



Complete Agenda

Democracy Service
Council Offices
CAERNARFON
Gwynedd
LL55 1SH

Cymraeg

Mae'r ddogfen hon hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Meeting

THE COUNCIL

Date and Time

1.30 pm, THURSDAY, 14TH MAY, 2026

*** NOTE ***

This meeting will be webcast

https://gwynedd.public-i.tv/core//en_GB/portal/home

Location

**Hybrid - Siambr Dafydd Orwig, Swyddfeydd y Cyngor, Caernarfon LL55 1SH
and Zoom**

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(DISTRIBUTED 08/05/26)

**Ian Jones
Head of Democracy Service**

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WEDNESDAY, 6 MAY 2026

Dear Councillor,

MEETING OF CYNGOR GWYNEDD – THURSDAY, 14 MAY 2026

YOU ARE HEREBY SUMMONED to attend a multi-location meeting of **CYNGOR GWYNEDD** which will be held at **1.30 pm** on **THURSDAY, 14TH MAY, 2026** in **SIAMBR DAFYDD ORWIG, SWYDDFEYDD Y CYNGOR, CAERNARFON LL55 1SH / VIRTUALLY ON ZOOM**, to consider the matters mentioned in the following agenda.

Yours faithfully,



Head of Democracy Services

The following rooms will be available for the political groups during the morning: -

Plaid Cymru - Siambr Dafydd Orwig
Independent – Siambr Hywel Dda
Lib / Lab – Ystafell Ogwen

AGENDA

1. CHAIR

To appoint a Chair for 2026/27.

2. VICE-CHAIR

To appoint a Vice-chair for 2026/27.

3. APOLOGIES

To receive any apologies for absence.

4. MINUTES

7 - 18

The Chair shall propose that the minutes of the previous meeting of the Council held on 5th March, 2026 be signed as a true record.

5. DECLARATION OF PERSONAL INTEREST

To receive any declarations of personal interest.

6. THE CHAIRMAN'S ANNOUNCEMENTS

To receive any Chair's announcements.

7. URGENT ITEMS

To note any items which are urgent business in the opinion of the Chair so they may be considered.

8. QUESTIONS

To consider any questions the appropriate notice for which have been given under Section 4.18 of the Constitution.

9. CYNGOR GWYNEDD PLAN 2023-28 - 2026/27 REVIEW

19 - 55

To submit the report of the Council Leader.

10. ADOPTION OF NEW ECONOMIC DEVELOPMENT STRATEGY FOR GWYNEDD

56 - 131

To submit the report of the Cabinet Member for Economy and Community.

11. VISITOR LEVY

132 - 289

To submit the report of the Cabinet Member for Economy and

Community.

12. ANNUAL REVIEW OF THE COUNCIL'S POLITICAL BALANCE 290 - 294

To submit the report of the Head of Democracy.

13. APPOINTMENT OF CHAIR OF THE DEMOCRACY SERVICES COMMITTEE 2026/27

To appoint a Chair of the Democracy Services Committee for 2026/27.

[In accordance with the requirements of Section 14 of the Local Government Bill (Wales) 2011, the Chair of the Democracy Services Committee shall be appointed by the Full Council and it cannot appoint a member of a political group which is represented on the executive.]

14. APPOINTMENT OF MEMBERS TO THE STANDARDS COMMITTEE - INTERVIEW PANEL RECOMMENDATIONS 295 - 296

To submit the report of the Monitoring Officer.

15. NOTICES OF MOTION

A) NOTICE OF MOTION BY COUNCILLOR EINIR WILLIAMS

In accordance with the Notice of Motion received under Section 4.19 of the Constitution, Councillor Einir Williams will propose as follows:-

Protecting Welsh Place Names on Ordnance Survey Maps

I want to express deep and passionate concern about the current Ordnance Survey (OS) policy which is leading to the deletion, undermining and ignoring of Welsh place names that have been part of our landscape for centuries.

Ordnance Survey maps currently:

- Replace historic Welsh names with English ones that have no basis or tradition, e.g. *The Mushroom Garden* for Coed Cerrig y Frân, *Heather Terrace Path* for Llwybr Gwregys.
- Place English names alongside Welsh names, creating the impression that the Welsh names are optional or secondary, e.g. *Cwm Cneifion / Nameless Cwm*, *Bala Lake / Llyn Tegid*. 'Snowdon/Yr Wyddfa (despite the fact that the Eryri National Park Authority does not use the name *Snowdon* now.)'

This Council criticises these practices, as they contribute directly to the loss of Welsh names, and therefore undermine our language, history and national identity. When the Ordnance Survey adopts an English name, it appears on websites, signs, publications, and media and as a result, the Welsh name is pushed aside.

This happens even among young Welsh-speakers, who are often led to believe that the English name is the "standard". This is how language is weakened, not in one shot, but in a thousand small

steps.

Welsh place names are part of our cultural DNA. They tell the story of the land, the people, the legends, the work, the life. No one has the right to delete or replace them.

Therefore, I want to propose to this Council today that we:

1. Write to the Ordnance Survey to call on them to put an end to the current harmful policy, and to adopt a clear and simple principle and to use only Welsh language landscape place names on maps in Wales.
2. Call on the Welsh Government to intervene formally and to ensure that the Ordnance Survey respects and protects historic Welsh names.

This is not just a matter of maps. It's a matter of identity, respect and cultural justice.

B) NOTICE OF MOTION BY COUNCILLOR NIA JEFFREYS

In accordance with the Notice of Motion received under Section 4.19 of the Constitution, Councillor Nia Jeffreys will propose as follows:-

The Council marks the murder of Member of Parliament, Jo Cox on 16/06/2016, ten years ago this year. (MP David Amess was also murdered on 15/10/2021).

In a world that is increasingly violent and aggressive, it is sad that elected members, of all parties and at all levels of government, are increasingly open to insults and abuse. Recent research shows that 72% of Councillors have experienced some form of threat – whether verbal or worse – in the last 12 months.

This Council believes that threatening or violent behaviour has no place in politics. Cyngor Gwynedd Councillors are committed to modelling the highest standards of respect and courtesy when dealing with each other and with the public, and we want the same respect to be shown towards us.

We call on members of this Council and members of Community and Town Councils throughout Gwynedd to support the One Voice Wales, NALC and SLCC "Civility and Respect Pledge" campaign.

[Un Llais Cymru](#)

16. RESPONSES / UPDATES TO PREVIOUS NOTICES OF MOTION 297

Letter from the Welsh Government in response to Councillor Gruffydd Williams' Notice of Motion to the 3rd March, 2026 Council meeting regarding Digital ID's.

THE COUNCIL 05/03/2026

Attendance:

Councillors: Ioan Thomas (Chair)
Elin Walker Jones (Vice-chair)

Craig ab Iago, Menna Baines, Beca Brown, Stephen Churchman, Wendy Cleaver, Robert Glyn Daniels, Dafydd Owen Davies, Elwyn Edwards, Elfed Wyn ap Elwyn, Gwion Emyr, Alan Jones Evans, Gwilym Evans, Dylan Fernley, Delyth Lloyd Griffiths, Jina Gwyrfai, John Brynmor Hughes, R. Medwyn Hughes, Elin Hywel, Nia Wyn Jeffreys, Anne Lloyd Jones, Berwyn Parry Jones, Dawn Lynne Jones, Dewi Jones, Elwyn Jones, Gwilym Jones, Gareth Tudor Jones, Huw Wyn Jones, June Jones, Eryl Jones-Williams, Cai Larsen, Beth Lawton, Dafydd Meurig, Dilwyn Morgan, Linda Morgan, Dewi Owen, Edgar Wyn Owen, Gwynfor Owen, Llio Elenid Owen, Gareth Coj Parry, Geraint Parry, Nigel Pickavance, John Pughe, Rheinallt Puw, Beca Roberts, John Pughe Roberts, Meryl Roberts, Richard Glyn Roberts, Huw Llwyd Rowlands, Paul Rowlinson, Angela Russell, Dyfrig Siencyn, Peter Thomas, Menna Trenholme, Rhys Tudur, Hefin Underwood, Einir Wyn Williams, Elfed Williams, Gareth Williams, Gruffydd Williams, Sasha Williams and Sian Williams.

Officers:

Dafydd Gibbard (Chief Executive), Dewi Morgan (Head of Finance), Iwan Evans (Monitoring Officer), Ian Jones (Head of Corporate Services), Nia Grisdale (Legal Service Manager), Ffion Madog Evans (Assistant Head of Finance – Accountancy and Pensions), Delyth Jones-Thomas (Investments Manager), Vera Jones (Democracy and Language Service Manager) and Annes Sion (Democracy Team Leader).

1. APOLOGIES

Apologies were received from Councillors Anwen Davies, Annwen Hughes, Louise Hughes, Arwyn Herald Roberts and Elfed Roberts.

2. MINUTES

The Chair signed the minutes of the previous Council meeting held on 4 December 2025 as a true record, along with the minutes of the Extraordinary Council meeting held on 5 February 2026.

3. DECLARATION OF PERSONAL INTEREST

The Monitoring Officer, on behalf of the chief officers present, declared an interest in item 9 as the report related to their salaries. It was explained that the Chief Executive would stay in the meeting but should there be a discussion on his salary then the Chief Executive would leave. The officers were deemed to have a substantial interest therefore the Monitoring Officer, together with the Head of Finance and the Head of Democracy Services left the meeting during the discussion on the item.

4. THE CHAIRMAN'S ANNOUNCEMENTS

Well wishes were relayed to Councillor Louise Hughes and her daughter who had recently undergone surgery, and to Councillor John Brynmor Hughes following a stay in hospital. It was expressed that several members of this Council had been unwell lately and they were all wished a full and speedy recovery.

On Saturday evening, the Cân i Gymru competition had taken place, the winning composers and soloist, namely Emlyn Gomer from Caernarfon, Gath Thomas from Dinas Dinlle and Henry Priestman from Anglesey and singer Sara Owen from Dyffryn Nantlle were congratulated.

Congratulations were noted to Celyn and Caio from Rhostryfan who were responsible for the production and distribution of Papur y Bobl – a new community paper for the area. Also to Jac Dei from Ysgol y Moelwyn who was busy making a name for himself in the world of darts. Along with 12-year-old Rio Chung from Bangor who was representing Wales at the European Billiards and Snooker Championships in Gandia this month.

5. URGENT ITEMS

None to note.

6. QUESTIONS

(The Cabinet Members' written responses to the questions had been published in advance.)

1. Question from Councillor Gwynfor Owen

If you don't already know, a campaign has been started in Harlech by a woman called Andrea Bowen to have a memorial to Catrin, daughter of Glyndŵr. Catrin's story is extremely sad, and she was clearly a very brave woman.

May I therefore ask whether the Council would be able to support in principle the community campaign to erect a statue of Catrin, daughter of Owain Glyndŵr, in Harlech, given her direct historic connection to the town through Harlech Castle, and the fact that there is currently no public memorial recognising her sacrifice and role in Welsh history?

Response from the Cabinet Member for Economy and Community, Councillor Medwyn Hughes

Thank you to the Councillor for his question. Harlech plays a prominent role in Welsh history, and the story of Catrin, daughter of Owain Glyndŵr, is significant in this history. I'm sure Cyngor Gwynedd would support in principle a local campaign to interpret the story by creating a statue of Catherine in Harlech. It would be an excellent opportunity to raise awareness and promote the story for the children and young people of Gwynedd and for visitors to the town and the Castle, which are of course part of a World Heritage Site. I know that officers from the Economy and Community Department are very willing to support the local group, and I'm sure other Council services will also support the campaign to identify a suitable site for the memorial.

Supplementary Question from Councillor Gwynfor Owen

He thanked the member for the response and looked forward to discussing the matter with the officers. He believed that the Department would certainly agree that it was a good idea to have a statue of the girl in north Wales as there were only a few memorials for women across the whole of Wales.

Response from the Cabinet Member for Economy and Community, Councillor Medwyn Hughes

The Cabinet Member agreed completely.

2. Question from Councillor Beca Brown

A report was published by Audit Wales in January 2021, assessing how successful or otherwise Ffordd Gwynedd had been. A section of the report titled “Culture – Empowerment, Trust and Leadership” warned of two problems: that constructive challenge was being suppressed and that some destructive challenge existed, often from those in authority — something that undermines trust and prevents empowerment.

Both issues contribute to the same systemic risk: a culture where concerns are not raised effectively, where ideas are not shared safely, and where unsafe practices may go unchallenged. Some of the consequences of such a culture were highlighted in the Our Bravery Brought Justice report.

Given that these concerns were raised in 2021 — two years before the arrest of Neil Foden — what actions were taken at the time to improve trust and to develop a working culture that empowers healthy and constructive challenge?

Response from the Cabinet Member for Corporate Services, Councillor Llio Elenid Owen

Ffordd Gwynedd is the term used to refer to our way of working here in Gwynedd. It forms nine work streams which are part of the Organisational Development Plan. There is an emphasis on putting the people of Gwynedd at the centre of everything we do and looking at the service that is provided through the eyes of the citizen.

A piece of work was designed in collaboration with Audit Wales to look at how the culture had embedded by 2020. The output of that work was a letter summarising the situation.

Audit Wales’s main finding in the letter was that:

"Ffordd Gwynedd is well rooted and driving cultural change, however, there are some common barriers and misconceptions that are slowing down the progress of Ffordd Gwynedd".

The work carried out by Audit Wales was based on interviews with every Head of Department and Director at the time. Among several constructive findings and recommendations, destructive challenge was identified as one barrier:

"... to feel empowered, you need to be able to trust those around you. They need to be supportive and positive, even when challenging. A safe environment is key, which is a safe space to experiment and explore ideas. A place where it is safe to fail and learn, seeking support and input from colleagues. Clearly, at a higher level in any organisation there is an inherent need to accept and respond to challenge, it is part of the job. However, it must be done in a constructive, supportive way or, otherwise it can be counterproductive. At present, in the Council, there are examples where this relationship of trust and constructive challenge does not exist; challenge is often described by some people and perceived by others as destructive."

In response to the Audit Office's letter, as a direct result of these comments, specific steps were taken by Council officers during 2021 to strengthen trust, and to further develop culture.

Following the appointment of a new Chief Executive in May 2021, one of the first steps he took was to try to ensure that each challenge was constructive in nature. The ethos of the Departmental Performance Challenge meetings was changed to one where there was a culture and emphasis of "Challenge and Support". This change supported two basic principles:

1. **Healthy and constructive challenge**, based on clear evidence and leadership; and
2. **Supporting performance** by strengthening management skills, ensuring consistency, and fostering an approach that is focused on development rather than criticism.

Since then, the new arrangements have become part of the Council's governance arrangements.

In addition:

1. The training pack for Managers has been reviewed ensuring that it includes promoting the culture of constructive challenge. (Similar training was given to Elected Members following the May 2022 election.)
2. The Audit Wales letter was submitted to the Governance and Audit Committee in July 2021 and a Task and Finish Group of Committee Members was established to work with the Chief Executive and Corporate Director to undertake an in-depth Review of how the way of working was developing throughout.
3. The Review included an assessment by each Departmental Management Team of how their department was implementing the way of working.
4. The conclusions of the Review were reported to the Education and Economy Scrutiny Committee in October 2022 with a number of recommendations on how to continue to develop the way of working.

The findings of this Review were discussed at the January 2023 meeting of the Council's Leadership Team and again when adopting a new version of the Ffordd Gwynedd Plan for 2023-28 at the Cabinet meeting in March 2023.

Several comments were made by the Cabinet Members at the time about different elements of Ffordd Gwynedd including equality, working with external partners and the importance of looking at the Council's services through the eyes of users.

We are now halfway through the plan that was adopted in 2023, and it is the Chief Executive's intention to undertake a further review of progress over the coming months. Reviewing and checking organisational culture is something that should happen continually, especially following the publication of the Our Bravery Brought Justice report.

The Our Bravery Brought Justice report has shaken the whole Council and is very relevant in the review of Ffordd Gwynedd. It will be essential to secure Members' input into this Review, and we will be seeking input from Audit Wales this time as well.

As always, when discussing this important topic, it is the victims who are at the forefront of our minds. I reiterate this Council's apologies to the victims and all those who were affected by the crimes. Through the Plan and the Response Board, actions are taking place to ensure that change happens, including change to the Council's culture; this is the greatest tribute we can pay to the courage of the victims.

Supplementary Question from Councillor Beca Brown

Considering that the Audit Wales 2021 letter raises concerns about organisational culture that are relevant to the issues explored in the Our Bravery Brought Justice report, and that this document does not appear to have been shared with the child practice review, can you explain what evidence there is that the actions you have stated, such as training and changes to performance challenge meetings, have improved trust and people's ability to raise concerns safely.

Response from the Cabinet Member for Corporate Services, Councillor Llio Elenid Owen

Cyngor Gwynedd complied and co-operated fully with the child practice review, detailed and thorough chronologies were prepared and hundreds of documents were shared with them. Background information was also shared in response to further requests as the review progressed. We accept all recommendations put forward by Our Bravery Brought Justice and are determined to act on all of these through the Response Plan. Trust is something

extremely difficult to measure as has been mentioned in the answer. A review of Ffordd Gwynedd is in the pipeline following Our Bravery Brought Justice, and members will have the opportunity to be part of that review.

7. 2026/27 BUDGET

The report was presented, stating that a number of questions arose about how council tax was spent. Information was presented which highlighted the main areas, such as that 80% of the funding went towards Education and Care. It was highlighted that 8,000 hours per week were given to domiciliary care each week, with 1500 individuals receiving a Telecare service. It was noted that 12,000 people had received support through the Housing Action plan since 2020. They highlighted that 93% of children had been able to stay at home with their families through the Trobwynt intervention, and that two Small Homes were now in operation, with a further two homes on the way. It was expressed that good work was being done and that the successes achieved by Council staff needed to be highlighted.

The budget was presented stating that it was necessary to begin with the financial forecasts from the current financial year in order to fully understand the situation. It was highlighted that there was a £5.3m overspend, where departmental budgets were not sufficient to meet the demand for service. It was explained that the main demand was in care, with a deficit of £3m in the Adults department and £1.8m in the Children's Department. It was added that the overspend had been funded through the use of reserves. It was expressed that due to the deal made in Cardiff at the end of last year, the settlement was much better than predicted at 4.1% – an additional £10.4m.

It was explained that as part of the budget-setting process the department had made a number of assumptions such as a pay rise of 4% for teachers and 3.4% for the rest of the Council's workforce. Along with natural inflation, it was noted that there was a need to invest in services, and there were ambitious plans for the coming year such as investment in care and education services.

It was estimated that an additional £23.3m would need to be spent in the next financial year to sustain our services, with the greatest pressure coming from salary inflation, general inflation and the increase in the demand for services. It was noted that this created a spending requirement for 2026/27 of £380m. It was explained that the settlement from the Welsh Government was £264m which left a gap of £116m. In terms of savings, it was highlighted that £664,000 worth of savings had already been approved, with a quarter of a million of these being available to cover the funding gap. As a result, in order to set a balanced budget this will mean raising the Council Tax by 5.17%.

It was explained that the tax base increased to just under 58k of dwellings due to an increase in the number of properties, the number that were subject to the Council Tax Premium and the decision to increase the premium on long-term empty properties. They expressed that it was very disappointing that the tax increase was higher than inflation once again, but the situation was much better than what they had feared back in December.

The Statutory Head of Finance drew attention to the Section 25 Statement in the appendices, which was a personal statement by him highlighting the robustness of the estimates on which the budget was based, as well as the potential risks and mitigation actions. He emphasised that the Cabinet had received a medium-term report back in September, and that the projections were being updated regularly and were based on the latest information. He expressed that accepting an annual settlement was challenging, and that the result of the Senedd election in May would have implications for the Council.

The context of the budget was highlighted by looking at this year's budget deficit which highlighted the additional financial pressures on services, specifically social care. He

explained that there was a recommendation to fund £9.9m of bids to address this. Despite this, he noted that the Council had a successful track record of complying with financial standards, codes of practice and sound governance organisation which was ratified annually by external financiers. It was explained that inflation rates had fallen to 2%, but that political events over the past week could affect them. Nevertheless, he remained confident that the projections were watertight.

In the context of the savings schemes, it was highlighted that the Council had managed to make savings over the years but that pressures continued to materialise, but there were mitigation measures in place to cope. It was reported that there was £110m in reserves, with £7.9m in general balances as well. It was explained that the general balances were at a reasonable level but needed to be reviewed. It was reported that Audit Wales had reviewed the Council's management of balances and had noted overall that the Council was constructive and provided assurance that there were arrangements in place to deal with funds.

It was noted that through the required work carried out to report on the robustness of the estimates that underpinned the budget, and having considered all the risks and mitigation actions, the Head of Finance was of the view that the Council's Budget for 2026/27 was robust, adequate and achievable.

Members were given an opportunity to ask questions and offer observations.

The significance of the decision to set a budget at a time of financial pressure was noted, and Plaid Cymru was thanked for reaching an agreement with the Labour Government. It was stressed that no one wanted to raise the tax in the face of financial pressure on residents. It was highlighted that excellent work was being carried out within the available budget, without making cuts to frontline services. In relation to the children's department, it was noted that there had been a marked increase in the number of individuals with profound complex needs who required specialist intervention. It was noted that this was not an easy budget but it was responsible and prioritised children and vulnerable people.

The members thanked the officers for the report and asked with regard to the financial assessment how premature the assessment was in light of the events of the previous week, and that oil costs had risen tremendously. It was expressed that the report had been published over a week ago, therefore they could not have known of events of the previous week. However, the assessment had been created with the situation as it was over a week ago, therefore the members could be assured that it was correct when it was sent. It was expressed that there were reserves for any costs that may increase such as energy costs, and therefore the Council would be able to cope with a rise in costs.

The Cabinet Member for Adults indicated that he welcomed the effort to set a balanced budget. He noted that he was seeing increased demand in the field daily, and that the decision to allocate £9.9m for the extra pressure was critical to securing services. He highlighted that setting the budget showed support for frontline staff and reflected the true cost of care in order to maintain quality, retain staff and avoid failures. It was recognised that setting a sustainable budget formed the basis of a sustainable service, albeit challenging in terms of finding the balance between raising taxes and maintaining services. It was emphasised that the budget was a clear statement of the values of the members, the county and their commitment to caring for vulnerable residents.

Comments were received from the Cabinet Member for Education who noted that the cost of teaching the next generation was high. He drew attention in particular to Additional Learning Needs, highlighting that additional funding had been identified in the budget. He stated that it was new funding that did not detract from any other services. Although this new funding was welcomed, he noted that the money was not enough and that a national revolution was needed. He highlighted that additional funding had been offered in England but no corresponding funding would be provided in Wales. However, he noted that the Government

had announced that significant funding would be provided to the Welsh Government for ALN. He promised that whichever party would lead the Senedd in May, he would try his best to influence and receive a fair share of the money.

There was agreement with the Cabinet Member for Education's comments, stressing the need to lobby the funding and that there was truly a need for a national revolution.

It was expressed that although £7.9 was available in the Council's general reserves, this represented approximately 1.3% of the budget. They noted the need to strengthen this, and that 3-5% was required.

It was noted that Central Government over the years had put more and more pressure on Local Government to maintain services at a lower level of budgets. The need to get the money to deliver services was emphasised.

A member enquired whether the Council had a database that monitored how many people who paid council tax had now had to apply for benefits, to see what the trend was over time. It was noted that the department had information about requests for discounts to Gwynedd, but not at a national level. A further conversation was offered with the member in order to understand what kind of information they required.

RESOLVED

1. To establish a budget of £379,701,110 for 2026/27 to be funded through a Government Grant of £264,009,390 and £115,691,720 of Council Tax income (which is a base increase of 4.75% plus a further 0.42% to cover the levy from the North Wales Fire and Rescue Authority, which gives a total of 5.17%)
2. To establish a capital programme of £40,179,430 in 2026/27, to be funded from the sources set out in Appendix 4 of the report.

8. CAPITAL STRATEGY 2026/27 (INCLUDING INVESTMENT AND BORROWING STRATEGIES)

The item was presented, stating that the report addressed the statutory requirement and provided a long-term context to capital expenditure and investment decisions while taking the risk into account. It was noted that the strategy combined the Budget report with the Borrowing and Investment plan by combining the capital programme with the treasury management side.

It was expressed that the report had already been submitted to the Governance and Audit Committee for consideration of any risks arising from the strategy. It was explained that since this was a technical field, a presentation had been given on aspects of Treasury Management by officials from the Arlingclose company to try and enhance understanding of the field.

Members were given an opportunity to ask questions and offer observations.

A member enquired whether they would consider getting capital money from the reserves, as borrowing could incur costs. Officers responded by noting that this already happened, and that the Council had not borrowed externally for years.

It was expressed, with the change in the boundaries of a new electoral areas, members might be in a difficult position when it came to lobbying for an individual authority and then there would be increasing pressure on the Council to lobby much more. In response it was noted that time will tell, but there was a possibility that the Council's voice would be strengthened.

RESOLVED

To accept the report and approve the Capital Strategy for 2026/27.

9. ANNUAL REPORT – THE COUNCIL'S PAY POLICY

The report was presented, stating that there was a statutory duty on all Councils to have a pay policy adopted annually by their Full Council. When adopting the pay policy for 2012/13, the Full Council decided to ask the Chief Officers Appointment Committee to conduct an annual review of the future sustainability of the pay policy and to submit recommendations to a meeting of the full Council in March each year. The Appointments Committee had considered the content of the draft pay policy at its meeting in February.

It was highlighted that there were two parts to consider. It was explained that annual salary increases for chief officers were set by the National Joint Council for Chief Officers. It was explained that the employers and unions had reached an agreement back in July for 2025/26, which was a 3.2% increase on the annual pay of chief officers. It was expressed that the process was about to begin for 2026/27.

The second element was the salaries of staff below chief officer level, and it was explained that these were also set by the Joint Council. It was highlighted that the employers and unions had agreed on a 3.2% increase for all staff and to also eliminate level 2 on the pay structure. It was noted that it was early days on the negotiations for 2026/27.

Members were given an opportunity to ask questions and offer observations.

It was pointed out that in recent years the reports had been approved by the Monitoring and Finance Officer but this year it was being approved by their deputies. It was added that this was obviously more sensible as they were discussing salaries, but the member asked why the change in procedure. They responded by noting that they had not changed things deliberately and that it was customary for deputies to approve the report but the Chief Executive would look into this.

RESOLVED

To adopt the draft Pay Policy Statement for 2026/27.

10. WALES PENSION PARTNERSHIP (WPP) – UPDATING THE INTER-AUTHORITY AGREEMENT (IAA)

The Monitoring Officer highlighted the reasons for submitting this report, noting that back in July the Council had agreed, with the eight authorities that were part of the investment pool, to set up a company. Consequently, it was explained that the Joint Committee would remain but within a new system. It was highlighted that only the Full Council had the right to change the terms of reference, and that the role of the joint committee needed to be revised and the revisions approved before the company became operational and to ensure full scrutiny of its work.

The Chair of the Pensions Committee noted that the Pensions Committee was cross-party and that they were unanimous in their support of the recommendation presented. She explained that a huge amount of work had been undertaken to prepare towards the change to be a company. She expressed that the matter was complex but the Committee had taken all possible steps to ensure that this decision was correct and fully scrutinised.

The report was submitted, stating that it sought approval to update the Inter-Authority Agreement between the eight Councils in Wales that administered Pension funds. The agreement had originally been approved by the full Council on 2 March 2017, to establish an investment pool for Welsh pension funds. It was explained that amendments had been approved back in October 2021. It was stressed that the arrangement established

under the system had worked well, with effective collaboration and the intention of saving investment managers' fees by investing on a larger scale.

However, the Westminster Government's "Fit for the Future" programme over the last eighteen months had meant that we had been forced to change. The Full Council in July approved the formation of a corporate entity wholly owned by the Wales Pension Partnership Administering Authorities, namely the WPP Investment Management Company, and to approve all other actions necessary to submit an application to the Financial Conduct Authority for authorisation of the company.

It was explained that the enforced changes had involved significant work along with time and resources. The new company was due to be operational by 1 April, 2026. However, there was one other agreement that the Council could not delegate to the Pensions Committee, which was the Inter-Authority Agreement. The amendments made to the agreement were highlighted, explaining that they had been the subject of work by legal advisers. It was expressed that there had been several discussions to keep track of the developments and they were therefore confident that it had been properly scrutinised.

Members were given an opportunity to ask questions and offer observations.

They expressed support for the decision and emphasised that there was little choice, but that the Pool hoped they would continue to work well together.

It was expressed that given the good performance of the pool, there were obvious risks to not signing this. It was explained that work had been carried out to ensure that we could continue to work as a partnership but the main concern was that this had been forced on us.

A member asked if there was an interest if a member was part of the pension scheme, it was stated that there was none.

RESOLVED

The amendments to the Inter-Authority Agreement (IAA) for the Wales Pension Partnership were accepted.

The Head of Legal Department, in consultation with the Head of Finance, was authorised to take the necessary actions to complete the agreement.

11. AMENDMENTS TO THE MEMBERS' CODE OF CONDUCT AND THE COUNCIL'S WHISTLE-BLOWING POLICY

The report was presented by the Monitoring Officer who noted that the report highlighted changes to the constitution. He noted that there were two aspects, the first being amending the code of conduct in line with the Local Government Regulations that came into force in January. He expressed that this was a minor change, simply in terms of the wording in the Code of Conduct and Principles of Conduct when discussing equality. Previously, for example, gender, race, disability and religion were listed individually, but the amendment changed this to "protected characteristics" as a term that covered all of them. In addition, in accordance with the Regulations, "socio-economic circumstances" were also included.

It was highlighted that the Code had already been statutorily amended, but the Council was required to formally adopt it and authorise the Monitoring Officer to amend the Internal Resolution Procedure as well to correspond with the Code of Conduct.

It was explained in relation to the second aspect that the Cabinet had reviewed the Whistle-blowing policy back in January and that amendments had been made. As it was a document that formed part of the Constitution, it was a requirement to submit it to the Council for information so that there was a record that a change had been made to the Constitution.

Members were given an opportunity to ask questions and offer observations.

It was noted that the items had been discussed in the Standards Committee, and that they were happy with the amendments.

RESOLVED

1. To adopt the amendments to the Principles of Conduct and Members' Code of Conduct in accordance with the statutory requirement. The Council is also asked to authorise the Monitoring Officer to amend the Local Resolution Procedure to correspond with the Code of Conduct where these provisions are referenced.
2. The content of the revised Whistle-blowing Policy was set out in the Constitution.

12. COMMITTEES CALENDAR 2026/27

The report was presented by the Head of Democracy Services, who highlighted that the May Election and the 2027 Election had a significant impact on the dates. He drew attention to the additional Scrutiny Committees that had been included in July because of the committees' work pressures and the pre-election period. Consequently, he highlighted that there was one change to the date of the Local Consultative Committee because of the need for dates for the additional Scrutiny committees. The committee would be held on 22 September, and this change would be reflected following a decision.

He noted that extensive consultations had been carried out and that amendments had been made following discussions with Eryri National Park and the Fire Authority. He expressed that we had tried to be as flexible as possible but were unable to address everything.

The Democracy Services Committee was thanked for their input to the Calendar at their meeting in February.

Members were given an opportunity to ask questions and offer observations.

The members were grateful for the discussions with the Fire Authority, but questioned if there were discussions when urgent or additional meetings were held. The officer responded by stating that this was something to keep in mind in terms of consultation, and that there was a need to carry on the discussion with the Fire Authority, but these were exceptions.

DECISION

To adopt the Committees Calendar for 2026/27

13. (A) NOTICE OF MOTION FROM COUNCILLOR GRUFFYDD WILLIAMS

The notice of motion was submitted by Councillor Gruffydd Williams under Section 4.19 of the Constitution, and was seconded.

The motion was supported, noting the following:-

- That personal freedom was all important and something that can be lost.
- It has often been highlighted that actions like this happen – starting small and growing over time and that there is a risk to individuals' data.

RESOLVED to adopt the motion, namely:-

In January 2026, the Westminster Government made a u-turn regarding their plans to make digital ID cards mandatory for proving the right to work, following a significant response from members of the public with a petition signed by over 3 million being submitted to the Government stating their opposition to DI. While the mandatory requirement for employment has been dropped, the government plans to move verification processes on-line by 2029, leading to concerns that a digital identification system will still be introduced gradually through the back door, as it were.

That this Council is totally opposed to the Digital Identification system and that Cyngor Gwynedd calls on the Welsh Government to oppose DI in line with the Government in Scotland and also in line with several local authorities across the UK. Convenience should never come at the expense of personal liberty.

11(b) NOTICE OF MOTION FROM COUNCILLOR ELIN HYWEL

The notice of motion was submitted by Councillor Elin Hywel under Section 4.19 of the Constitution, and was seconded. The member set out the context to her motion, noting:-

- That democracy cannot function without trust, and that it is won or lost through the way people speak, conduct themselves or the decisions that are made. It was stressed that trust in politics was currently extremely low.
- It was a very challenging time for the residents of Gwynedd at the moment with national and local events affecting trust in politicians.
- She noted that the responsibility lay with Councillors and asked the question, what was their part? As councillors they had a responsibility to declare and demonstrate a willingness to exercise and maintain trust. She explained that to declare this was only the first step.
- She expressed that only 38-39% of Gwynedd residents had voted in the Local Government Election back in 2022, and that 28 seats had been elected uncontested. As a result there had been no democratic procedure in those areas, because without a choice there was no election.
- She welcomed the Senedd's actions through the Elections and Elected Bodies (Wales) Act to strengthen the integrity of public life and place honesty at its heart.
- She expressed that most of the Councillors were here for the best reason which was to improve people's lives and to create better communities. She highlighted that discussions could be heated but that serving the residents of Gwynedd was focal to everyone.
- She noted that what happened in the Chamber needed to serve to strengthen democracy and to build respect and confidence in organisations.
- It was explained that if we can lead through words then we must be honest and they must truly mean something, because by losing trust in words there will be a loss of trust in democracy.
- She emphasised that the motion was not intended as a partisan accusation or finger-pointing but to stand together on one principle and to follow the Senedd's actions to strengthen integrity. She noted that Councillors had a duty to maintain and restore public trust.

Members provided observations on the notice, stating the following:-

- Trust was the foundation of democracy, because if the public were not involved then the connection between members and the public would disappear. The trust must be earned, and we must be transparent and respectful in our work and discussions.
- It was acknowledged that there were challenges but these were not unique challenges. It was expressed that the motion was a positive call to lead by example and to make it clear that Councillors took their responsibility seriously.
- A member disagreed with the paragraph about the Councillors who had been elected uncontested meaning that there was no democratic procedure, as individuals did have a choice, the choice to put their names forward and therefore there was a democratic procedure. It was expressed that it was not a reflection of trust but the need to

encourage more people to get involved and to stand up for their area, and the need to include this as part of the motion.

- It was highlighted that some seats were perhaps elected uncontested because the public was satisfied with the Councillor who had been serving them.
- The public's reasons for not standing were discussed, highlighting that time and work commitments can be reasons.
- The motion was supported, stating that the 2022 figures caused concern in terms of polling rates and a high number being elected uncontested. Reference was made to the need to look at culture, because trust was dependent on how individuals and organisations behaved, and the place and environment where individuals feel comfortable and safe to voice their opinions.
- It was noted that the motion was timely and that we needed to look at what we could do locally. A member expressed the need to look at what hung in the balance, as research showed that if people lose trust in an organisation they will move to non-organisational right-wing leaders.
- Plaid Cymru was asked to trust the Independent Group when considering chairs as they felt that their voice was not being heard.
- A member expressed that claiming there is no democratic choice if a Councillor is elected uncontested was not an insult to those particular Councillors, but rather a reflection of the flaws in the system.
- A member asked how the Senedd legislation was relevant to the motion. It was expressed that there had been an amendment to the legislation to ensure that lying during election campaigning was illegal. By doing this the Senedd had prioritised honesty and recognised the importance of that. It was noted that in a time where people do not trust politicians, it needs to be highlighted that transparency and honesty were at the heart of Gwynedd politics.

RESOLVED to adopt the motion, namely:-

In accordance with the Notice of Motion received from her pursuant to Section 4.19 of the Constitution, Councillor Elin Hywel will propose as follows:-

This Council recognises that trust is the foundation of democracy. We know that recent events locally, nationally and internationally have undermined that relationship with the people of Gwynedd. Democracy cannot function healthily without public trust in those who represent them; that trust enables people to participate in local democracy and, in turn, ensures their voice in shaping their future.

Evidence from the Office for National Statistics indicates that trust in politics and politicians is at a very low level, with only one in five trusting political parties, and that there is a direct link between low trust and low participation.

In light of that, this Council notes the low turnout in the 2022 Cyngor Gwynedd election, in line with wider trends throughout Wales, with around 38-39% voting, and that 28 of the 69 seats were elected uncontested, meaning that a large number of Gwynedd's constituents did not have a democratic choice.

The Council recognises that these figures highlight a serious challenge to the health of local democracy and to the relationship between constituents and their representatives.

It is recognised that our behaviour as public leaders sets the standard for democratic discussion. That trust cannot be built, or participation increased, unless we model those values ourselves.

This Council welcomes the actions of the Senedd through the Elections and Elected Bodies (Wales) Act to strengthen the integrity of public life and place honesty and truth at the heart of our democratic culture.

Accordingly, this Council makes it clear that we have a duty, both personally and collectively, to maintain and restore the public's trust.

We are committed to the truth, to transparency, to fairness, and to respect - the cornerstones of our right to represent the people of Gwynedd.

The meeting commenced at 1.30pm and concluded at 4.45pm.

CHAIR

MEETING	Full Council
DATE	14 May 2026
TITLE	Cyngor Gwynedd Plan 2023-2028 – 2026/27 Review
PURPOSE	Approval of the 2026/27 Review of the Council Plan
CABINET MEMBER	Councillor Nia Jeffreys
CONTACT OFFICER	Catrin Thomas, Corporate Director and Dewi W. Jones, Council Business Support Service Manager, Corporate Services Department

1. Decision Sought

- 1.1. On the recommendation of the Cabinet that the Council adopts the **Cyngor Gwynedd Plan 2023-28 - 2026/27 Review**.

2. Introduction

- 2.1. The Cyngor Gwynedd Plan 2023-28 is our public statement as a Council regarding what we intend to deliver for the people of Gwynedd. It conveys our priorities and our ambition for the next five years together with the projects we will be carrying out. The Cyngor Gwynedd Plan 2023-28 was originally adopted by the Full Council at its meeting on 2 March 2023.
- 2.2. The Plan comprises a series of projects for the five years 2023-2028 under seven priority areas: Tomorrow's Gwynedd, A Prosperous Gwynedd, A Homely Gwynedd, A Caring Gwynedd, A Welsh Gwynedd, A Green Gwynedd and An Efficient Gwynedd. The priority areas are our Well-being Objectives under the Well-being of Future Generations (Wales) Act 2015. The objectives will directly contribute to achieving the seven national well-being goals. A copy of the current version can be found here - [Cyngor Gwynedd Plan 2023-28](#)
- 2.3. The purpose of reviewing the Plan is to look at where we have reached as we are now over halfway through the Plan. Looking at the priority areas, our ambitions and projects, we considered what has changed, what has been achieved and what more we need to do.
- 2.4. It is also noted that we are expected to review our Well-being Objectives (Priority Areas) annually to ensure they remain up to date.
- 2.5. In January we held two workshop sessions (one for the Cabinet Members and the other for the Management Team) to look at where we have reached and to review the content of the current Plan. A further session for Cabinet Members was held on 12 February to consider the issues raised in the first two sessions and agree modifications to the 2026/27 version of the Cyngor Gwynedd Plan 2023-28.
- 2.6. Over 20 Councillors attended a workshop session on 24 February, where they had the opportunity to comment on the proposed changes to the Plan as part of the review. Valuable feedback was received from them and thank you to those members who attended for their comments and suggestions. A summary of the main issues identified by them is below. In summary, these are areas that can be incorporated within the Plan's existing projects by adding actions or milestones.
 - **Increased emphasis on job creation and quality employment across the County.** – this is already being addressed by projects within the A Prosperous Gwynedd Priority Area
 - **Promoting and enabling disabled people to work by ensuring the right support and environment.** – this is covered within the project **Developing training and employment opportunities for individuals in need of support**

- **Support for parents and carers of (non-Welsh-speaking) children in immersion provision so that they can support them confidently.** – a suggestion to include milestones within the project **Review of Gwynedd's Education Language Policy as well as carrying out an evaluation of the Immersion System.**
- **More social opportunities and activities for young people.** – this is already being covered within the project **Extending opportunities for play and socialising for children and young people.**

2.7. At its meeting on 10 March 2026 the Cabinet accepted the report on the **Cyngor Gwynedd Plan 2023-2028 – 2026/27 Review** as a record of the technical changes to date in the review of the Council Plan requesting further editorial work before submitting the review in its final form to the Full Council for adoption at its meeting on 14 May 2026.

2.8. As part of our commitment to paying more attention to children's rights we will be developing a version of the Plan that is suitable and easy for children to understand.

3. Relevant Considerations / Project Review

3.1 To ensure that the Plan and its projects continue to deliver for the people of Gwynedd and responds to changes, a review has been carried out. Here are the details.

3.1.1 Response Plan: Our Bravery Brought Justice

- To underline an ongoing commitment to implementing the recommendations of the 'Our Bravery Brought Justice' report, the Response Plan: Our Bravery Brought Justice is included at the beginning of the Council Plan.

The importance of the Response Plan: Our Bravery Brought Justice demands this.

3.1.2. New Priority Area - An Equal Gwynedd

- Equality and treating everyone equally is an all-important life principle. We want to establish a new priority area called An Equal Gwynedd to emphasise that this is an absolutely core basis for our work.
- The development of Gwynedd as a county that is child-friendly and a county that is considerate of trauma are areas where we need to do further work in order to establish direction and strong foundations to achieve the goal. We will use the resource to establish an evidence base, complete research work, and provide training and specific work programmes throughout the year.
- The following projects contribute directly to the work, so it would be sensible to move them from An Efficient Gwynedd to An Equal Gwynedd:
 - **Ensuring fairness for all** - a project that emphasises the Council's commitment to tackling inequalities and ensuring equity and inclusion. These are the 9 equality characteristics: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation.
 - **Women in leadership** - a project that strengthens efforts to break down barriers, encourage fair and inclusive representation in leadership roles.

3.1.3. New projects

- It is suggested that the following two projects be:
 - **Return to Gwynedd** - The aim is to retain and attract young people and a skilled workforce who strengthen Gwynedd's communities and economy while promoting the use of the Welsh language.

- **Gwynedd Economic Development Strategy (A Prosperous Gwynedd)** – The objective is to set a clear direction to ensure sustainable economic growth, with a focus on supporting local businesses, jobs and investment, in collaboration with the Council and its partners.

3.1.4. Projects for which there is a commitment to underline their importance

Tomorrow's Gwynedd

- **Extending socialising opportunities for children and young people** – Reinforcing the importance of providing socialising opportunities for children and young people throughout the county.

A Prosperous Gwynedd

- **Creating the best possible circumstances in Gwynedd for community enterprises and businesses to thrive.** – Discuss how the intention to establish a Trawsfynydd Science Park and develop a Skills and Business Innovation Centre can be introduced into the project's work programme
- **Regenerating communities and town centres** - Focus on the areas where we have influence, consider what the views are locally and measure the impact of regeneration on the communities.
- **Keeping the Benefit Local** – By increasing council spending in local supply chains, economies and communities are strengthened. We will do everything we can to intensify the impact of this.

A Homely Gwynedd

- **Management of second homes and short-term holiday accommodation** - Establishing how the current interventions have helped and what impact the work has had.

A Caring Gwynedd

- **Working with Health Services to enable people to live their best life in the community** - Achieving better outcomes for individuals and communities through greater collaboration and better integration of services.
- **Autism Plan** - Placing greater emphasis on the service user experience; making sure the service is easier to access; that there is greater co-ordination of support and that it better responds to the needs of autistic people and their families.
- **Llechen Lân** - The desire is to establish a Clean Slate for children. The key steps that need to be taken to do this are set out in the amendments. What needs to be done to implement the recommendations for adults is there as well.

An Efficient Gwynedd

- **Developing the Council's culture** - We want to improve the experience of residents dealing with the Council, establish how the current interventions have helped and what impact the work has had.

3.1.5. Projects that can become part of the day-to-day work of departments because their original objectives have been completed. (The projects will continue to be covered within the Departments' performance challenge and support regime.)

Tomorrow's Gwynedd

- **Promote the well-being of children and young people and reduce the cost of sending children to school** - The milestones for auditing, mapping and creating a guidance on the

cost of sending children to school have been completed. The next steps will contribute to the Supporting People project.

