness of local conservation efforts, and encourages more volunteering.

Action Plan

Project	Description	Timescale	Cost	Responsible bodies	Priority	Potential Impact
Neuadd Dwyfor	Invest in the necessary equipment (e.g. projector and lighting) to ensure that the Neuadd Dwyfor can maintain an active event calendar.	Medium	Medium	Cyngor Gwynedd	Medium	Neuadd Dwyfor can host a full range of events, delivering a diverse calendar of events that caters for all residents.
Highways Plan	Develop a plan for managing traffic at peak season which details the changes needed (e.g. changes to road layouts) and how they can be implemented.	Medium	Low to medium	Cyngor Gwynedd	High	Set a plan and vision for reducing congestion at peak times and improving the safety of highways in the town centre.
Weekly Market	Continue to support the weekly market and consult with traders to assess if there is interest in using High Street (subject to pedestrianisation).	Medium	Low	Cyngor Gwynedd, Cyngor Tref and market traders	Low	Revitalise and grow the weekly market, improving footfall and attracting new traders, and helping to activate High Street.
GISDA	Support GISDA to secure around £400,000 to purchase a town centre property and redevelop it into accommodation for young people experiencing homelessness.	Medium to long	High	GISDA and Cyngor Gwynedd	High	Provide vulnerable young people in the local area with safe & secure accommodation.
The Promenade	Invest in repairing and modernising the infrastructure and amenities along the promenade.	Medium to long	High	Cyngor Gwynedd	Medium	Improve access to the beach and quality of the visitor experience which in turn has potential to positively impact well-being and grow the value of the town's visitor economy.
Active Travel Network	Implement Cyngor Gwynedd's Active Travel Network to better connect the town's hubs (town centre and Marina), deliver additional cycle parking in town centre, and improve connection to Llanbedrog (in alignment with AONB Management Plan).	Medium to long	High	Cyngor Gwynedd and Cyngor Tref	Medium	Residents and visitors can take more short journeys on foot or by bike, reducing pressure on the network and improving the transport links within the town and with nearby towns and villages.
Events and Culture	Develop a defined event calendar that leverages the range of community venues in the town (e.g. Y Tŵr and Neuadd Dwyfor) and public art programme exploring and celebrating the town's linguistic and cultural heritage.	Medium to long	Low	Neuadd Dwyfor, Cyngor Tref, and other active local groups	Low	The town is vibrant year-round with events that cater for all ages and inspires pride in place through its celebration of its distinct local culture and the Welsh language.

Action Plan



Project	Description	Timescale	Cost	Responsible bodies	Priority	Potential Impact
Supply of Industrial Land and Premises	Identify suitable sites in the area between Pwllheli and Porthmadog for the development of new industrial units, addressing the historic undersupply in the local area.	Long	Low	Cyngor Gwynedd	Medium	New industrial units are built in the local area, enabling new businesses to start and local businesses to scale up, creating more local jobs and improving incomes.
Pwllheli Station	Explore long-term opportunities to greater utilise Pwllheli Station, including increasing train frequencies and extending timetables on the Cambrian Coast Railway during peak visitor season.	Long	High	Transport for Wales	Medium	Increase the town's accessibility, attracting more visitors to the town whilst reducing pressure on the road network.

Delivery

There are a series of planned and proposed projects in Pwllheli covering a broad range of themes – from economic development projects (e.g. hotel development) to environmental projects (e.g. Yr Hen Ynys).

These projects can have a transformative positive impact on the town, creating jobs, boosting incomes, increasing housing affordability, and improving the town’s public realm and well-being. But to realise these benefits requires a collaborative and joined up approach to delivery with cooperation between the key organisations working in the town.

This can be achieved by establishing a **Pwllheli Placemaking Partnership** formed of local and regional partners to guide and drive change in the town. A voluntary partnership would help coordinate the delivery of projects in the town, promote collaboration, and enable stakeholders to review progress on a regular basis (e.g. meet every 6 months). This, in turn, can inform future investment into the town.

The projects featured in the Options Analysis and Action Plan, alongside the **Marina Long Term Strategic Plan**, provide a clear focus and programme of work for the Partnership.

Key organisations that should be represented in the Partnership, include Cyngor Gwynedd, Cyngor Tref, Ffrindiau Pwllheli, and Pwllheli Business Forum.

Potential Composition of a Pwllheli Placemaking Partnership



Funding

Public sector funding is essential for delivering the key projects (High Street, North Quay, Old Clinic and Vet, and Yr Hen Ynys) which, in turn, create the conditions for attracting private sector investment.

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 build capacity and a track record of success to secure funding from Transforming Towns, the Welsh Government’s town centre regeneration programme.

Alongside Transforming Towns, the Council (in partnership with local organisations) can access public sector funding from the UK Government’s Shared Prosperity Fund, specific sectoral funds (e.g. Brilliant Basics for tourism), and potentially in future from the Visitor Levy (a proposed tax on overnight stays).

While the exact structure of both the UK and Welsh Governments regeneration funding programmes beyond 2024/25 remains uncertain, it is crucial to develop detailed plans for the proposed projects. As doing so will enable initial steps to be taken and enhance their chances of securing funding from the regeneration programmes, their successors or any ad hoc funding opportunities which emerge in future.

To finance the development of a hotel, the Council can engage with the Development Bank of Wales which provides patient capital for hospitality developments (e.g. via the Wales Tourism Investment Fund). Development Bank of Wales financing will improve the viability and reduce risk of the hotel development, which in turn can help attract private sector investment.

A business case demonstrating the economic and social benefits of the scheme will need to be developed as part of an application for finance from the Development Bank of Wales.