- **Extend opportunities for play and socialising for the county's children and young people**

Having taken steps to review and improve playing fields, secure grant funding, strengthen maintenance arrangements, and continue to work with Community and Town Councils, the milestones for the playing fields element have been completed.

A Homely Gwynedd

- **Dealing with the energy cost crisis and fuel poverty** - Embedded within day-to-day work with an Energy Team now set up to provide advice and guidance to people, the Fuel Poverty Partnership brings together relevant services and agencies.

A Welsh Gwynedd

- **Modernising and expanding immersion provision to teach Welsh to children** – We have invested in the Language Centres and arrangements have been put in place to improve communication with parents about Welsh language education, strengthen collaboration with community partners, and provide training and immersion resources to Foundation Phase staff. This is now part of long-term provision to ensure better quality for children and young people.

A Green Gwynedd

- **Clean and Tidy Communities** - The Tidying Team and community collaboration arrangements have been developed.
- **Public Transport** - The project has undertaken a strategic review of the network and introduced electric vehicles.

An Efficient Gwynedd

- **Workforce Planning** – Response arrangements in place.
- **Strategic review of Health and Safety management** - Steps to strengthen strategic arrangements for Health, Safety and Well-being have been put in place within the Council.
- **Managing the impact of national budgetary cuts** - Arrangements are now in place in terms of budget management and savings arrangements.

3.2. It is suggested that the remaining projects under the current seven priority areas will continue from 2025/26.

3.3. A text-only copy (Word) of the modified Plan is attached to this report as **Appendix 1**. **Appendix 2** also shows the revised front page on the website for the Cyngor Gwynedd Plan 2023-28 – 2026/27 Review.

3.4. We have also consulted with the trade unions (as required under the Social Partnership Duty) to receive their input on the recommendations but have not receive a response.

4. Resources

4.1. Additional resources are required in order to achieve the commitments noted for a number of projects within the Plan. Without the resource, it may not be possible for us to deliver what is noted.

- 4.2. Proactive steps have been taken to identify resources for the matters that are being included as new in the Plan or where the scope of work has changed. A number of these bids were approved by the Cabinet at its meeting on the 10th of March 2026 and further information can be found below:

Plan/Project	Resource
Response Plan: Our Bravery Brought Justice	£600,000 of permanent revenue has been included in the revenue budget which has already been approved by Cabinet and by Full Council on 10 th March. A one-off revenue funding of £200,000 has also been approved at the Cabinet meeting on 10 March.
An Equal Gwynedd	£200,000 of one-off revenue funding approved at the Cabinet meeting on 10 th March.
Creating the best possible circumstances in Gwynedd for community enterprises and businesses to thrive. (Trawsfynydd Science Park)	£1M of capital already committed by the Council and an Outline Business Case (OBC) for £10M of Growth Deal funding was considered by the Corporate Joint Committee's Economic Well-being Sub-Committee at its meeting on 13 March. Bids for funding from other sources are also in hand.
Return to Gwynedd	£200,000 of one-off revenue funding approved at the Cabinet meeting on 10 th March.
Gwynedd Economic Development Strategy	Delivered within existing Economy and Community Department resources

5 The Well-being of Future Generations (Wales) Act 2015

- 5.1 The Act places a duty on public bodies in Wales to improve economic, social, environmental and cultural well-being. As part of the duty, public bodies are required to publish well-being objectives that outline how they will improve well-being. Our seven priority areas are our Well-being Objectives under the Well-being of Future Generations (Wales) Act 2015. The objectives will directly contribute to achieving the seven national well-being goals. Our Well-being Statement for 2023-28 remains current.

6 Public Consultation

- 6.1 A new public consultation on the review was not carried out as extensive work has already been done during the formulation of the Council Plan 2023–28, including the use of information from the previous plan, the ‘**Ardal Ni’ (Our Area)** Engagement, and Well-being Assessments for Gwynedd and Anglesey.
- 6.2 As noted above, a workshop session for the Elected Members was held in February 2026. There was general agreement to the modifications as well as a welcome opportunity to feed into the process prior to the formal submission of the review of the Plan to Cabinet and the meeting of the Full Council.

7 Equality Act 2010

- 7.1 There is a statutory requirement to prepare and consider the findings of an equality impact assessment when preparing the plan in accordance with the requirements of the Equality Act 2010 as is implemented in Wales. The assessment is attached in **Appendix 3**.

- 7.2 The assessment on the Plan in its entirety does not identify any impact that would justify a departure from the recommendation, and there are elements for which a positive impact is anticipated. The Project Leaders will be responsible for undertaking a full Equality Impact Assessment on individual projects.

Views of the Statutory Officers:

i. Head of Finance

I can confirm the financial information contained in section 4 of this report. The Council Plan is a key part of the Council's governance arrangements and keeping it under review is essential. I support the decision sought.

ii. Monitoring Officer:

The Council Plan includes any review of part of the Council's Policy Framework. In accordance with statutory requirements, the strategy is submitted on the recommendation of the Cabinet for adoption by the Council. The report highlights the processes carried out along with the assessments and relevant statutory considerations in an appropriate manner. I am satisfied with the appropriateness of the decision being sought.

8 Views of the Local Member

Not a local matter.

9. Appendices

Appendix 1: Cyngor Gwynedd Plan 2023-2028 – 2026/27 Review (Word version)

Appendix 2: The Council Plan Front Page on the website

Appendix 3: Equality Impact Assessment – 2026/27 Review

The Cyngor Gwynedd Plan 2023-28

Reviewed March 2026



Foreword by Council Leader

The Council Plan is a map that takes us to where we want to get to. It keeps us on the right track. We want to see an equal, prosperous, warm, caring, Welsh, green, efficient Gwynedd that looks to the future.

The meaning of these priorities is explained in more detail in our plan. There is also a list of all the projects that we will implement to realise our objectives.

The priority that is particularly close to my heart is the new An Equal Gwynedd Priority Area. We try to put the principle of treating everyone equally at the heart of everything; this is the most effective way to ensure that services work for everyone in Gwynedd. 'Ensuring fairness for all' and 'Women in leadership' are the projects that will be implemented in the name of An Equal Gwynedd to address the barriers that limit people's opportunities.

We review the Council Plan every year because it's such a fast-changing world. We are living through a time where the cost of living is constantly increasing and putting a strain on the families and people of our county. We are fully aware that we must do everything within our power to ensure that our plan addresses the needs of the people of Gwynedd.

I am grateful for the dedication of every Councillor, all of the Council's workforce, our partners and our communities, who work hard with us to do the best every day for our county and our people.

The children of Gwynedd are our future, and the priority area of Tomorrow's Gwynedd ensures that we give our children and young people the best possible start in life. Seeing Gwynedd as a child-friendly and trauma-informed county is very important to me.

I am extremely proud of the fact that Gwynedd is a unique county with a strong cultural and community identity. The A Welsh Gwynedd priority area projects promote the prosperity of the Welsh language in all parts of the county ensuring opportunities for everyone to be able to use the Welsh language in their communities.

Ensuring that people are able to live and thrive in their own communities is another promise, and the new 'Returning to Gwynedd' project aims to strengthen the population of Gwynedd in order to contribute to vibrant communities and economic growth.

In addition, the Response Plan: Our Bravery Brought Justice is set out at the beginning of the Council Plan. It underlines the fact that this work is an ongoing commitment by us.

As Leader of the Council, I look forward to working with you, and all the partners throughout Gwynedd who truly believe in *doing* what this plan talks about doing. Seeing Gwynedd thrive is our goal.

Councillor Nia Wyn Jeffreys
Cyngor Gwynedd Leader

Introduction

The Council Plan outlines the direction of the Authority's work.

Each year it is reviewed and, following the latest review of its reach and current financial position, these are the priorities that have been agreed.

Please bear in mind that only parts of the Council's work appear in it; the day-to-day work of providing services throughout the county also continues.

Also, please consider that the Welsh Government has an act called the 'Well-being of Future Generations (Wales) Act 2015.' The Priority Areas you will see in the Council Plan are the Well-being Objectives which the Government is asking councils to create in order to contribute to achieving the seven goals of the 2015 Act.

The act also asks the Council to consider working in five specific ways namely, thinking about the long term, prevention, working in an integrated way, working collaboratively and involving people of all ages. Gwynedd will do this and place its residents at the heart of every decision.

The Plan has eight priority areas. The new one is An Equal Gwynedd. In each area, there are a number of projects. By implementing the projects, the Council is putting its vision into action.

Some projects that have achieved their original objectives have moved from the plan to be part of the day-to-day work of Council departments. There are a few new projects and a commitment to underline some of the features of other projects.

An overview of the Response Plan: Our Bravery Brought Justice has also been added. This is to underline the ongoing commitment to its implementation.

These are the eight Priority Areas.

- **AN EQUAL GWYNEDD** - Putting the people of Gwynedd first and treating them fairly
- **TOMORROW'S GWYNEDD** - Giving our children and young people the best possible start in life
- **A PROSPEROUS GWYNEDD** - Strengthening the economy and supporting the people of Gwynedd to earn a worthy wage
- **A HOMELY GWYNEDD** - Supporting the people of Gwynedd to live in suitable and affordable homes in their communities
- **A CARING GWYNEDD** - Supporting the residents of Gwynedd to live full and safe lives in our communities
- **A WELSH-SPEAKING GWYNEDD** - Ensuring that we give every possible opportunity for our residents to use the Welsh language in the community
- **A GREEN GWYNEDD** - Protecting the county's natural beauty, and responding positively to the climate change crisis
- **AN EFFICIENT GWYNEDD** - Ensuring that the Council performs effectively and efficiently

Projects	Overview
<p>Response plan</p>	<p>The purpose of our Response Plan is to explain how the Council will do everything within our power to ensure that offending such as this does not happen again in Gwynedd and that our Safeguarding arrangements for children and young people are of the highest possible standard. The themes of the Scheme include Voice of the Child and supporting victims, managing allegations and concerns, training and policies, governance, reasonable force, emergency response, and supporting Ysgol Friars. The Plan is comprehensive and includes a large number of work streams which are all detailed in the Response Plan.</p>

Priority Field - AN EQUAL GWYNEDD

Our ambition is to ensure that we put the residents of Gwynedd first and treat them fairly.

Projects	Overview
<p>Ensuring fairness for all</p>	<p>We will continue with the work that is already in the pipeline to ensure that the Council, in all of its actions, gives due attention to equality. We will identify the work that needs to be done to ensure that the Council treats everyone fairly, regardless of their equality characteristics, background and needs.</p>
<p>Women in Leadership</p>	<p>The number of women who undertake a management role within the Council is not commensurate with the distribution within the whole workforce. We will therefore continue to introduce a programme to develop potential for women, carrying out an audit of our recruitment and appointment methods for managerial posts and creating a forum for female leaders and prospective leaders as part of the programme to encourage more women to apply for senior posts within the Council.</p>

Priority Field – TOMORROW’S GWYNEDD

Giving our children and young people the best possible start in life

Our ambition is to ensure that every child educated in Gwynedd gets:

- Treated equally, encouraged to treat others equally and that we give priority to their happiness and well-being.
- Education of the best possible standard including access to a broad range of academic and vocational subjects to fulfil the requirements of the new 'Curriculum for Wales'.

- Access to Welsh-medium education throughout their time in education.
- Educated in buildings that are in a good state of repair, and to the best of our ability are safe and fit for purpose.
- The opportunity to develop into rounded citizens, who are content and confident in the world.
- Tailored support from professional services to meet their additional learning needs.
- The opportunity to have a nutritious meal in school, free of charge to as many pupils as possible.
- Access to equipment and technology that promote modern and effective learning.
- An assurance of suitable facilities and playing fields that are available for children and young people in their leisure time.

Projects	Overview
Transforming education for children in their early years	The early years are key to the social development of children, and the importance of this phase was particularly seen during the pandemic. We will transform this service, and we will be collaborating with the health service and Mudiad Meithrin in order to ensure that all of the county's children have the best possible start to their time in education.
Modernising buildings and the learning environment	Despite significant investment over the last decade, several of the county's school buildings are old and need modernisation. We will continue to make improvements to schools across the county, specifically in the Bangor and Cricieth areas, and we will take every opportunity to apply for grant assistance to enable us to modernise existing buildings and develop new buildings.
Extending opportunities for socialising for the county's children and young people	An assessment will be carried out of how the new Youth provision operates across the county, identifying any gaps and evaluating the outcomes delivered for young people, alongside consideration of options to extend the social opportunities available.
Delivering a 10-year strategy for education in Gwynedd	Having agreed a new strategy, we will now move to deliver the 10-year Education Strategy for Gwynedd. We engaged with key stakeholders on the priorities to ensure a resilient education system, together with world-class educational provision and experiences for children and young people in the county.
Review and improve the range of inclusion provisions in Gwynedd.	The range of inclusion provisions available to learners with emotional, behavioural and social needs to be reviewed and improved. The needs of these learners have increased, with the impact of the pandemic seen clearly and long term.

Strengthening the economy and supporting the people of Gwynedd to earn a decent salary

The foundation for enabling the people of Gwynedd to prosper is ensuring that there are suitable jobs available in the county paying salaries that enable them to support themselves and their families. Our ambition is to secure:

- High-quality jobs
- Support for local businesses to thrive
- Sustainable tourism for the benefit of communities
- Strong and resilient communities
- Prosperous and vibrant town centres

Projects	Overview
Promoting our culture and a sustainable visitor economy	<p>We will take a series of measures to promote our culture and create a sustainable visitor economy:</p> <ul style="list-style-type: none"> • The Gwynedd and Eryri Sustainable Visitor Economy Plan, formed jointly with the Eryri National Park Authority, will be launched in spring 2023. The principal partners and stakeholders will collaborate to deliver what will be in the Plan by establishing a Gwynedd and Eryri Sustainable Visitor Economy Partnership. • We will ensure prosperity from The Slate Landscape of Northwest Wales World Heritage Site designation and secure resources to fulfil the World Heritage Site Action Plan. • We will control motorhomes visiting Gwynedd by piloting the development of up to six designated sites for motorhomes to stay overnight. • Hosting the 2023 National Eisteddfod in Gwynedd will be a platform to celebrate our culture and language, arts and sports and ensure that the Eisteddfod leaves a positive legacy for Gwynedd communities.
Regenerating communities and town centres	<p>We will establish a Regeneration Framework by developing Local Regeneration Plans for 13 catchment areas across the county. We will ensure cross-departmental arrangements within the Council to ensure that work programmes intertwine and share information with communities by continuing with the engagement work. Town/City Centre action plans will be prepared for individual towns.</p>
Creating the best possible circumstances in Gwynedd for businesses and community enterprises to thrive	<p>We will support businesses and community enterprises in Gwynedd to thrive in many ways such as developing produce and accessing new markets, helping enterprises to save money by reducing waste and making better use of technology, supporting businesses in Gwynedd to trade together and prioritise helping enterprises that commit to paying a 'real living salary' to their employees. We will encourage businesses to make the most of the Welsh language, develop more business units to let, and will strive to ensure that the North Wales Growth Deal projects benefit the people of Gwynedd.</p>

Support the people of Gwynedd into work which will enable them to fulfil their potential	We will help the people of Gwynedd to fulfil their potential and support those who are excluded from the labour market to return to employment and will work with employers to assist them to ensure they have sufficient employees.
Keeping the Benefit Local	The Council is responsible for purchasing a significant amount of goods and services from external companies and we are keen to see local businesses competing and winning these contracts to ensure that as much of the Council's expenditure as possible remains local. This project will ensure that we make every effort to support local businesses to apply for opportunities, within the relevant rules, whilst ensuring at the same time that the Council receives the best value for the money that is spent.
Gwynedd Economic Development Strategy	The Strategy will aim to create a more productive, sustainable and inclusive economy for Gwynedd, strengthening the Welsh language, increasing local opportunities and improving the well-being of communities. The intention will be to help people and businesses thrive by creating better jobs, improving skills, and ensuring that economic benefits remain in the county.

Priority Field – A HOMELY GWYNEDD

Supporting the people of Gwynedd to live in suitable and affordable homes in their communities

Our ambition is to ensure that the people of Gwynedd can access a suitable home of a high standard, that is affordable and improves their quality of life. We will try to achieve this by setting an ambition to:

- Ensure that no-one is homeless in Gwynedd
- Help the residents of Gwynedd to own an affordable home in their community
- Ensure that houses in Gwynedd are environmentally friendly
- Ensure that houses in Gwynedd have a positive influence on the health and well-being of the county's residents

Projects	Overview
<p>Increasing the supply of suitable housing for local people</p>	<p>We will fulfil the projects that are part of our Housing Action Plan to increase the opportunities for Gwynedd residents to be able to secure a suitable home. Amongst the 33 individual projects that are part of the Housing Action Plan, we will:</p> <ul style="list-style-type: none"> • Collaborate with local housing associations to build more social housing by accelerating the building programme aiming to construct 500 new houses. • Build our own houses in sites across the county. They will be available to local residents at intermediate rent or to buy through shared equity schemes. We aim to build 100 houses of this type. • Buy private houses in order to let them out at an affordable rent to local people. We will target empty houses initially, but we will also look at houses on the open market. We aim to buy 100 affordable houses over the Plan's lifespan. • Provide assistance in the form of shared equity schemes so that first time local buyers can compete in the housing market. • Provide grants to assist first-time buyers to renovate empty houses to an acceptable living standard. This will bring empty houses back into use and will assist young people and first-time buyers to live in a house. We aim to bring 250 empty houses back into use. • Purchase building land for the future.
<p>Ensuring that no one is homeless in Gwynedd</p>	<p>In order to ensure that homeless people do not have to spend a long time in temporary accommodation, we will:</p> <ul style="list-style-type: none"> • Develop our own 'supported housing' units, namely accommodation where support is provided for homeless individuals by specialist staff to allow them to learn and develop life skills to improve their ability to maintain a future tenancy. • Refurbish and upgrade the former NatWest and GISDA building in Caernarfon to provide five flats for homeless youths and extend the current café to create employment for the homeless, as well as create a permanent home for GISDA and create a multi-agency space to support homeless youths. • Put a support package together to encourage private landlords to offer permanent accommodation for the homeless, instead of letting their accommodation for short-term periods or as holiday accommodation. We will aim to have 100 permanent accommodation units over the Plan's lifespan.

	<ul style="list-style-type: none"> • Work to prevent homelessness by increasing our capacity to assist and support vulnerable individuals to remain in their homes. • Attempt to move homeless people to fixed accommodation as soon as possible, rather than them having to stay in temporary accommodation for long periods.
<p>Managing second homes and short-term holiday accommodation</p>	<p>The substantial number of houses in Gwynedd that are being used as second homes and short-term holiday accommodation is having a detrimental impact on the ability of the people of Gwynedd to have access to homes in their communities. The Council has presented detailed research to the Government which highlights the need to act in the areas of planning, taxation and licensing in order to gain better control of the situation. Following recent announcements from the Government, including the establishment of the Dwyfor Pilot, which commits to introduce steps to tackle problems in the field, the Council is preparing to implement legislative changes as soon as possible. We will also set a Council tax premium for second homes and empty homes every year at an appropriate rate to respond to the situation at the time.</p>

Priority area - A CARING GWYNEDD

Supporting the residents of Gwynedd to live full and safe lives in our communities

Looking after vulnerable individuals is one of our main responsibilities, and our ambition is to support the residents of Gwynedd to live full and safe lives in our communities by:

- Safeguarding children, young people and vulnerable adults.
- Supporting residents to participate and engage with their communities, and to reduce poverty and its effects.
- Ensuring that children, young people and their families live happy lives and reach their potential in terms of their education, health and well-being.
- Ensuring there is information available for the residents of Gwynedd to assist them in making informed decisions about their health and physical and mental well-being.
- Enabling the residents of Gwynedd to live independently in suitable accommodation with dignity for as long as possible in their community.
- Supporting unpaid carers.
- Providing high-quality care and support in the right place at the right time.
- Supporting our communities to ensure accessibility and to develop into an Age-Friendly Gwynedd.

Projects	Overview
<p>Modernising our care resources to meet future needs</p>	<p>We will modernise our care homes, update our community resources and expand the accommodation options available to Gwynedd residents.</p> <p>Amongst our plans are:</p> <ul style="list-style-type: none"> • Extra Care Housing - Development of over 100 new units in Penyberth, Frondeg (Caernarfon), Canolfan Llew (Penygroes) and Dolgellau. • Residential Homes: <ul style="list-style-type: none"> ○ Redevelopment of Plas Gwilym, Penygroes. ○ Upgrading Hafod Mawddach and Cefn Rodyn. ○ Opening a Dementia Unit at Bryn Blodau and Plas Hedd Homes. ○ Planning dementia developments at Plas Pengwaith ○ Opening of new nursing and dementia home at Penyberth with 50+ beds • Supported Housing in the Community – a minimum of 6 houses located throughout the county to offer suitable and safe care homes. • Commissioning work jointly with the Housing Department to understand the need for suitable care accommodation for the future.
<p>Using more technology to improve the ability of Gwynedd residents to access support and care.</p>	<p>We will enable the people of Gwynedd to live a good life as long as possible within their local communities. To achieve this, they need to have the required information to take advantage of community opportunities that would promote their well-being, as well as flexible methods of organising the support they need.</p> <p>Amongst our plans are:</p> <ul style="list-style-type: none"> • Adopting and promoting a community information system, Dewis • Integrating a virtual occupational therapy system, AskSarah, into our website • Developing our use of Technology Enabled Care (TEC) • Promoting use of the Telecare service • Making use of robotics to enable independent living • Developing our Direct Payments system using a virtual wallet
<p>Working with Health Services to enable people to live their best life in the community</p>	<p>To ensure that we fully promote the well-being of individuals, it is vital that we are able to change our culture and ensure that we work effectively with the Health Board to deliver comprehensive care and health services into the future.</p> <p>Amongst our plans are:</p>

	<ul style="list-style-type: none"> • Co-locating adults' teams with community nurses and health therapists • Developing collaboration systems as one team around the individual through a Community Resource Team system • Working together to align the Community Resource Teams with the Primary Health Clusters • Developing new collaboration arrangements for the community mental health teams
Developing training and work opportunities for individuals who need support	We will promote training and work opportunities for individuals who need support. Amongst other schemes, we will improve provision at our Learning Disabilities Day Centres at Dolfeurig in Dolgellau and Frondeg, Caernarfon.
Llechen Lân	We will prepare an analysis of the demographics of Gwynedd; the demand for service; and social services best practices to understand and highlight the demand for service and associated resources that will be needed for the next twenty years.
Further developing the residential provision for children who are looked after in small group homes	We wish to improve the experiences of children with profound and complex needs in the Council's care, who currently have to leave the county or Wales in order to get suitable provision. We will develop registered residential homes for small groups of up to two children, which will allow them to receive care in Gwynedd, attend local schools, and fully participate in the lives of their communities.
Ensuring that full and timely support is available to support people to live at home with their families	<p>To ensure that people can live their best lives, we must make prompt and easily accessible support available for individuals and their families.</p> <p>We will implement plans to:</p> <ul style="list-style-type: none"> • ensure we acknowledge the value of family and unpaid carers by making sure that we can easily identify them and offer them full support with caring • reduce our waiting lists for new home care packages, ensuring no one in Gwynedd waits longer than 28 days following a care assessment.
Supporting People's Well-being	<p>Some residents find it difficult to cope with life's challenges and the situation of a number of residents has been exacerbated as a result of the cost-of-living crisis. These residents need support to cope, to thrive, to be safe and to keep healthy.</p> <p>We have a broad network throughout our communities which helps and supports residents to cope and to respond to their various needs. This network needs support to sustain that voluntary effort, and we will work to strengthen this essential task over the coming years.</p>
Autism Plan	Children, young people and adults with autism find it difficult to obtain the specialist support required. Therefore, we will improve our provision and make it easier for individuals and their families to transfer between different services.

Priority area – A WELSH GWYNEDD

Ensuring that we give our residents every possible opportunity to use the Welsh language in the community.

As a national leader we will promote the growth of the Welsh language in all parts of the county. Our ambition is to:

- Ensure that every child in Gwynedd can use Welsh confidently in school and in their social life.
- Promote the growth of the Welsh language in all parts of the county and ensuring there are sufficient opportunities for everyone to be able to use the Welsh language naturally in their communities.
- Work jointly with our partners to facilitate the ability for Gwynedd residents to have access to all public services through the medium of Welsh.
- Ensure that promoting the Welsh language is a key part of all the Council's work, and any plans that impact the people of Gwynedd.
- Support efforts to create new Welsh-speakers of all ages.
- Ensure access to facilities and information of a good quality in relation to leisure, culture and the arts.

Projects	Overview
Promoting the use of the Welsh Language by the residents of Gwynedd	We will conduct specific projects that will promote the use of Welsh and increase the opportunities to use the Welsh language in the community. This will include increasing the use of the Welsh language when dealing with public and community services.
Reviewing Gwynedd's Education Language Policy together with undertaking an evaluation of the Immersion System	Review Gwynedd's Education Language Policy along with undertaking an evaluation of the Immersion System to ensure that all education policies and services provided in Gwynedd set a firm foundation for the Welsh language, contribute to Cymraeg 2050, and reflect the most recent changes in the field by the Welsh Government.
Back to Gwynedd	Our aim will be to strengthen the population of Gwynedd by attracting and retaining Welsh speakers, young people and skilled workers. By doing this, we will respond to demographic challenges and skills shortages in order to contribute to sustainable, vibrant and economically competitive communities.

Priority Field – A GREEN GWYNEDD

Protecting the county's natural beauty, and responding positively to the climate change crisis

Cyngor Gwynedd has declared a climate emergency, and our aim is to be a net zero carbon Council and ecologically positive by 2030. Our ambition is to ensure:

- Significant reduction in carbon emissions.
- We respond to the effects of climate change.
- An increase in biodiversity and nature habitats.
- An excellent network of routes for residents to have the choice of active travel to their place of work, education or leisure.
- A public transport network that meets the needs of Gwynedd's communities.

Projects	Overview
Acting on flood risks	<p>The risks of coastal flooding and erosion are increasing with the impact of climate change which means that sea levels are rising and more intense storms occur more often. Gwynedd has the largest coastline in Wales and due to the nature of our landscape a high percentage of our communities, and the infrastructure that serves them, is on the coast.</p> <p>We will collaborate with other agencies, in order to prioritise our coast based on risk, and form an action plan to get to grips with the risks where this is possible.</p> <p>There is also a risk of inland flooding when water accumulates and rivers overflow. We will draw up catchment area plans in order to help avoid/respond to existing and increasing future threats.</p>
Waste and Recycling	<p>We will prepare a new waste and recycling strategy to try and increase the county's recycling level to meet the national target of 70% by 2025. This will assess how effective the current litter collection arrangements are in terms of promoting recycling (from door-to-door and in our centres) and introduce new arrangements where required.</p>
Climate and Nature Emergency Plan	<p>The Council's Climate and Nature Emergency Plan sets an ambition that "Cyngor Gwynedd will be net-zero carbon and ecologically positive by 2030." The Plan includes a wide range of projects to reduce carbon emissions from the use of our fleet and travel, use of buildings, procurement, street lighting and several other fields. We will commence with further investment of £3m in renewable energy schemes and we will also draft specific measures to get to grips with the side-effects of climate change on Gwynedd communities.</p>
Active Travel	<p>Active travel aims to ensure that walking and cycling becomes the normal choice for daily journeys, to improve our personal health, air quality and to make places more pleasant to live and work.</p> <p>We will improve the county's existing walking and cycle paths and introduce new active travel routes to facilitate more walking and cycling in our communities.</p>
Establishing a New Local Development Plan	<p>We will draw-up a new Local Development Plan for Gwynedd that will address housing needs, employment and the social and environmental needs of the county's residents over the next 15 years.</p>

Putting the residents of Gwynedd first and ensuring that the Council performs effectively and efficiently

In order to ensure that the residents of Gwynedd receive the best possible services, we have a responsibility to ensure that our internal operational arrangements are always of the highest standard. Our ambition is:

- To promote a culture of open and inclusive working which always puts the needs of the people of Gwynedd at the centre of everything we do.
- To provide adequate and suitable staffing resources for delivering services.
- To be an organisation that looks after our workforce's well-being and embeds the principles of equality naturally in all parts of the organisation.
- To make the best use of all financial resources.

Projects	Overview
Developing the Council's Culture	<p>The Council's culture places the people of Gwynedd at the centre of everything we do, and this means removing obstacles that prevent staff from achieving, with decisions based on evidence instead of assumptions.</p> <p>We are already challenging service teams to reflect on their current working arrangements, to challenge whether they are placing the people of Gwynedd at the centre and to consider whether there is room for improvement.</p> <p>We will focus on embedding a culture of empowerment, enablement and achievement across all the workforce, which provides services directly as well as indirectly to the people of Gwynedd.</p>
Digital Scheme	<p>People's expectations and trends have changed substantially as a result of the pandemic, and this is an opportunity to see whether we can further improve the experience of Gwynedd residents of front-line and back-office services by using digital technology.</p>
Adopting a Property Assets Management Plan to ensure that our estate is fit for purpose for future working	<p>We will adopt a new Property Assets Management Plan that will outline the Council's plan in terms of using our buildings to provide services. The previous Property Assets Management Plan was adopted in 2016, and a substantial change has occurred in working arrangements and service delivery since then. It is timely for us to look at managing and rationalising the estate in line with the Council's priorities and the needs of services provided for Gwynedd residents. Alongside with this we will confirm our flexible working and hybrid working arrangements.</p>

**Contribution to the five Ways of Working in the Well-being of Future Generations (Wales) Act
2015**

	Long term	Prevention	Integration	Collaboration	Involvement
AN EQUAL GWYNEDD – Putting the residents of Gwynedd first and treating them fairly.					
Ensuring fairness for all	✓	✓		✓	
Women in Leadership				✓	
TOMORROW’S GWYNEDD - Giving our children and young people the best possible start in life					
Transforming education for children in their early years	✓	✓	✓	✓	✓
Modernising buildings and the learning environment	✓	✓	✓	✓	✓
Extending the opportunities for the county's children and young people to socialise	✓	✓	✓	✓	✓
Delivering a 10-year strategy for education in Gwynedd	✓	✓	✓	✓	✓
Review and improve the range of inclusion provisions in Gwynedd.	✓	✓	✓	✓	✓
A PROSPEROUS GWYNEDD - Strengthening the economy and supporting the people of Gwynedd to earn a decent salary					
Promoting our culture and a sustainable visitor economy	✓	✓	✓	✓	✓
Regenerating communities and town centres	✓	✓	✓	✓	✓
Creating the best possible circumstances in Gwynedd for businesses and community enterprises to thrive, and support the people of Gwynedd into work	✓	✓	✓	✓	✓
Support the people of Gwynedd into work which will enable them to fulfil their potential.	✓	✓	✓	✓	✓
Keeping the Benefit Local	✓	✓	✓	✓	✓
Gwynedd Economic Development Strategy	✓	✓	✓	✓	✓
A HOMELY GWYNEDD - Supporting the people of Gwynedd to live in suitable and affordable homes in their communities					
Increasing the supply of housing for local people	✓	✓	✓	✓	
Ensuring that no one is homeless in Gwynedd	✓	✓		✓	










Managing second homes and short-term holiday accommodation	✓	✓	✓	✓	✓
A CARING GWYNEDD - Supporting the residents of Gwynedd to live full and safe lives in our communities					
Modernising our care resources to meet future needs	✓	✓	✓	✓	✓
Using more technology to improve the ability of Gwynedd residents to access support and care.	✓	✓	✓	✓	✓
Working with Health Services to enable people to live their best life in the community	✓	✓	✓	✓	✓
Developing training and work opportunities for individuals who need support		✓	✓	✓	✓
Llechen Lân	✓	✓		✓	✓
Further developing the residential provision for children who are looked after in small group homes	✓	✓	✓	✓	✓
Ensuring that full and timely support is available to support people to live at home with their families	✓	✓	✓	✓	✓
Supporting People's Well-being	✓	✓	✓	✓	✓
Autism Plan	✓	✓		✓	✓
A WELSH GWYNEDD - Ensuring that we give our residents every possible opportunity to use the Welsh language in the community					
Promoting the use of the Welsh Language by the residents of Gwynedd	✓	✓	✓	✓	✓
Reviewing Gwynedd's Education Language Policy together with undertaking an evaluation of the Immersion System	✓	✓	✓	✓	✓
Back to Gwynedd	✓	✓	✓	✓	✓
A GREEN GWYNEDD - Protecting the county's natural beauty, and responding positively to the climate change crisis					
Acting on flood risks	✓	✓	✓	✓	✓
Waste and Recycling	✓	✓	✓	✓	✓
Climate and Nature Emergency Plan	✓	✓	✓	✓	✓
Active Travel	✓	✓	✓	✓	✓

New Local Development Plan	✓	✓	✓	✓	✓
AN EFFICIENT GWYNEDD - Ensuring that the Council performs effectively and efficiently					
Developing the Council's Culture	✓	✓	✓	✓	✓
Digital Scheme	✓	✓	✓	✓	✓
Adopting the Property Assets Management Plan to ensure that our estate is fit for purpose for working in the future	✓	✓	✓	✓	✓

The Cyngor Gwynedd Plan 2023-28

The purpose of the Plan is to set out the Council's vision and priorities for the period between April 2023 and the end of March 2028. The Plan explains why we are focusing our energy and resources in certain areas.

The Plan includes a number of different projects which are listed under eight priority fields:

 <p>Introduction Foreword to the Plan by Councillor Nia Jeffreys.</p>	 <p>Tomorrow's Gwynedd Giving our children and young people the best possible start in life.</p>	 <p>A Prosperous Gwynedd Strengthening the economy and supporting the people of Gwynedd to earn a decent salary.</p>
 <p>A Homely Gwynedd Supporting the people of Gwynedd to live in suitable and affordable homes in their communities.</p>	 <p>A Caring Gwynedd Supporting the residents of Gwynedd to live full and safe lives in our communities.</p>	 <p>A Welsh Gwynedd Ensuring that we give our residents every possible opportunity to use the Welsh language in the community.</p>
 <p>A Green Gwynedd Protecting the county's natural beauty, and responding positively to the climate change crisis.</p>	 <p>An Efficient Gwynedd Putting the residents of Gwynedd first and treating them fairly and ensuring that the Council performs effectively and efficiently.</p>	 <p>An equal Gwynedd A Gwynedd where we are all treated equally.</p>

Response Plan: Our Bravery Brought Justice

A Response Plan Programme Board has been established to look at, challenge and drive all the work streams deriving from the reviews and investigations following the offences of the former Ysgol Friars Headteacher.

The Board is independent, consisting of professionals from other organisations such as Estyn, the Welsh Government, the Children's Commissioner and Care Inspectorate Wales, therefore can look at the work objectively and offer a challenge from the outside. The Board looks at the impact of the changes that Cyngor Gwynedd has introduced, and reports on what is working and what has changed.

[More information about the work and membership of the Response Plan Programme Board](#)

PDF version of the Plan

Click on the link below to download a pdf version of the Council Plan:

[Cyngor Gwynedd Plan 2023-28 \(pdf version\)](#)

[Cyngor Gwynedd Plan 2023-28: 2024/25 Review](#)

(This is a pdf of the Plan launched in 2023. Since then, annual reviews have been carried out, and the latest version can be seen in the tiles above).

How can we improve this page? [Let us know](#)

Assessing the Impact on Equality Characteristics, the Welsh language and Socio-economic Disadvantage

Please see the sheet *How to Make an Equality Impact Assessment* for assistance to complete this form. You are also welcome to contact Delyth Williams, Policy and Equality Officer on ext. 32708, or DelythGadlysWilliams@gwynedd.llyw.cymru, for further assistance.

The Council is required (under the Equality Act 2010) to consider the impact that changes to any policy or procedure (or the creation of a new policy or procedure) will have on people with protected equality characteristics. The Council also has additional general duties to ensure fairness and to foster good relationships. Therefore, a timely assessment must be made before any decision is taken on any relevant change (i.e. that affects people with protected equality characteristics).

The Council is also required, under the requirements of the Welsh Language Standards (Section 44 of the Welsh Language (Wales) Measure 2011), to consider the impact that any change in policy or procedure (or the creation of a new policy or procedure), will have on opportunities for people to use the Welsh language and to ensure that the Welsh language is not treated less favourably than English. This document therefore ensures that these decisions safeguard and promote the use made of the Welsh language.

From 1 April 2021, the Council has a duty to give due attention to addressing socio-economic disadvantage in strategic decisions.

1) Details

1.1 What is the name of the policy / service in question?

The Council Plan 2023-28, Revision 2026/27

1.2 What is the purpose of the policy / service being created or amended? What changes are being considered?

The purpose of the Council's Plan is to identify priorities and key areas to implement between 2023 and 2028. This is the fourth year of the Plan. The original version of the Plan was adopted by the Council at its meeting on 2 March 2023.

The new Plan states our vision for the next 5 years, and then every annual review will offer an update that summarises where we have reached on the journey, and what our priorities will be for the year to come.

Here are the changes made to the 2026/27 Revision:

The following new Section has been added:

Response Plan: Our Bravery Brought Justice

- Due to the importance of this work, the desire to include the introduction of the new section to acknowledge the work of the Response Plan was noted. The purpose of the Response Plan is to explain how the Council will do everything within its power to ensure that such crime does not happen again in Gwynedd and that arrangements to Safeguard children and young people are of the highest possible standard.

The following New Priority Field has been added:

Equal Gwynedd – two projects under An Effective Gwynedd will be moved here (**Ensure fairness for all** and **Women in Leadership**)

The scope or content of the following project has changed:

Priority Area: Tomorrow's Gwynedd

- **Extending opportunities for socialising for the county's children and young people** - modifications to the project overview.

Priority Area: A Prosperous Gwynedd

- **Create the best possible circumstances in Gwynedd for business and community enterprise to thrive.**
- **Regenerating communities and town centres.**
- **Keeping the Benefit Local**

- modifications to the projects overview.

Priority Area: A Homely Gwynedd

- **Managing second homes and short-term holiday accommodation**

- modifications to the project overview.

Priority Area: A Caring Gwynedd

- **Working with Health Services to enable people to live their best life in the community.**
- **Autism Plan.**
- **Llechen Lân.**

- modifications to the projects overview.

Priority Area: An Effective Gwynedd

- **Developing the Council's Culture**

- modifications to the project overview.

The following projects have been newly added:

Priority Area: A Welsh Gwynedd

- **Back to Gwynedd**

Priority Area: A Prosperous Gwynedd

- **Gwynedd Economic Development Strategy**

The following project has transferred to being part of the day-to-day work of the relevant Department during 2026/27:

Priority Area: Tomorrow's Gwynedd

- Promoting the well-being of children and young people and reducing the cost of sending children to school.

Priority Area: A Homely Gwynedd

- Dealing with the energy cost crisis and fuel poverty.

Priority Area: A Welsh Gwynedd

- Modernising and extending the immersion provision to teach Welsh to children.

Priority Area: A Green Gwynedd

- Clean and Tidy Communities
- Public Transport

Priority Area: An Effective Gwynedd

- Strategic review of Health and Safety management.
- Workforce Planning.
- Managing the impact of national budgetary cuts.

This Equality Impact Assessment looks at the Plan in its entirety. Each individual project within the Plan is expected to have a separate Assessment, whether for the entire project and/or for specific sections of it. It is the duty of the person responsible for the individual projects to undertake the Assessment(s).

1.3 Who is responsible for this assessment?

Dewi Jones, The Council's Business Support Service Manager, Leadership Team

1.4 When did you commence the assessment? Which version is this?

January 2023 – version 1, full assessment of the Plan.
This is version 4 – February 2026 – 2026/27 Revision of the Plan

2) Action

2.1 Who are the stakeholders or partners whom we will have to work with to carry out this assessment?

Elected Members, service users, Gwynedd residents.

2.2 **What steps have you taken to engage with people who have protected characteristics, regarding the Welsh language or with communities (either due to location or due to need), who are living with a socio-economic disadvantage?**

A consultation was undertaken during December 2022 and January 2023 to introduce and explain the draft priorities to the public, partners and local organisations and raise awareness of the opportunity for them to participate in the exercise by completing a short on-line questionnaire at www.gwynedd.llyw.cymru/consultations Paper copies were also available in local libraries and Siopau Gwynedd.

We encouraged as many as possible of Gwynedd's residents to complete and return the questionnaire by using the Council's website, the local press, spreading the message through our partners, social media websites and elected members' e-newsletter and Council staff.

We contacted organisations that represent or work with people and/or children with equality characteristics to inform them of the engagement and to ask them to notify their users of the questionnaire.

2.3 **What was the outcome of the engagement?**

The consultation remained open from 8 December 2022 until 3 January 2023.

We received 643 responses to the questionnaire. On the whole, respondents agreed with the priority areas and the projects and there were no specific concerns relating to the equality characteristics.

The following table shows the number of respondents per area – Arfon, Dwyfor and Meirionnydd.

Area	Number	Percentage
Arfon	282	43.9%
Dwyfor	137	21.3%
Meirionnydd	203	31.6%
Outside Gwynedd	9	1.4%
No response	12	1.9%
Total	643	100.0%

The respondents were asked to answer questions about their equality features (optional) and the information gathered was as follows:

Gender

	Number	Percentage
Man / Male	267	41.5
Woman / Female	313	48.7
I identify in a different way	1	0.2
I prefer not to say	47	7.3
No response	15	2.3
Total	643	100.0

Age

	Number	Percentage
15 years old or younger	4	0.6
16 - 24 years old	11	1.7
25 - 34 years old	59	9.2
35 - 44 years old	60	9.3
45 - 54 years old	119	18.5
55 - 64 years old	162	25.2
65 - 74 years old	128	19.9
75 - 84 years old	38	5.9
85 + years old	4	0.6
I prefer not to say	46	7.2
No response	12	1.9
Total	643	100.0

Do you understand, speak, read and/or write in Welsh?

	Number	Percentage
Speak Welsh	329	51.2
Can understand Welsh verbally	281	43.7
Read Welsh	279	43.4
Write in Welsh	243	37.8
I do not understand Welsh (none of the above)	107	16.6
I prefer not to say	66	10.3
Other	75	11.7
Multiple choice question		

Nationality or national identity

	Number	Percentage
Welsh	304	47.3
English	83	12.9
Scottish	5	0.8
Northern Irish	1	0.2
British	161	25.0
I prefer not to say	46	7.2

Other	30	4.7
No response	13	2.0
Total	643	100.0

Race

	Number	Percentage
White	556	86.5
Black / African / Caribbean	0	0.0
Asian	1	0.2
Gypsy / Irish traveller	2	0.3
Mixed / several ethnic groups	8	1.2
I prefer not to say	57	8.9
Other	7	1.1
No response	12	1.9
Total	643	100.0

What is your religion?

	Number	Percentage
No religion	238	37.0
Christian	286	44.5
Muslim	0	0.0
Buddhist	4	0.6
Hindu	0	0.0
Jewish	3	0.5
Sikh	0	0.0
I prefer not to say	71	11.0
Other	26	4.0
No response	15	2.3
Total	643	100.0

Which of the following describes you best?

	Number	Percentage
Heterosexual / Straight	506	78.7
Gay man	10	1.6
Gay woman/lesbian	8	1.2
Bisexual	10	1.6
I prefer not to say	79	12.3
Other	10	1.6
No response	20	3.1
Total	643	100.0

Has your gender identity changed from what you were assigned at birth?

	Number	Percentage
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Yes	10	1.6
No	541	84.1
I prefer not to say	67	10.4
No response	25	3.9
Total	643	100.0

It was not possible to identify a trend in the responses for any of the equality characteristics.

Individual projects should use the information gathered and engage further with the residents of Gwynedd as required.

2.4 On the basis of what other evidence are you acting?

As part of the process of drawing up the Council Plan for 2023-28, in July 2022 the Heads of Department were asked to identify and consider potential priorities and schemes for the next five years. In order to do this, consideration was given to several pieces of work/information, including the projects that were in the current 2022-23 Plan, feedback from engagement on the 'Ardal Ni' Regeneration Framework, and the Well-being Assessments by the Gwynedd and Anglesey Public Services Board.

In addition, in October 2022 a workshop was held with the Cabinet Members to discuss potential schemes for the new Plan.

Two further workshop sessions were held with elected members in December 2022 in order to give local members the opportunity to express their views and to highlight any additional issues that needed addressing.

To ensure that we meet the needs of the people of Gwynedd, we decided to engage on the 2023-28 version of the Plan with the public during December 2022 – January 2023. This was an opportunity for residents, businesses, groups and organisations, elected members, and City, Town and Community Councils to have their say on the draft priorities.

Council Plan review workshops were held with Cabinet Members and Elected Members in **January and February 2026** and the issues raised in these workshops have fed into the review.

2.5 Are there any gaps in the evidence that needs to be collected?

The Council's Departments are responsible for implementing the individual schemes within the Council Plan. The Council's performance-challenge processes, where the Cabinet Member and members of scrutiny committees challenge the progress and development of the work being carried out on the Plan, is continuous work throughout the year. The reports on these performance challenge meetings are published as part of the Cabinet's meeting papers.

If it is necessary to change the content or direction of any individual project, then the Equality Impact Assessment will be revisited for that project.

The Council Plan 2023-28 together with the Equality Impact Assessment are submitted to the Cabinet and the Council for scrutiny and will be reviewed annually.

3) Identifying the Impact

3.1 The Council must duly address the impact that any changes will have on people with the following equality characteristics. What effect will the new policy/service or the proposed changes in the policy or service have on people with these characteristics? We must also consider the impact on socio-economic disadvantage and on the Welsh language.

Characteristics	What type of impact? *	In what way? What is the evidence?
Race (including nationality)	Positive	<p>The Council's Strategic Equality Plan for 2024-28 will give particular regard to any matters arising from the Welsh Government's Anti-racist Wales Action Plan.</p> <p>The project titled "Ensuring Fairness for Everyone" within the Council Plan will act on every characteristic, including race.</p>
Disability	Positive	<p>Care is a priority area; therefore, it is expected to have a positive impact. All other individual schemes are expected to look at the impact on disability when conducting a separate Equality Impact Assessment.</p> <p>9.8% (N=63) of the respondents to the public consultation noted that they have a disability.</p> <p>A higher percentage of the respondents who noted that they have a disability (95.2%, N=60) agreed with Priority Area 3 compared with the proportion of the total number who responded to the consultation (85.1%, N=547).</p> <p>The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including disability.</p>
Gender	Positive	<p>There is one specific individual plan in this area namely "Women in Leadership" therefore a positive impact is expected here. Nevertheless, it is not possible to identify the impact of the Plan in its entirety without completing impact assessments on the other individual schemes.</p> <p>The project titled "Ensuring Fairness for Everyone" will act</p>

		on every characteristic, including gender.
Age	Positive	<p>Age is prioritised in a number of fields therefore we expect the Plan to have a positive impact on children, young people and older people.</p> <p>Each individual plan is expected to look at the impact on different ages when conducting a separate Equality Impact Assessment.</p> <p>91.3% of the respondents to the public consultation agreed with Priority Area 1.</p> <p>The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including age.</p>
Sexual orientation	Positive	The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including sexual orientation.
Religion or belief (or non-belief)	Positive	The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including religion.
Gender reassignment	Positive	The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including gender reassignment.
Pregnancy and maternity	Positive	The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including pregnancy and maternity.
Marriage and civil partnership	Positive	The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including marriage and civil partnership.
The Welsh language	Uncertain at present because of a lack of evidence	<p>There is a specific priority within the Council Plan that involves promoting the use of the Welsh language, with two projects identified under that priority. There are a number of individual projects within the Council that contribute to the Council's strategic objective of promoting the use of the Welsh Language. As no individual assessments have been prepared/submitted for the individual projects, it is very difficult at this point to assess the impact of the entire Plan on the Welsh language and its speakers, whether positive or negative.</p> <p>Each individual plan is expected to study the impact on the Welsh language when conducting a separate Equality Impact Assessment.</p> <p>66.9% of the respondents to the public consultation agreed with Priority Area 5.</p> <p>The project titled "Ensuring Fairness for Everyone" will act on every characteristic, including language.</p>

Socio-economic Disadvantage	Positive	<p>The Council is aware that a number of Gwynedd residents are living in unequal living conditions due to socio-economic disadvantage. Therefore, a number of the projects that are already included in the Council Plan relate to reducing socio-economic disadvantage. Examples of projects are noted below:</p> <p>Employment – Creating the best possible circumstances in Gwynedd for businesses and community enterprises to thrive. Supporting the people of Gwynedd into work which enables them to live a good life</p> <p>Education – Transforming education for children in their early years</p> <p>Health – Working with Health Services to enable people to live their best life in the community.</p> <p>Justice and Standards of Living – Supporting People's Well-being</p>
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3.2 The Council has a duty under the Equality Act 2010 to contribute positively to a fairer society through advancing equality and good relations in its activities in the fields of age, gender, sexual orientation, religion, race, transgender, disability and pregnancy and maternity. The Council must duly address the way any change impacts on these duties.

General Duties of the Equality Act	Does it have an impact? *	In what way? What is the evidence?
Eliminate unlawful discrimination, harassment and victimisation	Yes	The priority areas and the individual plans should have a positive impact on the duty. The Equality Impact Assessments on the individual plans will need to identify whether there are any particular matters to consider.
Promote equal opportunities	Yes	The priority areas and the individual plans should have a positive impact on the duty. The Equality Impact Assessments on the individual plans will need to identify whether there are any particular matters to consider.

Foster good relations	Yes	The priority areas and the individual plans should have a positive impact on the duty. The Equality Impact Assessments on the individual plans will need to identify whether there are any particular matters to consider.
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3.3 How does your proposal ensure that you work in accordance with the Welsh Language Standards (Welsh Language (Wales) Measure 2011), to ensure that the Welsh language is not treated less favourably than the English language, and that every opportunity is taken to promote the Welsh language (beyond providing bilingual services) and increase opportunities to use and learn the language in the community?

Project – Modernising and extending the immersion provision to teach Welsh to children

It is essential that learners who are latecomers get the opportunity to learn Welsh as soon as possible, through a first-rate modern provision that is spread across Wales. It is essential that learners who are less confident in Welsh also have an opportunity to gain confidence and to improve their Welsh skills with the support of the Immersion Education System. We also wish to see our language immersion methods extended to support the Welsh language expanded in schools that serve communities where opportunities to use Welsh in the home and outside school are limited. This project in cooperation with the Immersion System and our schools will give all our learners the best opportunity to become confident Welsh speakers who can use the language in all aspects of life.

Project – Reviewing Gwynedd's Education Language Policy together with undertaking an evaluation of the Immersion System to ensure that all education policies and services provided to children and young people in Gwynedd set a firm foundation for the Welsh language.

Project – Promote the use of the Welsh Language by the residents of Gwynedd

We will conduct specific projects that will promote the use of Welsh and increase the opportunities to use the Welsh language in the community. This will include increasing the use of the Welsh language when dealing with public and community services.

Information from the individual Impact Assessments will provide further information around how the projects will operate in accordance with the Welsh Language Standards.

3.4 What other measures or changes could you include to strengthen or change the policy/practice so as to have a positive impact on people's opportunities to use the Welsh language, and to reduce or prevent any detrimental impacts that the policy/practice could have on the Welsh language?

The purpose of the Council's Plan is to identify priorities and key areas to implement between 2023 and 2028. This Equality Impact Assessment looks at the Plan in its entirety. Each

individual project is expected to have a separate Assessment, whether for the entire project and/or for specific sections of it. It is the duty of the person responsible for the individual projects to undertake these Assessment(s). These assessments will need to identify any further opportunities to promote the Welsh language in their areas.

3.5 How does the proposal show that you have given due regard to the need to address inequality due to socio-economic disadvantage? (Please note that this relates to closing the inequality gap, rather than only improving outcomes for everyone).

The following are examples of projects that are included in the Plan which respond to the need to address inequality due to socio-economic disadvantage:

Employment – Creating the best possible circumstances in Gwynedd for businesses and community enterprises to thrive.

Supporting the people of Gwynedd into work which enables them to live a good life

We will support businesses and community enterprises in Gwynedd to thrive in many ways such as developing produce and accessing new markets, helping enterprises to save money by reducing waste and make better use of technology, supporting businesses in Gwynedd to trade together and prioritise helping enterprises that commit to paying a 'real living wage' to their employees. We will promote businesses to make the most of the Welsh language, will develop more business units to let, and will strive to ensure that the North Wales Growth Deal projects benefit the people of Gwynedd. In addition, we will help the people of Gwynedd to fulfil their potential and support those who are excluded from the labour market to return to employment and will work with employers to help them to ensure they have a sufficient workforce.

Education – Transforming education for children in their early years.

The early years are key to children's social development, and the importance of this phase was particularly evident during the pandemic. We wish to transform this service and will collaborate with the health service and Mudiad Meithrin in order to ensure that all of the county's children have the best possible start to their time in education.

Health – Using more of technology to improve the ability of Gwynedd residents to access support and care.

We need to enable the people of Gwynedd to live a good life as long as possible within their local communities. To achieve this, they need to have the required information to take advantage of community opportunities that would promote their well-being, as well as flexible methods of organising the support they need.

Justice and Standards of Living – Support People's Well-being.

Some residents find it difficult to cope with life's challenges and the situation of a number of residents has been exacerbated as a result of the cost-of-living crisis. These residents need support to cope, to thrive, to be safe and to keep healthy.

We have a wide network throughout our communities which helps and supports residents to cope and to respond to their various needs. This network needs support to sustain that

voluntary effort, and we will work to strengthen this essential work over the coming years.

3.6 What other measures or changes can you include to strengthen or change the policy / practice to demonstrate that you have given due regard to the need to reduce disproportionate outcomes as a result of socio-economic disadvantage, in accordance with the Socio-Economic Act?

Each individual project is expected to have a separate Assessment, whether for the entire project and/or for specific sections of it, and this will include assessing the socio-economic disadvantage. It is the duty of the person responsible for the individual projects to undertake these Assessment(s). These assessments will need to identify any further opportunities to reduce inequality as a result of socio-economic disadvantage in their fields.

4) Analysing the results

4.1 Is the policy therefore likely to have a significant, positive impact on any of the above? What is the reason for this?

It appears that the priority areas should have a significant, positive impact on many of the equality characteristics. Each individual equality impact assessment is expected to look at the impact in greater detail. This is particularly true if Covid considerations are to be fully considered in their impact assessments.

4.2 Is the policy therefore likely to have a significant, negative impact on any of the above? What is the reason for this?

No significant, negative impacts have been identified with the Plan as a whole. Each individual impact assessment looks at the impact in greater detail.

4.3 What should be done?

Select one of the following:

Continue with the policy/service as it is robust	X
Revise the policy to remove any barriers	
Suspend and abolish the policy as the harmful impacts are too great	
Continue with the policy as any harmful impact can be justified	

No further steps at present, it is premature to decide, or there is insufficient evidence	
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4.4 If you decide to continue with the plan, what steps will you take to reduce or mitigate any negative impacts?

The individual assessments identify any negative impacts and the steps to mitigate them.

4.5 If you are not taking any further action to remove or reduce the negative impacts, please explain why here.

We have not identified any actions for the Plan as a whole, but it will be taken into consideration in the individual assessments.

5) Monitoring

5.1 What steps will you take to monitor the impact and effectiveness of the policy or service (action plan)?

The Council's Departments are responsible for implementing the individual schemes within the Council Plan. The Council's performance-challenging processes, where the Cabinet Member and members of scrutiny committees challenge the progress and development of the work being carried out on the Plan, is continuous work throughout the year. The reports on these performance challenge meetings are published as part of the Cabinet's meeting papers.

If it is necessary to change the content or direction of any individual project, then the Equality Impact Assessment will be revisited for that project.

The Council Plan 2023-28 together with the Equality Impact Assessment are submitted to the Cabinet and the Council for scrutiny and will be reviewed annually.

MEETING:	The Full Council
DATE:	14 May 2026
CABINET MEMBER:	Councillor R. Medwyn Hughes Cabinet Member – Economy and Community
TITLE:	Adoption of new economic development strategy for Gwynedd
CONTACT OFFICER:	Sioned E Williams, Head of Economy and Community

DECISION SOUGHT

That Cyngor Gwynedd adopt 'Gwynedd 2035: An Economy that Works for All' as an economic development strategy for Gwynedd.

1. THE REASON WHY THE COUNCIL NEEDS TO MAKE THE DECISION:

- 1.1 [Section 4 of the Cyngor Gwynedd Constitution](#) notes that an economic development strategy is part of the Policy Framework and is required to be approved by the Full Council on the basis of a Cabinet recommendation.

2. INTRODUCTION AND RATIONALE

Background

- 2.1 The Council has several schemes that refer to economic development:
- 'A Prosperous Gwynedd' is one of the seven priorities within the [Council Plan](#);
 - the [Ardal Ni \(Our Area\) Local Regeneration Plans](#) identify local priorities for the economy; and,
 - the [Gwynedd and Eryri Sustainable Visitor Economy Plan](#) offers guidance for part of the economy.
- 2.2 These plans - along with regional documents, such as the [North Wales Regional Economic Framework](#) - have laid the foundations for the Council's work in economic development in recent years.
- 2.3 Through the Council Plan, the Cabinet has recognised that not having a single plan encapsulating what the people and communities of Gwynedd want and setting the direction for the county's economy, is a gap. As a result, the Economy and Community Department has been asked to draw up a new economic development strategy for Gwynedd.

The requirement for an economic development strategy

- 2.4 Financing for economic development is increasingly uncertain and dependent on short-term funding; for example, the Shared Prosperity Fund (SPF) will come to an end during the year and there is uncertainty regarding the future of ARFOR and no successor for the Levelling Up Fund (LUF) which funds the Llewyrch o'r Llechi programme.
- 2.5 There is a growing emphasis by the Welsh Government on regional collaboration, particularly in the context of Ambition North Wales and the economic well-being responsibility of the Corporate Joint Committee.
- 2.6 There is significant investment by the Welsh and UK Governments in the Anglesey Free Port and the Flint and Wrexham Investment Zone, but no similar plans for Gwynedd.
- 2.7 This is all within an operating environment of constant changes for enterprises.
- 2.8 Ongoing uncertainty within the economy stems from the growing international conflict and the turbulent political and social atmosphere in Wales and the UK.
- 2.9 The economy is also on the brink of major technological change as a result of artificial intelligence and that goes hand in hand with the effects of climate change.
- 2.10 By creating and adopting a strategy it will be possible to summarise the case for the development of the economy of Gwynedd, determine agreed prioritisation for responding to our needs and establish consistent guidance for the selection of schemes and prioritising expenditure in the area.
- 2.11 By adopting a strategy, we can identify and develop appropriate activities and better measure the impact of our efforts.

The challenges that require attention

- 2.12 Here in Gwynedd, we have a strong economic history that we can be proud of. There is also a modern and innovative economy with substantial potential in our existing enterprises and opportunities in new industries and activities but much of this potential is yet to be realised.
- 2.13 There are a range of positive qualities to the economy; unemployment is low, the qualification level of our workforce is high, we are resilient and our businesses have the best survival rate in Wales.
- 2.14 However, as with other rural and peripheral areas, there are challenges that need attention and, of course, the Strategy focuses on responding to those challenges.

2.15 The main issues that need to be addressed include:

- Fewer working-age people working
- Fewer people of working age
- Low wages
- Too much part-time and seasonal work
- People in poverty even though they are working
- Low productivity
- Lack of diversity of industries
- Not enough new enterprises starting up
- Enterprises not growing

Developing the Strategy

2.16 The new strategy; 'Gwynedd 2035: An Economy that Works for All', is enclosed in Appendix 1 of the report.

2.17 The content of the Strategy stems from an extended development process in collaboration with a wide range of stakeholders including the Council's key partners from the public, private and third sectors.

2.18 The main steps in the development of the Strategy included:

- researching the composition and relative performance of the economy of Gwynedd;
- reviewing good practice in Wales, and comparable areas across Britain;
- seeking the views of enterprises of all types and from all parts of Gwynedd through a survey;
- individual and joint discussions with stakeholders in the public, private and third sectors; and,
- receiving the input of elected members of the Council via the Education and Economy Scrutiny Committee.

2.19 On the basis of the information gathered a draft of the Strategy was produced. Constructive and positive feedback on the draft was received from the Scrutiny Committee and Council stakeholders across the three sectors before the content was confirmed.

The Strategy's Priorities

2.20 We want an economy that gives everyone an opportunity to live full lives and realise their full potential, and for an economy that strengthens the natural and cultural wealth which makes our county so unique.

2.21 With significant economic changes underway, there is an exciting opportunity to make Gwynedd a destination of excellence in new industries. Similarly, we must be supportive of those industries that already exist in Gwynedd and are essential to our communities, enterprises and residents. We must continue to nurture and add value to our traditional sectors, such as agriculture and tourism, as a solid foundation and a full part of a modern and innovative economy.

2.22 The vision 'Gwynedd 2035: An Economy That Works for All' is:

'An innovative, productive and low-carbon economy which strengthens the Welsh language, creates new opportunities and contributes towards everyone's well-being'

2.23 It is a vision that puts the people, communities and enterprises of Gwynedd at the centre and in order to implement it, three themes have been identified: Enterprise, People and Place.

2.24 For each of the three themes, there are two strategic priorities:

Enterprise: prosperous local enterprises that excel

1. Maximise the value of our current economy:
Realise the potential of our existing enterprises and sectors by increasing their value, strengthening their resilience and supporting them to reduce emissions
2. Make the most of new opportunities
Support and make the most of new industries and activity with substantial potential, ensuring that the benefit stays local

People: a skilled and inclusive workforce

3. Securing a skilled workforce:
Nurturing, attracting and retaining talent responding to the county's long-term skills needs
4. Supporting our people:
Supporting the people of Gwynedd to realise their full potential, to obtain quality employment, fair salaries and local opportunities

Place: the best conditions to thrive

5. The best possible connectivity and infrastructure:
Acting for better connectivity and business infrastructure to boost the economy
6. A great place to live, work and enterprise:
Promoting Gwynedd as a great place to live, work and enterprise, celebrating the Welsh language and our unique identity

Implementing the Strategy

- 2.25 A constant theme throughout the Strategy is the need for broad ownership and effort across organisations and sectors in order to realise it.
- 2.26 The advisory panel set up to support the realisation of the SPF in Gwynedd has highlighted the value of bringing together organisations from the public, private and third sectors.
- 2.27 We will therefore establish a 'Gwynedd Economy Forum' to co-ordinate the implementation of the Strategy.
- 2.28 The Forum membership includes the main organisations that contribute to local prosperity, and the bodies who work to develop an economy that benefits our communities. The Forum will bring local partners together from the public sector, private sector and third sector. Relevant regional and national organisations would also be a part of the Forum.
- 2.29 We will secure a voice for different parts of Gwynedd to ensure that there is awareness of these variances across the county.
- 2.30 The Forum will meet at least three times a year, in order to:
- Create and coordinate an annual Delivery Plan for the Strategy.
 - Monitor activities and their individual and composite indicators.
 - Maintain an overview of the progress towards achieving the Strategy.
 - Review and update the Strategy as needed.
 - Maintain an overview of the field and broader developments that are relevant to the Gwynedd economy, lobbying in favour of our needs.
 - Promote and facilitate collaboration between organisations with a role in developing the county's economy and other partnerships / forums.
- 2.31 The Strategy establishes the goal and identifies the method of addressing the long-term economic challenges identified for Gwynedd.
- 2.32 A Delivery Plan will be formulated annually under the leadership of the Gwynedd Economy Forum to implement the Strategy. The Plan will include current activity, and projects that are underway, noting their alignment with the Strategy and the areas that will benefit. The Strategy's Monitoring and Evaluation Framework will then be a means of measuring the success and impact of the activities.
- 2.33 The preparation of the Strategy has also prompted a review of operating arrangements within economic development in the county. The review will look at opportunities to establish Menter Gwynedd as a vehicle for collaboration to ensure that initiatives across Gwynedd receive support and understand where help is available.

3. ENGAGEMENT UNDERTAKEN PRIOR TO RECOMMENDING THE DECISION

3.1 There have been ongoing efforts to secure stakeholder input into the Strategy. Before starting to create the Strategy, the views of others were gathered regarding the needs and priorities of the people and communities of Gwynedd, and the Strategy has been shared in draft form to ensure there is support for its content.

3.2 Stakeholders who have offered input include:

- Welsh Government
- Ambition North Wales
- North Wales Skills Partnership
- Business Wales
- Bangor University
- Eryri National Park Authority
- Adra Housing Association
- Federation of Small Businesses (FSB) Cymru
- Gwynedd and Eryri Sustainable Tourism Partnership 2035
- The National Farmers' Union (NFU) and the Farmers' Union of Wales (FUW)
- Gwynedd Social Enterprise Network
- Mantell Gwynedd

3.3 The Council's Elected Members have also offered input and guidance via the Cabinet Members and the Education and Economy Scrutiny Committee.

3.4 A summary of the engagement, input received and our response can be found in Appendix 2 of the report.

4. COMPOSITE IMPACT ASSESSMENT

4.1 Appendix 3 contains the Composite Impact Assessment prepared for the Strategy. The Assessment considers the impact of the Strategy on the residents of Gwynedd:

- identifying the main characteristics of the relationship between the Welsh language and the economy in Gwynedd and showing how the Strategy responds to these characteristics in order to strengthen the Welsh language.
- assessing the impact of the Strategy on well-being in a holistic manner, including economic and social, environmental and cultural aspects
- explaining how the Strategy meets the requirements and purpose of the Well-being of Future Generations (Wales) Act 2015, including the Principles of Sustainable Development (i.e., the Five Ways of Working) and the Seven Well-being Goals

4.2 Preparing the Assessment has been an ongoing process with the Council's equality and language officers during the development of the Strategy which, in turn, has informed the content of the document.

5. THE WELL-BEING OF FUTURE GENERATIONS (WALES) ACT 2015

- 5.1 An assessment of the alignment of the Strategy with the requirements and wishes of the Well-being of Future Generations Act, which is enclosed in Appendix 4, has been carried out. The outcome of the assessment has led to creating Section 3 of the Strategy (The Case for Action).

6. CABINET RECOMMENDATION

- 6.1 The Cyngor Gwynedd Cabinet, at its meeting of 10 March 2026, considered the above information and the content of the Strategy, agreeing to recommend the adoption of 'Gwynedd 2035: An Economy that Works for All', to the Full Council.

VIEWS OF THE STATUTORY OFFICERS:

Monitoring Officer:

"The Economic Development Strategy is part of the Council's Policy Framework. In accordance with the statutory requirements, the Strategy is submitted on the Cabinets recommendation for adoption by the Council. The report highlights the engagement processes undertaken along with the relevant statutory assessments and considerations in an appropriate manner. I am satisfied with the propriety of the decision sought. "

Head of Finance Department:

"This Strategy contains a number of activity areas, and both the report and Strategy emphasise that widespread ownership and effort across organisations and sectors are needed to make it a reality. In this context it is noted that the Strategy does not highlight the revenue and capital costs that Cyngor Gwynedd will face in order to realise it. Whilst many of these costs will be funded from current budgets, if requests for additional budget need to be presented, I expect that this will be done through the Council's usual arrangements. However, the Economic Strategy and the plans contained therein will be considered when reviewing the Council's long-term financial plans."

APPENDICES

1. The Strategy 'Gwynedd 2035: An Economy That Works for All'
2. Engagement Report
3. Composite Impact Assessment
4. Well-being of Future Generations Act Assessment

AN ECONOMY THAT WORKS FOR ALL


GWYNEDD 2035



*An innovative,
productive and
low-carbon economy
which strengthens
the Welsh language,
creates new
opportunities and
contributes towards
everyone's
well-being.*



EXECUTIVE SUMMARY



Gwynedd is a unique county. In its close communities, its natural beauty and in the vibrancy of the Welsh language in the county, it has a unique identity and appeal which makes it one of the best locations to live and work in Wales and beyond.

We also have a modern and innovative economy with substantial potential in our existing enterprises and opportunities in new industries and activities for a prosperous future for the people of Gwynedd.

But a lot of this potential is yet to be realised. According to many indicators, there is a substantial gap between the economy of Gwynedd and the rest of Wales and the United Kingdom (UK). In part, this can be attributed to the sense that the area lacks the opportunities, suitable employment or salaries required to live full lives.

This Strategy responds to this gap, and it will shape our work until 2035. It is an honest assessment of today's economy; however, it is ambitious for the future. By identifying our strengths and weaknesses, the opportunities here in the county, and those areas in need of improvement, the Strategy's purpose is to realise the potential of our people and our enterprises and create new benefits and opportunities. Our vision is to create:

"An innovative, productive and low-carbon economy which strengthens the Welsh language, creates new opportunities and contributes towards everyone's well-being."

Creating growth for growth's sake is not the intention. The purpose of the Strategy is to ensure inclusive and sustainable growth, so that individuals, businesses and community enterprises in Gwynedd genuinely benefit from the economy. Essentially, it is a strategy that focuses on the values that mean the most to the people of Gwynedd:



Living with dignity

Everyone should receive enough to sustain themselves and their families, to have full and happy lives without wanting for anything.



Opportunities

Every individual should be able to access the opportunities they need to realise their full potential, regardless of their socio-economic background.



Fairness

No area, person or community should be left behind.



Local roots

Gwynedd enterprises are the essence of Gwynedd's economy, and through them, we are able to retain the wealth that we create locally.



Sustainability

The Welsh language and environment must be nurtured and protected which, together, make Gwynedd such a unique place to live, work and enterprise.

As the funding landscape changes, there will be a need to decide where and how to target resources to secure the greatest economic and social benefit. This may include targeting resources geographically or to specific groups or sectors. This Strategy gives us the structure to assess and prioritise interventions, in order to strike a balance between growth and quality of life.

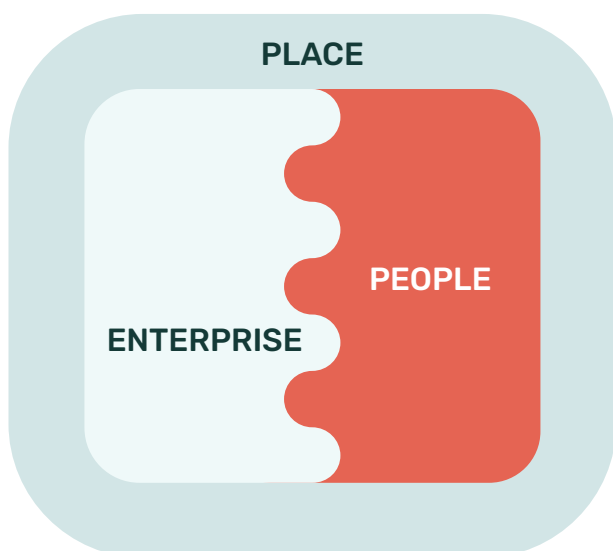




This is not solely a Council Strategy. We will need to collaborate with partners on a local, county, regional and national level, to make the biggest possible difference. We will build on positive experiences of collaboration by establishing the **Gwynedd Economy Forum**. The Forum will bring organisations and partners together to draw up and coordinate an annual delivery plan which will include current activity and upcoming projects. This will assist to identify geographical and thematic gaps in terms of implementing the Strategy.

In order to review progress against the Strategy's priorities, a monitoring and evaluation framework has been developed. The indicators within the framework reflect the Strategy's priorities and the change required. This will assist the Forum when evaluating and reviewing progress.

This is a vision that puts the people, communities and enterprises of Gwynedd at the centre. To implement this, we have three themes:



Local **enterprises** of all shapes and sizes - commercial, community and voluntary - are essential to create opportunities for local **people** to sustain themselves and realise their potential.

Skilled **people** are essential to **enterprises** if they are to succeed.

People and **enterprises** need each other if they are to thrive and make a positive contribution to their communities.

An effective and attractive **place**, which helps them succeed, is critical to **enterprises** and **people**.

For each of the three themes, we have identified two strategic priorities:

AN ECONOMY THAT WORKS FOR ALL

GWYNEDD 2035

OUR VISION:

An innovative, productive and low-carbon economy which strengthens the Welsh language, creates new opportunities and contributes towards everyone's well-being.



ENTERPRISE

Prosperous local enterprises that excel



PEOPLE

A skilled and inclusive workforce



PLACE

The best conditions to thrive

PRIORITY ONE

Maximise the value of our current economy

1. More productive and competitive enterprises
2. More efficient enterprises to reduce costs and waste
3. Enterprises equipped with new technologies
4. Innovative enterprises
5. Enterprises accessing new markets
6. Local ownership of enterprises
7. Retain public sector spending local
8. Engage with enterprises to share information
9. Support the transition to a net zero economy
10. Encourage enterprises to collaborate
11. Local ownership of economic assets .

PRIORITY TWO

Make the most of new opportunities

1. Attract investment and high-quality jobs.
2. Capitalise on significant regional investments
3. Support local enterprises in new industries
4. Support local enterprises to access private investment.
5. Making the most of our strategic assets
6. New developments to benefit local communities
7. Capitalise on opportunities arising from global changes.
8. Collaboration between enterprises and education in research and development.

PRIORITY THREE

Securing a skilled workforce

1. Overcome recruitment skills challenges
2. Collaborate on long-term skills needs
3. Showcase local employment opportunities to young people
4. Promote schemes to attract and develop talent
5. Support young people who are NEET to realise their potential
6. Support volunteering opportunities
7. Encourage flexible working arrangements.

PRIORITY FOUR

Supporting our people

1. Support people who are out of work to gain employment
2. Help people in work to access better jobs
3. Promote the Real Living Wage
4. Promote inclusive employment
5. Increase in the number of secure jobs
6. Support older people to work or volunteer
7. Reduce inequality between men and women in the labour market
8. Ensure fair opportunities for disabled people by removing barriers.

PRIORITY FIVE

The best possible connectivity and infrastructure

1. Improve digital connectivity in areas where it is weak
2. Press for improved local transport
3. Improve the Gwynedd roads network to support businesses
4. Press for improvements to the grid and utility infrastructure
5. Support town centre regeneration.
6. Develop the stock of business and works units.

PRIORITY SIX

A great place to live, work and enterprise

1. Build confidence to succeed locally
2. Support Gwynedd's unique cultural.
3. Strengthen the use and visibility of the Welsh language
4. Attract the Gwynedd diaspora back to the area
5. Encourage buying locally

THE CHANGE REQUIRED

Higher wages and incomes

More secure jobs

Less poverty and disadvantage

More local employment opportunities

More people living and working locally

Job satisfaction and realising potential

A green economy that protects the environment

Increased use and visibility of the language



OUR STRATEGY TO DEVELOP THE GWYNEDD ECONOMY UP TO 2035



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1. | FOREWORD



Here in Gwynedd, we have a strong economic history that we can be proud of. From our world-famous quarrying communities to our university and power stations - all parts of Gwynedd have witnessed substantial innovation and progressiveness.

But we are not going to rely on the past. Today, we have huge potential in Gwynedd - in our residents, our communities and our entrepreneurs; but this potential is not always realised. There remains a substantial gap between the performance of the economy in Gwynedd and the economies of Wales and the United Kingdom on average.

Therefore, it is a privilege to introduce this Economic Strategy which clearly sets out our vision and long-term priorities for Gwynedd's economy:

“

"An innovative, productive and low-carbon economy which strengthens the Welsh language, creates new opportunities and contributes towards everyone's well-being."

”

Growth for growth's sake is not our intention. We must create an economy which brings benefits to all by creating new employment, reducing poverty and improving quality of life across the county. This is the economy that will give our people the opportunities they need to remain in or return to their communities and thrive. And this will be an economy that will strengthen and protect the Welsh language and environment. At the heart of this, Gwynedd enterprises will realise their full potential, they will be resilient and they will grow, and the wealth we create will stay local.

It is a vision which responds to the call for prosperity expressed by Gwynedd residents during the Ardal Ni consultation. We heard calls for full-time higher-salary jobs, for a more stable and diverse economy, for lively town centres, and for opportunities for our young people to thrive in Gwynedd.

We want an economy that gives everyone an opportunity to live full lives and realise their full potential, and for an economy that strengthens the natural and cultural wealth which makes our county so unique.

Prosperity that is not only sustainable but is also **inclusive** and **fair** and **restores** the community, natural and cultural wealth of our county.

With substantial economic changes afoot, there is an exciting opportunity ahead of us to make Gwynedd a destination of excellence in new industries - in the creative and digital industries, professional services, clean energy and low-carbon activity, life sciences, advanced manufacturing and aerospace. Similarly, we must support those industries that already exist in Gwynedd which are essential to our communities, enterprises and residents. For example, with the second largest agricultural land area in Wales, we must continue to nurture and add value to our traditional sectors, such as agriculture and tourism, as a firm foundation and integral part of a modern and innovative economy.

Consequently, there is a need for a clearer and stronger voice to steer development which affects us and keeps the benefits local. This Economic Strategy was formulated for this purpose. It acknowledges that we will need to collaborate with partners on all levels and influence them if we are to take advantage of opportunities and overcome challenges, and as the funding landscape and economic policy changes, the value and importance of collaboration increases.

We look forward to seeing this Economic Strategy deliver its vision.



A handwritten signature in black ink that reads "R. Medwyn Hughes". The signature is written in a cursive, flowing style.

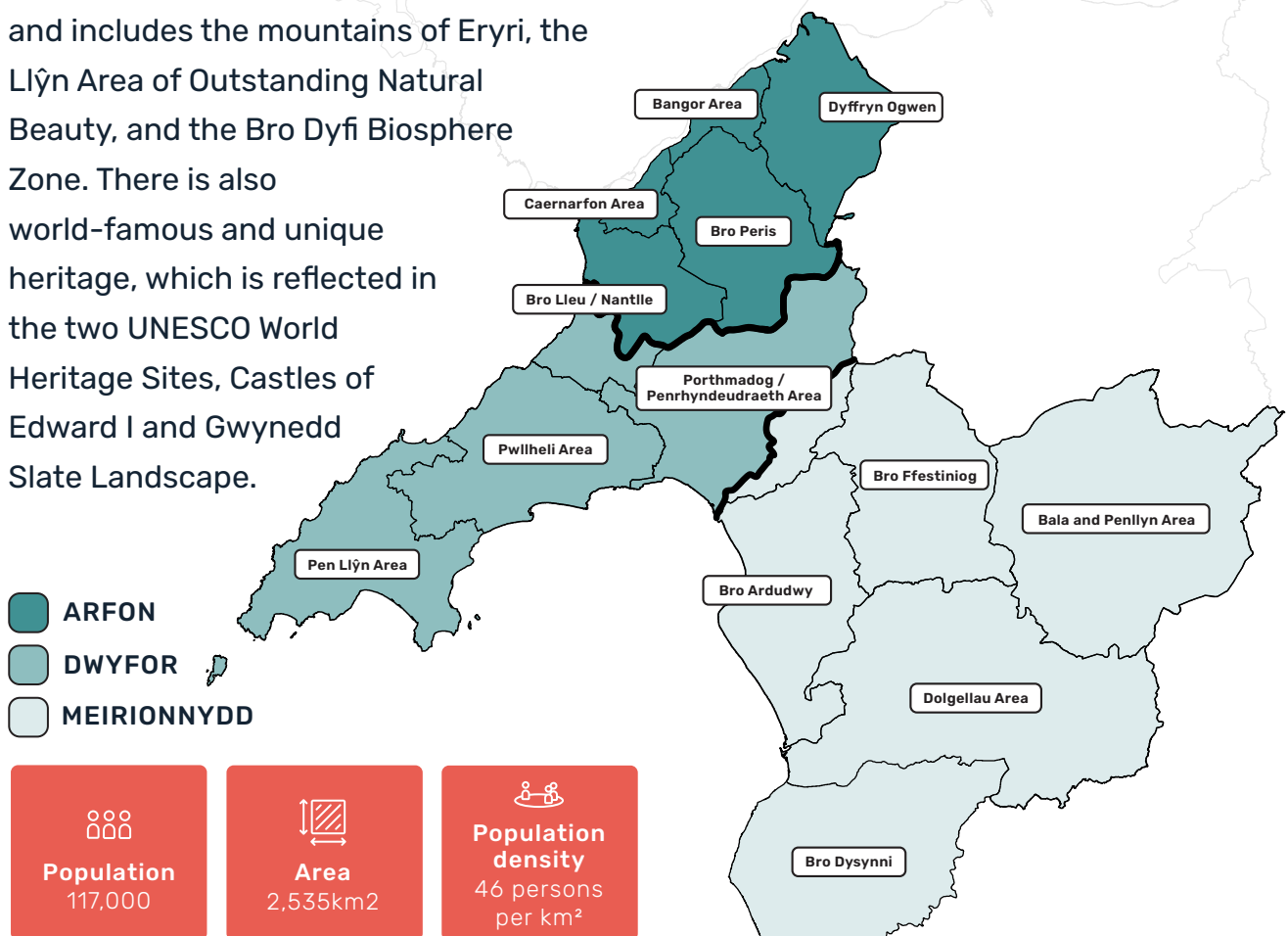
Cllr. R. Medwyn Hughes

Cabinet Member for Economy and Community
Cyngor Gwynedd

2. THE PROFILE OF GWYNEDD'S ECONOMY

Geographically, Gwynedd is the second largest county in Wales. Located in north-west Wales, Gwynedd extends from Cardigan Bay in the west to the banks of the Menai Straits in the north, and a substantial part of the county is located within Eryri National Park. This geography shapes the spatial distribution of the population, with most living along the coastline and low-lying areas, particularly in the north of the county, and the rest live in villages, smaller towns or in the countryside.

Gwynedd is an unique county with outstanding cultural and environmental wealth. Gwynedd is the county with the highest percentage of Welsh speakers in Wales and 92% of the county's local areas * are above the threshold of the Welsh Communities Commission's high-density Welsh threshold. The county is also environmentally rich and includes the mountains of Eryri, the Llŷn Area of Outstanding Natural Beauty, and the Bro Dyfi Biosphere Zone. There is also world-famous and unique heritage, which is reflected in the two UNESCO World Heritage Sites, Castles of Edward I and Gwynedd Slate Landscape.



* The areas have been defined by the Office for National Statistics as a Lower Layer Super Output Area (LSOA) - standard statistical areas used to collect and publish data on a small local level, which usually include around 1,500 people.

THE LABOUR MARKET

73% of Gwynedd's working-age population are employed, which is lower than Wales and the UK.ⁱ

The proportion of the workforce that is self-employed is over **50%** higher in Gwynedd than in Wales.ⁱⁱ

Average weekly earnings for workers in Gwynedd are over **£50** lower than the Wales average and £100 lower than the UK average.ⁱⁱⁱ

PRODUCTIVITY

Gross Value Added (GVA) per head in Gwynedd is around £3,500 per year lower than the North Wales average, and almost

£12,000 lower than the UK average.^{iv}

GVA per job in Gwynedd is **£10,000** lower than the North Wales average, and over **£23,000** lower than the UK average.^v

GVA per hour worked in Gwynedd is the second lowest in North Wales, and recorded the lowest growth between 2004 and 2023.^{vi}

SKILLS

Only **4%** of the working age population in Gwynedd has no qualifications, lower than North Wales and Wales overall.^{vii}

70.6% of the working age population in Gwynedd holds qualifications above A Level, higher than North Wales and Wales.^{viii}

Almost **1/3** of the economically inactive working age population in Gwynedd wants a job, a higher proportion than in Wales and the UK.^{ix}

COUNTY ENTERPRISES

Over half of enterprises established in Gwynedd in 2019 were still trading in 2024 – the highest five year survival rate in Wales.^x

94.6% of Gwynedd's native businesses employ fewer than 10 people.^{xi}

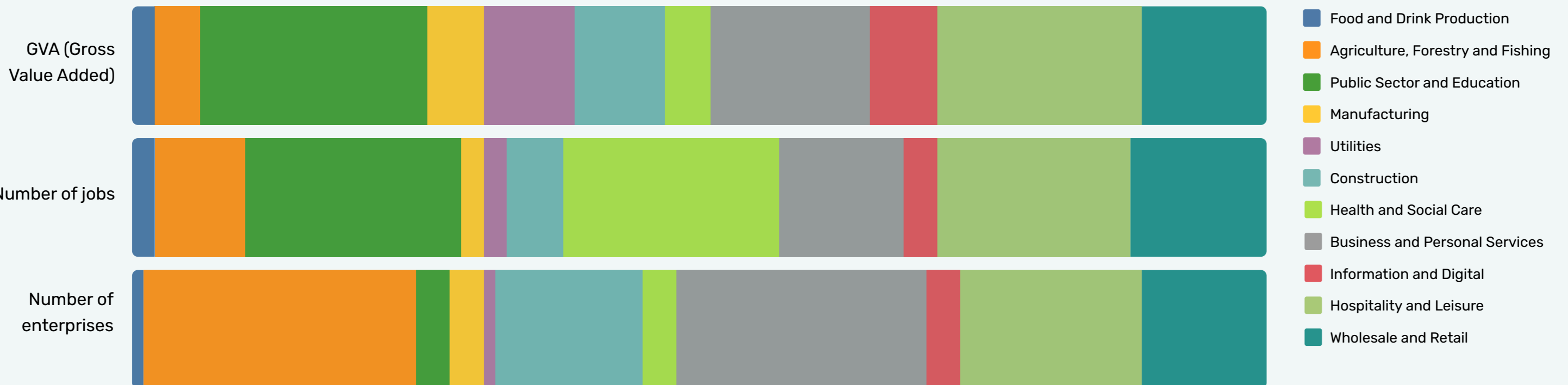
230 enterprises employing more than 250 people in Gwynedd (1.4%).^{xii}

Almost **14%** of Gwynedd's enterprises are in the hospitality sector – a higher proportion than in other North Wales counties.^{xiii}

Across the western counties of North Wales, agriculture represents the strongest sector **23%** while manufacturing is the weakest, accounting for just **5%** of enterprises.^{xiv}

There are almost **13,000** native enterprises in Gwynedd, spread across a wide range of sectors.^{xv}

Economic Contribution by Sector^{xvi}





3. THE CASE FOR ACTION

Here in Gwynedd, we have a strong economic history of which we can be proud. We are also home to a modern and innovative economy, with significant potential within existing enterprises and opportunities in new and emerging industries and activities.

The economy has a number of positive strengths: unemployment is low, workforce qualification levels are high, the economy is resilient, and business survival rates are among the highest in Wales.

Despite this, a range of indicators show that a gap remains between the performance of Gwynedd's economy and that of other areas in Wales and the United Kingdom. This reflects deep-rooted structural inequalities that place people in Gwynedd at a relative disadvantage, limiting their ability to access suitable, secure employment with fair pay, and constraining the potential of the local economy to improve living standards and life opportunities.

According to the [Competitiveness Index \(2025\)](#), Gwynedd is amongst the lowest-performing 10% of counties economically across England and Wales. While Gwynedd's performance is among the strongest of rural and western counties in Wales, this remains a central challenge with a direct impact on the well-being of Gwynedd's residents.

The Strategy focuses on the issues requiring attention, with the most significant gaps indicating that Gwynedd underperforms against more than one [National Well-being Indicator](#):

GAPS IN GWYNEDD'S ECONOMY

WORKFORCE GAP : Low unemployment rate, but the county's inactivity rate (i.e. the proportion of the 16- to 64-year-old population not in employment) is higher than the averages for north Wales and the UK.
(Well-being Indicator 21: Proportion of the population in employment)

POPULATION GAP : The population is ageing quicker than in Wales and the UK, with a higher proportion of older people of retirement age and high levels of outward migration amongst young people.



PAY GAP : The average weekly salary of a full-time worker and household gross disposable income has been consistently lower in Gwynedd since 2010 than the Welsh and UK averages.

(Well-being Indicator 10: Household Gross Disposable Income per Head)

WORK CONDITIONS GAP : Substantially higher rates of workers in Gwynedd are part-time and seasonal employees, compared with Wales and the UK.

(Well-being Indicator 16: Percentage of the population in employment, on permanent contracts and earning the Real Living Wage).

WELL-BEING GAP : Low salaries and part-time jobs cause high levels of poverty in rural and urban areas, with in-work poverty particularly high in Gwynedd compared with Wales and the UK.

(Well-being Indicator 18: Percentage of households in poverty compared with the UK)

(Well-being Indicator 19: Percentage of households in material deprivation)

PRODUCTIVITY GAP : The value of what is produced in Gwynedd (per hour worked; per job filled), is substantially lower than the averages of Wales and the UK in 2023, and the productivity growth rate in Gwynedd is substantially lower than the averages of Wales and the UK since 2004.

(Well-being Indicator 09: GVA per hour worked compared with the UK average)

INDUSTRIAL GAP : A relatively narrow range of industries with employees and enterprises more numerous in a smaller range of industries.


NEW ENTERPRISE GAP : The business start-up rate in Gwynedd is amongst the lowest across the counties of Wales in 2023, below the Wales national average and significantly below the UK average.

HIGH PERFORMANCE GAP : Percentage of enterprises that saw an increase of 20% in the number of employees over a three-year period was consistently lower in Gwynedd than in Wales and the UK between 2018 and 2023.

DIGITAL CONNECTIVITY GAP : Percentage of property with access to gigabyte connectivity (>1,000 Mbps) is lower than the averages for Wales and the UK, with a higher proportion of properties also with the weakest connectivity (<15 Mbps). 4G and 5G coverage is also lower in Gwynedd.

(Well-being Indicator 50: Digital inclusion)

4. THE CHANGE REQUIRED



The gaps facing Gwynedd shows a clear need for a fundamental change in the economy: change which, on one hand, addresses the comparative under-performance of the economy, and creates the best possible conditions for our enterprises, and on the other hand, change which has a direct positive impact on the well-being of our people and life opportunities in Gwynedd. The Strategy has been developed in order to start-up and support these types of change.

On the whole economy level, it includes:

- **Raising the productivity levels of our enterprises and our workers** to stimulate higher salaries and better working conditions.
- **Increasing the competitiveness of our native enterprises** so that they are more effective and efficient, realising their long-term business objectives and creating quality jobs.
- **Strengthening digital connectivity and the county's business infrastructure** to create the best possible conditions for enterprise.
- **Creating a more diverse industrial foundation** with local enterprises in a range of industries, creating new opportunities and a more resilient economy.
- **Supporting our people to gain the skills they need** so that they, as well as the enterprises employing them, can take full advantage of opportunities.
- **Retaining more of the wealth that we have created locally in Gwynedd** to maximise benefits for the people, enterprises and communities of Gwynedd.
- **Building an economy that is** environmentally, linguistically and culturally sustainable.

We are going to implement this mainly to make a positive difference to the lives of the people of Gwynedd. The most important outcomes affecting the people of Gwynedd are:

- Higher salaries and gross household income
- More people employed in stable jobs
- Lower levels of poverty and socio-economic disadvantage
- Broader variety of work opportunities locally
- More people able to stay, live and work in their local communities
- More people enjoying their work and realising their full potential
- A green economy which protects the county's outstanding natural environment
- A Welsh economy which increases the use and visibility of the language with customers and in the workplace across Gwynedd.

At the heart of all efforts to deliver the Strategy, we will focus on the values that matter most to the people of Gwynedd:

Living with dignity

Everyone should receive enough to sustain themselves and their families, to have full and happy lives without wanting for anything.

Opportunities

Every individual should be able to access the opportunities they need to realise their full potential, regardless of their socio-economic background.

Fairness

No area, person or community should be left behind.

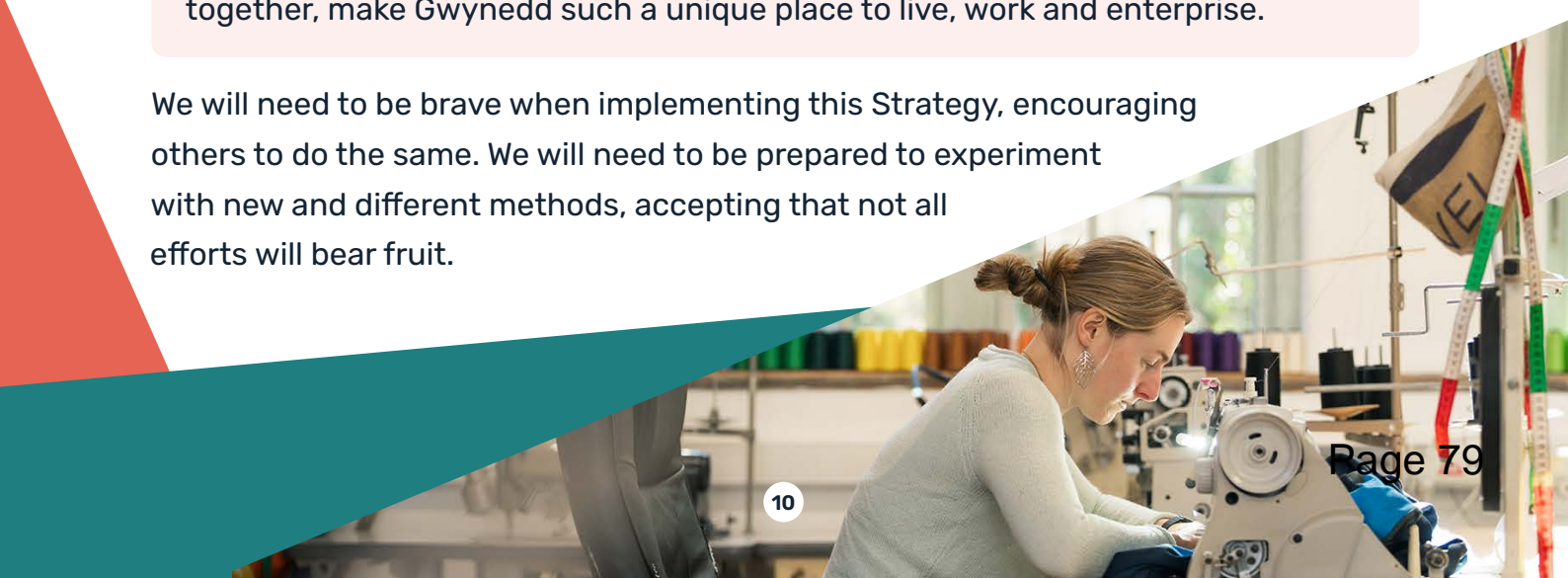
Local roots

Gwynedd enterprises are the essence of Gwynedd's economy, and through them, we are able to retain the wealth that we create locally.

Sustainability

The Welsh language and environment must be nurtured and protected which, together, make Gwynedd such a unique place to live, work and enterprise.

We will need to be brave when implementing this Strategy, encouraging others to do the same. We will need to be prepared to experiment with new and different methods, accepting that not all efforts will bear fruit.



5. DEVELOPING THE STRATEGY FOR GWYNEDD'S ECONOMY

The Strategy was developed through desk-based research and extensive stakeholder engagement between 2024 and 2025. It provides an honest yet ambitious assessment of the economy and has been designed in light of Gwynedd's opportunities, challenges and needs, alongside a clear understanding of what can realistically be delivered by Cyngor Gwynedd and its partners.



RESEARCH AND ENGAGEMENT

The economic profile of Gwynedd was considered first, including its characteristics and performance, how it compares with other areas, and the wider influences affecting the county now or likely to do so in the future. Alongside this research, the strategic and policy context was mapped at county, regional and national levels (Wales and the UK), in order to secure the greatest possible benefit for Gwynedd from a broad range of economic development activities.

Extensive engagement was undertaken with strategic partners, businesses and residents, including meetings with key Council stakeholders involved in economic development. Feedback from Gwynedd businesses was gathered through the Council's Business Surveys in 2024 and 2025, providing a clear picture of the opportunities and challenges they face, the types of support required, and their future intentions.

Responses to the Council's public consultations were also used, including the Ardal Ni Consultation, which focused on Gwynedd's economy and communities. Views were gathered from residents on the strengths of their local areas, aspects requiring improvement, and the changes they would like to see. This provides a valuable measure of what matters to the people of Gwynedd and their vision for the county's economy.

INFLUENCE AND COLLABORATION

Employers across the public, private and third sectors have a key role to play in delivering this Strategy. Much of the change will be realised through their actions, and this requires support—whether through the Council’s direct influence or through working in partnership with others. Areas within local influence are wide-ranging and include business development grants, place-shaping and regeneration schemes, planning and building control, business licensing and trading standards. They also encompass careers advice and support, as well as health interventions and social services to help sustain a healthy, safe and work-ready workforce.

One area of particular importance when developing the economy is to ensure that public contracts support local suppliers. Whether individually, or when forming cooperative enterprises, local suppliers have the capacity to deliver substantial contracts. Keeping the pound local is more important than ever. There is a duty - not only on the Council but also on all our partners - to make a concerted effort to support the local supply chain, through procurement practices and by encouraging individual businesses to use them.

Many of these areas are strongly influenced by national policies of the UK Government and the Welsh Government, where the main decision-making powers reside. As a result, collaboration and influence are essential to ensure the greatest possible benefit for Gwynedd. We will continue to make the strongest possible case to secure a fair share of economic investment from all future sources.

Public, private and joint enterprises will be critical to delivering this Strategy. We are already working on projects through partnership and will continue to maintain and expand our network of funding partners. We will explore traditional and innovative approaches to bringing organisations together to fund appropriate projects for the county.

THE STRATEGIC AND POLICY CONTEXT

This Strategy responds to the relevant strategic context and economic development policies, building on what is already in place in order to add value and ensure the greatest possible benefit for Gwynedd. This context will be monitored throughout the lifetime of the Strategy to ensure it remains relevant and responsive to wider policy changes.

It also acknowledges that Gwynedd forms part of a wider region, with people and businesses working and operating across county boundaries. Gwynedd’s economy cannot thrive without both drawing on and contributing ideas, approaches and talent from within the region and beyond.

LOCAL AREAS

- [Ardal Ni: Local Regeneration Plans](#): In 2022, Cyngor Gwynedd consulted with communities across the county which led to the development of 13 local regeneration plans. Collectively, these form a regeneration framework for the county with economic issues identified as a common theme.
- [Town Regeneration Plans](#): Cyngor Gwynedd has eight plans to improve its main commercial centre, which will be a guide for future investment.
- [Local and community connection](#): A range of networks operate across Gwynedd, including town and community councils and wider local forums, many of which have set out local priorities and needs within strategic documents.

GWYNEDD

- [Cyngor Gwynedd Plan 2023-28](#): The Council's corporate plan identifies A Prosperous Gwynedd amongst its strategic priorities, with the aim of "*strengthening the economy and support the people of Gwynedd to earn a worthy wage*".
- [Gwynedd and Eryri Sustainable Visitor Economy Strategic Plan 2035](#): The Strategic Plan has been adopted by Cyngor Gwynedd and Eryri National Park Authority to deliver their principles for a sustainable visitor economy.
- [Cyngor Gwynedd Language Strategy 2023 - 2033](#): The Language Strategy sets out Cyngor Gwynedd's priorities for promoting the Welsh language and facilitating its use across the county.
- [Cynllun Eryri](#): Cynllun Eryri is Eryri National Park Authority's Statutory Management Plan to protect the unique features of Eryri.
- [Planning Policy](#): Town and country planning responsibilities within Gwynedd are divided between [Cyngor Gwynedd](#) and [Eryri National Park Authority](#).



REGIONAL

- [North Wales Growth Deal](#): Led by the North Wales Corporate Joint Committee, the programme invests £120 million from the Welsh Government and £120 million from the UK Government into a range of projects across five programmes, with the aim of creating 4,000 jobs by 2036.
- [North Wales Skills and Employment Plan 2023-2025](#): The North Wales Skills Partnership provides guidance on the needs of employers and employees within the regional economy.
- [North Wales Regional Economic Framework](#): This framework outlines how the region works collectively towards shared priorities.
- [ARFOR programme](#): ARFOR is a partnership between the councils of Anglesey, Gwynedd, Ceredigion, and Carmarthenshire, which seeks to support the viability of the Welsh language by addressing socio-economic challenges within Welsh-speaking communities.

WALES

- [Regional investment in Wales](#): A Welsh Government Framework which outlines its approach to regional investment.
- [Economic Mission: priorities for a stronger economy](#): Welsh Government Priorities for building a more prosperous, equal, and greener economy based on four priority areas, with a strong emphasis on inclusive growth.
- [Foundational Economy: mission statement](#): A statement of Welsh Government priorities for the sectors it considers fundamental to the economy.
- [Innovation strategy for Wales](#): The Welsh Government's strategy for using innovation to improve people's lives and stimulate the economy.
- [The Well-being of Future Generations \(Wales\) Act 2015](#): **The Act places a duty** on public bodies in Wales to consider the well-being of the population and future generations. The Strategy has been developed in accordance with the principles and purpose of this Act.

THE UNITED KINGDOM

- [Economic Mission](#): Economic growth is the main priority of the current government in London. The aim is to increase productivity and create a competitive, varied, and innovative economy.
- [Industrial strategy. 2035](#): The UK Government Industrial Strategy, *Invest 2035*, is central to its Economic Mission. It identifies eight strategic growth sectors and a range of interventions to support them. The Artificial Intelligence Action Plan also promotes growth by increasing the use of technology across enterprises and the wider economy.

6. THE STRATEGY'S PRIORITIES



OUR VISION

“An innovative, productive and low-carbon economy which strengthens the Welsh language, creates new opportunities and contributes towards everyone's well-being.”



ENTERPRISE

Prosperous local enterprises that excel

PRIORITY ONE

Maximise the value of our current economy

Aim (what?):

Realising the potential of our existing enterprises and sectors by increasing their value, strengthening their resilience and supporting them to reduce emissions.

Activity areas (how?):

- 1.1 Supporting enterprises to become more productive and competitive and create more value.
- 1.2 Supporting enterprises to become more efficient and reduce costs and waste.
- 1.3 Supporting enterprises to adopt and/or respond to new technologies.
- 1.4 Supporting enterprises to innovate by using the resources available to create and develop new products and services.
- 1.5 Supporting local enterprises to reach new markets.
- 1.6 Supporting succession plans that keep ownership local.
- 1.7 Retaining more public spending in the local area.
- 1.8 Regular engagement with Gwynedd enterprises to highlight business opportunities and information.
- 1.9 Supporting the transition to a net zero economy and take advantage of the opportunities that come from that.
- 1.10 Encouraging micro and small enterprises to collaborate in order to build on each other's strengths.
- 1.11 Encouraging and supporting local ownership of economic assets.

PRIORITY TWO

Make the most of new opportunities

Aim (what?):

Supporting and making the most of new industries and activity with substantial potential, ensuring that the benefit stays local

Activity areas (how?):

- 2.1** Attracting investment to create quality employment for the county.
- 2.2** Capitalise on significant investments in the north Wales region to ensure the greatest possible benefits for Gwynedd from the North Wales Growth Deal, Wrexham and Flintshire Investment Zone and Anglesey Freeport.
- 2.3** Supporting local enterprises with potential in new industries and activity, to keep the benefit local.
- 2.4** Supporting local enterprises to take advantage of alternative and private investment opportunities.
- 2.5** Making the most of our strategic assets with potential to attract substantial developments.
- 2.6** Ensuring that new developments in Gwynedd benefit the communities in which they are located.
- 2.7** Ensuring that Gwynedd enterprises take advantage of opportunities arising from major changes in the global economy.
- 2.8** Encouraging and enabling enterprises and education organisations to collaborate on research and development opportunities.





People

A skilled and inclusive workforce

PRIORITY THREE

Securing a skilled workforce

Aim (what?):

Nurturing, attracting and retaining talent, responding to the county's long-term skills requirements

Activity areas (how?):

- 3.1 Supporting Gwynedd enterprises to overcome recruitment challenges and skills needs.
- 3.2 Working with education sector partners in order to plan for long-term skills needs.
- 3.3 Keeping in contact with young people who leave the county, or who consider doing so, and showing the work opportunities here in Gwynedd.
- 3.4 Promoting schemes to attract and develop talent.
- 3.5 Supporting young people not in education, employment or training (NEET) to take advantage of opportunities and achieve their full potential.
- 3.6 Supporting volunteering opportunities.
- 3.7 Encouraging use of alternative work arrangements and patterns to enable more convenient working in terms of location and time, particularly within our rural areas.



PRIORITY FOUR

Supporting our people

Aim (what?):

Supporting the people of Gwynedd to realise their full potential, to obtain quality employment, fair salaries and opportunities locally

Activity areas (how?):

- 4.1 Supporting people who are unemployed, inactive or facing additional challenges into employment.
- 4.2 Supporting people in employment to progress to a better post with higher salaries or more certain work conditions.
- 4.3 Promoting the Real Living Wage amongst the county's employers.
- 4.4 Promoting inclusive types of employment to make it easier for people to be able to work.
- 4.5 Promoting work opportunities that give people security.
- 4.6 Supporting people of retirement age to continue working and volunteering if they wish to do so.
- 4.7 Reducing inequality between men and women to ensure that everyone is treated the same and are able to participate fully in the labour market.
- 4.8 Ensuring that disabled people have fair opportunities, by removing barriers and ensuring equal access to services and to opportunities.





Place

The best conditions to thrive

PRIORITY FIVE

The best possible connectivity and infrastructure

Aim (what?):

Acting for better connectivity and business infrastructure to boost the economy

Activity areas (how?):

- 5.1 Expanding access to the best possible digital connectivity in areas where it is weak.
- 5.2 Pressing for improvements in transportation in order to facilitate the movement of people locally.
- 5.3 Pressing for improvements in the Gwynedd roads network in order to facilitate business development.
- 5.4 Pressing for improvements in local grid capacity and utility infrastructure.
- 5.5 Supporting town centre regeneration plans.
- 5.6 Creating and improving work unit stock in order to ensure suitable provision.



PRIORITY SIX

A great place to live, work and enterprise

Aim (what?):

Promoting Gwynedd as a great place to live, work and enterprise, celebrating the Welsh language and our unique identity

Activity areas (how?):

- 6.1 Building self-confidence and the belief that success can be achieved locally in Gwynedd.
- 6.2 Energising and support the unique cultural and social scene of Gwynedd.
- 6.3 Strengthening the use and visibility of the Welsh language as a unique aspect of Gwynedd's economy.
- 6.4 Engaging with the Gwynedd diaspora to attract different experience, expertise and investment back to the area.
- 6.5 Encouraging more people and enterprises to buy locally.





7. THE STRATEGY IN PRACTICE

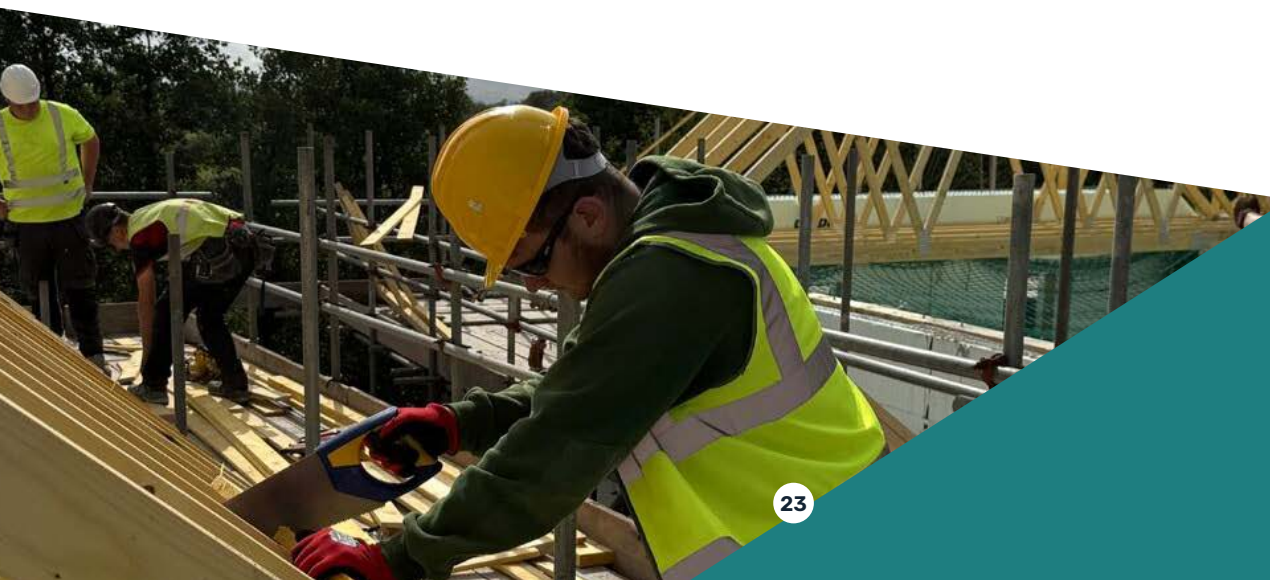
WORKING IN PARTNERSHIP

The Strategy is not a document for a single organisation alone. Its success will require effort across organisations and sectors.

We will build on the positive experience of implementing the UK's Shared Prosperity Fund and the appreciation that organisations have expressed for the opportunity to come together to collaborate, coordinate their efforts, and express the needs of their stakeholders. Therefore, we will establish the '**Gwynedd Economy Forum**' in order to implement the Strategy.

The Forum membership includes the key organisations that contribute to local prosperity, and the bodies working to develop an economy that benefits our communities. The Forum will bring together local partners from the public, private sector and third sectors. Relevant regional and national organisations will also be part of the Forum.

We will ensure that different parts of Gwynedd have a voice in order to maintain awareness of the diversity that exists across the county.



The Forum will formally meet three times a year, to:

1. Formulate and coordinate an annual Delivery Plan for the Strategy.
2. Monitor activities and their individual and composite indicators.
3. Maintain oversight of the progress towards delivering the Strategy.
4. Review and update the Strategy as needed.
5. Maintain oversight of the wider landscape and developments relevant to Gwynedd's economy and lobby on behalf of our needs.
6. Promote and facilitate collaboration between organisations with a role in developing the county's economy and other partnerships / forums.



STRATEGY DELIVERY PLAN

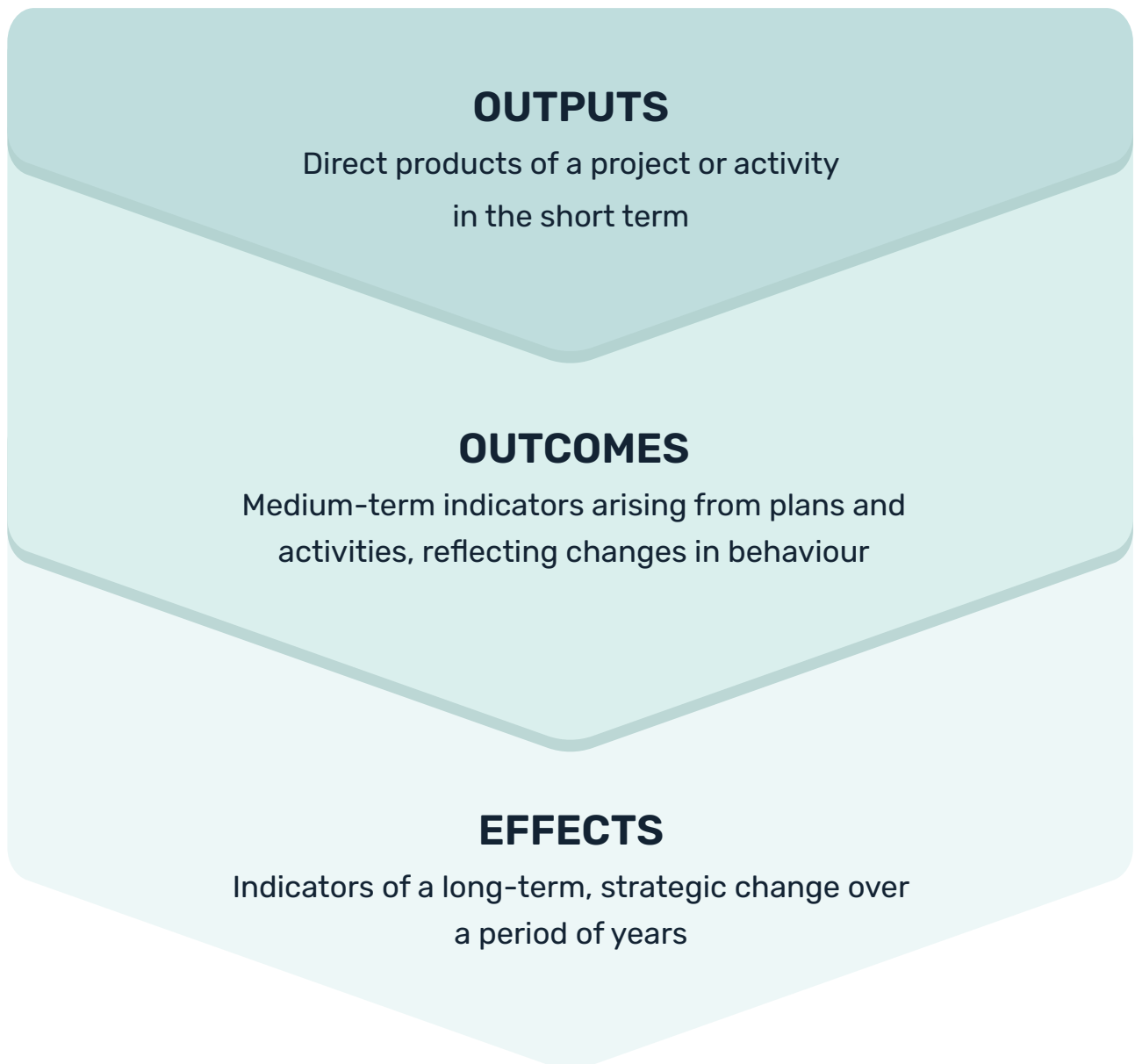
The Strategy sets out the aim and identifies a method of addressing the long-term economic challenges that have been identified for Gwynedd.

An annual Delivery Plan will be prepared under the leadership of the Gwynedd Economy Forum to implement the Strategy. The Plan will include activity already underway, as well as projects in development, identifying their alignment with the Strategy and the areas that will benefit.

The plan will also be a way for the Forum to identify gaps in provision and of influencing regional and national plans.

MONITORING, EVALUATING AND REVIEWING

It is crucial that we can measure what the plans and activities deliver individually, and their composite impact.



By having a consistent selection of indicators, it will be possible to evaluate the impact of activities and review our progress against the Strategy's priorities.

The indicators identified reflect the change needed and the priorities within the Strategy

MONITORING AND EVALUATION FRAMEWORK

THE STRATEGY IN PRACTICE

Outputs - Short Term

A1. Enterprises supported to adopt technology	A11. Enterprises in high value sectors supported to start up or grow	A23. Unemployed, economically inactive or people facing additional challenges supported into employment	A34. Improvements to grid capacity and other utility infrastructure
A2. Enterprises receiving succession support	A12. Major developments engaged	A24. People in work who have received training or support	A35. Work units built
A3. Enterprises supported to transfer to employee ownership	A13. Major developments consented	A25. People of retirement age supported to continue working or volunteering	A36. Commercial floor spaces permitted
A4. Enterprises adopting green technology	A14. Inward investment into capital projects	A26. Disabled people supported into training, work or volunteering	A37. Commercial floor spaces built
A5. Local enterprises engaging with business support	A15. Public sector investment into capital projects	A27. Women supported into training or to return to work	A38. Welsh speakers supported to secure a job and return to the area
A6. Enterprises that have received procurement support	A16. Public sector investment to support the growth of existing businesses	A28. Digital infrastructure improvements supported	A39. Enterprises committing to using more Welsh
A7. Enterprises supported to expand into a new market	A17. Inward investment to support the growth of existing businesses	A29. Number of jobs created	A40. Young people engaged before they graduate from education
A8. Enterprises supported to win public sector contracts	A18. Enterprises receiving recruitment support	A30. Towns that have received investment	A41. Enterprises supported to increase spending in the local supply chain
A9. Enterprises supported to become more productive and competitive	A19. People enrolled in a qualification	A31. Empty buildings returned to use	A42. Cultural or social activities supported
A10. Manufacturing enterprises supported to start up or grow	A20. Young people who are not in education, employment or training (NEET) receiving support	A32. Public spaces improved	A43. Number of activities to promote positive perceptions of Gwynedd
	A21. People supported through schemes to attract and develop talent	A33. Improvements to transport connectivity	
	A22. People supported to volunteer		

Outcomes - Medium Term

C1. Enterprises remaining locally owned following founder's retirement	C10. Major developments spending with local enterprises	C17. Enterprises paying the Real Living Wage as a result of support	C25. Enterprises located within new work units or new commercial floor spaces
C2. Enterprises more productive as a result of support	C11. Enterprises reporting a reduction in recruitment challenges	C18. People in employment as a result of support	C26. Enterprises using more Welsh as a result of support
C3. Enterprises that have reduced their carbon footprint as a result of support	C12. People gaining a qualification as a result of support	C19. People of retirement age in employment or volunteering as a result of support	C27. People who have participated in a cultural or social activity
C4. Increase in business start-up rate	C13. NEET young people in education, training or work as a result of support	C20. Disabled people who have received training, are in employment or volunteering following support	C28. People engaged in activities to promote positive perceptions of Gwynedd
C5. Increase in business survival rate	C14. People volunteering as a result of support	C21. Individuals/businesses with access to improved digital infrastructure	C29. Enterprises creating an action plan to use the Welsh language
C6. Public sector spending with local enterprises	C15. People who were unemployed, economically inactive or facing additional challenges in employment	C22. Residents living / visiting towns that have received investment	
C7. Increase in spending in the supply chain in North Wales	C16. People increasing their earnings (increased hours/wages) as a result of support	C23. People benefitting from improved transport connectivity	
C8. Enterprises being established or growing as a result of inward investment		C24. Increase in the number of visitors to town centres	
C9. Enterprises being established or growing as a result of public sector investment			

Effect - Long Term

E1. Gwynedd economy's productivity gap narrowing compared to Wales, UK and similar areas	E7. An economy that will be better able to seize global opportunities	E14. Household income closer to the average in Wales and the UK	E20. Reduction in the risk that grid capacity or other infrastructure will restrict or delay development
E2. Proportion of businesses hiring closer to the Welsh and UK average	E8. Business growth increases as talent supply strengthens	E15. Part-time working rate closer to the average in Wales and UK	E21. Reduction in the barrier that transport connectivity creates for jobseekers
E3. Increase in the proportion of medium-sized enterprises	E9. The skills level in the county maintained and improved	E16. Reduction in the rate of children in workless households	E22. Reduction in the rate of young people emigrating from the county
E4. Growth in employment across the economy, particularly in the high value/high productivity sectors	E10. Reduction in young people not in education, employment or training (NEET)	E17. Increase in the rate of people over the age of 50 continuing to work	E23. Increase in the perception that Gwynedd is a good place to live or venture among young people
E5. A more diversified economy by sector	E11. Increased sense of community pride and community engagement	E18. Digital infrastructure availability rate closer to the average in Wales and UK and better than similar areas	E24. Reduction in the rate of people commuting from the county
E6. Growth in employment across the economy, particularly in the high value/high productivity sectors	E12. Economic inactivity rate closer to the average in Wales and UK	E19. Town centres that are more resilient and sustainable, with fewer dilapidated or vacant buildings	E25. Increase in the use of Welsh across the county
	E13. Narrowing in the average pay gap with Wales and the UK		E26. Communities where the percentage of speakers has been maintained or improved

SOURCES

- i. 73% of Gwynedd's working age population is in employment, which is lower than Wales (73.7%) and the United Kingdom (UK) (76.6%) [Annual Population Survey: summary of economic activity | StatsWales](#)
- ii. Nomis employment and unemployment data for the period October 2024 – September 2025 for the working age population (18–64) shows that 11.9% of the workforce in Gwynedd is self employed, compared with 7.9% in Wales and 9.5% in the UK
[Labour Market Profile - Nomis - Official Census and Labour Market Statistics](#)
- iii. Workers in Gwynedd earn some of the lowest weekly wages in the UK, averaging £669.20 per week, compared with £719.30 in Wales and £766.60 in the UK. Nomis data on weekly and hourly pay by workplace shows that Gwynedd is below the Wales and UK averages
[Labour Market Profile - Nomis - Official Census and Labour Market Statistics](#)
- iv. Welsh Government data on GVA for 2023 shows £23,848 per head for Gwynedd, £27,395 per head for north Wales, £25,742 for Wales and £35,661 for the UK
[Gross value added by Welsh local authority and year | StatsWales](#)
- v. Office for National Statistics productivity data for the period 2002–2023 shows GVA per filled job of £43,076 in Gwynedd, compared with £53,042 on average in North Wales and £66,402 in the UK
[GVA per filled job by Local Authority - Office for National Statistics](#)
(Table B3 / line 347, line 6 and average of line 346–351)
- vi. Office for National Statistics data measuring productivity for the period 2004 to 2023, showing GVA of £29.30 per hour worked in Gwynedd in 2023, a growth of 43% since 2004
[GVA per hour worked by Local Authority - Office for National Statistics \(Table A3 / line 347\)](#)
- vii. Welsh Government data on qualifications for working age adults (18–64) in 2024 shows that 4% of adults in Gwynedd have no qualifications, compared with 8.5% in North Wales and 7.9% in Wales.
[Working-age adults with no qualifications by region and local authority | StatsWales](#)
- viii. Welsh Government data for 2024 also shows that 70.6% of working age adults in Gwynedd hold qualifications at Level 3 (A Level) or above, compared with 69.1% in North Wales and 68.6% in Wales.
[Working-age adults qualified to Level 3 or above by region and local authority | StatsWales](#)
- ix. Nomis economic inactivity data for the period October 2024–2025 shows that 32.7% of economically inactive working age people in Gwynedd want a job, around 60% higher than Wales (19.3%) and the UK (20.5%).
[Labour Market Profile - Nomis](#)
- x. Office for National Statistics business demography data shows that 55.2% of businesses established in Gwynedd survive for five years, the highest five year survival rate in Wales, compared with 38.1% across Wales and 38.4% in the UK. [Business survival rates by area and birth year | StatsWales](#)
- xi. Welsh Government enterprise size analysis for 2025 shows that 94.6% of businesses in Gwynedd are micro enterprises (0–9 employees), similar to 94.3% in North Wales, 94.6% in Wales, and 95.8% in the UK.
[Welsh Government data – number of micro-enterprises](#)
- xii. Welsh Government data on enterprise size and industry in 2025 shows that 230 enterprises in Gwynedd (1.4%) employ 250 or more people, compared with 1.0% in North Wales and 0.7% in Wales.
[Welsh Government data – number of large enterprises](#)
- xiii. Office for National Statistics data on the number of businesses by sector in each county (2025)
[UK business: activity, size and location - Office for National Statistics](#) (Table 1, Gwynedd row 345)
- xiv. Office for National Statistics data on the number of businesses by sector in each county (2025)
[UK business: activity, size and location - Office for National Statistics](#) (Table 1, Gwynedd row 345)
- xv. [Size analysis of businesses by industry \(SIC2007\), size band, area and year | StatsWales](#)

xvi. **Economic Contribution by Sector**

The sectors have been grouped in a way that enables data to be compared and the information to be present-ed in a manner that is relevant and meaningful to the people of Gwynedd.

GVA: Office for National Statistics (ONS) data on Gross Value Added (GVA) for Gwynedd shows the GVA contribut-ion of each sector against the defined sector groups. Imputed rental of owner occupied properties, valued at £308 million (almost 11% of the total), has been excluded as it does not represent genuine productive activity within the economy.

[Regional gross value added \(balanced\) by industry \(Table 3c\)](#)

Number of jobs: ONS data on employment by sector is sourced from the [Business Register and Employment Survey \(BRES\)](#). The data includes working business owners, as this captures self employed individuals—a group that is particularly well represented in Gwynedd.

Number of enterprises: ONS data on the number of enterprises is sourced from the [Inter Departmental Business Register \(IDBR\)](#). This includes the number of enterprises only, rather than the number of local units.



PHOTOS

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APPENDIX 2

Gwynedd Economy Strategy – Engagement Report

GWYNEDD 2035

An Economy that Works for All

An innovative, productive and low-carbon economy which strengthens the Welsh language, creates new opportunities and contributes towards everyone's well-being

Overview

This report provides a summary of the engagement work undertaken over the twelve-month period from November 2024 to the end of October 2025 in connection with the development and production of the Gwynedd Economy Strategy.

Extensive engagement was undertaken with stakeholders, including the Council's strategic partners, as well as businesses and residents across the county. A series of one-to-one meetings was held with the Council's key partners in the field of economic development at county, regional and national levels, with input received from the public and private sectors, as well as third-sector organisations.

In order to gather input from Gwynedd's business community, the Council's Business Surveys for 2024 and 2025 were used. These surveys captured messages from businesses regarding their future intentions, the opportunities and challenges they face, and the types of support they require. The survey results are available on Gwynedd Council's website: [Gwynedd Council Business Survey 2024](#).

Wide-ranging engagement sessions were also held to capture the views of stakeholders and Council Members during the development of the Strategy and the draft policy.

Feedback was received on the themes and priorities to be included, the strengths and weaknesses of Gwynedd's economy, the county's needs and challenges, and the opportunities that should be responded to.

In addition, a high-level assessment of the Strategy's alignment with the requirements and aspirations of the Well-being of Future Generations (Wales) Act was undertaken. The outcome of this assessment informed the development of Section 3 of the Strategy (The Case for Action)

Engagement approach

Meetings were arranged with strategic partners and external stakeholders on a one-to-one basis, as well as attendance at group meetings.

Stakeholders who have provided input into the Strategy include representatives from:

- Welsh Government
- Ambition North Wales
- North Wales Skills Partnership
- Business Wales
- Bangor University
- Eryri National Park Authority
- Adra Housing Association
- Federation of Small Businesses (FSB) Wales

- Mantell Gwynedd
- GISDA
- Gwynedd and Eryri 2035 Sustainable Tourism Partnership
- National Farmers' Union (NFU) and Farmers' Union of Wales (FUW)
- Gwynedd Social Enterprise Network
- Menter Môn

An effort was also made to secure feedback from experts in the fields of community wealth building and the foundational economy through Professors Karel Williams and Julie Froud (Foundational Economy Research Ltd).

In addition to external partners, the Strategy was discussed with a range of officers within the Council, including:

- Language and Equality Unit (Corporate Services)
- Procurement Unit (Corporate Services)
- Sustainable Visitor Economy Plan (Economy and Community)
- *Llechen Lân* Strategy (Corporate Leadership Team)

A list of sample questions was developed to support and stimulate discussion with stakeholders (attached).

Response

Useful comments and suggestions were received from partners and stakeholders regarding the direction and content of the Strategy. Following these discussions, amendments were made during the policy development process to reflect the feedback received.

The responses identified a number of overarching themes, and the feedback has been summarised under the following headings:

- Workforce and skills
- The context within Gwynedd
- Local communities
- The Welsh language and the culture of Gwynedd
- Collaboration
- Businesses
- Infrastructure
- Environment

Comments provided prior to the development of the Strategy are set out below:

Theme	Issues Raised	Response
Workforce and skills	Recruitment challenges	Priority 3, Point 1 addresses this specifically
	A need to provide training and to increase the skills of the workforce to meet the specific requirements of available jobs. Apprenticeships are an important means of achieving this; however, challenges arise due to a lack of sufficient advance notice of major developments.	Priority 3, Point 2 addresses this specifically. The Foreword also refers to the funding landscape.
	A need to invest in young people to reduce the number who disengage from education.	Priority 3, Point 5 addresses this specifically.
	Address the challenge of retaining young people in the area, and to attract them back to the area to work.	Priority 3, Point 3 addresses this specifically.
	Equality within the workforce is important	Priority 4 Point 4, 7 and 8 address this specifically.
	Conditions that encourage the creation of high-quality jobs for the people of Gwynedd are needed.	Priority 1 and 2 contribute to this and Priority 4 Point 2, 3 and 5 refer to working conditions.
Context	The regional economic context of Gwynedd's economy should be demonstrated.	Section II – <i>Gwynedd Economy Profile</i> provides detailed consideration of this issue.
	Reference the challenge posed by short-term funding programmes.	This is referenced in the Foreword.
	The need for consistency and alignment with other Council strategies, for example the Well-being Plan, the Procurement Strategy and the Language Strategy.	Section V – <i>Developing Gwynedd's Economy Strategy</i> considers this in detail.
Local Communities	Ensure that support is available across the whole county, including rural areas, and that resources are targeted fairly, rather than opportunities being concentrated in specific areas.	Priority 5, in its entirety, addresses this issue.
	The need to retain local benefits from enterprise expenditure.	Priority 6 Point 5 addresses this specifically.
	Encourage the procurement of local services and products	Section V – <i>Influence and Collaboration</i> refers to supporting

		local suppliers, and Priority 1, Point 7 also refers to this.
	Consider how to ensure that local communities benefit from tourism.	The <i>Gwynedd and Eryri 2035 Sustainable Visitor Economy Strategic Plan</i> has been considered within the strategic context. The Foreword refers to tourism.
Welsh language and the culture of Gwynedd	The vital role of the Welsh language in employment and in the county's economy should be prioritised and safeguarded.	This forms one of the core values highlighted within the Strategy. Priority 6, Point 3 refers to this specifically.
	The important contribution of the arts and heritage to Gwynedd's economy should be recognised	Priority 6 Point 2 refers to this specifically.
Collaboration	Collaboration between the Council, local and regional partners, and communities in order to deliver the Strategy should be ensured	Section V – <i>Influence and Collaboration</i> refers to this. Section VII – <i>Delivering the Strategy</i> sets the foundation for the establishment of the Gwynedd Economy Forum.
	There is a need for a forum to promote economic partnership working.	Section VII – <i>Delivering the Strategy</i> sets the foundation for the establishment of the Gwynedd Economy Forum.
Businesses	The Strategy should include support for businesses and enterprises, including the need for assistance to enable business growth and development.	The purpose of Priority 1 as a whole is to support businesses and enterprises.
	Support for entrepreneurs in developing their businesses is needed	Priority 1 addresses this issue.
	The need for premises and workspace for growing businesses.	Priority 5 Point 6 addresses this specifically.
	Encourage opportunities arising from major developments.	Priority 2 Point 6 and 7 address this specifically.
	Encourage collaboration and networking between enterprises	Priority 1 Point 10 addresses this specifically.
Infrastructure	A response to challenges relating to community transport and public transport is needed.	Priority 5 Point 2 addresses this specifically.

	The geography of the county, including transport needs and digital Connectivity should be referenced.	Priority 5 Point 1 and 3 address this specifically.
Environment	Major developments should demonstrate that they protect and safeguard the environment.	Section IV – <i>The Change Required</i> refers to this issue.

Following its development, a draft version of the Strategy was circulated to partners and stakeholders in order to gather feedback on the document. An effort was also made to seek the views of the Council's Elected Members through Cabinet Members and the Education and Economy Scrutiny Committee.

Overall, there was widespread support for the Strategy; however, a number of comments were provided, as detailed below. The final document was amended to reflect the suggestions arising from the feedback received.

Theme	Issues Raised	Response
Workforce and skills	Working patterns and flexible ways of working need to be referenced.	Priority 3 Point 7 addresses this specifically.
	The upskilling of young people, and to utilise key educational institutions within the county to provide training to meet demand in new sectors and industries needs to be addressed.	Section IV – <i>The Change Required</i> and Priority 3, Points 2, 3, 4 and 5 address this specifically.
Context	Reference to opportunities arising from statutory and national influences is needed	Section V – <i>Developing the Strategy</i> refers to this.
Local Communities	Tourism should be referenced in the Foreword	Included.
	Strengthen the reference to procuring local services and strengthening the local supply chain in order to retain expenditure and benefits locally across the public and private sectors	Included in Sections V and VI. Priority 1, Point 7 and Priority 6, Point 5 address this specifically.
	Need to show that resources will be targeted towards deprived and rural areas	Section IV – <i>The Change Required</i> refers to the improvements expected to arise from delivering the Strategy.
	The Freeport should be referenced.	Included in Priority 2, Point 2.
Welsh language and the culture of Gwynedd	There is a need to demonstrate that Welsh identity and culture are important for growth.	Included in the Foreword and Priority 6.

	It is positive that the Welsh language is reflected in the vision, but a desire for the language to be more prominent within the priorities	The Vision and Priority 6, Point 3 specifically refer to this.
	Reference to the bilingual nature of Gwynedd	Included in Section II – <i>Economic Profile</i> . Priority 6 also addresses this.
	To be explicit that the Strategy is relevant to the Welsh language and local communities	This is one of the core values highlighted within the Strategy. Priority 6 as a whole addresses this.
	Reference to Cyngor Gwynedd’s Language Strategy	Included within the Economic Profile.
Collaboration	It should be demonstrated more clearly that Council departments will work together and collaborate with major external bodies	Section V – <i>Influencing and Collaboration</i> addresses this.
	Provide more information on the role of the Gwynedd Economy Forum	Section VII – <i>Delivering the Strategy</i> addresses this.
	Place greater emphasis on strategic partners delivering the Strategy alongside the Council	The Foreword, Section V – <i>Influencing and Collaboration</i> , and Section VII – <i>Delivering the Strategy</i> address this.
	Stronger reference to influencing governments to maximise economic investment in Gwynedd and to collaborate in attracting investment	Section VII – <i>Delivering the Strategy</i> addresses this.
	The references to increasing links between the University and Gwynedd communities, and to utilise expertise and resources to undertake research that benefits the economy need to be strengthened.	The Foreword and Section V – <i>Influencing and Collaboration</i> address this.
Businesses	Greater reference to attracting and encouraging private sector investment	Section V – <i>Influencing and Collaboration</i> and Priority 2, Point 1 address this.
	Hospitality and agriculture should not be grouped together, as they are very different sectors	The Foreword has been amended to reflect this.
	No reference to piloting or testing new and innovative ideas is made; there is a need to recognise existing community innovation hubs also.	Priority 1, Point 4 addresses this.

Infrastructure	There is a need for clarity regarding which infrastructure is being targeted	Priority 5 sets out specific targets.
	Strengthen the consideration of commuting and active travel across the region	Priority 5, Points 2 and 3 address this.
Delivering the Strategy	There is a need for clear indicators linked to the priorities, which can be used to measure the success of the Strategy. Include outputs to demonstrate the number of jobs created	The Monitoring and Evaluation Framework includes indicators. Included within the Monitoring and Evaluation Framework.
	An annual review of progress and learning through delivery of interventions should be included.	The Gwynedd Economy Forum will undertake this, as set out in Section VII.
	There is a need for an indicator to measure the impact on the number of Welsh speakers holding professional roles	This is difficult to measure in practice.
	Objectives could be clearer in terms of how they will be delivered and which are most critical; support expressed for the monitoring framework	The Monitoring and Evaluation Framework includes indicators to be measured.
	There is a need to show more clearly how interventions will improve the economy and which sectors will be targeted	Section IV outlines the key improvements to the economy. The annual Delivery Plan will set out more detailed targets.

Monitoring and Evaluation Framework

A framework was developed to measure the impact of the Strategy, with indicators selected specifically to address the themes raised through the engagement process.

Expert professional advice was also sought from specialists in the field of economics in order to standardise the selection and ensure that the indicators align with the Vision and the Priorities set out in the Strategy.

Conclusion

A significant effort was made over an extended period to engage with partners from a range of sectors, as well as experts across a variety of fields relevant to the economic development of Gwynedd. Comments were received to help shape the direction and content of the Strategy prior to the commencement of the document drafting process, and wide-ranging feedback was also gathered on a draft version to ensure that relevant issues had been adequately addressed.

Sample Questions to Stimulate Discussion with Stakeholders

1. What aspects should be reflected in the strategy's vision statement?
2. What aspects should be reflected in the strategy's priorities?
3. What economic challenges need to be overcome in Gwynedd, within your sector or your local area?
 - What are the main barriers limiting economic growth?
 - Are there any specific barriers related to skills or technological infrastructure?
4. What economic opportunities do you feel could be capitalised upon?
 - Which areas have potential for growth or innovation?
 - How can the Council make the most of these opportunities?
5. Do you have any plans or activities that will contribute to the economic development of the county?
6. What key priorities should the new Economic Strategy focus on?
 - In your view, which actions would have the most positive impact on the local economy?
 - Do you feel that specific strategies are needed for individual sectors, or a more general strategy?
7. How can we promote sustainable development and green growth within the local economy, and ensure that the benefits of development are retained locally?
8. How can the Strategy contribute to the vitality of the Welsh language in Gwynedd?
9. Are there any additional ideas or feedback you would like to share in relation to the Strategy?

Composite Impact Assessment

This document assesses the impact that the policy, procedure, plan etc. will have on the population of the county and is undertaken based on a number of legislative requirements.

- **The Equality Act 2010.** It places a duty on public bodies to give due regard to the impact that any new (or amended) policy, procedure, plan etc. may have on people with protected characteristics. We are required to:
 - eliminate unlawful discrimination, harassment and victimisation and other behaviour prohibited by the Act.
 - promote equality of opportunity between people who share a relevant protected characteristic and those who do not.
 - foster good relations between people who share a protected characteristic and those who do not.

In Wales, the specific duty sets out the requirement to conduct an impact assessment following specific guidance, to consider the effect that any change to a policy or procedure (or the creation of a new one) will have on people with protected equality characteristics. An assessment must be undertaken in a timely manner before any relevant decision is made (i.e. one that affects people with a protected equality characteristic).

- **Socio-economic Duty.** Wales has now implemented this additional duty, which forms part of the Equality Act 2010, placing a requirement on public bodies to address socio-economic disadvantage in strategic decisions.
- **Welsh Language Standards (Section 44 of the Welsh Language Measure (Wales) 2011).** The Council is required to consider the impact that any change to a policy or procedure (or the creation of a new one) will have on opportunities for people to use the Welsh language, and to ensure that Welsh is not treated less favourably than English. This document therefore ensures that these decisions protect and promote the use of the Welsh language.
- **Well-being of Future Generations (Wales) Act 2015.** The Council has a duty to implement the five ways of working and to respond to the seven national well-being goals.
- **Armed Forces Act 2021.** Councils must give due regard to the impact of this proposal on those who are serving or have served in the Armed Forces, as well as their families.

Gwynedd Economic Strategy Equality Assessment 30/01/2026

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STEP 1 - Main Aims and Objectives of the Policy or Practice

1. What kind of document or procedure is being assessed?

Set objectives (for example, well-being objectives, equality objectives, Welsh Language strategy)

2. What are the aims, objectives and intended outcomes of the policy or practice?

The vision of the Gwynedd Economic Strategy is to foster an innovative, productive and low-carbon economy which strengthens the Welsh language, creates new opportunities and contributes to everyone's well-being. The aim of this new Strategy is to ensure inclusive and sustainable growth, so that individuals, businesses and community enterprises in Gwynedd genuinely benefit from the economy. The Strategy will remain in place until 2035.

By identifying the county's strengths and weaknesses, together with the opportunities available and the areas in need of improvement, the objective is clear: to enable the people and enterprises of Gwynedd to reach their full potential, creating new benefits and opportunities for the future.

3. Who are the main advisory groups (stakeholders)?

Gwynedd Businesses

The people and communities of Gwynedd

Community enterprises

Social enterprises

Gwynedd's educational institutions

STEP 2 - Engagement Data and Impact Assessment

4. Has an attempt been made to comply with the duty to engage in accordance with what is described above and has sufficient information been gathered to proceed?

Yes

Details of engagement. Please note any consultation or engagement you have made or intend to do

Stakeholder	Date	Information
Chief Officer Mantell Gwynedd	21/11/24	<p>Areas to consider in the Strategy: Staff recruitment is challenging for community enterprises. Need to measure the social value of projects and invest in the places that contribute more. Community transportation challenges need to be addressed. Need to promote and protect the environment of Gwynedd and the Welsh language.</p>
Bangor University business department officers	21/11/24	<p>Areas to consider in the Strategy: Need to show the regional context to Gwynedd's economy Start-ups need support to develop Increase the link between the university and the communities of Gwynedd – to use the expertise and resources to increase the skills of the workforce, to conduct research. Comments on draft: Welsh identity and culture are important for growth. Need clarity on which infrastructure is being targeted Include work patterns in Place / People More space to plan</p>
Chief Executive of GISDA	26/11/24	<p>Initial input to the Strategy: The challenge of having short-term funding programs, and the importance of equality need to be addressed. Need to demonstrate that there is collaboration between the different departments in the Council to deliver the Strategy Supportive of keeping more of the benefit local Greater emphasis on the value of the arts</p>
Chief Executive of Eryri National Park	03/12/24	<p>Consultation to gather input for the strategy: There was strong support for the ambition to develop a Strategy. It was noted that there is a need to target actions towards the rural areas of the county. Apprenticeships were highlighted as important to address the skills required for available jobs and to help retain young people in the area</p>

Gwynedd and Anglesey Services Board	03/12/24	<p>Consultation to gather input for the strategy: Ensure that the Strategy aligns with the current Well-being Plan.</p> <p>Address how to retain young people, attract them back to the area, and prioritise the Welsh language within employment.</p> <p>Consider how to ensure that the local community benefits from tourism</p>
Federation of Small Businesses (FSB)	13/12/24	<p>Consultation to gather input for the strategy: The strategy needs to be realistic – ambitious but achievable. The geography of the county needs to be considered – transport needs and digital connectivity.</p> <p>Address how to take advantage of tourism to bring benefits to the local economy. Include support for businesses in the strategy.</p>
Procurement Manager Cyngor Gwynedd	08/01/25	Supportive to the reference to procurement. The Economy Strategy needs to be aligned with the Procurement Strategy.
County advisor NFU	27/05/25	Consultation to gather input for the strategy
Representative of the Gwynedd Community Enterprise Network	29/07/25	Consultation to gather input for the strategy
Ambition North Wales	21/11/25	Comments on the draft: Supportive but have corrected some of the facts on projects in the Delivery Plan
Skills Manager - North Wales Regional Skills Partnership	01/25 & 31/10/25	Consultation to gather initial input for the strategy and then comments on the draft: Very positive about the strategy. Specific work programmes could be referred to by the Skills Partnership.
Senior Language Consultant Cyngor Gwynedd	07/02/25 & 28/10/25	Consultation to gather initial input for the strategy and then comments on the draft: Positive that the Welsh language gets attention in the vision. Eager for the language to have a more prominent place in the priorities, and to have an indicator to measure the impact of the number of Welsh speakers holding professional positions. Reference should also be made to the Council's language strategy.
Welsh Government	21/02/25 & 31/10/25	Consultation to gather initial input for the strategy and then comments on the draft: The document is well structured, but the strategic intent needs to be better strengthened. It could be better shown how objectives will be realized, and which ones are most key. Provide more information about the role of the Gwynedd Economy Forum. Supportive of the monitoring framework.

Gwynedd Sustainable Tourism Partnership Representative	28/07/25	Comments on the draft: Need to focus more on attracting inward investment. Tourism should be referred to in the preface, and is there room to refer to the tourist levy?
Business Wales	31/07/25	Consultation to gather input for the strategy: Need to demonstrate the importance of collaboration with partners, quality and sustainable growth.
Chief Executive Grŵp Llandrillo-Menai	21/08/25	Comments on the draft: Supportive but need to address upskilling young people to meet the demand for new industries. Collaboration between enterprises, organisations and communities is important.
Director of Policy and Delivery - Adra Housing Association	15/09/25	Comments on the draft: The Strategy hits the mark in terms of the main areas. Need for clear indicators linking to the priorities that could be used to measure success Need to address how to encourage private sector investment, and the role of Governments. Strengthen the direction of keeping spending local and procurement.
Scrutiny committee Cyngor Gwynedd	16/10/25	Comments on the draft: It needs to be demonstrated that resources will be targeted towards deprived and rural areas. Need to ensure that departments work together. The hospitality and agriculture sectors should not be coupled – they are very different. Need to review what has been achieved annually
Managing Director Menter Môn	30/10/25	Comments on the draft: Supportive that the important economic role of social enterprises is recognised. It needs to include how to support and encourage social enterprises to grow, and guidance on realising the potential of cultural and heritage assets. There is no reference to trialling new ideas or acknowledging the innovation hubs that exist. The reference to the local supply chain needs to be strengthened.

5. What information is available about the impact on each of the characteristics and topics below?

	Relevant Evidence, Information and Data	Potential Positive and/or Negative Impact
Race	No evidence	No impact recognised so far
Disability	The percentage of properties with access to gigabyte connectivity (>1,000 Mbps) is	Positive Impacts from the implementation of the Strategy: Improving accessibility to Gwynedd's

	<p>below the Welsh and UK averages, with a higher proportion of properties also having weak connectivity (<15 Mbps). Reach of 4G – and 5G is also lower in Gwynedd.</p> <p>Therefore, there is not as much opportunity for employers to offer hybrid or work-from-home terms.</p> <p>The employment rate for disabled people in Gwynedd is lower as a percentage than in Wales and the United Kingdom.</p>	<p>business buildings</p> <p>Increasing digital inclusion among the people of Gwynedd</p> <p>Increasing digital infrastructure in Gwynedd that will allow more services and businesses to operate online</p> <p>Encourage employers to adopt inclusive recruitment practices, including accessible interviews and flexible jobs</p> <p>Increasing diversity in the workforce</p> <p>Increasing opportunities and jobs for people with diverse needs</p> <p>Reducing the pay gap in the local economy</p> <p>Ensure that Gwynedd's businesses and enterprises adhere to and implement legislation, accessibility standards and the rights of disabled and/or neuro-diverse people</p> <p>The council is part of a disability scheme <i>Hyderus</i> up to level 2, and age-friendly.</p>
Gender	<p>There are more men than women in employment, and women's average weekly wage is lower than men's</p> <p>Labour Market Profile - Nomis - Official Census and Labour Market Statistics</p>	<p>Reduce the gender pay gap by offering more flexible opportunities and reduce the impact of seasonal wages and part-time work.</p> <p>Increase the opportunities for women to return to work after maternity leave.</p>
Age	<p>Population ageing faster than the Welsh and UK average, and high levels of emigration among young people creating a challenge to maintain a skilled and adequate workforce.</p>	<p>Reduce pressure on the labour market by supporting people of retirement age to continue working or volunteering if they wish.</p> <p>Increase the number of people over 50 in employment by improving the digital inclusion of the workforce, improving the flexibility of working conditions in Gwynedd, and increasing training and advice for career change or re-entry.</p> <p>A more skilled workforce by ensuring that suitable training is available to young people for the industries/careers/sectors available in Gwynedd, which in turn will increase the number of young people employed in the county.</p> <p>More young people who are not in work are supported on the journey from education to employability.</p>

Religion and belief	No evidence gathered so far	No impact recognised so far
Sexual orientation	No evidence gathered so far	No impact recognised so far
Gender reassignment	No evidence gathered so far	No impact recognised so far
Marriage and Civil Partnership	No evidence gathered so far	No impact recognised so far
Pregnancy and Maternity	<p>More men than women are in employment, and women's average weekly wage is lower than men's</p> <p>Labour Market Profile - Nomis - Official Census and Labour Market Statistics</p>	<p>Increased job security for pregnant women, by reducing the risk of insecure contracts or unstable hours.</p> <p>Increasing the opportunities for women to return to work after maternity leave, by encouraging more flexible and supportive working conditions from initiatives in Gwynedd.</p> <p>Improved access to training and career development after a period of maternity leave.</p> <p>Encourage employers to adopt more inclusive policies that support women after a period of maternity leave – e.g. gradual return, flexible hours, health support, childcare</p>
The Welsh Language	Gwynedd is the Welsh county with the highest percentage of Welsh speakers	<p>Strengthening the visibility and use of Welsh – the language will be part of the customer experience and in the workplace.</p> <p>Access to services and activities by county enterprises will be improved.</p> <p>Ensuring employment opportunities that support the language, this will enable Welsh speakers to stay in their communities or return.</p> <p>A monitoring framework will include the commitment to use the Welsh language by the county's enterprises.</p>
Socio-Economic Considerations	<p>The county's inactivity rate (i.e. the proportion of the population aged 16-64 who are not in work) is higher than the average for North Wales and the UK.</p> <p>The average weekly wage of a full-time worker and gross household spending income</p>	<p>Reducing poverty and deprivation by seeking to raise wages and secure stable jobs, which in turn will increase household incomes.</p> <p>Supporting individuals who are unemployed or inactive to overcome barriers to employment or training.</p> <p>Seek to ensure that no community or group is left behind by promoting inclusive</p>

	<p>have been consistently lower in Gwynedd since 2010 than the Welsh and UK averages. Significantly higher rates of employees in Gwynedd are part-time and seasonal employees compared to Wales and the UK.</p> <p>Low wages and part-time jobs cause high levels of poverty in rural and urban areas, with in-work poverty particularly high in Gwynedd compared to Wales and the UK.</p>	<p>employment to enable people of different backgrounds and ages to work.</p> <p>Strengthening local communities through the regeneration of infrastructure and town centres.</p>
Those who serve or have served in the armed forces, together with their families	No evidence gathered so far	No impact recognised so far
Human Rights	No evidence gathered so far	No impact recognised so far
Other	Not applicable	Not applicable

6. Are there any data or information gaps, and if so, what are they and how will they be addressed?

A comprehensive consultation has been undertaken, and no gaps have been identified

7. When considering other key decisions that affect these groups, is there an incremental impact (cumulative effect)?

There is an increasingly positive impact as the Strategy is a long-term plan.

8. What does the proposal include to demonstrate that you have given due regard to the Public Sector Equality Duty (to promote equality of opportunity; help eliminate unlawful discrimination, harassment or victimisation; and foster good relations and wider community cohesion), as encompassed by the three aims of the General Duty in the Equality Act 2010?

The strategy seeks to promote equality and prevent discrimination through several concrete approaches – it emphasises that no person, area or community is to be left behind, and aims to ensure that employment opportunities, training and support for entrepreneurship are available to all, regardless of their socio-economic background, age or location.

There will be support to overcome barriers for people who are unemployed or inactive due to additional challenges.

There will be plans to prevent young people from being NEET (not in employment, education or training). The strategy seeks to ensure inclusive forms of employment by promoting flexible working patterns and alternative arrangements to enable people from different backgrounds, including parents, carers and people with disabilities, to work.

Volunteering opportunities to strengthen skills and community cohesion will be supported – this will encourage people within a community to come together through different activities. This will foster good relationships within communities and wider cohesion on community and social plans.

9. How does the proposal demonstrate that due regard has been given to the need to address inequality arising from socio-economic disadvantage? (Note that this relates to closing inequality gaps rather than simply improving outcomes for everyone.)

The county's enterprises will be encouraged to pay the Real Living Wage to reduce poverty for those in work.

There will be equitable access for all to skills and training including under-represented groups.

Short, medium and long-term indicators will be monitored to assess progress towards an inclusive economy, for example:

- number of people being supported to overcome barriers
- the number of businesses committing to fair pay
- number of individuals from underrepresented groups taking advantage of opportunities.

10. How does the proposal demonstrate compliance with the requirements of the Welsh Language Standards (Welsh Language (Wales) Measure 2011), to ensure that the Welsh language is not treated less favourably than English, and to secure opportunities for people to use the Welsh language? Furthermore, how will the proposal be delivered in line with the Council's language policy and strategy to take every opportunity to promote the Welsh language (beyond providing bilingual services) and to increase opportunities to use and learn the language within the community?

The current Language Policy of Cyngor Gwynedd is based on the principle that Welsh is the Council's natural language and that Welsh is the main administrative and public language, with all services, meetings, correspondence and signage being bilingual but with priority given to Welsh. It ensures that the public and staff receive a full service in Welsh, that Welsh language skills are essential for all posts, and that organisations receiving support from the Council are also expected to promote the Welsh language.

One of the main priorities of the Strategy is to 'Promote Gwynedd as a great place to live, work and venture, celebrating our unique identity and the Welsh language.' Priority will be given to strengthening the use of the language in the workplace and among customers, ensuring that Welsh is visible and naturally used within enterprises in the county.

The Strategy recognises that economic factors influence language transmission, especially in households facing poverty. By creating quality jobs and fair wages, it seeks to reduce the economic pressures that contribute to the loss of the language.

Ensuring employment opportunities for Welsh speakers is a key focus of the Strategy, aiming to retain young people locally by creating attractive jobs and reducing emigration – one of the main causes of the decline in the number of Welsh speakers. It also promotes opportunities for local people to progress into managerial and professional roles.

The Strategy emphasises the importance of Gwynedd’s cultural scene as part of the economy, supporting events and activities that promote the language and local identity.

11. How does this proposal meet the requirements of the Well-being of Future Generations Act by implementing the five ways of working, and respond to the seven national well-being goals, including creating a More Equal Wales?

Five Ways of Working in Practice

Involvement:

Feedback from Gwynedd residents through the *Ardal Ni* consultation and two surveys of Gwynedd businesses was used to understand the needs of people, communities and enterprises. Meetings were held with key partners to ensure a diversity of perspectives and expertise.

Long-term:

The Strategy sets a clear direction for the future despite funding uncertainty. It addresses long-term economic gaps such as low productivity, an ageing population, poor digital connectivity and low wages.

Prevention:

The Strategy proactively responds to prevent a series of socio-economic problems from worsening by raising productivity levels, strengthening connectivity, creating a more diverse industrial base, increasing skills, and keeping more of the benefits locally. Expected outcomes include more stable jobs, higher wages, reduced poverty, a green economy and a thriving Welsh language.

Integration:

The Strategy aligns with the Council’s existing plans and local regeneration frameworks. It also complements tourism and procurement plans to retain benefits within the local area.

Collaboration:

The Strategy has been developed with input from partners in the public sector, private bodies and community enterprises. Local action plans will be co-developed with partners throughout the Strategy period (2025–2035).

Responding to the Seven Well-being Goals

1. A Prosperous Wales:

The Strategy’s vision is for an economy that places emphasis on the socio-economic well-being of the population, rather than traditional macro-economic indicators.

2. A Resilient Wales:

Gwynedd has exceptional natural assets that make it one of the best places to live and work. Protecting and enhancing the environment is therefore central to the Strategy – with action intended to reduce waste, encourage circular and green business practices, promote and take advantage of new opportunities in the green economy, and advocate for improvements to local grid capacity to make renewable and low-carbon energy developments more viable in Gwynedd.

3. A Healthier Wales:

People living in poverty, with insecure work or low wages are often more likely to experience poorer physical and mental health. The Strategy works to improve wages and working conditions, which will ultimately help improve the health of the people of Gwynedd. The Strategy also recognises that enjoying one's work is important for mental health, therefore ensuring that people access jobs that provide satisfaction is a key consideration.

4. A More Equal Wales:

A core priority of the Strategy is supporting the people of Gwynedd to reach their full potential by accessing quality work, fair wages and local opportunities. Practical steps to achieve this include:

- Supporting people who are unemployed, inactive or facing barriers to work.
- Helping people already in work to move into better jobs with fairer pay and conditions.
- Promoting the Real Living Wage.
- Promoting inclusive employment to make work more accessible.
- Promoting secure employment opportunities for the people of Gwynedd.
- Supporting older people to continue working or volunteering if they wish.

The Strategy also seeks to prevent young people from leaving Gwynedd for work-related reasons, by creating local opportunities and demonstrating that it is possible to build a successful future here.

5. A Wales of Cohesive Communities:

Connectivity is a fundamental part of the Strategy because broadband coverage is weaker than average in Gwynedd, particularly in rural areas. Action will therefore be taken to improve digital connectivity, ensuring that more people and businesses have access to fast and reliable broadband.

6. A Wales of Vibrant Culture and Thriving Welsh Language:

The Welsh language is central to the Strategy. It recognises that economic factors can influence the viability of the language in Welsh-speaking communities such as Gwynedd. The Strategy therefore works to prevent or reverse language shift and to increase the use and visibility of Welsh among customers and in the workplace.

Any business or enterprise receiving support from the Council will be required to demonstrate progress in its use of the Welsh language, and a new monitoring system has been created to verify

this.

The Strategy also recognises the importance of Gwynedd's culture, particularly in contributing to energy, identity and a rich social life locally, and a specific priority area addresses this.

7. A Globally Responsible Wales:

The Strategy looks beyond Gwynedd, recognising that many people from Wales living abroad are keen to support their home communities. This presents an opportunity to bring their experience, expertise and talent back to Gwynedd, and this group is being specifically targeted.

In addition, the Strategy supports the global movement towards a net-zero economy, responding to the climate emergency.

STEP 3 - Procurement and Partnerships

12. Will this policy or practice be undertaken as a whole or in part by contractors or in partnership with other organisation(s)?

Yes

What action will be taken to comply with the General Equality Duty, Human Rights and Welsh language legislation and the Socio-Economic Duty in relation to procurement and/or partnerships?

Procurement:

The Strategy promotes the duty by the Council and their partners to support local suppliers in the procurement of services and the appointment of contractors.

Any tender documents and specifications will follow Cyngor Gwynedd's procurement policies and comply with any relevant rules and legislation.

Partnerships:

The Strategy promotes the duty by the Council and their partners to support local suppliers in the procurement of services and the appointment of contractors.

Any tender documents and specifications will follow Cyngor Gwynedd's procurement policies and comply with any relevant rules and legislation.

STEP 4 - Dealing with Negative or Unlawful Impact and Strengthening the Policy or Practice

13. When considering proportionality, does the policy or practice cause a significant positive or negative impact, or create unequal outcomes?

Significant Positive Impact:

1. More secure jobs and fair wages – the Strategy will help create quality jobs, reduce job insecurity, and promote the Real Living Wage.

2. Reducing poverty and socio-economic disadvantage – by improving household incomes and offering local employment opportunities, there will be less in-work poverty and deprivation.
3. Retaining young people and talent locally – employment and training opportunities will reduce the emigration of young people and attract talent back to the county.
4. Improved skills and access to training – training programmes and skills initiatives will ensure a skilled workforce for emerging industries.
5. Strengthening the Welsh language and Gwynedd’s culture – businesses will increase their use of Welsh, and support for the cultural scene will promote local identity.
6. Improved digital connectivity and infrastructure – investment in broadband and transport will in turn create more accessible and diverse employment opportunities.
7. A green and sustainable economy – the Strategy supports a net-zero economy, creating opportunities in green technologies and protecting the environment.

Significant Negative Impact:

1. Funding uncertainty – delivering the Strategy depends on funding from the Welsh Government, the UK Government and partners. If funding is not available, some projects may be unable to proceed. As the Strategy is long-term, it is hoped that any available funding can be channelled into delivering the projects that will bring the greatest benefits to the people of Gwynedd.
2. Implementation risks – major projects can take a long time to complete, which may lead to delays before results are seen. This could in turn cause frustration among businesses and communities.
3. Unequal impact – resources will need to be targeted carefully to avoid some areas or groups benefiting more than others, which could increase inequality within the county. The Delivery Plan will consider the geographical spread of projects to ensure that all areas benefit and to reduce geographical inequality.

14. Any intentional negative impact should be explained and why it is believed that there is justification for such action (for example, on the basis of improving equal opportunity, or fostering good relationships between those who share a protected characteristic and those who do not, or because of objective justification or affirmative action).

Not applicable

15. Will any of the negative impacts identified count as unlawful but unavoidable discrimination (e.g. funding reduction)?

No

Please note the reason for saying so and the justification for continuing

Not applicable

16. What other measures or changes could be included in order to strengthen or change the policy/practice to demonstrate that due attention has been given to the promotion of equal opportunities; helping to eradicate unlawful discrimination, harassment or persecution and

foster good relationships and wider community cohesion; as addressed in the General Duty of the Equality Act 2010?

As consideration has already been made, no additional measures have been identified at this time.

17. What other measures or changes could be included to strengthen or change the policy/practice to demonstrate that due attention has been given to the need to reduce disproportionate outcomes as a result of socio-economic disadvantage?

As consideration has already been made, no additional measures have been identified at this time.

18. What other measures or changes could be included in order to strengthen or change the policy/practice to demonstrate that due regard has been given to the need to increase opportunities for people to use the Welsh language and not to treat the Welsh language less favourably than English in accordance with the Welsh Language (Wales) Measure 2011 and to reduce or prevent any adverse effects that the policy/practice may have on the Welsh language?

As consideration has already been made, no additional measures have been identified at this time.

19. Whether there is enough information to form a balanced opinion and move forward?

Yes

STEP 5 – Decision to Proceed

20. Given the information gathered in Steps 1-4, is it possible to proceed with the policy or practice or not, and if so, on what basis?

Proceed with the policy in its current form

STEP 6 - Actions and Arrangements for Monitoring Results and Reviewing Data

The IEA process is an ongoing one and does not end when the policy/practice and the IAE have been agreed and implemented. There is a specific legal duty to monitor the impact of the policies/practices on equality on an ongoing basis to identify whether the outcomes have changed since you introduced or modified this new policy or practice. If you do not have the relevant data, you should be taking action to correct this in your action plan.

21. What actions identified in Steps 1-5 or any additional data collection work will assist in monitoring the policy/practice when implemented:

Action	Dates	Timeline	Lead Responsible	Add to Service Plan
Present to Cabinet	10/03/2026	once	Sioned Williams	Yes
Present to Full Council	14/05/2026	once	Sioned Williams	Yes

22. What arrangements to monitor and review the ongoing impact of this policy or practice will be implemented, including timeline for when it should be formally reviewed:

Monitoring and Reviewing Arrangements (including where the results will be recorded)	Timeline and Frequency	Lead Responsible	Add to Service Plan
Strategy Delivery Plan	Annually	Economy Department Officers	No



APPENDIX 4

TITLE **Assessment of the Well-being of Future Generations (Wales) Act 2015**

1. PURPOSE OF THE ASSESSMENT

- 1.1. This assessment introduces the Gwynedd Economic Strategy, and explains how the Strategy has been developed, and how it meets the requirements and purpose of the Well-being of Future Generations (Wales) Act 2015.

2. REQUIREMENTS OF THE ACT

- 2.1. The Well-being of Future Generations (Wales) Act 2015 places a responsibility on public bodies in Wales to act in a sustainable manner and contribute to the well-being of today's generations, as well as future generations. It considers well-being in a holistic manner, including economic and social, environmental and cultural aspects.
- 2.2. Decisions made by public bodies are required to meet two requirements – the Five Ways of Working and the Seven National Well-being Goals. The Five Ways of Working identify a series of actions that should be acted upon when making decisions, and the Seven Well-being Goals outline the long-term outcomes towards which to contribute.

Five Ways of Working (Principles of Sustainable Development for Wales):

- Involvement
- Long-term action
- Prevention
- Integration
- Collaborate

National Well-being Goals:

- A Prosperous Wales
- A Resilient Wales
- A Healthier Wales
- A more Equal Wales
- A Wales of Cohesive Communities
- A Wales of Vibrant Culture and Thriving Welsh Language
- A Globally Responsible Wales

3. THRIVING WALES

- 3.1. While the well-being goals are holistic and interdependent, *it is a prosperous Wales* that looks most at economic issues. It is defined in the following way:

"An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing [...] fair work."

It recognises the value and importance of productivity, but stresses that "prosperity" is not growth for its own sake. Rather, the emphasis is on socio-economic well-being – on life outcomes, not traditional economic indicators, without overusing the planet's resources.

- 3.2. In his [2025 Annual Report](#), the Future Generations Commissioner said that economic policy in Wales has not moved sufficiently towards a wellbeing economy model (p. 86.), and that this should be done at all levels, including local government. In its definition, it includes decent work, fair and local procurement, local economies, skills for the future and a low-carbon society.

- 3.3. In light of these definitions, it is argued that the vision of the Strategy aligns very closely with the meaning of the well-being aim emphasised by the Commissioner:

"An innovative, productive and low carbon economy which strengthens the Welsh language, creates new opportunities and contributes to everyone's well-being."

The vision is defined against five principles that focus on the well-being needs of the people of Gwynedd:

- **To live with dignity:** That everyone should receive enough to sustain themselves and their families, to have full and happy lives without wanting for anything.
- **Opportunities:** That every individual should be able to access the opportunities they need to realise their full potential, regardless of their socio-economic background.
- **Fairness:** That no area, person or community should be left behind.
- **Local roots:** That Gwynedd's enterprises are the essence of Gwynedd's economy, and through them, we are able to retain the wealth that we create locally.
- **Sustainability:** That the Welsh language and environment must be nurtured and protected which, together, make Gwynedd such a unique place to live, work and venture.

4. PRINCIPLES OF SUSTAINABLE DEVELOPMENT

METHOD	HOW WAS IT IMPLEMENTED?
<p>CONTENT</p> <p>To elicit input from individuals and groups with an interest and/or expertise in relevant issues, and to reflect the diversity of the area served.</p>	<ul style="list-style-type: none"> ▪ The messages conveyed by the people of Gwynedd in the <i>Ardal Ni</i> Consultation (2022) were used to identify what the people of Gwynedd feel is good about their local areas, and the things that need to be improved. These messages have been incorporated into the vision of the Strategy to ensure that we reflect what is important to the people of Gwynedd. It is a useful resource for understanding the views of Gwynedd residents, and the diversity of views in different parts of the county. ▪ Enterprises in Gwynedd were invited to respond to two <i>Business Surveys</i>, the first in 2024 and the second in 2025. While hospitality businesses have been somewhat over-represented, there have been responses from businesses in a diverse range of industries. Messages were conveyed about businesses' intentions for the future, the challenges they face and the types of support they value. The Strategy responds to this input, particularly in its treatment of Gwynedd's enterprises – responding, e.g., to the challenges they have identified, including recruitment. ▪ The economic terrain is complex and involves policy actors at many levels. In order to elicit input from the greatest possible variety of actors and bring their expertise, a series of meetings were organised, including with the following bodies: Welsh Government, Business Wales; Federation of Small Businesses Wales; the agricultural unions (FUW, NFU Cymru); North Wales Ambition Board; North Wales Skills Partnership; Snowdonia National Park; Bangor University; Grŵp Llandrillo-Menai; Gwynedd Community Enterprise Network, and; Mantell Gwynedd for the volunteer field in Gwynedd.
<p>LONG-TERM ACTION</p> <p>Identify long-term trends and plan for them in a way that is balanced with short-term needs.</p>	<ul style="list-style-type: none"> ▪ The policy and economic planning context is uncertain and rapidly changing in Wales. There is uncertainty as to the future of funding schemes from the Welsh and UK governments, and there is an increasing emphasis on regional collaboration. This Strategy responds to these uncertainties, setting a long-term strategic direction, regardless of the funding plans provided to the Council and its partners. ▪ The Strategy responds to a series of "gaps" that reflect the structural underperformance of the economy in Gwynedd over the longer term, when compared to Wales and the UK. Over half of them are National Well-being Indicators and show Gwynedd's relative disadvantage in terms of economic well-being: <ul style="list-style-type: none"> ○ Productivity Gap (Well-being Indicator 09): The value of what is produced in Gwynedd (per hour worked; per job filled) is substantially lower than the Welsh and UK averages in 2023, and the productivity growth rate in Gwynedd is substantially lower than the Wales and UK averages since 2004. ○ Industrial Gap: A relatively narrow range of industries, with employees and enterprises more numerous in a smaller range

of industries.

- **New Enterprise Gap:** The business start-up rate in Gwynedd is amongst the lowest across Welsh counties in 2023, below the Welsh national average and significantly below the UK average.
- **High Performance Gap:** The percentage of enterprises that saw an increase of 20% in the number of employees over a three-year period was consistently lower in Gwynedd than in Wales and the UK between 2018 and 2023.
- **Digital Connectivity Gap (Well-being Indicator 50):** The percentage of properties with access to gigabyte connectivity (>1,000 Mbps) is lower than the averages for Wales and the UK, with a higher proportion of properties also having the weakest connectivity (<15 Mbps). 4G and 5G coverage is also lower in Gwynedd.
- **Workforce Gap (Well-being Indicator 21):** The unemployment rate is low, but the county's inactivity rate (i.e., proportion of population aged 16-64 who are not in work) is higher than the average for North Wales and the UK.
- **Population Gap:** The population is ageing quicker than in Wales and the UK, with a higher proportion of older people of retirement age and high levels of outward migration among young people.
- **Pay Gap (Well-being Indicator 10):** The average weekly salary of a full-time worker and household gross disposable income has been consistently lower in Gwynedd since 2010 than the Welsh and UK averages.
- **Work Conditions Gap (Well-being Indicator 16):** Substantially higher rates of workers in Gwynedd are part-time and seasonal employees, compared with Wales and the UK.
- **Well-being Gap (Well-being Indicators 18 & 19):** Low salaries and part-time jobs cause high levels of poverty in rural and urban areas, with in-work poverty particularly high in Gwynedd compared to Wales and the UK.

- Along with these long-term "gaps", other long-term trends that are likely to have an impact on the Strategy and its effectiveness have also been identified:
 - Moving to a net-zero and low-carbon economy is an economic opportunity; but, if the new wealth created is to be preserved locally, it is necessary to ensure that the people of Gwynedd have the skills to take advantage of work and business opportunities.
 - New technologies, e.g., artificial intelligence is an opportunity; but poses risks, especially if the people and businesses of Gwynedd are not attuned to the latest developments and able to respond to them effectively.
 - The language shift in Gwynedd is partly influenced by the economy (Welsh Communities Commission, 2024); e.g., lower language transmission in socio-economically disadvantaged households.

PREVENTIVE ACTION

Prevent problems from happening in the first place or getting worse.

- The Strategy deliberately responds to a series of "gaps" where Gwynedd performs below national averages or peers, and which create socio-economic wellbeing problems. The following changes are therefore implemented which, in essence, seek to alleviate the "gaps" or prevent them from getting worse. On the one hand, structural change in the economy, including:

- **Raising the productivity levels of our enterprises and workers** to stimulate higher salaries and better working conditions.
 - **Increasing the competitiveness of our native enterprises** so that they are more effective and efficient, realising their long-term business objectives and creating quality jobs.
 - **Strengthening digital connectivity and the county's business infrastructure** to create the best possible conditions for enterprise.
 - **Creating a more diverse industrial foundation** with local enterprises in a range of industries, creating new opportunities and a more resilient economy.
 - **Supporting our people to gain the skills they need**, so that they, along with the enterprises that employ them, can take full advantage of opportunities;
 - **To retain more of the wealth created in Gwynedd locally**, in order to maximise benefits for Gwynedd's people, enterprises and communities, and;
 - **Building a net zero and naturally Welsh economy**, that is environmentally and culturally sustainable.
- This is primarily done in order to prevent or reduce the socio-economic wellbeing challenges faced in Gwynedd. To this end, the change implemented will include:
 - Higher salaries and gross household income;
 - More people employed in stable jobs;
 - Lower levels of poverty and socio-economic disadvantage;
 - Broader variety of employment opportunities locally;
 - More people able to stay, live and work in their local communities;
 - More people enjoying their work and realising their full potential;
 - A green economy that protects the county's exceptional natural environment, and;
 - A Welsh economy which increases the use and visibility of the language with customers and in the workplace across Gwynedd.

INTEGRATE

To act in a way that is compatible with, and adds value to, rather than undermines other plans and priorities.

- The Strategy builds upon the strategic direction already set out in the Council's Plan: *"Strengthening the economy and supporting the residents of Gwynedd to earn decent wages"*. The Strategy takes this direction, but because it is one of several corporate priorities, the purpose of this Strategy is to define the economic vision in further depth and to pay particular attention to the economy; that is to ensure priorities and meaningful action.
- The new Economic Strategy lies alongside the Gwynedd and Snowdonia Sustainable Visiting Economy Plan, following the direction set out in that Plan for tourism, and complements its vision for a sustainable wellbeing economy.
- *Gwynedd Ni* is Gwynedd Council's local regeneration framework. It focuses on 13 local areas across the county. To ensure

	<p>meaningful action in each of these local areas, individual action plans will be prepared for them and added to the framework. The content of these schemes will be co-developed with the Council's local partners – local representatives, community enterprises and private and charitable bodies.</p> <ul style="list-style-type: none"> ▪ The Strategy has been developed in conjunction with the Council's new Procurement Plan, meaning that they blend very closely together, particularly when trying to keep the benefits of public spending local.
<p>COLLABORATE To act in collaboration with partners (both internal and external) and with enterprises and the people of Gwynedd.</p>	<ul style="list-style-type: none"> ▪ The Strategy has been developed in light of the input provided by a series of partners, as listed above in the Content Section. It recognises that it will be necessary to work with them to maximise the value of the Strategy and that the Council as a single body cannot act independently. Therefore, this Strategy lives up to the forces that are in the hands of the Council, as well as the forces that lie in other bodies. ▪ The Strategy recognises that the people and enterprises of Gwynedd are the essence of the local economy. Therefore, the Council will continue to elicit their input over the full duration of the Strategy, including the annual Business Surveys. There will also be a need to continue to work together in the implementation of the Strategy's projects. ▪ The local action plans developed in light of the Strategy will be co-created with the Council's local partners – local representatives, community enterprises and private and charitable organisations. This will ensure co-production and co-operation over the full lifetime of the Strategy, 2025-35.

5. HOW WILL THE NATIONAL WELL-BEING GOALS BE MET?

Thriving Wales

"An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing fair work."

See Part 3. The vision of the Strategy is explained very closely with the Future Generations Commissioner's definition of the Prosperous Wales goal, i.e., an economy that places emphasis on the socio-economic well-being of the population, not traditional macro indicators.

A Resilient Wales

"A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change."

Gwynedd has an exceptional natural wealth which makes it one of the best places to live and work. Therefore, protecting and nurturing the environment is central to the Strategy,

Action is planned to reduce waste, encourage circular and green ways of doing business, promote and take advantage of new opportunities in the green economy, and push for improvements in grid capacity locally to make renewable and low carbon energy developments more feasible in Gwynedd.

A Healthier Wales

"A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood."

It is known that people who are socio-economically disadvantaged, facing low wages, job insecurity or poverty, are more likely to face poorer physical and mental health. Improvements in pay and working conditions will be implemented in the Strategy – and this, in due course, will have a positive structural impact on health outcomes.

It is also recognized in the Strategy that mental health is partly shaped by the enjoyment gained from work, or not. Therefore, ensuring that people in Gwynedd have access to work that they enjoy is also important.

A more Equal Wales

"A society that enables people to fulfil their potential no matter what their background or circumstances."

Unleashing the potential of the people of Gwynedd is a central objective in the Strategy, and it is emphasized on several occasions in the document itself. At the moment, the "gaps" which mean that Gwynedd is underperforming economically when compared to Wales and the UK, mean that the people of Gwynedd face a relative disadvantage - and, as such, face structural challenges reaching their full potential. Therefore, action will be taken to mitigate the "gaps" and prevent them from worsening across the Strategy's six priorities.

In particular, the fourth priority – *Supporting Our People* – deals

specifically with supporting people to reach their full potential: *"Supporting the people of Gwynedd to reach their full potential, to access quality employment, fair salaries and opportunities locally."* It consists of the following operations:

- Supporting people into work who are unemployed, inactive or facing additional challenges;
- Supporting people in work to get better jobs with higher wages, or more secure working conditions.
- Promoting the Real Living Wage among the county's employers.
- Promoting inclusive forms of employment to make it easier for people to be able to work.
- To promote employment opportunities that provide security to the people of Gwynedd.
- Supporting older people of retirement age to continue working and/or volunteering, where they want to do so.

It is also known that many of the young people who leave Gwynedd do so not because they necessarily want to leave, but because they feel it is necessary to do so to find work. Because of this, the migration challenge is specifically addressed to support young people to be able to succeed locally, regardless of their background and aspirations.

Wales of Cohesive Communities

"Attractive, viable, safe and well-connected communities."

Connectivity is an essential part of the Strategy, particularly in light of the digital "gap" which means that broadband connectivity is weaker in Gwynedd. Improvements in broadband connectivity are therefore being implemented, especially in rural areas facing the weakest digital connectivity.

A Wales with a Vibrant Culture where the Welsh Language Thrives

"A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation."

The Welsh language is central to the Strategy. Structural economic influences are known to have an impact on the viability of the Welsh language in those communities with a high density of Welsh speakers (Welsh Communities Commission, 2024), including Gwynedd – and the Strategy fully accepts that. The Strategy will act to mitigate or reverse the language shifts faced in Gwynedd and are partly driven by the economy, as well as increasing the use and visibility of the Welsh language more generally in Gwynedd, both among customers and in the workforce.

The largest language shifts include:

- Emigration of young people – More likely to be speaking Welsh.
- Local people are under-represented in the highest managerial positions in Gwynedd, and;
- Households with one or more Welsh speaking parents but

who are at socio-economic disadvantage, are less likely to pass on Welsh to children.

Any body, enterprise or business in receipt of support from the Council, whether financial or non-financial, will have to demonstrate an increase in their use of the Welsh language; and a new monitoring document has been developed for this purpose.

The Strategy also recognises the importance of Gwynedd's cultural scene, particularly in creating vibrance and a rich social life locally – and as an important aspect of the economy. Because of this, culture is specifically addressed in the sixth priority of the Strategy.

A Globally Responsible Wales

" A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being."

There is an international orientation to the Strategy. It recognises that Gwynedd and Wales have an international "diaspora" which often looks back to Wales and wants to make a difference to the communities it originally came from. It is an opportunity to bring resource, expertise and talented people back to Gwynedd, and they are targeted in the Strategy to do so.

Beyond this opportunity, the Strategy supports the move towards a net zero economy due to the climate change crisis internationally.

6. CONCLUSION

- 6.1. Following this assessment, it is concluded that Gwynedd's Economic Strategy very closely meets the requirements and purpose of the Well-being Act. The Five Ways of Working have been fully incorporated into the development of the Strategy, and there is a clear well-being orientation in it – an orientation that veers from a traditional focus on economic growth for its own sake, towards a new model of economic development that prioritises the socio-economic well-being of the population.

MEETING	Full Council
DATE	14 May, 2026
SUBJECT	Visitor Levy
PURPOSE	Decide whether to implement a public consultation procedure on the introduction of a Visitor Levy in Gwynedd
AUTHOR	Roland Evans Assistant Head of Economy and Community Department
CABINET MEMBER	Cllr R.Medwyn Hughes

The Decision Sought

1. To publish a Report setting out the Gwynedd Visitor Levy Proposal;
2. To consult on the Proposal to introduce the levy in accordance with the consultees listed in paragraph 5.4 and 5.5 of this report;
3. To notify the Welsh Revenue Authority, in accordance with the statute, of its intention to consult on introducing the Levy.

Background and Context

1. Background

- 1.1. On 24 November 2024, the Welsh Government published the Visitor Accommodation (Register and Levy) Etc. (Wales) Bill.
- 1.2. The Bill was approved by Senedd Cymru on 8 July 2025, and received Royal Assent on 18 September 2025, The Visitor Accommodation (Register and Levy) Etc. (Wales) Bill.
- 1.3. The Act sets out the requirements for introducing new legislation to register holiday accommodation in Wales and introduces legislation that gives individual local authorities the right to introduce a Visitor Levy in their individual areas.
- 1.4. Since 2018, the Council has stated its support of the principle of establishing a Visitor Levy in Wales.
- 1.5. In 2019 research by Cyngor Gwynedd, 'Benefiting from Tourism', identified that a levy would bring the greatest benefits to the area in terms of potential income that could be generated to support the destinations of Gwynedd and Eryri.
- 1.6. Reports researching Holiday Homes produced by Cyngor Gwynedd in 2019-2020 identify the need to establish a licensing scheme for short-term holiday lets.
- 1.7. The financial position of Local Authorities and other public bodies highlights the need to seek to identify new sources of income for supporting the visitor economy and respond to increasing financial challenges to maintain county-wide infrastructure and the opportunities arising from having visitors in our area.

- 1.8. Over the last 5 years, the Council and Eryri National Park Authority have worked hand in hand with community, business and public partners to develop the Gwynedd and Eryri 2035 Plan – A plan to support a sustainable visitor economy in the area. The Plan sets out our strategic priorities to ensure a sustainable visitor economy in Gwynedd and Eryri.
- 1.9. In terms of the sector profile and visiting pattern, according to Beauforts' 2019 research report, the majority of visitor groups to Gwynedd are either couples (29%) or family groups with young children (24%). Gwynedd had a slightly higher proportion of family groups with older children visiting than the Welsh average (19% of visitors to Gwynedd had older children or a combination of older and younger children, compared to 12% across Wales as a whole). The average number of people in each party visiting is 4.3 (3.4 adults and 0.9 children), which is slightly higher than the Wales average of 3.7 (2.8 adults and 0.9 children)
- 1.10. It must be recognised that a number of voices are raising concerns about the state of the visitor economy in the wake of Covid-19, the 182 day rule, the Article 4 Direction and the cost of living crisis. The Council has held discussions on the principle of establishing and implementing a Levy in the past with the sector and intends to continue to do so.
- 1.11. *Promoting our Culture and a Sustainable Visitor Economy* have been included as priority projects in the Cyngor Gwynedd Plan under the A Prosperous Gwynedd Priority. Considering national legislation on the Visitor Levy and consultation through the Gwynedd and Eryri Partnership 2035 (G&E2035) is one of the year 3 and 4 milestones of the Plan.
- 1.12. A Report was submitted to the Scrutiny Committee on 12 February 2026 to scrutinise the impact of the introduction of a Levy in Gwynedd and the considerations for doing so. The Scrutiny Committee's decision was:
- a. To accept the report and note the observations.
 - b. Recommend to the Cabinet Member for Economy and Community:
 - To ensure that full consideration is given to all the complexities involved in introducing this new levy.
 - If the Council decides to introduce a Visitor Levy:
 - That there is a specific commitment on how the money raised would be spent, giving priority to areas relating to tourism and the community.
 - That thorough consultation takes place across the county and with relevant partners to identify community priorities.
 - There needs to be transparency with those who pay the levy regarding how the money will be spent.
 - That communication about exceptions is effective and sensitive as necessary.

2. The Visitor Accommodation (Registration and Levy) Etc. (Wales) Act

- 2.1. All Visitor Accommodation Providers in Wales will be required to register their premises and some of these details will be made available to the public. All holiday

lets will have to register even if a Local Authority does not choose to adopt the Levy in their area.

- 2.2. The Welsh Revenue Authority (WRA) will manage the Register and manage the collection of the Levy on behalf of Local Authorities. Cyngor Gwynedd will have no role in the operation of the registration, enforcement and levy collection procedure.
- 2.3. The registration of visitor accommodation will give Cyngor Gwynedd a much clearer picture of the numbers of visitor beds available in the County – but it will not give a picture of the use of those beds in any year.
- 2.4. Powers are given to local authorities to adopt a visitor levy by resolution of the Full Council.
- 2.5. Money raised through the Levy will be spent by local authorities on managing sustainable destinations.
- 2.6. Visitor Accommodation Providers file returns to the WRA and pay the Visitor Levy based on the number of stays per person, per night.
- 2.7. The Act notes levy scales. The rates are:

Type of accommodation	Rate (per person, per night)
Tenting campsites and shared bedrooms (hostels and dorm)	£0.75c £0.90p inc VAT
All other types of holiday accommodation (caravan, motorhome, self-catering, glamping, bed and breakfast, hotel, etc.)	£1.30 £1.56 inc VAT

- 2.8. There are limited exceptions to the visitor levy
 - a. young people under the age of 18 from the lowest rate of levy (shared hostels, rooms or tent campsites)
 - b. anyone who stays more than 31 nights in a single stay; and
 - c. emergency or temporary housing arranged by the local authority.

3. Decision-making process, outline timetable and considerations

- 3.1. The Full Council will have to decide on the introduction of a Visitor Levy in Gwynedd.
- 3.2. Before doing so certain steps based on statute or Statutory Guidance need to be implemented:
 - a. The WRA must be notified of the intention
 - b. Publish a report setting out its proposals which sets out an estimate of the output of the levy, information on how the output is intended to be used and the Council's proposals for membership of the Levy Board. (Appendix 1 – Gwynedd Levy Proposal).
 - c. The report must be submitted to the WRA
 - d. A statutory consultation must be held

- e. In addition to and in accordance with the Statutory Guidance it is necessary to prepare an Economic, Social and Environmental Impact Assessment. (Appendix 2 + 3).
 - f. It is also of course required to prepare general impact assessments in terms of Equality, the Welsh Language etc. (Appendix 4)
- 3.3. At present, the position of other counties in Wales varies in relation to the Levy with some already indicating that they will not consult on the introduction of a levy in the short / medium term (Powys / Pembrokeshire) and Cardiff have approved to give notice to the WRA that they will be implementing the Levy from 1 April 2027.
- 3.4. Discussions have taken place over the last few months with the Isle of Anglesey County Council and Conwy County Borough Council to co-ordinate the timetable and consultation work on the Levy and also to work together on commissioning Impact Assessments. The three counties will work together to ensure that our consultation and decision-making schedules are aligned.
- 3.5. The Act provides that a Levy may be introduced from 1 April or 1 October in any financial year – but 12 months' notice must be given following consultation and a decision by the Full Council.
- 3.6. Due to the need to undertake meaningful public consultation and to coincide with pre-election periods, the earliest Gwynedd can implement a Levy would be 01 October 2027 following 12 months' notice.
- 3.7. A final decision will be made following the completion of the consultation and the matter being brought back to Full Council for consideration.

4. Assessment of the Levy in Gwynedd and research and information matters

- 4.1. It must be noted that the quality and reliability of the data available at a national level not to mention the Gwynedd level in order to assess the impact of the introduction of a Levy is extremely challenging and limited as it does not exist in many cases. The ability to receive more detailed and reliable data on visitor numbers and visitor bed use is highly unlikely unless there would be significant expenditure and according to forecasts there is no assurance of any additional data nor confirmation that the data would not date almost instantaneously.
- 4.2. For a number of years the Council has considered how visitors could make a contribution to supporting a sustainable visitor economy in the County – including the Benefiting from Tourism project referred to previously. Of all the possible options considered at the time – from voluntary donation from visitors, the establishment of a Tourism Business Improvement District to the establishment of a Visitor Levy – the Levy proved to be the most effective means of generating income to support a sustainable visitor economy in the area as it was then assumed that it could raise up to £9m of additional income per annum (based on STEAM 2017 (Scarborough Tourism Economic Activity Monitor) visitor data).

4.3. As a local context, Gwynedd's STEAM data (which also has warnings/caveats and is an international model to assess trends in visitor numbers and economic contribution) highlights the following for 2024:

Economic Impact: £1.785bn

Number of visits: 7.75m

Number of visit days: 24.09m

Total employment: 17,644

4.4. Taking into account the research undertaken by the Welsh Government in the development of the bill, as well as previous research and guidance that has been received from the Government, the Economy and Community Department is working with the Isle of Anglesey County Council and Conwy County Borough Council and has commissioned an assessment of the economic impact of introducing a Levy in our areas. We have also consulted with the City of Cardiff Council and the City of Edinburgh Council.

4.5. The jointly commissioned impact assessment follows Welsh Government guidance and uses similar models used by the Government in the development of national impact assessments. The data used is based on International Passenger Survey and Great British Tourism Survey figures for the years 2022-2024. Consideration is also given to STEAM data as part of the assessment.

4.6. This research focuses on:

- a. The research and studies prepared by the Welsh Government in its assessment
- b. Review of any other existing studies
- c. Impact assessment at Gwynedd level – but with many conditions and caveats.
- d. Cross-referencing back to Government work
- e. Conclusion on the possible impact.
- f. Review of the draft impact assessment following the consultation process

4.7. The economic impact assessment concludes that the effects of the levy on Gwynedd would be relatively small. The following is noted:

- a. *The evidence base on the economic impact of visitor levies is relatively limited, due to a lack of relevant evidence of the impact of visitor levies from elsewhere, coupled with gaps and uncertainty in the data. As a result, the national assessment includes a significant number of caveats and relies on wide ranges of estimates. Assessment at local level faces further challenges, as a result of more prominent data gaps and an even less advanced evidence base on the impact of visitor levies at local level (compared to the national level).*
- b. *The main conditions/caveats relevant to the assessment at a local level are:*
 - *There is significant uncertainty about the elasticity of demand. While this is already the case at an all Wales level, the uncertainty is even more evident when applied at the Gwynedd level.*
 - *There are various data sources for estimating the current size of Gwynedd's visitor economy. The main analysis uses the International Passenger Survey*

(IPS) and the Great British Tourism Survey (GBTS), in line with the Welsh Government's assessment and guidance provided to local authorities. STEAM data shows a significantly larger visitor economy; the implications of this are set out in the report.

- *At a national level, it can reasonably be expected that the majority of visitor spending will be kept within Wales. This is not necessarily the case at the level of a smaller area; for example, some spending by visitors to Gwynedd may take place in Conwy or Anglesey (and vice versa).*
 - *Similarly, it is likely that a higher level of leakage will be associated with levy-funded expenditure, as some businesses benefiting from levy-funded contracts may be located outside Gwynedd.*
 - *The assessment at a national level (necessarily) assumes that the levy will be introduced throughout Wales. At the Gwynedd level, the effects will differ depending on whether the levy is introduced by only one local authority, or whether neighbouring authorities also implement it.*
- c. *Therefore, the assessment at Gwynedd level is appropriately caveated, and should be read in the context of the gaps in the data and the relatively limited evidence base, particularly at a local level.*
- d. *However, we are confident that the impact on Gwynedd will be relatively small, both in terms of employment and Gross Value Added (GVA). We have adopted an approach broadly similar to the Welsh Government's analysis in order to determine the bookends for the likely range of these effects.*
- e. *Within this main analysis, the assumptions made are generally conservative in assessing the impact on the economy (i.e. they tend to overestimate the potential negative impact). For example, it is assumed that Gwynedd loses all visitor spending, when some of that expenditure would in fact have taken place outside Gwynedd (for example, when visitors staying in Gwynedd spend money in other local authorities on day trips). It is also assumed that there is some loss of economic activity outside Gwynedd as a result of levy spending, whilst at the same time assuming that Gwynedd businesses do not benefit from contracts arising from visitor levy expenditure in other local authorities.*
- f. *Similarly, the analysis assumes that there is no growth in the visitor economy and allows for a decrease in the number of visitors as a result of the introduction of the levy. In practice, if the visitor economy were to grow, the funding raised through the levy would increase, and the expenditure of the levy itself could stimulate higher tourism through a better visitor experience. This would help maintain and enhance Gwynedd's competitiveness as a tourist destination. There is evidence of year-on-year growth in visitors at other locations where visitor levies have been introduced.*

- g. *Any growth in the visitor economy would also offset any losses to the economy (in terms of jobs and GVA) arising from visitors who do not come as a result of the levy, and would also increase the revenue raised through the levy.*
 - h. *Nevertheless, on the basis of this approach, the effects of the levy are estimated to be relatively small. Even with these conservative assumptions (i.e. assumptions that could overestimate any negative impact), it is estimated that the levy could lead to:*
 - *Change in employment between -50 and +21 jobs – equivalent to a loss of around -0.1% or an increase of around 0.04% of employment in Gwynedd.*
 - *Change in annual GVA between -£2.7m and +£0.4m per annum – equivalent to a loss of around -0.1% or an increase of less than 0.01% of Gwynedd's economy.*
 - *Annual revenues of between £2.4m and £2.8m.*
 - i. *This range, which ranges from a relatively small negative impact to a relatively small positive impact, reflects the findings of the Welsh Government's Assessment, which also concluded that the impact on a national scale is likely to be between a small negative impact and a small positive impact.*
 - j. *STEAM data estimates that Gwynedd's current tourism economy is significantly larger than that indicated by the IPS and GBTS; if STEAM data were used, the effects of the levy would be about 4 to 5 times greater. This underlines the uncertainty in the data, and therefore the inherent uncertainty in predicting the impact of the levy.*
- 4.8. Research by [Bangor University](#) to the effect of the introduction of a Visitor Levy in 7 areas of the world comparative to Wales states that:
- a. Limited evidence on the effects of tourism taxes: '**Comprehensive assessment of the impacts of tourism taxes remains limited**, despite their clear motives for action'.
 - b. In general, **tourism in locations that have introduced a visitor levy has continued to grow year on year** (though we can't know what the counter-fact would have been without a levy).
- 4.9. Further research published in April 2026 by Bangor University on behalf of Roberts Group '[Visitor Levy to Gwynedd](#)' provides recommendations on how Cyngor Gwynedd could use its powers under the Visitor Accommodation (Register and Levy) Etc. (Wales) Bill to improve the performance of the tourism sector in Gwynedd. The report examines governance, implementation, investment, communication, and review models and provides 9 key recommendations. The report concludes:
If implemented effectively, the levy can transform Gwynedd's tourism sector, improving competitiveness, reducing pressure on sensitive areas, and creating long-term economic and social benefits.
- 4.10. The Draft Gwynedd Levy Proposal already addresses the recommendations and considerations set out in this report.

5. The public consultation

- 5.1. Should the Council support a public consultation, this work would be led by the Tourism, Marketing and Events Service with the support of the Communications and Legal Services and support by the Welsh Government and the WRA.
- 5.2. A Local Authority is expected to undertake a consultation process based on the "Gunning" public consultation principles before deciding whether to introduce the 12 month notice to implement the Levy.
- 5.3. The consultation should set out the case for introducing a levy outlining the potential benefits and offer suggestions on how the levy could be invested for the benefit of the local area, businesses, residents and visitors. As with all consultations, the process will need to ensure that sufficient information is included to allow for intelligent consideration and response. It is also a means of obtaining contribution towards the assessments and reports that will go before the Council when considering the adoption of the levy.
- 5.4. In the case of Gwynedd, subject to the Council's decision a consultation period would take place over 08 weeks between 20 May and 15 July 2026. It is a statutory requirement to consult with:
 - a. Local People
 - b. Town and Community Councils
 - c. County Councils bordering Gwynedd
 - d. Eryri National Park Authority
 - e. North Wales Corporate Joint Committee
 - f. Bodies representing tourism businesses or businesses engaged in tourism-related activities, promoting or facilitating tourism in the principal council area;
 - g. Prospective members of the Levy Board if they are not already included in this list.
- 5.5. Consultation will be carried out through the following methods which will include:
 - a. On-line questionnaire for businesses, residents and visitors
 - b. Special events (one in each of the 3 areas of Gwynedd and two online)
 - c. Pop-up sessions within the 3 areas of Gwynedd
 - d. Meetings of the Gwynedd and Eryri Partnership 2035
 - e. Providing information through the specific part of the Council website on the Levy
- 5.6. While much of the above can be achieved with existing resources – facilitation and organisation, analysis and reporting elements will be commissioned to support the process.
- 5.7. To ensure inclusive consultation a economic, environmental and social impact assessments have been prepared and will form part of the consultation package to seek further responses. The results of the consultation will serve as consideration for the final impact assessments as well as taking into account the Council's decision on whether or not to adopt the Levy.

6. Communication and Engagement Plan

- 6.1. Should there be a decision to consult publicly, it is intended to establish formal arrangements for engagement on and communication of the Act in Gwynedd.
- 6.2. The establishment of a Communication and Engagement Plan would create formal arrangements within the Council and with partners to communicate and engage on the development of the overnight accommodation registration scheme and the Levy within Gwynedd. The Welsh Government and the WRA have provide statutory guidance to include this.

7. Possible use of the Visitor Levy and Operation

- 7.1. The Act identifies specific areas for the future investment (hypothecation) of Levy funds for the purposes of managing and improving destinations in its area, including:
 - a. mitigate the impact that visitors have;
 - b. maintain and promote the use of the Welsh language;
 - c. promote and support the sustainable economic growth of tourism and other forms of travel;
 - d. provide, maintain and improve infrastructure, facilities and services for visitor use (whether or not they are also for use by local people)."
- 7.2. The Welsh Government and the WRA have issued further guidance on these hypothecated areas.
- 7.3. Given that we have adopted [The Gwynedd and Eryri Strategic Plan 2035](#) which identifies a clear vision, principles and objectives to support a sustainable visitor economy in the area – it would be sensible to use these priorities (which are aligned with the allocated areas) to prioritise investments from the levy in Gwynedd in order to realise our vision.

Report on the use of levy earnings:

- 7.4. A principal council must publish an annual report on the amount of earnings from the Levy and how these earnings have been used by the Council to manage and improve destinations.

Levy partnership forums:

- 7.5. The act requires the establishment of a local Levy Partnership Forum to provide information and advice on how earnings from the Levy can be used and to provide information and advice if a Council wishes to add an additional amount to the Levy locally (premium).
- 7.6. If it is decided to implement the Levy, given that we have established the Gwynedd and Eryri 2035 Partnership, it is reasonable to propose that this partnership should act as a 'Levy Partnership Forum' in Gwynedd to offer guidance.

Resources and investment

- 7.7. Information on how much income could be collected in Gwynedd varies based on the data used. As can be seen from the Impact Assessment Report it can go from £2.8m at a conservative, pessimistic level to up to £12.4m if STEAM data is used which is likely to overcalculate.
- 7.8. The Welsh Government has agreed to contribute towards the costs of establishing the Levy in Wales to ensure that the costs of administering the Levy do not exceed 10% of the resources collected within a Local Authority. (from £200,800 to £1.2m if the above figures are used).
- 7.9. There are considerations locally in terms of the likely costs of administering the partnership and the fund that will be available to invest in the area due to the Levy - an approximation of these costs makes a total of around £100,000 a year. This cost could be paid through Levy earnings.
- 7.10. In light of the Welsh Government's statutory guidelines for the consultation process and a decision to introduce the Levy in local areas, it is suggested that additional resources will be required by the Economy and Community Department to undertake this work. These additional resources would contribute to the commissioning of impact assessments, coordinating the consultation process, analysing solutions, coordinating and establishing arrangements for the Levy's investment frameworks.
- 7.11. Naturally, the sector, communities, stakeholders and visitors will be keen to see significant investment and this could include projects such as:

Principle and Objective of G+E2035	Examples of potential activity that could be funded through the Levy in Gwynedd
<p>Celebrate, Respect and Protect our Communities, Language, Culture and Heritage:</p> <p>→ A visitor economy in the ownership of our communities with an emphasis on pride in one's area</p> <p>→ A visitor economy that is world-leading in Heritage, Language, Culture and the Outdoors</p>	<ul style="list-style-type: none"> ✓ Campaigns to promote culture and the Welsh language ✓ Promoting a sense of place and a Welsh Offer for businesses via training ✓ Projects to conserve built and living cultural heritage ✓ Support for the Slate Landscape World Heritage Site and its activities ✓ Supporting a programme of cultural events ✓ Supporting communities to increase their use of Welsh
<p>Maintaining and Respecting our Environment</p> <p>→ A visitor economy that respects our natural and built environment and considers the implications of visitor economy developments on</p>	<ul style="list-style-type: none"> ✓ Better public transport to serve communities – extra buses and later in the evening ✓ Basic infrastructure (bins / refuse collection / toilets / street hygiene etc.)

<p>our environment today and in the future</p> <p>→ A visitor economy that is world-leading in sustainable and low carbon developments and infrastructure and when responding to the climate change emergency</p>	<ul style="list-style-type: none"> ✓ Maintain popular routes and create new ones. ✓ Protect habitats e.g. seas and waters, uplands etc. ✓ Bespoke interpretation of our environment and habitats ✓ Support for environmental conservation projects ✓ Campaigns and support for a plastic-free sector
<p>Ensuring that the benefits to the communities of the area outweigh any disadvantages</p> <p>→ A visitor economy that ensures that infrastructure and resources contribute towards the well-being of the community all year round</p> <p>→ A visitor economy that thrives for the well-being of Gwynedd residents and businesses and that offers quality employment opportunities for local people all year round</p> <p>→ A visitor economy that promotes local ownership and supports local supply chains and produce</p>	<ul style="list-style-type: none"> ✓ Grant packages to support businesses, events and communities ✓ Visitor campaigns to extend the season, promote the area's special qualities and encourage respect and safety. ✓ Develop bespoke packages and tours to visit the area and reduce pressure on busy areas ✓ Support for e.g. Mountain and Coast Rescue Teams ✓ Improve infrastructure e.g. Arosfan (overnight stay scheme), car parks, stations etc. ✓ Extend warden and enforcement hours ✓ Promote or support regenerative tourism efforts, i.e. Tourism that has a positive impact on local communities and the environment. ✓ Training or development of skills or activity related to tourism. ✓ Developing a local produce package and local supply chains ✓ Support for Businesses

8. Other considerations

- 8.1. The Welsh Government has already announced that its Brilliant Basics programme to invest in tourism infrastructure is unlikely to continue beyond 2027. This has been an important fund for Gwynedd and has invested in new car parks, toilets, footpaths and facilities such as 'Aros-fan'.
- 8.2. We need assurances from the Welsh Government that the introduction of a Levy in an area will not affect our annual settlement, the enhanced population grant or our ability to access funds to support tourism and destination management in the future.
- 8.3. There has been criticism that the sector is under pressure, that Cyngor Gwynedd is anti-tourism and that the introduction of a levy will turn visitors away from the area

overnight. The impact studies will explore this area – but information at a local level is difficult to gather, although evidence from other areas that have introduced a levy suggests that it does not have an impact on visitor numbers.

- 8.4. It should be remembered that the UK Government is now legislating to allow Mayors in England to introduce a Visitor Levy in the English city regions.
- 8.5. In future, if it is decided to introduce a Visitor Levy, 12 months' notice may be given following a consultation to abolish the Levy in a local area.
- 8.6. It must be remembered that the tourism sector is open to changes in visiting patterns that are affected by wider local and global factors and having a consistent pattern from one year to the next is impossible to predict.

9. The Well-being of Future Generations (Wales) Act 2015

- 9.1. There is a duty to act in accordance with the principle of sustainable development, which is to seek to ensure that the needs of the present are met without jeopardising the ability of future generations to meet their needs.
- 9.2. In acting in accordance with this general duty the Council needs to take into account the importance of long-term impact, being integrated, inclusive, collaborative and preventative in the development and implementation of the proposal in question.
- 9.3. In accordance with the requirements of the Act, Cyngor Gwynedd has adopted well-being objectives. Particular attention is drawn to the following objectives which the Visitor Levy could support if adopted:
 - A PROSPEROUS GWYNEDD - Strengthening the economy and supporting the people of Gwynedd to earn a worthy wage
 - A WELSH GWYNEDD - Ensuring that we give every possible opportunity for our residents to use the Welsh language in the community.
 - A GREEN GWYNEDD - Protecting the county's natural beauty, and responding positively to the climate change crisis
 - AN EFFICIENT GWYNEDD - Putting the people of Gwynedd first and treating them fairly and ensuring that the Council performs effectively and efficiently

10. Impact on Equality Characteristics, the Welsh Language and the Socio-Economic Duty

- 10.1. The Council is subject to public sector duties under the Equality Act 2010 (including Welsh public sector duties). In accordance with these legal duties in decision-making, Councils must pay due regard to the need to (1) abolish unlawful discrimination, (2) promote equal opportunities and (3) foster good relations on the basis of the protected characteristics and have due regard to a socio-economic duty under Section 1 of the Act. In accordance with the Welsh Language (Wales) Measure 2011 a linguistic impact assessment was prepared. A Composite Impact Assessment has been prepared in draft (Appendix 3) and

highlights that some negative impacts may arise from the adoption of a Levy in Gwynedd. However, reinvesting the money generated by the levy has the potential to support positive outcomes on the industry, our communities, the environment and the Welsh language. Operating through the structure of the Gwynedd and Eryri 2035 Partnership it is possible to act inclusively and monitor the implementation of the levy and its implementation priorities through new metrics and it will be possible to consider and respond to any negative impacts on the protected groups.⁹⁸

11. Environmental Impact Assessment

- 11.1. The Environmental Impact Assessment (**Appendix 5**) highlights the following areas to mitigate the potential impact of the introduction of a Levy in Gwynedd:
 - .a. To earmark a certain proportion of the levy income for environmental projects and destination management.
 - .b. To regularly monitor the impacts of the levy on visitor flow and environmental pressures, adapting policies if necessary.
 - .c. To work in partnership with local communities, environmental organisations and the tourism sector to ensure investments target the areas of greatest need.
 - .d. To use the levy income on designated motor home parking schemes, improved enforcement and management, and sustainable camping infrastructure where appropriate.
- 11.2. The assessment shows that the Visitor Levy in Gwynedd has the potential to have a significant positive impact on the environment, provided that the income collected is strategically and transparently invested in destination management and the protection of natural assets.
- 11.3. With appropriate mitigation measures, it can be ensured that the levy contributes to a sustainable visitor economy that protects the environment for the benefit of present and future generations.

12. Social Impact Assessment

- 12.1. The Social Impact Assessment (**Appendix 6**) highlights the following areas to mitigate the potential impact of the introduction of a Levy in Gwynedd:
 - a. Rigorous and ongoing community consultation on investment priorities
 - b. Clear communication that the Levy income is:
 - Being kept locally
 - Being invested for the benefit of communities and well-being
 - c. Regular monitoring of social impact in reviewing the Levy
 - d. Creating a Gwynedd Levy Partnership Forum to ensure community participation
- 12.2. The Assessment generally concludes that the adoption of a Visitor Levy in Gwynedd can have a significant positive social impact, provided that:
 - a. The principles of equity and inclusion are central
 - b. The income is clearly targeted towards community benefit

- c. The Council continues to engage meaningfully with communities, businesses and stakeholders
- 12.3. With the appropriate mitigation measures, the Levy offers an opportunity to strengthen community cohesion and ensure a visitor economy that works better for the people of Gwynedd.
13. All impact assessments will be reviewed following the public consultation and will receive full consideration when a decision on whether to introduce a Visitor Levy in Gwynedd is made by the Full Council in the future.

14. Next Steps

Timetable	Action
14 May '26	Full Council decides to consult publicly Commission consultation support and feedback analysis if supported
20 May'26 – 15 July '26	Public consultation including public meetings, drop-in sessions, online questionnaire etc.
August 2026	Consider the results of the Public Consultation and any modifications to the Impact Assessments
24 September 2026	Full Council Decision on whether or not to adopt the Levy in Gwynedd
30 September 2026	Issue a 12 month official Notice to the WRA if Cyngor Gwynedd decides to adopt the Levy
1 October 2027	Levy in operation in Gwynedd
30 June 2028	First payment of the Levy to Cyngor Gwynedd

Background Information

Reports to Cyngor Gwynedd Committees:

Date	Report	Decision
12-02-26	Agenda for Education and Economy Scrutiny Committee on Thursday, 12th February, 2026, 10.30 am	To accept the report with recommendations for the Cabinet Member to consider if a Levy is adopted in Gwynedd.
28-03-23	28032023 Holiday Accommodation Consultation.doc.pdf	Support for Cyngor Gwynedd's response to the Visit Wales consultation on establishing a statutory licensing scheme in Wales for holiday lets.
15-12-2020	Item 8 - Report Holiday Homes.pdf	b) To assist in retaining control there should also be a call for the introduction of a compulsory licensing scheme for short-term holiday lets which would be the responsibility of the local authority to implement it

13-03-2018	Item 15 - Report - Welsh Governments Taxation Powers.pdf	Cabinet will be given the opportunity to discuss the Welsh Government's intention to introduce new taxes and consider whether it wishes to express an opinion on the proposals.
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[Senedd Cymru's Finance Committee and evidence from Cyngor Gwynedd \(30/01/25\)](#)

[Gwynedd and Eryri Sustainable Visitor Economy 2035](#)

Views of Statutory Officers

“This report and the documentation which supports the proposal has been subject to input and advice from the Legal Service. I note in particular that the consultation process is designed having regard to the principles in the case of R v London Borough of Brent ex parte Gunning 1985 which lays the legal basis for consultation processes. In accordance with the provisions of Section 54 of the Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 and the Local Authorities (Executive Arrangements) (Functions and Responsibilities) (Wales) Regulations 2007 the decision to approve the proposal and undertake a consultation process is a matter for the Full Council. I am therefore satisfied with the propriety of the decision sought.”

Head of Finance

“The Visitor Levy has been the subject of discussion in Wales for several years now, and I have been aware of these developments. The documentation included as part of the package for this item shows the detailed work that has been done to gather evidence to reach a decision on the matter in an appropriate manner.

Any steps that can be taken to attract additional income and mitigate the Council's costs in tackling higher spending areas to support the tourism sector are welcome. The next step, which is the decision currently being sought, is whether or not to hold a public consultation on the matter. I have no objection to the decision sought – this is the logical next step in the process, and the results of the consultation will be considered when the Council makes a final decision on the matter in September 2026.”

Appendices

Appendix 1 - Gwynedd Levy Proposal

Appendix 2 - Economic Impact Assessment

Appendix 3 – Equality Impact Assessment

Appendix 4 - Cyngor Gwynedd's Composite Impact Assessment
Appendix 5 – Environmental Impact Assessment
Appendix 6 – Social Impact Assessment



GWYNEDD

VISITOR LEVY PROPOSAL

May 2026

1. Gwynedd Visitor Levy: the proposal

Cyngor Gwynedd is considering introducing a Visitor Levy for all eligible holiday accommodation and overnight stays as outlined in the Visitor Accommodation (Register and Levy) Etc. Act (Wales) 2025 within Cyngor Gwynedd's local authority boundaries from 1 October 2027. This will be for all accommodation providers who will have to register on a national register of accommodation providers.

The Levy will be levied at a per person per night rate as outlined in the act. The Levy will be collected by the accommodation provider. The initial rates will be as outlined in the act:

Type of accommodation	Rate (per person, per night)
Tenting campsites and shared bedrooms (hostels and dorm)	£0.75c (children under 18 exempt) £0.90p inc VAT
All other types of holiday accommodation (caravan, glamping, motorhome, self-catering, bed and breakfast, hotel, etc.)	£1.30 £1.56 inc VAT

Exemptions

You will not be expected to pay the levy if you are:

- Under 18 and staying in a tenting campsite or shared room (such as a hostel or dorm);
- Staying for more than 31 nights in one stay; and
- In emergency or temporary accommodation arranged by a local council.

Refunds

The following will be eligible to apply for a refund from the Welsh Revenue Authority:

- Disabled people who pay extra levy costs when they have a carer; and
- People fleeing domestic violence.

2. Levy Income

Approach

A variety of data sources were used to estimate the initial income from the Levy for Gwynedd. The following sources were focused on:

- Information and data from the Welsh Government, Visit Wales
- Assessments and research by the Welsh Government
- Great British Tourism Survey data
- International Passenger Survey data
- STEAM data for Gwynedd

The local authority uses STEAM data for its performance monitoring reports. However, it was considered prudent to carry out further analysis to ensure that the data being used was appropriate in determining the overall level of income that the levy would raise.

In particular this was considered because:

- All the data is still based on sample information and subject to error;
- The ability to verify estimates using alternative methods; and
- Consideration of the impact on areas such as Levy exemptions.

It should be noted, however, that STEAM data is data used nationally by the Welsh Government and is one of the common measures of tourism available.

Data and research

It must be highlighted that the national data as well as the local data are open to challenge, and based on samples and multipliers.

STEAM is a tourism economic impact modelling process that measures tourism from the bottom up, through its use of local supply-side data and tourism performance and visitor survey data collection. STEAM is capable of providing robust outputs at a variety of geographical levels and, as such, has been adopted for use across the UK and abroad by tourism boards, local authorities, regional development agencies, national park authorities, and many other public and private sector organisations.

STEAM quantifies the local economic impact of tourism, from overnight and day visitors, by analysing and using a variety of inputs including visitor attraction numbers, tourist accommodation bed stock, attendance at events, occupancy levels, accommodation tariffs, macroeconomic factors, visitor spending levels, transport usage levels and tourism-specific economic multipliers.

STEAM data highlights the following in terms of the value and numbers of the tourism sector for Gwynedd for 2024:

- Economic Impact: £1.785bn
- Number of visits: 7.75m
- Number of visit days: 24.09m
- Total employment: 17,644

The most recent bed stock research carried out by Cyngor Gwynedd in 2019 shows the following with a comparison for 2011. It should be noted that these figures may have changed significantly due to Covid19 and the cost of living situation. A national registration procedure will ensure that up-to-date information is available in the future for these figures:

	2019 Figure	2011 Figure	% Change since 2011
Organisations not including AirBnB	3,212	2,807	+14.4%
AirBnB Organisations*	745	-	-
Total Organisations	3,957	2,807	+40.9%
		■	
Visitor Beds not including AirBnB	132,924	125,273	+6.1%
AirBnB Visitor Beds*	3,661	-	-
Total Visitor Beds	136,585	125,273	+9.0%

Based on the Economic Impact Assessment (see Chapter 8 for further details) the visitor levy would raise approximately £2.8m, of which up to £2.5m would be retained by Cyngor Gwynedd to be spent in the local area (in accordance with the Act), assuming that up to 10% of the revenue is used to cover the operating costs of the Welsh Revenue Authority.

The method set out to calculate this amount allows for a reduction in demand in response to the visitor levy – this reduction results in a slight reduction in revenue, but remains in the range of £2.7m to £2.8m in total, and between £2.4m and £2.5m once the contribution to the operating costs of the Welsh Revenue Authority is excluded.

In fact, the revenue collected could be higher than this for a number of reasons:

- This assumes that the number of visitors is stable based on 2024 data, and that the only change is a decrease in the number of visitors (or nights of stay) as a result of the levy. In fact, Gwynedd's visitor economy could grow (with or without the levy). Gwynedd's tourism market has been growing since the Covid pandemic, and this could continue. There is also evidence of year-on-year growth in tourism in locations that have introduced a visitor tax (see Bangor University's Economic Impact report).
- The visitor levy will enable Cyngor Gwynedd to invest in activities in accordance with the Act, including promoting and supporting the sustainable economic

growth of tourism, and providing, maintaining and improving infrastructure, facilities and services for use by visitors. This investment itself is likely to drive an increase in the number of visitors. Conversely, there could be a decrease in the number of visitors if this investment was not made through the visitor levy.

- STEAM data suggests that Gwynedd's current visitor economy is significantly larger, which would result in higher revenues.

	Main Analysis Core scenario (elasticity of -0.74)	STEAM (elasticity of -0.74)
Revenue (excluding VAT)	£2.8m <i>£2.5m including contribution to WRA</i>	£12.4m <i>£11.2m including contribution to WRA</i>

Proposed Levy Budget in Gwynedd 2027/28

It is suggested that the proposed budget for Gwynedd should be calculated on a conservative figure of **£2.5m** in the first year that the Levy is implemented locally, but it is anticipated that this figure will be higher given the gaps in the data and the huge difference between the data figures used. It is only when a Levy is implemented in Gwynedd that we will know, with certainty, how much money will be collected.

3. Proposals for the use of Levy income in Gwynedd

Use of the Levy is restricted for the purposes of 'destination management and improvement'. In the Welsh context the following areas are highlighted in the act:

- a. mitigate the impact that visitors have;
- b. maintain and promote the use of the Welsh language;
- c. promote and support the sustainable economic growth of tourism and other forms of travel;
- d. provide, maintain and improve infrastructure, facilities and services for visitor use (whether or not they are also for use by local people).

The act states that local authorities must give details at the end of a financial year in a publication highlighting how much income has been collected and how that income has been invested in order to manage and improve a destination.

Given that Cyngor Gwynedd, Eryri National Park Authority and Conwy County Borough Council have adopted the Gwynedd and Eryri 2035 Strategic Plan (G+E2035) which identifies a clear vision, principles and objectives to support a sustainable visitor economy in the area – these priorities are intended to be used to prioritise investments from the levy in Gwynedd.

Our vision within the plan is:

"A visitor economy for the benefit and well-being of the people, environment, language and culture of Gwynedd and Eryri".

3 principles have been agreed to realise the vision:

1. Celebrate, Respect and Protect our Communities, Language, Culture and Heritage
2. Maintain and Respect our Environment
3. Ensure that the benefits to the communities of Gwynedd and Eryri outweigh any disadvantages

An Annual Action Plan is being developed to implement the Strategic Plan in response to Gwynedd residents' questionnaire on tourism, the Gwynedd business questionnaire as well as the work of Ardal Ni plans and priority workshops held with members of the Gwynedd and Eryri 2035 Partnership.

In Gwynedd levy investment schemes could focus on some of the following activities:

Principle and Objective of G+E2035	Examples of potential activity that could be funded through the Levy in Gwynedd
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<p>Celebrate, Respect and Protect our Communities, Language, Culture and Heritage:</p> <ul style="list-style-type: none"> • A visitor economy in the ownership of our communities with an emphasis on pride in one's area • A visitor economy that is world-leading in Heritage, Language, Culture and the Outdoors 	<ul style="list-style-type: none"> ✓ Campaigns to promote culture and the Welsh language ✓ Promoting a sense of place and a Welsh Offer for businesses via training ✓ Projects to conserve built and living cultural heritage ✓ Support for the Slate Landscape World Heritage Site and its activities ✓ Support cultural activities and events ✓ Support the Welsh Language
<p>Maintain and Respect our Environment</p> <ul style="list-style-type: none"> • A visitor economy that respects our natural and built environment and considers the implications of visitor economy developments on our environment today and in the future • A visitor economy that is world-leading in sustainable and low carbon developments and infrastructure and when responding to the climate change emergency 	<ul style="list-style-type: none"> ✓ Improved public transport to serve communities and individuals who want to commute to work – extra buses and later in the evening ✓ Basic infrastructure (bins / refuse collection / toilets / street hygiene etc.) ✓ Maintain popular routes and create new ones. ✓ Protect habitats e.g. seas and waters ✓ Bespoke interpretation ✓ Support for environmental conservation projects ✓ Campaigns and support for a plastic-free sector ✓ Car charging points ✓ Bathing water or clean beaches schemes.
<p>Ensuring that the benefits to the communities of the area outweigh any disadvantages</p> <ul style="list-style-type: none"> • A visitor economy that ensures that infrastructure and resources contribute towards the well-being of the community all year round • A visitor economy that thrives for the well-being of Gwynedd residents and businesses and that offers quality employment opportunities for local people all year round • A visitor economy that promotes local ownership and supports local supply chains and produce 	<ul style="list-style-type: none"> ✓ Grant packages to support businesses, events and communities ✓ Visitor campaigns to extend the season, promote the area's special qualities and encourage respect and safety. ✓ Develop bespoke packages and tours to visit the area and reduce pressure on busy areas ✓ Support for e.g. Mountain and maritime Rescue Teams ✓ Improve infrastructure e.g. toilets, Arosfan (overnight stay scheme), car parks, stations, access to location etc.

	<ul style="list-style-type: none">✓ Extend the hours of wardens or enforcement officers✓ Promote or support regenerative tourism efforts, i.e. Tourism that has a positive impact on local communities and the environment.✓ Training or development of skills or activity related to tourism.✓ Develop a local produce package✓ Schemes to support sustainable tourism growth.✓ Provide information to visitors.
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4. Establishing a Visitor Levy Partnership Forum in Gwynedd

Local Authorities introducing a Levy in their area are expected to establish a Levy Partnership Forum to discuss issues relating to the Levy locally. In particular, the Forum is expected to provide information and advice on how investment from the Levy income should be prioritised for destination management and improvement in the area.

The Forum's views should inform the decision-making process regarding the investment of the Levy income and the Council should take into account any information or advice provided by the Forum in making decisions.

A Local Authority must take reasonable steps to ensure that the Forum is made up of representatives from:

- Organisations representing businesses working in tourism, or operating in related activities within the main Council area;
- Organisations that promote or facilitate tourism in the main Council area; and
- Other relevant local bodies and representatives with an interest in tourism or visitor accommodation in the main Council area that the council feels are relevant.

The Gwynedd and Eryri 2035 Partnership has already been established in Gwynedd to support a sustainable visitor economy in the area.

The Partnership is open to anyone interested in the visitor economy in Gwynedd and includes representatives from the private, community and public sectors.

The Gwynedd and Eryri 2035 Partnership meets to:

- Be a voice to ensure ownership of the Gwynedd and Eryri Sustainable Visitor Economy Plan by the main stakeholders of the visitor economy.
- Discuss, give opinions and monitor the implementation of the Gwynedd and Eryri Sustainable Visitor Economy Plan 2035, its indicators and its Action Plan.
- Be a sector liaison forum and share information with the sector;
- Identify Priorities and issues to report to the Action Group;
- Be a voice for the sector in prioritising any funding opportunities that may be available;
- Oversee the Terms of Reference and Membership of the Partnership modifying it as necessary with the approval of the Steering Board;
- Give the sector a voice on the Strategic Board where appropriate to ensure the successful implementation of the Plan and its implementation structures.

The Partnership is independent of Cyngor Gwynedd and Eryri National Park but is a formal part of the operating structure reporting to the Strategic Board.

The Partnership will be expected to comment and make recommendations on the implementation of the Gwynedd and Eryri 2035 Plan, its implementation structures and the priorities of the Levy to the Strategic Board through the Co-Chairs or Co-Vice-Chairs.

Identify Levy Investment Priorities

It is planned to hold an annual discussion/workshop within the G&E2035 Partnership in order to identify potential priorities and projects for investing the Levy. Priorities and projects will be influenced by:

- Gwynedd Residents' Survey
- Gwynedd Business Survey
- Feedback from 'Ardal Ni' (Our Area) Forums
- Visitor Survey (when held)
- Partnership members' views on current issues
- Identified strategic priorities



Proposed membership of the Gwynedd Visitor Levy Partnership Forum

The Partnership's voice and the priorities/projects raised in the workshop will be summarised and packaged for discussion, amendment and agreement as recommendations in the Strategic Board for presentation to the Cabinet of Cyngor Gwynedd.

As the Strategic Board also covers part of Conwy, Conwy County Borough Council will not be involved in this prioritisation discussion – although the priorities could also apply to the Conwy Levy Partnership Forum if they establish a Levy in the county.

Proposed Forum Members (formerly the G&E2035 Strategic Board **excluding** a formal voice for Conwy)

Gwynedd + Eryri 2035 Co-Chairs (x2) – representing the whole partnership

The Leader of Cyngor Gwynedd

Cyngor Gwynedd Cabinet Member for Economy and Community

Chair of Eryri National Park Authority

Chief Executive, Eryri National Park Authority

North Wales Tourism Representative

Mid Wales Tourism Representative

Cyngor Gwynedd Officers (x2)

Eryri National Park Authority Officers (x2)

Observers: Visit Wales + Welsh Revenue Authority

Final decisions on the use of the Levy income will be the responsibility of the elected members of the Cabinet of Cyngor Gwynedd considering the recommendations of the G&E2035 Strategic Board.

Annual schedule of meetings:

Month	Group	Purpose
November	G&E 2035 Partnership	Review previous term. Scoping workshop and identify priorities for the future.
March	G&E2035 Strategic Board	Agree recommendations, priorities and projects to be submitted to Cyngor Gwynedd's Cabinet. Report on the implementation of the Levy.
May	G&E 2035 Partnership	Report on the implementation of the action plan. Report on the implementation of Levy and income. Share this season's information. Training
September	G&E2035 Strategic Board	Monitor the progress of implementation. Report on the implementation of the Levy. Identify potential strategic issues that may be prioritised in the future.

Identification of Levy priorities using existing structures:

Cyngor Gwynedd Cabinet
Determine the priorities

G&E 2035 Strategic Board
Agree and recommend priorities

Gwynedd and Eryri 2035 Partnership
Annual workshop to identify issues and potential responses

5. Annual Reports

Local Authorities are expected to publish a report in each financial year in which they have received the Levy income. The annual report must:

- State how income from the Levy is earmarked;
- State the total amount of income collected through the Levy and received by the Local Authority;
- State the net revenue received after costs have been taken into account;
- Provide details of how the income of the year in question has been invested for destination management and improvement;
- Provide an assessment of the impact of those projects on businesses and communities;
- Consideration could be given to including details of how money is intended to be invested in the future – particularly in cases where income is carried over to another financial year.

An annual report is expected to be published as soon as possible after 30 June following a financial year on the Local Authority's website.

Monitoring and evaluation

Once a Levy is operational in an area, a Local Authority will need to assess the impact of the Levy on its area to ensure there are no adverse or negative side effects. The Guidance states that Local Authorities can monitor impact through a number of methods including:

- A cost-benefit analysis of the projects, programmes or activities funded through the Levy.
- Surveys, interviews and stakeholder engagement (e.g. Feedback from the Partnership Forum).
- Analysis of trends, consideration of visitor numbers and flow.
- Analysis of trends of visitor accommodation provision in the area.

Indicators at a local level will need to be considered for Levy investment decisions. These may be in line with indicators that have been identified and are being developed for the G&E2035 Plan:

GE01	% of the County's residents surveyed who stated that tourism in their area has a positive result
GE02	% of the County's residents surveyed who believed that tourism has a positive influence on the Welsh language and culture
GE03	% of businesses and visitor economy enterprises that have been awarded a GandE2035 Sustainable Tourism Champion accreditation
GE04	Number of individuals registered on the Gwynedd and Eryri Ambassador scheme

GE05	% of the County's residents who were surveyed state that tourism has a negative influence on the environment and nature
GE06	Number of Sherpa service users (seeking to identify further transport and environment measures)
GE07	Overnight visitor spend
GE08	Day visitor spend
GE09	Number employed within the tourism sector

It will also be necessary to monitor:

- Total numbers of visitors staying overnight
- Hotel occupancy rates

Indicators for investments from Levy income in Gwynedd could vary based on the priorities that will be supported, but could include for example:

- Number of projects to support a sustainable visitor economy (culture / language / environment / tourism regeneration)
- Number of sustainable visitor economy support grants allocated
- Total £ investment attracted through projects funded through the Levy
- Number of campaigns promoting supported G&E2035 principles
- Reach of supported campaigns
- Additional expenditure from supported campaigns
- Satisfaction of visitors to Gwynedd
- Km of routes created or improved
- Number of additional opening hours of public toilets
- Number of additional bus services created
- Attendance at events and training held through Levy income
- etc.

6. Consultation Process

A Local Authority is expected to undertake a consultation process based on the "Gunning" public consultation principles before submitting a 12 month notice.

The consultation should set out the case for introducing a levy outlining the potential benefits and offer suggestions on how the levy could be invested for the benefit of the local area, businesses, residents and visitors. The guidance states that:

- The consultation must be at a formative stage;
- Sufficient information is provided to allow for intelligent consideration and response;
- Adequate time is given for consideration and response;
- The decision-making body must conscientiously take into account the responses from the consultation.

The consultation materials must be clear and accessible, timescales should be realistic and feedback should be genuinely considered when formulating the final policy. A Local Authority should then consult with communities about its proposals to consider the responses when making a decision on the adoption of the Levy.

This document is the Gwynedd Visitor Levy Proposal.

The consultees

The Guidance identifies the following as mandatory consultees that should be included:

- **Local people**, i.e. people who live, work or study in the Local Authority area.
- **Community Councils** in the Local Authority area.
- **Public services board** (according to Section 4 of the Well-being of Future Generations (Wales) Act 2015 for the Local Authority area).
- **The principal council for an area adjoining the consulting council**, i.e. neighbouring councils, so that they are aware of the plans. The authorities may also wish to consider whether there are any opportunities for collaboration. In the case of Gwynedd this includes Anglesey, Conwy, Denbighshire and Powys.
- **National Park Authority** for a National Park any part of which is in the Local Authority area
- **Corporate Joint Committee** which includes as a member at least one senior executive member of the principal council.
- **Organisations representing businesses working in the tourism sector**, or participating in tourism-related activities, in the principal council area; and/or promote or facilitate tourism in the council area.
- **Where there is a proposal to introduce the levy**, the consultation should include all persons identified in the report by virtue of section 47(5)(c) of the Act (which refers to

the proposed membership of the visitor levy partnership forum) who is not otherwise a mandatory adviser.

Consultation framework

In the case of Gwynedd the consultation period would take place over 08 weeks between May and July 2026 and would include:

- Online questionnaire for businesses, residents and visitors
- Special events (one in each of the 3 areas of Gwynedd and one on-line)
- Pop-up and drop-in sessions within the 3 areas of Gwynedd
- Gwynedd and Eryri 2035 Partnership Meeting

The results of the consultation will serve as consideration for the final impact assessments as well as taking into account the Council's decision on whether or not to adopt the Levy.

Communication and Engagement Plan

A Communication and Engagement Plan is planned to establish formal arrangements within the Council and with partners to communicate and engage on the development of the overnight accommodation registration procedure and the Levy within Gwynedd.

The Welsh Government and the WRA have provide statutory guidance to address this area.

7. Local Impact Assessments

Economic Impact

The introduction of a Visitor Levy could have three conflicting effects on the local economy:

- The projects and programmes invested in them could support the growth of the visitor economy;
- The introduction of a Levy has the potential to reduce the demand for accommodation; and
- The costs of administering the Levy have a negative impact on the tourism sector.

The overall aim should be to ensure that the benefits of the scheme outweigh the negative impacts. This suggests:

- Spending should focus on those fields that increase sustainable tourism;
- The level of the Levy should be set to ensure that the effects on demand are small; and
- Administrative costs are reduced.

On the first point, it is also important to ensure that the Levy achieves additionality in terms of expenditure.

The importance of the visitor economy to the economy of Gwynedd

The visitor economy sector is important to the economy of Gwynedd.

Gwynedd and Eryri are home to iconic natural and heritage attractions, which include Yr Wyddfa, the National Park, the Llŷn Area of Outstanding Natural Beauty (AONB), one of the longest sections of the Wales Coast Path, blue flag beaches and marinas, the largest forest in North Wales, over 100 lakes, World Heritage Sites and the Dyfi Biosphere.

There are 17 National Nature Reserves in Eryri; more than in any other national park in Wales; and 56 Sites of Special Scientific Interest. The vast biodiversity reflects the variety of the landscape, geology, climate and land management methods. The wealth of plants and animals is fundamental to the history, culture, language, economy and continual well-being of everyone who lives in and visits the area.

There are a number of high standard businesses, attractions and food and drink producers here that have invested heavily over the past decade providing unique experiences for residents and visitors. The outdoor and heritage sectors are two of the county's strongest sectors.

The area is a stronghold of the Welsh language with over 64% of the population speaking Welsh fluently according to the 2021 census.

For centuries, the area has attracted visitors who have been fascinated by our natural and built environment and our communities.

The visitor economy has an important contribution to make to the economy and communities of Gwynedd and Eryri - this contribution needs to be balanced and sustainable in order to protect our communities, our environment, language and culture for future generations. Data and research highlight the need for a better balance in the visitor economy and within the economy generally in the Gwynedd and Eryri National Park area.

As part of the development of the Gwynedd Levy Proposal, an Economic Impact Assessment was commissioned to assess the impact of introducing a Levy locally.

In terms of the size of the sector in Gwynedd, the Welsh Government's analysis uses the Great Britain Tourism Survey (GBTS) and the International Passenger Survey (IPS) for the period 2022 to 2024 – this is also the guidance provided to local authorities.

This results in an average of 0.87 million visits, with 3.6 million bed nights, supporting £250 million of spending. It should be noted that this includes all journeys, including those staying in accommodation that is not covered by the levy (for example, staying with friends and family).

It should be noted that this dataset showed a decrease in the number of bed nights and expenditure compared to pre-Covid averages (2017–2019) and the data used in the Welsh Government Consultation Document. This decrease could be partly due to a change in the data collection methodology, but it is also due to a real decrease in tourism in Gwynedd.

However, using the 2022–24 average does not take into account the more recent growth (or potential future growth) in the number of bednights and spending. Therefore, a sensitivity test using 2024 bednights and spending data is included.

Also included is a sensitivity test using STEAM data, which has much higher visitor numbers and levels of expenditure – this is likely to overestimate the impact of the levy, but it is included for completeness, and because it is noted that the rural nature of Gwynedd could mean that the GBTS and IPS underestimate visitor numbers.

It must be noted that the quality and reliability of the data available at a national level not to mention the Gwynedd level in order to assess the impact of the introduction of a Levy is extremely challenging and limited as it does not exist in many cases.

For a number of years the Council has considered how visitors could make a contribution to supporting a sustainable visitor economy in the County – including the Benefiting from Tourism project during 2019. Of all the possible options considered at

the time – from voluntary donation from visitors, the establishment of a Tourism Business Improvement District to the establishment of a Visitor Levy – the Levy proved to be the most effective means of generating income to support a sustainable visitor economy in the area as it was then assumed that it could raise up to £9m of additional income per annum (based on STEAM 2017 (Scarborough Tourism Economic Activity Monitor) visitor data).

Taking into account the research undertaken by the Welsh Government in the development of the bill, as well as previous research and draft guidance that has been received from the Government, the Economy and Community Department is working with the Isle of Anglesey County Council and Conwy County Borough Council and has commissioned an economic impact assessment of introducing a Levy in our areas. The results consider research from Bangor University's Business School into models of levy implementation in international destinations on economic impact on those communities

The jointly commissioned impact assessment follows Welsh Government guidance and uses similar models used by the Government in the development of national impact assessments. The data used is based on International Passenger Survey and Great British Tourism Survey figures for the years 2022-2024. Consideration is also given to STEAM data as part of the assessment.

This research focuses on:

- The research and studies prepared by the Welsh Government in its assessment
- Review of any other existing studies
- Impact assessment at Gwynedd level – but with many conditions and caveats.
- Cross-referencing back to Government work
- Conclusion on the possible impact.
- Review of the draft impact assessment following the consultation process

The economic impact assessment concludes that the effects of the levy on Gwynedd would be relatively small. The following are noted:

The evidence base on the economic impact of visitor levies is relatively limited, due to a lack of relevant evidence of the impact of visitor levies from elsewhere, coupled with gaps and uncertainty in the data. As a result, the national assessment includes a significant number of caveats and relies on wide ranges of estimates. Assessment at local level faces further challenges, as a result of more prominent data gaps and an even less advanced evidence base on the impact of visitor levies at local level (compared to the national level).

The main conditions/caveats relevant to the assessment at a local level are:

- *There is significant uncertainty about the elasticity of demand. While this is already the case at an all-Wales level, the uncertainty is even more evident when applied at the Gwynedd level.*
- *There are various data sources for estimating the current size of Gwynedd's visitor economy. The main analysis uses the International Passenger Survey (IPS) and the Great British Tourism Survey (GBTS), in line with the Welsh Government's assessment and guidance provided to local authorities. STEAM data shows a significantly larger visitor economy; the implications of this are set out in the report.*
- *At a national level, it can reasonably be expected that the majority of visitor spending will be kept within Wales. This is not necessarily the case at the level of a smaller area; for example, some spending by visitors to Gwynedd may take place in Conwy or Anglesey (and vice versa).*
- *Similarly, it is likely that a higher level of leakage will be associated with levy-funded expenditure, as some businesses benefiting from levy-funded contracts may be located outside Gwynedd.*
- *The assessment at a national level (necessarily) assumes that the levy will be introduced throughout Wales. At the Gwynedd level, the effects will differ depending on whether the levy is introduced by only one local authority, or whether neighbouring authorities also implement it.*

Therefore, the assessment at Gwynedd level is appropriately conditioned, and should be read in the context of the gaps in the data and the relatively limited evidence base, particularly at a local level.

However, we are confident that the impact on Gwynedd will be relatively small, both in terms of employment and Gross Value Added (GVA). We have adopted an approach broadly similar to the Welsh Government's analysis in order to determine the bookends for the likely range of these effects.

Within this main analysis, the assumptions made are generally conservative in assessing the impact on the economy (i.e. they tend to overestimate the potential negative impact). For example, it is assumed that Gwynedd loses all visitor spending, when some of that expenditure would in fact have taken place outside Gwynedd (for example, when visitors staying in Gwynedd spend money in other local authorities on day trips). It is also assumed that there is some loss of economic activity outside Gwynedd as a result of levy spending, whilst at the same time assuming that Gwynedd businesses do not benefit from contracts arising from visitor levy expenditure in other local authorities.

Similarly, the analysis assumes that there is no growth in the visitor economy and allows for a decrease in the number of visitors as a result of the introduction of the levy. In practice, if the visitor economy were to grow, the funding raised through the

levy would increase, and the expenditure of the levy itself could stimulate higher tourism through a better visitor experience. This would help maintain and enhance Gwynedd's competitiveness as a tourist destination. There is evidence of year-on-year growth in visitors at other locations where visitor levies have been introduced.

Any growth in the visitor economy would also offset any losses to the economy (in terms of jobs and GVA) arising from visitors who do not come as a result of the levy, and would also increase the revenue raised through the levy.

Nevertheless, on the basis of this approach, the effects of the levy are estimated to be relatively small. Even with these conservative assumptions (i.e. assumptions that could overestimate any negative impact), it is estimated that the levy could lead to:

Change in employment between -50 and +21 jobs – equivalent to a loss of around -0.1% or an increase of around 0.04% of employment in Gwynedd.

Change in annual GVA between -£2.7m and +£0.4m per annum – equivalent to a loss of around -0.1% or an increase of less than 0.01% of Gwynedd's economy.

Annual revenues of between £2.4m and £2.8m.

This range, which ranges from a relatively small negative impact to a relatively small positive impact, reflects the findings of the Welsh Government's Assessment, which also concluded that the impact on a national scale is likely to be between a small negative impact and a small positive impact.

STEAM data estimates that Gwynedd's current tourism economy is significantly larger than that indicated by the IPS and GBTS; if STEAM data were used, the effects of the levy would be about 4 to 5 times greater. This underlines the uncertainty in the data, and therefore the inherent uncertainty in predicting the impact of the levy.

8. Equality and Language Impact Assessment

The table below summarises the findings of the equality impact assessment against protected characteristics:

Protected characteristic	Possible impacts	Possible mitigation where necessary
Age	<p>The Welsh Government concludes that there are 'no' potential direct effects in terms of Age once mitigating measures (including the under 18 exception for lower limit accommodation) are considered. It is not anticipated that there would be any Gwynedd specific characteristics that would alter the findings of the Welsh Government Equality Impact Assessment (WG EQIA.)</p> <p>Potential impacts are associated with a higher proportion of older visitors to Gwynedd, and a young workforce, but any effects of the levy are likely to be small – and will be to some extent offset by the levy expenditure.</p>	<p>People under the age of 18 are exempt from the levy for lower-rate stays.</p> <p>Future use of the levy</p>
Disability	<p>WG EQIA noted that it could be interpreted as indirect discrimination to charge a visitor levy on carers travelling with a disabled person in need of care as part of their visit but that the option (excluding an exemption) was a proportionate response.</p> <p>Once a mitigation measure (including a refund for a person in receipt of disability benefit) has been included, no other impacts have been identified and it is not anticipated that there would be any Gwynedd specific characteristics that would alter WG EQIA findings.</p>	<p>A refund mechanism for people in receipt of disability benefit who are travelling with a person providing care, support or assistance.</p> <p>Future use of the levy</p>
Gender reassignment	<p>The Welsh Government concludes that there are 'no' potential direct effects in terms of gender reassignment. It is not anticipated that there would be any Gwynedd specific characteristics that would alter the findings of WG EQIA.</p>	<p>Stays in private hospitals are exempt from the levy.</p>

Protected characteristic	Possible impacts	Possible mitigation where necessary
Marriage and civil partnership	<p>The Welsh Government concludes that there are 'no' potential direct effects in terms of Marriage and Civil Partnership.</p> <p>It is not anticipated that there would be any Gwynedd specific characteristics that would alter the findings of WG EQIA.</p>	No potential impacts were identified
Pregnancy and maternity	<p>The Welsh Government concludes that there are 'no' potential direct effects in relation to Pregnancy and Maternity. It is not anticipated that there would be any Gwynedd specific characteristics that would alter the findings of WG EQIA.</p>	No potential impacts were identified
Race	<p>Visitors to Gwynedd and workers in the delivery, hotels and restaurants sector are more likely to be white, than the Welsh average.</p> <p>The Welsh Government concludes that there are 'no' potential direct effects in terms of Race. It is not anticipated that there would be any Gwynedd specific characteristics that would alter the findings of WG EQIA.</p>	<p>Gypsy, Roma and Traveller sites provided by a local authority or registered social landlord are exempt from the levy.</p> <p>Exemptions/refunds are available for vulnerable groups, e.g. asylum seekers and those fleeing domestic abuse</p> <p>Future use of the levy</p>

Protected characteristic	Possible impacts	Possible mitigation where necessary
Religion and belief	<p>The Welsh Government concludes that there are 'no' potential direct impacts in relation to Religion and Belief. It is not anticipated that there would be any Gwynedd specific characteristics that would alter the findings of WG EQIA.</p>	<p>The Welsh Revenue Authority (WRA) will offer non-digital processes to cater for those whose faith may limit digital engagement.</p> <p>Free accommodation is exempt from levy and there is a lower levy on stays in lower rate accommodation.</p> <p>Future use of the levy</p>
Gender	<p>The Welsh Government concludes that there are 'no' potential direct effects in relation to Gender. There are no characteristics specific to Gwynedd that would change the WG EQIA findings.</p> <p>It is not anticipated that there would be a disproportionate or discriminatory impact in Gwynedd as a result of the levy on women (or men) working in the tourism sector.</p>	<p>No potential impacts were identified</p>
Sexual orientation	<p>The Welsh Government concludes that there are 'no' potential direct effects in terms of Sexual Orientation. It is not anticipated that there would be any Gwynedd specific characteristics that would alter the findings of WG EQIA.</p>	<p>No potential impacts were identified</p>

Protected characteristic	Possible impacts	Possible mitigation where necessary
Language	<p>According to the Welsh Government assessment, impacts on the Welsh language could appear if the levy reduces the competitiveness and profitability of the tourism sector, which employs Welsh-speakers, including those visitors from holding educational visits to destinations in Wales.</p> <p>The levy could support the tourism industry and employment opportunities or enterprises in Welsh language regions.</p> <p>It is likely that there will be a very small impact/no measurable impact due to the levy on the use of Welsh except for realising that there may be fewer opportunities to use Welsh should there be a loss in terms of the demand. There is no evidence to show that people will leave their communities due to the tourism levy.</p>	<p>Future use of the levy to support the Welsh language and the use of the Welsh language in our communities and businesses</p>

Protected characteristic	Possible impacts	Possible mitigation where necessary
Socio-economic Disadvantage	<p>According to the Welsh Government integrated assessment, higher taxes may prevent travellers who are on a budget or individuals on a lower income from visiting areas that adopt a levy, raising possible concerns about fairness and inclusivity. However, the levy has been planned with two rates that will be applied per person, per night. The basic rate will be £1.30 for most types of accommodation and the lower rate for hostels and camp-sites will be £0.75. Adding a lower rate acknowledges that the cost of this type of accommodation is lower compared to others. In addition, young people aged under 18 years of age will not be included in the fee calculated for the tourist levy for lower-rate stays. This means that they will not have to pay the levy when it is transferred by a provided that will not be included in the levy's calculations (i.e. there is no levy to transfer).</p>	<p>Welsh Ministers can assess and change the rates set out in the legislation to mitigate impacts.</p> <p>Future use of the Levy to support improvements to the local area, by using the revenue to help maintain and regenerate local services and infrastructure.</p>

Environmental Impact Assessment

Gwynedd is home to a wide range of environmentally sensitive assets, including:

- Areas of outstanding natural beauty and landscapes of national importance.
- Fragile ecosystems subject to seasonal pressures due to high numbers of visitors.
- Historic towns and villages where over-tourism can affect the quality of the living environment and built heritage.

The Council's documents already recognise that these pressures need to be managed in order to ensure the long-term sustainability of Gwynedd's visitor economy.

997 Gwynedd residents responded to the Gwynedd Residents' Questionnaire: Views on Tourism in 2025. Of the 380 that believed that tourism had a negative impact the following responses were noted relevant to the Environment:

- 26.1% believe that tourism has a negative influence on the environment and nature
- 31.4% believe that tourism has a negative influence on the cleanliness of public spaces
- 31.6% believe tourism has a negative influence on litter

If a Levy were to be established in Gwynedd, priority would be given to Environmental Schemes from the choice of potential investment areas (Environmental/Community/Culture and Language/Infrastructure/Destination Management).

Potential Environmental Impacts

Positive Impacts

The introduction of a Visitor Levy could generate a number of environmental benefits, including:

- Better management of popular destinations, by investing in infrastructure such as paths, waste facilities and sanitation facilities.
- Investing in landscape conservation, biodiversity and natural heritage, mitigating damage resulting from over-tourism.
- Encouraging more sustainable tourism, by shifting the focus from growth in numbers to the value and quality of the visitor experience.
- Improving the public transport links offer to locals and visitors.

The proposed use of the income to improve the local environment has been highlighted in the Council's presentations and papers on the levy.

Potential Negative Impacts

There may be some negative impacts or indirect risks, including:

- Changes in visitor patterns, which could shift pressure towards less-prepared areas if visitors are looking for cheaper options.
- A risk that a slight reduction in the number of visitors could lead to indirect economic consequences, with potential implications for continued investment in environmental management if income is not clearly ring-fenced.

In addition to the impacts noted above, there is a risk that the introduction of a Visitor Levy on overnight stays could reinforce some inappropriate tourism behaviours, if not implemented alongside appropriate control and enforcement measures. Specifically:

- A potential increase in unauthorised wild camping, particularly in environmentally sensitive areas, which can lead to:
 - Damage to natural habitats and biodiversity.
 - An increase in waste, human excrement and water pollution.
 - Additional pressure on footpaths, common land and protected sites.
- Illegal parking of motor homes and camper vans overnight, especially on narrow lanes, in coastal areas and near popular destinations, with the following consequences:
 - A negative visual impact on the landscape and natural heritage.
 - Blocking access for local residents, emergency services and agricultural activity.
 - Additional pressure on local facilities not designed for overnight stays.

- A risk that some visitors, in attempting to avoid the costs of registered accommodation, may move towards unregulated types of stays, undermining the aims of the levy in terms of:
 - Creating a more sustainable visitor economy.
 - Ensuring that visitors contribute fairly to the costs of managing and maintaining the environment.

These problems have already been recognised as part of the wider discussion about tourism management and visitor pressure on Gwynedd's communities, and without appropriate intervention they could increase as a result of unintentional behavioural changes.

Mitigation and Improvement Measures

In order to reduce negative impacts and reinforce environmental benefits, it is recommended:

- To earmark a certain proportion of the levy income for environmental projects and destination management.
- To regularly monitor the impacts of the levy on visitor flow and environmental pressures, adapting policies if necessary.
- To work in partnership with local communities, environmental organisations and the tourism sector to ensure investments target the areas of greatest need.
- To use the levy income on designated motor home parking schemes, improved enforcement and management, and sustainable camping infrastructure where appropriate.

The intention to establish local governance and partnership arrangements has already been identified in the policy work related to the levy.

The assessment shows that the Visitor Levy in Gwynedd has the potential to have a significant positive impact on the environment, provided that the income collected is strategically and transparently invested in destination management and the protection of natural assets.

With appropriate mitigation measures, it can be ensured that the levy contributes to a sustainable visitor economy that protects the environment for the benefit of present and future generations.

Social Impact Assessment

Gwynedd is a county:

- With communities of strong Welsh identity, language and culture
- That experiences significant seasonal pressures in some areas due to high levels of visits
- Where tourism contributes positively to employment, but can also:

- Increase pressures on local services
- Impact on housing affordability and community cohesion
- Create tensions between the needs of visitors and residents
- 997 Gwynedd residents responded to the Gwynedd Residents' Questionnaire: Views on Tourism in 2025, noting the following responses relevant to social elements:
 - 69.5% live in a community that is frequently visited by tourists
 - 74.1% believe that tourism has more positive consequences than negative consequences on their community
 - 85.7% believe there is a positive influence on the local economy
 - 83.2% believe there is a positive influence on employment
 - 67.1% believe there is a positive influence on community vitality
 - 59.9% believe there is a positive influence on the quality of life
 - 21.2% believe there is a neutral influence on the quality of life
 - 39.4% believe there is a positive influence on the Welsh language and culture
 - 35% believe there is a neutral influence on the Welsh language and culture
- Among the 380 who believed there was a negative influence on their community, these were the main issues:
 - 67.1% - Traffic Issues
 - 63.9% - Parking Issues
 - 53.8% - Loss of available housing in communities in favour of short-term accommodation
 - 50.5% - house price increases
 - 48.5% - crowds of people
 - 38.3% - losing the authenticity of your area, weakening its local identity, language and way of life
 - 27.5% - an increase in the cost of living
 - 28.8% - safety issues, disrespectful behaviour
 - 21.7% - noise
 - 21.9% - light pollution

Potential Positive Social Impacts

Benefit for Local Communities

- Creating a dedicated source of income to invest in:

- Community infrastructure
- Public spaces, town centres and villages
- Cultural and community activities

Improved Community Well-being

- Reinvesting the income can help:
 - Manage visitor pressures
 - Improve the quality of life of residents in popular areas
 - Support local initiatives that strengthen social cohesion

Supporting the Welsh Language and Local Culture

- The potential to target investment in:
 - Cultural enterprises
 - Community events
 - Infrastructure that strengthens social use of the Welsh language

Potential Negative Social Impacts and Risks

Fairness and Inclusion

- The Levy could:
 - Disproportionately affect lower-income visitors or budget travellers
 - Create concerns about the affordability of holidays, particularly for families or certain groups (a risk also identified by the Welsh Government)

Impact on Small Businesses

- Small or community accommodation businesses:
 - They could be concerned about the impact on demand if visitors choose not to visit Gwynedd
 - Communication, support and consistency may be required to clarify the purpose of the Levy

Community Perception

- Without clear communication, there could be a risk:
 - For the Levy to be seen as a "tourism tax" rather than a community investment mechanism

Impact on Protected Groups

- **Disabled People:** Refund provisions reduce potential negative impacts
- **Young People:** Investing in local services and facilities can create an indirect benefit
- **Older People:** Better infrastructure and public spaces can support well-being
- **Low Income Groups::** The risk of a negative impact on affordability requires ongoing monitoring

Mitigation and Consolidation Measures

The following measures are proposed:

- Rigorous and ongoing community consultation on investment priorities
- Clear communication that the Levy income is:
 - Being kept locally
 - Being invested for the benefit of communities and well-being
- Regular monitoring of social impact in reviewing the Levy

Creating a Gwynedd Levy Partnership Forum to ensure community participation

All impact assessments will be reviewed following the public consultation and will receive full consideration when a decision on whether to introduce a Visitor Levy in Gwynedd is made by the Full Council in September 2026.

9. Well-being of Future Generations Act Impact Assessment

There is a duty to act in accordance with the principle of sustainable development, which is to seek to ensure that the needs of the present are met without jeopardising the ability of future generations to meet their needs.

In acting in accordance with this general duty the Council needs to take into account the importance of long-term impact, being integrated, inclusive, collaborative and preventative in the development and implementation of the proposal in question.

In accordance with the requirements of the Act, Cyngor Gwynedd has adopted well-being objectives. Particular attention is drawn to the following objectives which the Visitor Levy could support if adopted:

A PROSPEROUS GWYNEDD - Strengthening the economy and supporting the people of Gwynedd to earn a worthy wage

A WELSH-SPEAKING GWYNEDD - Ensure that we give every possible opportunity for our residents to use the Welsh language in the community.

A GREEN GWYNEDD - Protecting the county's natural beauty, and responding positively to the climate change crisis

AN EFFICIENT GWYNEDD - Putting the people of Gwynedd first and treating them fairly and ensuring that the Council performs effectively and efficiently

10. Contact Details

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**Gwynedd
Visitor Levy
Economic
Impact
Assesment**

MARCH 2026

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1 Executive Summary

- 1.1 The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 (the 'Act') gives councils in Wales the choice to introduce a charge on overnight stays. Known as a 'visitor levy', councils can choose to introduce the levy in their area from April 2027.
- 1.2 Cyngor Gwynedd is considering introducing a visitor levy – this Economic Assessment seeks to determine the potential economic impact of doing so.
- 1.3 There have been a number of studies to support the Welsh Government's decision to implement the Act. This report reviews these reports to determine the applicability of applying the same approach at a more local level.
- 1.4 The evidence base on the economic impact of visitor levies is relatively limited, due to a lack of applicable evidence of the impact of visitor levies from elsewhere, and there are gaps and uncertainties in data. This means that the national assessment is heavily caveated and relies on wide ranges – there are further complications with a local assessment as a result of gaps in data and an even more immature evidence base on the local impact of visitor levies (as opposed to national).
- 1.5 The key caveats relevant to the local level assessment are:
 - There are significant uncertainties in the elasticities of demand – this is the case at a Welsh level and is even more acute when applied at a Gwynedd level.
 - There are different data sources for the current size of the Gwynedd visitor economy. The main analysis uses the International Passenger Survey (IPS) and the Great British Tourism Survey (GBTS) – this is in line with the Welsh Government Appraisal and guidance provided to local authorities. STEAM data reports a much larger current visitor economy – the implications of this is set out in the report.
 - The available data does not differentiate between those who camp in campsites and those who camp in caravans / campervan or glamping.
 - At a national level, the majority of visitor spending can reasonably be expected to be captured in Wales. That is not the case at a smaller area – for example, some spending of someone who visits Gwynedd may be in Conwy or Anglesey (and vice versa).
 - Similarly, the spending of the levy will also have a higher level of leakage as some businesses who benefit from contracts through the spending of the levy may not be based in Gwynedd.
 - The national level assessment (necessarily) assumed that the levy will be imposed across all of Wales – at a Gwynedd level, there will be different impacts if Gwynedd implements the charge, but its neighbouring authorities do not, compared to if all neighbouring authorities implement the charge.
- 1.6 Therefore, the Gwynedd level assessment is appropriately caveated, and should be read in the context of gaps in the data and the relatively limited evidence base, particularly at the local level.

- 1.7 Nonetheless, we are confident that the impact on Gwynedd will be relatively small in terms of both the impact on employment and GVA. We have applied a broadly similar approach to the Welsh Government analysis to establish bookends for the likely range of these impacts.
- 1.8 Within this main analysis, the assumptions are generally conservative in terms of the approach to assessing the impact on the economy (i.e. they verge on overestimating the negative impact). For example, we assume the Gwynedd suffers all the loss of visitor spending, when in reality some of the spending will be lost from outside of Gwynedd (as people staying in Gwynedd spend money in other local authorities on day trips). It also assumes that there is leakage of economic activity from the spending of the levy outside of Gwynedd while also assuming that Gwynedd businesses do not benefit from contracts that result from the spending of visitor levies from other local authorities.
- 1.9 Similarly, the analysis assumes there is no change in the visitor economy other than allowing for a reduction in visitors in response to the introduction of the levy. In practice, if the visitor economy grows then the funding raised by the levy will increase (and vice versa¹), and indeed the levy spending could drive higher tourism through an improved visitor experience. This would help to maintain and improve Gwynedd's competitiveness as a tourist destination. There is evidence of year on year growth in visitors in other locations where visitor levies have been introduced.
- 1.10 Any growth in the visitor economy would also offset any losses to the economy (jobs and GVA) as a result of the visitors who do not come as a result of the levy and result in an increase in the levy revenue.
- 1.11 Nonetheless, based on this approach, the impacts of the levy are estimated to be relatively small. It is estimated that the levy could result in:
- A change in employment could be between -50 and +21 – this is between a loss of -0.1% or an increase of 0.04% of employment in Gwynedd.
 - A change in annual GVA could be between -£2.7m and +£0.4m per annum – this is equivalent to between a loss of -0.1% and an increase of 0.01% of Gwynedd's economy.
 - A revenue of between £2.4m to £2.8m per annum
- 1.12 This range from a relatively small negative impact to a relatively small positive impact reflects the findings of the Welsh Government Appraisal which also concluded a small negative to small positive impact at a national scale.
- 1.13 The STEAM data estimates the current Gwynedd tourist economy to be much larger than the IPS and GBTC – the impacts of the levy would be approximately 4 to 5 times larger if the STEAM data were used instead. This highlights the uncertainty in the data and therefore the inherent uncertainty in forecasting the impact of the levy.

¹ Conversely if tourism reduced for reasons other than the levy, the revenue funding would decrease.

2 Introduction

An overview of the Visitor Levy

- 2.1 The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 (the 'Act') gives councils in Wales the choice to introduce a charge on overnight stays. Known as a 'visitor levy', councils can choose to introduce the levy in their area from April 2027.
- 2.2 The levy is chargeable at two separate rates:
- Campsite pitches (tents) and shared rooms (hostels and dormitories): 75p per person, per night
 - All other types of visitor accommodation: £1.30 per person, per night
- 2.3 Note that those who camp in campervans, caravans or glamping will be required to pay the higher rate.
- 2.4 There are exemptions²; Visitors will not pay the visitor levy if they are:
- under 18 years of age and staying on a campsite pitch or in shared rooms (such as a hostel or a dormitories)
 - staying for more than 31 nights in a single booking
 - in emergency or temporary housing arranged by the local council
- 2.5 The funds from the levy will be reinvested for the purposes of destination management and improvement in the area. Section 44 of the Act stipulates that councils must use the proceeds of the levy for:
- mitigating the impact of visitors;
 - maintaining and promoting use of the Welsh language;
 - promoting and supporting the sustainable economic growth of tourism and other kinds of travel;
 - providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people).

The purpose of this report

- 2.6 Cyngor Gwynedd is seeking to determine the potential economic impact of introducing a visitor levy.

² <http://gov.wales/visitor-levy-small-contribution-lasting-legacy>

- 2.7 This report is phase two of a two phase process. Part one was joint commission between the local authorities of Gwynedd, Anglesey and Conwy which reviewed the data availability and evidence base that could be used in the individual Economic Impact Assessments. This means (as far as possible and appropriate) there is a uniform approach to the data review and analysis to feed into the consultation process. This Economic Impact Assessment for Cyngor Gwynedd is stand alone and includes the relevant information from the phase one study.
- 2.8 Section 3 of this report reviews the work undertaken by Welsh Government to understand the economic impacts of the Act at a national level, and the extent to which the approach could be applicable at a more local level.
- 2.9 The evidence base on the economic impact of visitor levies is relatively limited, due to a lack of applicable evidence of the impact of visitor levies from elsewhere, and there are gaps and uncertainties in data. Therefore even the national assessment is heavily caveated and relies on wide ranges. These limitations are even more pronounced at local level.
- 2.10 The key caveats relevant to the local level assessment are:
- There is uncertainty over how much of the levy is passed to consumers (modelled as 'bookends' at only as 0% or 100%)
 - There are significant uncertainties in the elasticities of demand – this is the case at a Welsh level and is even more acute when applied at a Gwynedd level.
 - There are different data sources for the current level of visitors, bed nights and spend. The main analysis uses the International Passenger Survey and the Great British Tourism Survey (GBTS) – this is in line with the Welsh Government Appraisal and guidance provided to local authorities. Using STEAM data reports a much larger current visitor economy and therefore a larger impact – this means that there is a large range of potential impact and highlights the inherent uncertainty in the forecasting.
 - The available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate – this is in line with the approach taken by Welsh Government in the economic assessment and advice of data to use in assessments that was provided by Welsh Government to local authorities. On the one hand, the approach will underestimate the impact on visitors and the loss of employment as a result of lower visitor spending. On the other hand, this will be offset by also underestimating the impact of the increase in jobs as a result of spending of the levy and the levy revenue collected. It will also be offset to some extent by the assumption (that again is in line with the Welsh Government approach) that all international visitors will pay the higher rate.
 - At a national level, the majority of visitor spending can reasonably be expected to be captured in Wales. That is not the case at a smaller area – for example, some spending of someone who visits Gwynedd may be in Anglesey or Conwy (and vice versa).
 - Similarly, the spending of the levy will also have a higher level of leakage as some businesses who benefit from contracts through the spending of the levy may not be based in Gwynedd.
 - The national level assessment (necessarily) assumed that the levy will be imposed across all of Wales – at a Gwynedd level, there will be different impacts if one local

authority implements the charge, but its neighbouring authorities do not, compared to if all neighbouring authorities implement the charge.

2.11 The local (Gwynedd) level assessment is therefore appropriately caveated and should be read in the context of uncertainty in data and relatively limited evidence base, particularly at the local level.

2.12 An updated report will be produced if further data become available or further data / feedback received through the consultation process would meaningfully change the conclusions of the economic impact assessment.

2.13 The remainder of the report covers:

- A review of the work undertaken by the Welsh Government to understand the economic impact of the Act (Section 3)
- A wider literature review to understand the extent to which evidence exists that would allow for the Wales wide approach to be undertaken at a smaller geographical scale (Section 4)
- Caveated Gwynedd level economic impact assessment (Section 5)
- Cross checking with the Welsh Government Analysis, accounting for the relative importance of tourism to Gwynedd (Section 6)
- Conclusion (Section 7)

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3 Studies to support the Welsh Government Act – Economic Impact

3.1 There have been a number of studies to support the Welsh Government's decision to introduce the Act. These include:

- Evidence review of elasticities relevant to a visitor levy in Wales, Alma Economics, 2022
- The Potential Economic & Greenhouse Gas Impacts of a Visitor Levy in Wales, Cardiff Business School & Welsh Government, 2024 - referred to in this report as the Welsh Government 2024 analysis
- Revised analysis of the potential economic and greenhouse gas impacts of a visitor levy, Welsh Government, 2025 - referred to in this report as the Welsh Government 2025 analysis
- Review of impacts of visitor levies in global destination, Bangor University 2024

3.2 These reports are undertaken at an all Wales level and are heavily caveated.

Evidence review of elasticities relevant to a visitor levy in Wales, Alma Economics, 2022

3.3 Alma Economics undertook a Rapid Evidence Assessment (REA) which reviewed the literature on elasticities relevant to a visitor levy in Wales.

3.4 It sought to estimate the price elasticity of demand of tourism and accommodation in particular. Price Elasticity of Demand (PED) is the measure of responsiveness of the demand for a good or service when its price changes. A negative PED denotes a decrease in quantity demanded when price increases. A high elasticity of demand indicates that the quantity demanded of a good or service is highly responsive to changes in its price, meaning a small price change can lead to a significant change in demand. Inelastic (or low elastic) demand is when demand is not responsive to price.

3.5 The report identified a high level of uncertainty and significant evidence gaps. Even where relevant evidence was found, there was a large variation in the magnitude of estimates of elasticities and there were no studies that provided Wales specific estimates and only a small minority of studies considered the UK market.

3.6 There were significant variations in the findings for tourism – while the majority of studies (70%) found that tourism was inelastic, there were some studies that reported elastic demand. The average mid-range PED across all studies was -0.7 and the median was -0.9. This means that for a 1% increase in the price of a good or service leads to a 0.7% reduction in demand.

3.7 There were only two studies that specifically considered accommodation – those showed it to be price inelastic (at -0.7). The report includes a caveat that these should be interpreted with caution given the limited number of studies. At least one of these reports was specifically based on international tourism – and so will be less relevant to a domestic market.

- 3.8 The review (by the report's own admission) provided very little evidence of addressing the more nuanced research questions, including (i) insight into the drivers of visitor behaviour, (ii) the impact of visitor levies or similar on tourism demand, and (iii) how the explored elasticities may vary depending on the characteristics of tourists (e.g., based on protected characteristics).
- 3.9 The report itself is also clear that these studies provided very little evidence differences that might occur at a sub-regional level, with most studies focusing on national impacts and / or international tourism.

The Potential Economic & Greenhouse Gas Impacts of a Visitor Levy in Wales, Cardiff Business School & Welsh Government, 2024

- 3.10 This report estimates the economic and greenhouse gas emissions impact of the levy at an all-Wales level. We have reviewed it to understand the extent to which a similar method could be used to estimate the impact of a levy in individual Local Authorities.
- 3.11 The report includes two scenarios:
- i. 100% levy is passed on from business to consumers.
 - ii. 100% levy is absorbed by the business
- 3.12 The analysis does not account for supply-side changes, such as providers exiting the market due to the levy.

100% Levy is passed on from business to consumers

- 3.13 The study calculates the likely impact on the study in three scenarios (optimistic, neutral and pessimistic) based on a range of elasticities taken from the Alma study. It applies these to different visitor segments (two domestic with different spending patterns and overseas visitors). This results in a change in consumer demand for each segment.
- 3.14 The report uses elasticities from the Alma Economics study which (as above) has significant uncertainty, data gaps, and is largely based on international tourism and national effects. The issue of applying national elasticities will be more problematic at a Local Authority level than it would be at an all-Wales level.
- 3.15 The study assumes that the price elasticity of demand feeds through directly into the economy – i.e. the increase in the levy results in a reduction in demand (within the study area) which means a reduction in total trip spending (also in the study area). This could be due to either people not visiting the study area or visiting the study area for a shorter period of time as a result of the levy.
- 3.16 The model then uses Input-Output tables to determine the likely impact of the Welsh Economy.

100% Levy is absorbed by the business

- 3.17 This scenario assumes that there is no change to visitors or revenues and that businesses absorb all of the costs. The report assumes that there are no supply side changes – i.e. no business exits the market, or are put off entering the market in future, instead the levy is taken from the output of the businesses.

3.18 It assumes that there are no losses in employment and only decreases in salary (and other elements of output). This is likely to underestimate the employment loss since – in reality, a loss of revenue would result in a reduction in staff as well as a reduction in salaries.

Issues and Caveats

3.19 The report itself highlights significant caveats:

- **Price Elasticity Uncertainty:** as above, there are significant uncertainties in the elasticities – this is the case at a Welsh level and will become even more acute if used at a smaller study area.
- **Accommodation Supply:** as above, the model does not account for supply-side changes, such as providers exiting the market due to the levy.
- **Pass-Through Assumptions:** as above, the report assesses the ‘book ends’ of the likely impact by assessing the impact if the levy is passed on to visitors or absorbed by businesses – it does not seek to assess the extent to which one is more or less likely.
- **In-Wales Costs:** The analysis only includes in Wales costs and so it likely underestimates the total costs of the trip, particularly for international trips. This will therefore overestimate the reduction in international trips post levy (and so presents a worst-case scenario)
- **Base-Year Constraints:** The levy is modelled on 2019 tourism data due to data limitations, with rates adjusted for inflation.
- **Future inflation:** Future inflation and sector changes are not included – it is effectively a snapshot in time in a given year.
- **Administrative costs:** The analysis does not include any frictional or administrative costs that any new Levy might engender.

Revised analysis of the potential economic and greenhouse gas impacts of a visitor levy, Welsh Government, 2025

3.20 This report updated the previous work for two sets of rates. One of those sets of rates (£1.30 standard / £0.75 lower) was subsequently used in the Act. The analysis also excluded children and young people staying in Lower Band accommodation, since they are excluded from the Levy.

3.21 The report used similar methodology as the original but noted that: ‘Constraints on time and access to data architectures mean a full, and fully comparable, reworking of the 2024 impact assessment is not possible’.

3.22 The results of the analysis at a Welsh level are set out in Table 3.1.

Table 3.1: Summary of likely impacts in Welsh Government report

			Likely range
Employment	Passing Levy onto visitors	FTEs	-400 to 100
	Businesses absorb levy	FTEs	360
Annual GVA (£m)	Passing Levy onto visitors		£7.5m to £11.1m
	Businesses absorb levy		£32.3m

Review of impacts of visitor levies in global destination, Bangor University 2024

- 3.23 Bangor University undertook a review of international evidence on the environmental, social, and cultural impacts of visitor levies in various global destinations. The report then provided recommendations of the Welsh Government on the implementation of the levy.
- 3.24 The report identified five case studies / areas which had implemented visitor levies that had similarities to Wales in terms of the reliance on the tourism sector and / or their social, cultural and/or environmental context. This meant that the case studies included places that, like Wales, were reliant on their tourism industry.
- 3.25 The report focused on the implementation of the levy – including what the levy can be spent on, the decision making process and authority, local accountability, the scope of project and activities funded, the impact of the funded projects (noting a lack of evidence) and the need for transparency, accountability, monitoring and evaluation.
- 3.26 It did not focus on the impact of the levy on the tourism sector specifically, although there were some takeaways that do inform our report:
- There is limited evidence on the effects of tourism taxes: ‘A **comprehensive assessment of the impacts of tourism taxes remains limited**, despite their clear motivations for implementation’.
 - In general, there has been continued **year-on year growth in tourism in locations that have introduced a visitor levy** (although we cannot know what the counterfactual would have been without a levy).
 - **Some locations choose to vary the tax during different seasons** – for example, the Balearic Islands have implemented two separate visitor levies: €0.25 – €1 per person per night in low season (November – April) and €1 – €4 per person per night in high season (May – October).³ **While others do not:** in Mareo and San Martin, where seasonality is high (visitor numbers in the four busiest months are over ten times those in the quietest four months), a flat visitor levy has been imposed throughout the year (€1.50 – €3.50 per person per night).
 - Some locations (Catalonia / Barcelona and the Balearic Islands) **vary by accommodation type / quality** (including different rates for different hotel ‘star’ quality. While **others do not have as much differentiation:** Iceland initially introduced a flat

³ Welsh Government, 2024. Review of visitor levies in global destinations [here](#)

rate and subsequently split the rate into three broad categories camping, hotels, and cruise ships.

Conclusions and implications for our study

3.27 The work undertaken to support the Welsh Government has highlighted that there are gaps in the evidence base for understanding the economic impact of the Visitor Levy. This means that the Welsh level economic impact study is necessarily caveated and includes wide ranges / book ends for the likely impact.

3.28 Applying the Welsh Government approach at a more local area level would have the same caveats and issues – and some of the issues would be more acute at a smaller study area.

3.29 The detail is set out above, but the key issues include:

- **There is limited applicable evidence on the Price Elasticity of Demand** – both Welsh Government economic appraisals use the PEDs from the Alma Study which are largely national studies for international tourism. There are no Welsh specific studies and only two that specifically look at accommodation (rather than tourism as a whole). The issue of using these elasticities become even more acute at a smaller study area since it is not clear that national elasticities hold at a sub-regional level.
- The analysis does **not take a view on the extent to which the levy is passed on** - it has book end for the impact of 0% or 100% of the levy being passed onto consumers.
- It also does **not allow for supply side changes** – i.e. it does not allow for the potential some businesses are deterred from entering or leave the market. In the scenario where all of the levy is passed on to businesses, it is assumed that there is no loss in employment (only a loss in wages).
- **There is very little evidence addressing the more nuanced questions**, including (i) insight into the drivers of visitor behaviour, (ii) the impact of visitor levies or similar on tourism demand, and (iii) how the explored elasticities may vary depending on the characteristics of tourists (e.g., based on protected characteristics). **This means the analysis makes mostly linear assumptions based on averages.** This also makes it difficult to apply local characteristic to the study (and so to adapt the methodology in the national assessment to a more local level).
- It **does not include out of country costs** which likely underestimates the total cost of the trip, particularly for international trips. This will therefore overestimate the reduction in international trips post levy (and so presents a worst-case scenario).
- The analysis does not consider what visitor spending that is ‘lost’ as a result of the levy is spent on instead – this could be day trips (instead of overnight trips) or Welsh residents spending money on other things (instead of holidaying within Wales). This approach is again likely to be worst case scenario in terms of the impact of the levy on the Welsh economy. This is likely to be less relevant at Gwynedd level than the Welsh level as those visiting Gwynedd (who are put off by the levy) are unlikely to also live in Gwynedd (whereas a Welsh resident may also holiday in Wales – for example, a Cardiff resident may spend money in Cardiff rather than holiday in Gwynedd).

4 Further literature review

- 4.1 We conducted a further literature review to understand the extent to which evidence exists that would
- Allow for the Wales wide approach to be adapted for a local level assessment.
 - Fill the evidence gaps identified above
- 4.2 There was limited additional evidence above what was used in the work to support the Welsh Government when implementing the Act.
- 4.3 There were various other examples where there has been continued year-on year growth in tourism in locations that have introduced a visitor levy (although as above we cannot know what the counterfactual would have been without a levy).
- 4.4 The other questions the literature review sought to answer were:
- To what extent does a visitor levy get passed on to visitors?
 - How does the impact of a visitor levy change with seasonality or popularity of a destination?
 - How does the does the cost of accommodation / trip change the impact of the levy? There was no additional evidence found to answer this question.
 - Do visitors adjust their wider trip spending if they bear the cost of the levy?

To what extent does a visitor levy get passed on to visitors?

- 4.5 The extent to which a visitor levy gets passed on to consumers will determine whether it is consumers or accommodation providers who will bear the cost of the levy. As set out above the Welsh government economic appraisal does not take a view on this but tests book ends for 0% to 100% pass on.
- 4.6 The literature provides mixed evidence on the rate of pass-through (the extent to which businesses pass on changes in tax as changes in price to consumers) of a visitor levy or other tax mechanisms.
- 4.7 We looked at various tax mechanisms to determine pass-through rates:
- A review of lodging taxes in US cities showed that a lodging tax is unlikely to be fully passed on to the visitors – about 86% of tax paid is by visitors and the remaining 14% is absorbed by accommodation providers in the form of lower accommodation rates or reduced occupancy.⁴

⁴ Hudson, S., Meng, F., So, K. K. F., Smith, S., Li, J., & Qi, R. (2021). The effect of lodging tax increases on US destinations. *Tourism Economics*, 27(1), 205-219. Available [here](#)

- The European Commission study found that there was a high degree of pass-through in the long run but also had example of where taxes were not passed through. For example a case study of Disneyland Paris indicated they were unlikely to pass on VAT rate increases in 2014 to visitors due to the high price sensitivity of visitors. This meant Disneyland absorbed the cost of the VAT increase to mitigate the impact on visitor numbers and expenditure.⁵
- A study looking at the pass through of air passenger taxes on airfares across Europe estimated air passenger tax pass-through rates from 20% to 56%.⁶ The same study mentions that the consumer share of the tax burden from a French VAT-reform was between 57% and 77%.

4.8 The literature review therefore does not provide clear evidence for the different level of pass-through rates that could be used – and so we maintain the approach in the Welsh Government Assessment of using bookends.

How does the impact of a visitor levy change with seasonality or popularity of a destination?

4.9 There are limited studies that have quantified PEDs for different seasons but several studies state that demand for tourism is less elastic in the high seasons compared to the low seasons.⁷

- The report on the balancing of revenue and demand in the hotel industry in Dubai⁸ found that demand elasticity is much higher in the low seasons (and lower in high season). That is likely to be driven significantly by international travel – the report found that local hotels do not face strong seasonality as much international hotels do.
- The report on the price elasticities for accommodation services in Prague showed that visitors are less elastic during the high seasons than they are throughout the year with PEDs of -0.22 to 0.78 in the high seasons vs PEDs of -0.10 to -0.54 throughout the year. The positive PEDs in the high season suggest that the expected price-demand relationship may not always hold.⁹

4.10 The European Commission study found that there were higher elasticity of demand in destinations with close substitutes. It showed that European countries in proximity still exhibit differences in PEDs due to the type of seasonal tourism offering.

4.11 Separately, the study of lodging tax increases on US destinations showed that approximately 49% of travellers altered their plans due to high travel taxes by reducing spending, staying somewhere cheaper and visiting during low season.¹⁰

4.12 While the literature review highlighted some further evidence on seasonality, not sufficiently to be able to determine how Gwynedd would differ from the Welsh Average.

⁵ European Commission, 2017. The Impact of Taxes on the Competitiveness of European Tourism [here](#)

⁶ Wozny, F. (2024). *Tax incidence in heterogeneous markets: The pass-through of air passenger taxes on airfares* (No. 16783). IZA Discussion Papers. Available [here](#)

⁷ Baždar Gašljević, T., Maradin, D., & Cerović, L. (2023). Price Elasticity of Demand For Hotel Services On The Business Example Of Two Hotels In The Republic Of Croatia. *Journal of accounting and management*, 13(1), 1-14. Available [here](#)

⁸ Alrawabdeh, W. (2021). Seasonal balancing of revenue and demand in hotel industry: the case of Dubai City. *Journal of Revenue and Pricing Management*, 21(1), 36. Available [here](#)

⁹ Petříček, M., & Chalupa, Š. (2020). PRICE ELASTICITY OF DEMAND FOR ACCOMODATION SERVICES–EMPIRICAL APPLICATION IN PRAGUE. *Ad Alta: Journal of Interdisciplinary Research*, 10(1). Available [here](#)

¹⁰ Hudson, S., Meng, F., So, K. K. F., Smith, S., Li, J., & Qi, R. (2021). The effect of lodging tax increases on US destinations. *Tourism Economics*, 27(1), 205-219. Available [here](#)

Do visitors adjust their wider trip spending if they bear the cost of the levy?

4.13 While the study of lodging tax increases on US destinations¹¹ mentioned above showed that visitors responded to a levy by decreasing their spending, the study did not quantify to what extent visitors reduce their spending. And overall, the literature is not clear about how visitors would adjust their wider trip spending if they bear the cost of the levy.

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¹¹ Ibid

5 Caveated Gwynedd level economic impact assessment

- 5.1 As set out in the previous sections, there is insufficient evidence to be able to robustly and accurately model the precise impact of the levy, or what how different scenarios would impact the magnitude of the effect (for example, whether other local authorities also implement a levy).
- 5.2 Therefore, we have taken a twin track approach to provide book ends (broadly following the Welsh Government approach) and sense checks for the likely range of the effect:
- Caveated reproduction of the Welsh Government approach. This is set out in Section 5.
 - Cross checking with the Welsh Government Analysis, accounting for the relative importance of tourism to Gwynedd. This is set out in this Section 6.

Caveated reproduction of the Welsh Government approach

- 5.3 We have taken a similar approach to the Welsh Government 2025 analysis to estimate the impacts at the Gwynedd level – as in the Welsh Government approach this includes ‘bookends’ with two scenarios, one where 100% of the Levy being absorbed by businesses and another where 100% being absorbed by businesses
- 5.4 The approach is caveated because – as set out in Section 3, there are caveats within the Welsh Government report that also apply here and are in some cases more exaggerated in a local level assessment.
- 5.5 The key caveats that are relevant to the local level assessment are:
- At a national level, the majority of visitor spending can reasonably be expected to be captured in Wales. That is not the case at a smaller area – for example, some spending of someone who visits Gwynedd may be in Anglesey or Conwy (and vice versa). For the purposes of this assessment, we assume that all spending is ‘lost’ from Gwynedd and so this a worst-case scenario in terms of the impact on the visitor economy.
 - Similarly, the spending of the levy will also have a higher level of leakage as some businesses who benefit from contracts through the spending of the levy may not be based in Gwynedd.
 - There are different data sources for the current size of the Gwynedd visitor economy – this is set out in more detail below.
 - The available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate – this is in line with the approach taken by Welsh Government in the economic assessment and advice of data to use in assessments that was provided by Welsh Government to local authorities. One the one hand, the approach will underestimate the impact on visitors and the loss of employment as a result of lower

visitor spending. On the other hand, this will be offset by also underestimating the impact of the increase in jobs as a result of spending of the levy and the levy revenue collected. It will also be offset to some extent by the assumption (that again is in line with the Welsh Government approach) that all international visitors will pay the higher rate.

- The Welsh Government analysis assume that a change in the price of tourism (i.e. the levy) results in a decrease in demand for tourism. It does not consider changes in visitor spending patterns within the trip (for example reducing other trip costs by the cost of the levy). This is likely to be worst case scenario in respect to the impact of the levy on the Welsh economy (assuming that the PED picks up all of the change in visitor behaviour). The same approach is taken in the local assessment – again this is likely to be worst case.
- There are significant uncertainties in the elasticities – this is the case at a Welsh level and is even more acute if used at a smaller study area. There is no alternative evidence for a more robust assessment and so we have used the range of elasticities of demand used in the Welsh Government assessment.
- The national level assessment (necessarily) assumed that the levy will be imposed across all of Wales – there will be different impacts if one local authority implements the charge, but its neighbouring authorities do not, compared to if all neighbouring authorities implement the charge. It is not possible to accurately assess what the impact of different combination of local authorities introducing the levy is, but the effect on the magnitude of the impact is considered.
- The scenario where the levy is passed onto businesses does not account for supply-side changes, such as providers exiting the market due to the levy.
- It also does not account for reductions in employment and assumes that the savings are found within the ‘value add’ of the businesses operations. In reality, it would likely result in a reduction of jobs too.

5.6 As with the Welsh Government analysis, the analysis does not include inflation (it considers the annual impact if the levy was in place in 2024 – the latest year for which data is available), it does not include administration costs on businesses, and it does not include costs that are outside of Wales (this means the analysis likely slightly overestimates the impact of the levy, particularly for international visitors – for whom out of Wales costs will be higher).

5.7 Given the lack of evidence, there are assumptions (such as elasticities of demand) where we have not sought to make the assumptions Gwynedd specific – but instead have indicated whether the estimates are likely to under or overestimate the impacts, and provided sensitivity tests as appropriate.

5.8 VAT will be charged on the Visitor Levy¹².

Estimating the current number of visitor economy

5.9 In order to estimate the impact of the visitor levy, we first need to estimate the size of the visitor economy (the number of visitors, and nights stayed, and the spending that they support).

¹² [Visitor Levy for visitor accommodation providers: overview | GOV.WALES](#)

- 5.10 The Welsh Government analysis uses the Great British Tourism Survey (GBTS) and International Passenger Survey (IPS) for 2022 to 2024 – this is also the guidance that has been provided to local authorities.
- 5.11 This results in an average of 0.87m visits staying 3.6m bed nights and supporting £250m of spend. Note this is all trips including those that are staying in accommodation that is not included in the levy (for example staying with friends and family).
- 5.12 It should be noted that this data set has seen a reduction in bed nights and spend compared to pre Covid averages (2017-2019) and the data used in the Welsh Government Consultation Document¹³. This decrease may be partly due to a change in methodology in the data collection but may also be as a result of an actual decrease in tourism in Gwynedd.
- 5.13 However using the 2022-24 average does not account for the more recent (or indeed future) growth in bed nights and spend. Therefore a sensitivity test is included with the 2024 bed nights and spend.
- 5.14 A sensitivity test is also included to include the STEAM data which has a much higher visitor numbers and spend data – this is likely to overestimate the impact of the levy but is included for completeness, and because it is noted that the rural nature of Gwynedd may mean that the GTBS and the IPS may underestimate visitor numbers.

Visitor levy passed entirely on to tourists

- 5.15 This section assumes that 100% of the visitor levy is passed on to consumers. It first considers the impact of the loss of visitor spending and then considers the extent to which the spending of the levy itself would offset the loss.

The impact of the potential loss of visitor spending

- 5.16 In the main analysis we use the average annual data from the GTBS and IPS for 2022 to 2024
- 5.17 Including both international and domestic tourists who stay in accommodation that is eligible for the levy, it is estimated that there are approximately 0.67m overnight visitors to Gwynedd per year – who spend an average of 3.9 nights and spend £307 per person per trip.
- 5.18 Note that since this does not include those who are staying in accommodation that would be exempt from the levy the 0.87m visits set out above reduces 0.67m visits (and bed nights and spend also reduce)¹⁴.

Table 5.1: All eligible overnight visits to Gwynedd – split between accommodation types and visitor type – core scenario (2022 to 2024)

¹³ *Welsh Government Consultation Document: Consultation on proposals for a discretionary Visitor Levy for local authorities Compendium of visitor and visitor accommodation provider data sources 2022*

¹⁴ For Great British Tourism Survey we exclude those staying in 'other accommodation' and for the International Passenger Survey we exclude those who are staying in their own home or staying for free with friends and family

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	Overseas visitors (Standard Band)	Total (avg over 2022-2024)
Total visits by overnight visitors ('000)	398	227	50	674
Total Gwynedd bed nights ('000)	1,450	868	305	2,623
Average trip length (nights)	3.6	3.8	6.2	3.9
Total Gwynedd overnight expenditure (including VAT)	£129m	£54m	£24m	£207m
Cost per trip (including VAT)	£324	£236	£485	£307
Cost per night (including VAT)	£89	£62	£79	£79

Source: Great British Tourism Survey and International Passenger Survey

- 5.19 The Welsh Government 2025 analysis estimated that 22% of those in the Lower Band accommodation are children and so are exempt from the levy. It is assumed that this assumption holds at a Gwynedd level – were the proportion of children to be lower the impact of the levy would be higher, and conversely were the proportion of children to be higher the magnitude of the impact of the levy would be smaller.
- 5.20 The table below include only eligible visitors (i.e. it excludes children visiting lower band accommodation).
- 5.21 Note that all international visitors are assumed to stay in standard accommodation and so pay the levy – this is consistent with the Welsh Government analysis. Were there to be children in lower bound accommodation within this group, the magnitude impact of the levy would be smaller).
- 5.22 As set out above, the available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate – this is in line with the approach taken by Welsh Government in the economic assessment and advice of data to use in assessments that was provided by Welsh Government to local authorities.
- 5.23 On the one hand, the approach will underestimate the impact on visitors (including underestimating the number of people who pay the higher rate and overestimating the number of children who are exempt from paying) and the loss of employment as a result of lower visitor spending. On the other hand, this will be offset by also underestimating the impact of the increase in jobs as a result of spending of the levy and the levy revenue collected. It will also be offset to some extent by the assumption (that again is in line with the Welsh Government approach) that all international visitors will pay the higher rate.

Table 5.2: All eligible overnight visits to Gwynedd – split between accommodation types and visitor type – core scenario

	UK-resident visitors	UK-resident visitors	International	Total
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	(Standard Band)	(Lower Band)		
Eligible overnight visits ('000)	398	177	50	625
Eligible bed nights ('000)	1,450	677	305	2,432
Average trip length (nights)	3.6	3.8	6.2	3.9
Eligible overnight expenditure (inc VAT)	£129m	£42m	£24m	£195m
Cost per trip	£324	£236	£485	£312
Cost per night	£89	£62	£79	£80

5.24 The levy is £1.30 per person, per night for standard accommodation and 75p for lower band accommodation. VAT is charged and so those costs increase to £1.56 and 90p. Based on the average trip length and the total cost per trip, it is estimated that the visitor levy would be between 1.5% and 2.0% of the trip cost depending on trip / visitor type.

5.25 The elasticity is assumed to be -0.74. This is in line with the Welsh Government (2025) appraisal (for the neutral scenario). We have also tested the more pessimistic elasticity (-1.12) and more optimistic elasticity (-0.38) from the Welsh Government appraisal – this range is presented at the end this section.

5.26 As is set out above, there is very little evidence on local level elasticities as a result of visitor levies – the relatively limited analysis that exists is based on national evidence. In the absence of more locally specific evidence the range of multipliers has been applied.

5.27 It should also be noted that elasticity of demand in Gwynedd will be affected (to some extent) by whether neighbouring local authorities also introduce the visitor levy – if Gwynedd is the only local authority to introduce the levy, the impact on visitor behaviour will likely to be higher (as visitors may choose to go to other local authorities instead) whereas if more local authorities introduce a charge, the impact is likely to be lower.

5.28 Using the neutral multiplier (-0.74) results in a reduction in demand of between 1.1% and 1.5% depending on trip / visitor type.

Table 5.3: Change in demand as a result of the levy – core scenario

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	International
Levy per person per night (ex VAT)	£1.30	£0.75	£1.30
Levy per person per night (inc VAT)	£1.56	£0.90	£1.56
Average trip length (nights)	3.6	3.8	6.2
Avg per-trip expenditure (inc VAT)	£324	£236	£485
Per trip Visitor Levy:	£5.68	£3.45	£9.61
a) As a % of trip cost	1.8%	1.5%	2.0%

b) Elasticity	-0.74	-0.74	-0.74
Percentage change in consumer demand (a x b)	-1.3%	-1.1%	-1.5%

5.29 This reduction in demand results in a £2.5m reduction in spending by visitors per year (including VAT) and £2.1m (excluding VAT).

5.30 Not all of that spend would have been spent in Gwynedd - some would have been spent in other local authorities (either day trips or on the journey) but to be conservative it is assumed that all of the loss is felt in Gwynedd. This will overestimate the (negative) impact on the Gwynedd economy.

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Table 5.4: Loss in trip expenditure – core scenario

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	Overseas visitors (Standard Band)	Total
Eligible overnight expenditure (inc VAT)	£129m	£42m	£24m	£195m
Percentage change in demand	-1.3%	-1.1%	-1.5%	
Post Visitor Levy expenditure (inc VAT)	£127m	£41m	£24m	£192m
Gross Trip Expenditure reduction (direct) - inc VAT	-£1.7m	-£0.5m	-£0.4m	-£2.5m
Gross Trip Expenditure Losses (direct) - excl VAT	-£1.4m	-£0.4m	-£0.3m	-£2.1m

5.31 Based on Welsh Government multipliers for ‘accommodation and food’ – indirect and induced effects are also included. Again, these would not all have been felt in Gwynedd and so this is likely to overestimate (the negative) impact of the loss of expenditure as a result of the levy.

5.32 We apply both a type 1 (which captures direct and indirect effects) and type 2 multipliers (which capture direct, indirect and induced effects) for accommodation and food¹⁵ – this is used as a proxy for all spending and is likely to capture the majority of the spending patterns.

5.33 This results in a loss of between £1.5m and £1.7m of annual GVA per year – which results in the loss of between 42 and 47 FTE jobs.

Table 5.5: Loss in annual GVA and employment as a result of loss of visitor spending – core scenario

	Type 1	Type 1 and Type 2
Change in direct annual output (exl VAT)	-£2.1m	-£2.1m
Multiplier (accommodation and food)	1.23	1.39
Change in total annual output	-£2.5m	-£2.9m
Ratio of Output to GVA (accommodation and food)	0.58	0.58
Change in annual GVA	-£1.5m	-£1.7m
GVA per FTE (accom and food) in Gwynedd	£35,525	£35,525
Change in FTE Employment	-42	-47

¹⁵ This is based on Welsh Government Indicative economic multipliers (input-output tables): 2019

The impact of the Visitor Levy spending

5.34 The visitor levy will result in an increase in economic activity. The visitor levy can be spent on:

- mitigating the impact of visitors;
- maintaining and promoting use of the Welsh language;
- promoting and supporting the sustainable economic growth of tourism and other kinds of travel;
- providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people)

5.35 For the purpose of this assessment, it is assumed that the impact is felt equally across different sectors of the economy (and so Gwynedd averages have been used). This could be updated when further information on the type of investment that the visitor levy is spent on is available.

5.36 The Levy would result in £2.8m of revenue excluding VAT (see Table 5.6) – this accounts for the reduction in demand as a result of the levy and excludes children from the lower band accommodation.

5.37 Not all of this will be spent with Gwynedd employers, since:

- Up to 10% will go to Welsh Government to cover operating costs – in main analysis it is assumed that the full 10% is taken by Welsh Government, but a sensitivity test is included to reduce this to 0% (to give the full range of 0% to 10%).
- A further 25% leakage is applied to allow for the spending of the Gwynedd levy to be spent on companies outside of Gwynedd. This is a conservative estimate since leakage is anticipated to be very low – the spending of the fund would be carried out by Cyngor Gwynedd in line with its sustainable tourism principles. Spending is likely to include spending on destinations and communities in Gwynedd including destination management, regeneration and public realm projects, and events. This means that spend would be with local contractors and businesses as far as possible. The nature of the spending (relatively small contracts) means that it is more likely to be delivered by local businesses and less likely to attract businesses from further afield. There may also be local grants for businesses (which themselves would support economic activity) which would be largely spent within the county. Nonetheless a higher leakage of 45% is included as a sensitivity test.

5.38 Again, we apply type 1 and type 2 multipliers and a ratio of GVA to output¹⁶ – this result in an increase of approximately £1.1m to £1.3m in annual GVA in Gwynedd supporting 19 to 21 FTE jobs (see Table 5.7).

¹⁶ Multiplier and ratio based on Welsh Government Indicative economic multipliers (input-output tables): 2019

Table 5.6: Levy revenue – core scenario

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	Overseas visitors (Standard Band)	Total
Post-levy eligible bed-nights accounting for reduced demand ('000)	1,431	670	301	2,401
Levy per person per night (ex VAT)	£1.30	£0.75	£1.30	
Visitor Levy Revenue (ex VAT)	£1.9m	£0.5m	£0.4m	£2.8m
Visitor Levy Revenue (inc VAT)	£2.2m	£0.6m	£0.5m	£3.3m

Table 5.7: increase in annual GVA and employment as a result of spending of the Visitor Levy – core scenario

	Low Scenario - Type 1	High Scenario - Type 2
Visitors Levy revenue (ex VAT) – direct output	£2.8m	£2.8m
Excluding 10% that goes to WG operating cost	£2.5m	£2.5m
Leakage	25%	25%
Visitors Levy revenue (ex VAT) in Gwynedd – direct output	£1.9m	£1.9m
Multiplier (all sectors)	1.21	1.33
Change in total output (including direct etc) in Gwynedd	£2.2m	£2.5m
Ratio of Output to GVA (all sectors)	0.5	0.5
Change in GVA in Gwynedd	£1.1m	£1.3m
GVA per FTE across all sectors (Gwynedd)	£58,615	£58,615
Change in FTE Employment in Gwynedd	19	21

Total impact of the Levy

5.39 The combined impact of the levy is the loss of visitor spending plus the increase economic activity as a result of the levy spending in Gwynedd.

5.40 In the core scenario that is anticipated to be a £0.3m to £0.4m loss of annual GVA (which is a 0.01% decrease in Gwynedd's annual GVA) and the loss of 22 to 26 jobs (which is 0.05% of the Gwynedd's employment).

Table 5.8: Change in annual GVA and employment combined effect – core scenario

		Core (based on elasticities)
GVA	Decrease due to loss of spending	-£1.5m to -1.7m
	Increase due to spending of the levy	+£1.1m to +£1.3m
	Change in annual GVA	-£0.3m to -£0.4m
	Gwynedd GVA (2023)	£2,842m
	Approx percent of Gwynedd Economy GVA	-0.01%
Employment	Decrease due to loss of spending	-42 to -47 jobs
	Increase due to spending of the levy	+19 to +21 jobs
	Change in FTE Employment	-22 to -26 jobs
	Gwynedd FTE Total	48,485
	Approximate percent of Gwynedd employment	-0.05%

5.41 The core scenario is based on an elasticity of -0.74. Applying Welsh Government's optimistic elasticity (-0.38) reduces the impact to the loss of 2 to 3 jobs and results in an increase in annual GVA of £0.4m.

5.42 Applying a more pessimistic elasticity (-1.12) results in a larger loss of up to 50 jobs and up to £1.3m annual loss in annual GVA.

Table 5.9: Change in annual GVA and employment combined effect

	Lower Bound (based on elasticities)	Core (based on elasticities)	Higher bound (based on elasticities)
Decrease due to loss of spending	-£2.2m to -£2.5m	-£1.5m to -£1.7m	-£0.8m to -£0.9m
Increase due to spending of the levy	+£1.1m to +£1.2m	+£1.1m to +£1.3m	+£1.1m to +£1.3m
Change in annual GVA	-£1.1m to -£1.3m	-£0.3m to -£0.4m	£0.4m
Gwynedd GVA (2023)	£2,842m	£2,842m	£2,842m
% of Gwynedd Economy GVA	-0.04% to -0.05%	-0.01%	0.01%
Decrease due to loss of spending	-63 to -71 jobs	-42 to -47 jobs	-21 to -24 jobs
Increase due to spending of the levy	+19 to +21 jobs	+19 to +21 jobs	+20 to +22 jobs
Change in FTE Employment	-44 to -50 jobs	-22 to -26 jobs	-2 to -3 jobs

Gwynedd FTE Total	48,485	48,485	48,485
% of Gwynedd employment	-0.1%	-0.05%	-0.01%

5.43 Table 5.10 sets out the total levy revenue collected in each scenario – note the economic activity supported by these activities is included in the GVA impacts set above but is included here for clarity.

5.44 Based on the current number of visitors (bed nights) the levy would raise £2.8m, of which up to £2.5m would be retained by Cyngor Gwynedd to spend in the local area (in line with the Act) assuming that up to 10% of the revenue covers Welsh Government operating costs.

5.45 The approach set out in the previous analysis allows for a reduction in demand in response to the visitor levy – this reduction results in the revenue falling slightly but it remains between £2.7m and £2.8m in total, and between £2.4m and £2.5m once the contribution to Welsh Government operating costs have been excluded.

5.46 In reality, the revenue collected could be higher than this for a number of reasons:

- This assumes that the number of visitors is static as of 2022 to 2024 data – and the only change is a reduction in visitors (or bed nights) as a result of the levy. In reality the visitor economy may grow (with or without the levy). The Gwynedd tourism market has been growing post Covid and this may continue. There is also evidence year-on year growth in tourism in locations that have introduced a visitor levy (refer to the Bangor University report as summarised in Section 3). On the other hand, if visitor numbers reduced, there would be a reduction in revenue.
- The levy will allow Cyngor Gwynedd to invest in activities in line with the Act, including promoting and supporting the sustainable economic growth of tourism, and providing, maintaining and improving infrastructure, facilities and services for use by visitors. This investment is itself likely to drive an increase in visitor numbers. Conversely there could be a fall in visitors without the investment in the levy.
- STEAM data suggests a much more significant current visitor economy in Gwynedd – this would result in a larger revenue – this is set out in more detail in the sensitivity test in the next section.
- The available data does not differentiate between those who camp in campsites (who pay the lower rate) and those who camp in caravans / campervan or glamping (who pay the higher rate). For the purpose of this assessment we have assumed that all domestic visitors to campsites pay the lower rate, in reality some will pay the higher rate which will increase the revenue. There will also be fewer children who are exempt.

Table 5.10: Revenue estimates

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	Overseas visitors (Standard Band)	Total	Reduced by 10% to WG for operating costs
Levy per night (excl VAT)	£1.30	£0.75	£1.30		

No reduction in demand	In scope bed nights	1.45m	0.68m	0.31m	2.43m	
	Revenue (excl VAT)	£1.88m	£0.51m	£0.40m	£2.79m	£2.51m
Core	In scope bed nights	1.43m	0.67m	0.30m	2.40m	
	Revenue (excl VAT)	£1.86m	£0.50m	£0.39m	£2.75m	£2.48m
Optimistic	In scope bed nights	1.44m	0.67m	0.30m	2.42m	
	Revenue (excl VAT)	£1.87m	£0.50m	£0.39m	£2.77m	£2.49m
Pessimistic	In scope bed nights	1.42m	0.67m	0.30m	2.39m	
	Revenue (excl VAT)	£1.85m	£0.50m	£0.39m	£2.74m	£2.46m

Sensitivity test and impacts of assumptions

- 5.47 There are a number of assumptions made above which effect the scale of the impact. The key assumption are set out in the table below, alongside the implications for the magnitude of the impact. Additional sensitivity tests are also carried out – those are set out in Table 5.12 and Table 13..
- 5.48 As set out above, there are a number of different sources for estimating the current size of Gwynedd’s tourist economy. The main analysis presented above uses the GBTS and IPS for average annual data for 2022 to 2024 – this is in line with the approach used by Welsh Government and also the guidance that has been provided to local authorities.
- 5.49 The annual figure for 2024 is higher than the average annual figures for 2022-24 (reflecting a recovering post-covid market) and so we have added the 2024 figures as a sensitivity test.
- 5.50 STEAM data estimates a much bigger tourism market in Gwynedd – this is set out in more detail, including a sensitivity test, below.

Table 5.11: Implications of assumptions on likely magnitude of impact

	Sensitivity test	Implication
Contribution to WG operating costs reduced to 0%	Yes – Table 5.12	Tested in sensitivity test = negligible change in impact
Higher level (45%) of leakage is applied	Yes – Table 5.12	Tested in sensitivity test = Slightly higher magnitude of impact
Using 2024 GTBS and IPS data (instead of 2022 to 2024 average)	Yes – Table 5.12	Tested in sensitivity test = Slightly higher magnitude of impact
Using STEAM data	Yes – Table 5.13	Tested in sensitivity test = Higher magnitude of impact
Proportion of children in standard accommodation is higher than 22%	No	Lower impact in terms of loss of visitor expenditure (as more children, who are exempt) + Lower impact in terms of spending of levy = Lower magnitude of impact

Proportion of children in standard accommodation is lower than 22%	No	Higher impact in terms of loss of visitor expenditure (as fewer children, who are exempt) + Higher impact in terms of spending of levy = Higher magnitude of impact
Impact of people in campsites / motorhomes / glamping paying the higher rate	No	Higher impact in terms of loss of visitor expenditure + Higher impact in terms of spending of levy = Higher magnitude of impact
More pessimistic elasticity of demand	Included in Table 5.9 (lower bound)	Included in lower bound above = Higher magnitude of impact
More optimistic elasticity of demand	Included in Table 5.9 (higher bound)	Included in higher bound above = Lower magnitude of impact
Cyngor Gwynedd only local authority to introduce levy	Not explicitly	Not explicitly but likely to be closer to 'more pessimistic elasticity of demand' = Higher magnitude of impact
Cyngor Gwynedd and neighbouring local authorities to introduce levy	Not explicitly	Not explicitly but likely to be closer to 'more optimistic elasticity of demand' = Lower magnitude of impact
Less than 100% of spending is 'lost' from Gwynedd	No	Lower impact in terms of loss of visitor expenditure = Lower magnitude of impact

Table 5.12: Sensitivity tests

	Core	Contribution to WG operating costs reduced to 0%	Higher level (45%) of leakage is applied	Using 2024 GTBS and IPS data
Change in annual GVA	-£0.3m to -£0.4m	-£0.2m to -£0.3m	-£0.6m to -£0.7m	-£0.4m to -£0.5m
Gwynedd GVA (2023)	£2,842m	£2,842m	£2,842m	£2,842m
Approx percent of Gwynedd Economy GVA	-0.01%	-0.01%	-0.02% to -0.03%	-0.01% to -0.02%
Change in FTE Employment	-22 to -26 jobs	-20 to -23 jobs	-27 to -31 jobs	-25 to -29 jobs
Gwynedd FTE Total	48,485	48,485	48,485	48,485
Approximate percent of Gwynedd employment	-0.05%	-0.04% to -0.05%	-0.06%	-0.05% to -0.06%

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- 5.51 STEAM data reports a much higher tourism sector in Gwynedd. In 2024 there were estimated to be 4.1m visitors, staying 20.4m days and spending over £1bn. That is approximately 4 to 5 times bigger than the tourism market in Gwynedd based on the IPS and the GTBS.
- 5.52 The sensitivity test below estimates the likely impact of the levy based on the STEAM numbers, this is likely to overestimate the impact of the levy but is included for completeness and in recognition that the rural nature of Gwynedd may mean that the GTBS and the IPS may underestimate visitor numbers.
- 5.53 The STEAM data counts visitor days – for the purpose of the analysis we have assumed a staying visitor day = a night. This will overestimate the impact of the levy since someone may be present in an area for more days than they are nights.
- 5.54 The STEAM data does not split non-serviced accommodation into lower band and standard accommodation and so a range (i.e. from 100% in lower bound to 100% standard band) is used. The reality will be somewhere in between.
- 5.55 This STEAM analysis provides a bookend in terms of:
- 5.55.1 Worst case in terms of impact on employment and GVA – this results in a reduction of between 100 and 240 jobs (0.2% to 0.5% of Gwynedd’s employment) and £1.5m to £4.0m GVA (up to 0.1% of Gwynedd’s economy).
- 5.55.2 Best case in terms of available revenue spending – this increases to £11.2m and £13.8m (after accounting for contribution to Welsh Government operating costs). This is likely to be a very best case scenario in terms of revenue funding (for reasons set out above it is likely to be an overestimate).
- 5.56 Note that this analysis is based on the core scenario (i.e. an elasticity of -0.74). Applying Welsh Government’s range of elasticity (-0.38 to -1.12) would results in a wider range of impacts using the STEAM data,
- 5.57 The main analysis (following the Welsh Government approach and guidance) remains the preferred approach but the STEAM data demonstrates the uncertainty (and potentially top end) of the likely impact.

Table 5.13: Change in annual GVA and employment combined effect

	Main analysis Core scenario (elasticity of -0.74)	STEAM 2024 (elasticity of -0.74)
Decrease due to loss of spending	-£1.5m to -£1.7m	-£6.7m to -£15.6m
Increase due to spending of the levy	+£1.1m to +£1.3m	+£5.2m to +£11.6m
Change in annual GVA	-£0.3m to -£0.4m	-£1.5m to -£4.0m
Gwynedd GVA (2023)	£2,842m	£2,842m
Approx percent of Gwynedd Economy GVA	-0.01%	-0.05% to -0.1%
Decrease due to loss of spending	-42 to -47 jobs	-188 to -438

Increase due to spending of the levy	+19 to +21 jobs	+88 to 198
Change in FTE Employment	-22 to -26 jobs	-100 to -240
Gwynedd FTE Total	48,485	48,485
Approximate percent of Gwynedd employment	-0.05%	-0.2% to -0.5%
Revenue (excl VAT)	£2.8m <i>£2.5m accounting for contribution to WG</i>	£12.4m to £15.3 <i>£11.2m to £13.8m accounting for contribution to WG</i>

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Visitor levy entirely borne by the accommodation provider

5.58 This scenario assumes that businesses absorb the cost of the Visitor Levy which means that there is no change to the level of visitors to Gwynedd. This means that the businesses absorb £3.3m including VAT (this is worst case as some businesses will pass VAT on).

Table 5.11: Total cost to be absorbed by the business

	UK-resident visitors (Standard Band)	UK-resident visitors (Lower Band)	International	TOTAL
Eligible bed nights (no reduction in demand) ('000)	1,450	677	305	2,432
Levy per person per night (inc VAT)	£1.56	£0.90	£1.56	
Total levy = total cost to be absorbed	£2.3m	£0.6m	£0.5m	£3.3m

5.59 Businesses absorb £3.3m of additional cost and this is paid for business revenues – the Welsh Government appraisal assumes that this is ‘found’ from within the value added and so in the same as GVA. In reality, it would likely there would also be some reduction in jobs.

5.60 The Welsh Government appraisal also assumes that neither input prices change, nor do visitor volumes, nor economic scale. This means that there are no ‘Type 1’ supply chain multiplier effects. There are however some indirect effects consequent on the Levy squeeze, reducing income to be spent (in part) across the Gwynedd economy and so a multiplier of 1.2 is applied to include direct and induced, but excludes indirect GVA. This results in a loss of £3.9m in annual GVA.

Table 5.12: Change in annual GVA due to impact of Levy being absorbed by the business

	TOTAL
Direct annual GVA	-£3.3m
Multiplier (direct and induced, excludes indirect)	1.16
Total annual GVA	-£3.9m

5.61 As set out above, the spending of the levy is expected to result in an increase of £1.1m to £1.3m in GVA per year in the core scenario and an increase of 19 to 21 jobs (accounting for contribution to WG operating costs and leakage). This results in a combined impact of a loss of £2.7m in annual GVA and an increase in 19 to 21 jobs.

Table 5.13: Change in annual GVA and employment combined effect – core scenario¹⁷

	Annual GVA	Employment
Change due to impact of Levy being absorbed by the business	-£3.9m	0
Change due to spending of the Levy being	+£1.1m to +£1.3m	19 to 21 jobs
Net change	-£2.7m	19 to 21 jobs
Proportion of Gwynedd economy	-0.1%	0.04%

5.62 The relevant sensitivities set out above are included in the table below. The higher leakage, change in contribution to Welsh Government operating costs and approach to VAT changes results in a jobs impact of between 14 and 24 jobs and a loss of between -£2.0m and -£3.0m of annual GVA.

5.63 Again the STEAM data has a much larger impact (driven by a larger current tourist economy) and shows the bookends (both positive and negative) of potential impacts.

Table 5.14: Sensitivity tests

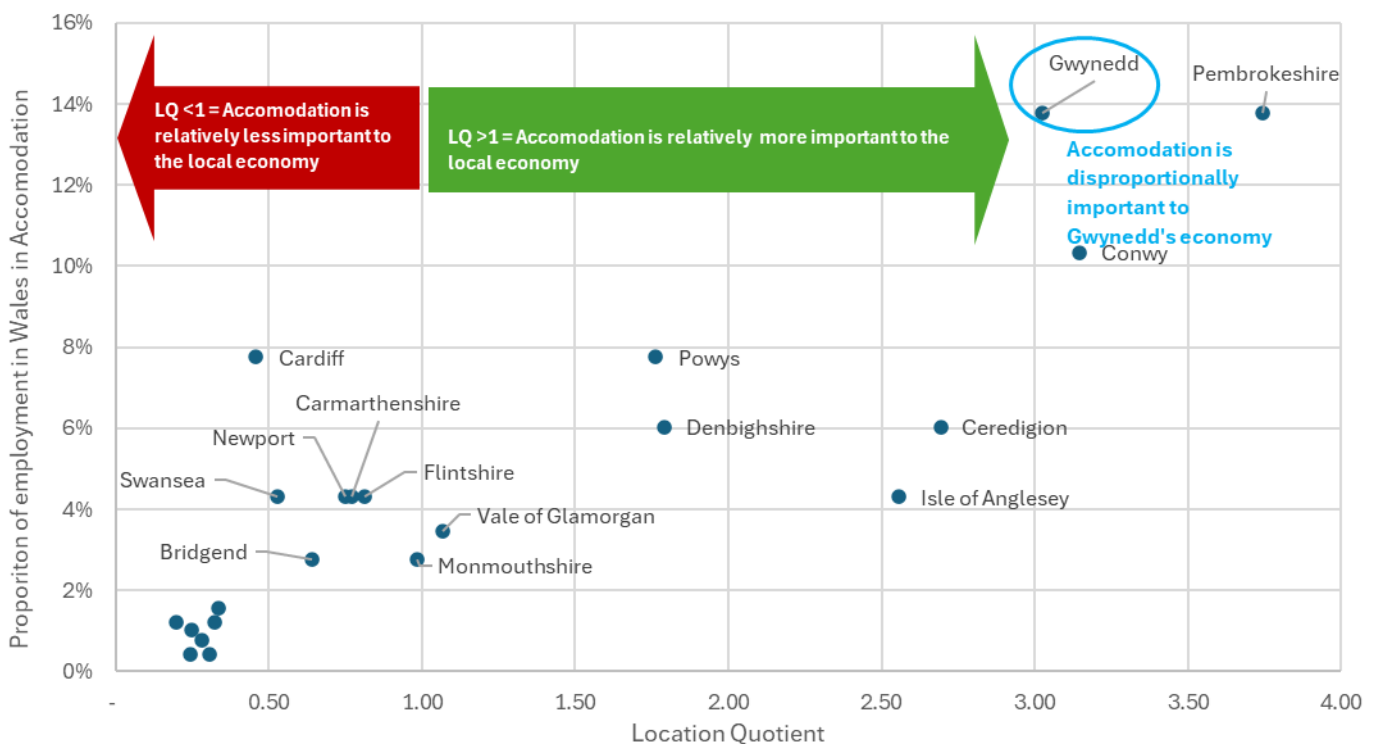
	Annual GVA	Employment
Core	-£2.7m	19 to 21 jobs
Higher level (45%) of leakage is applied	-£3.0m	14 to 16 jobs
Contribution to WG operating costs reduced to 0%	-£2.5m	22 to 24 jobs
Businesses do not 'absorb VAT'	-£2.0m	19 to 21 jobs
STEAM	-£12m to -£25m	88 to 198 jobs

¹⁷ The range of different elasticities makes negligible difference to the bound presented in this table.

6 Cross checking with the Welsh Government Analysis, accounting for the relative importance of tourism to Gwynedd

- 6.1 We have conducted 'sense checks' which uses the overall impact of the Visitor Levy on the Welsh economy (from the Welsh Government analysis) to estimate the likely impact on Gwynedd. Note this does not address the caveats with the Welsh Government analysis, or its applicability at a more local level, but it does provide additional confidence in the analysis.
- 6.2 First, it should be noted that Gwynedd has a significant proportion of the overall Welsh tourism market (and therefore employment) and the economy is disproportionately reliant on it. This is shown in Figure 6.1 which shows that Gwynedd has just under 14% of Wales' total employment in Accommodation but that it has a location quotient of 3.0 which means that accommodation is disproportionately important to the local economy.

Figure 6.1: Accommodation employment in Wales -Location Quotient and proportion of employment in Wales



- 6.3 The table below shows that based on a number of different measures (employment, visitor nights and spend); the Gwynedd tourism sector is between 7% and 15% of the Welsh tourism economy.

Table 6.1: Gwynedd tourism sector as a proportion of Wales total

	Proportion of Welsh total tourism sector
Employment in Accommodation (BRES 2024)	14%
Employment in Accommodation and Food (BRES 2024)	7%
Domestic - nights (all trip types)	15%
Domestic - spend (all trip types)	11%
International - nights (excl own home and family and friends)	10%
International - spend (excl own home and family and friends)	8%

6.4 As a sense check, we have applied this to the findings of the Welsh Government 2024 Appraisal. In the appraisal that passed on 100% of the levy to the customer, it found that:

- Across Wales, the Levy would result in between a loss of 400 and an increase of 100 jobs
- And a change in annual GVA of between -£7.5m and an increase of £11.1m

6.5 If we applied the range above (7% to 15%) we would expect an impact of between -60 and plus 15 jobs and a change in GVA of between a loss of £1.1m and a gain of £1.7m. This compares to the estimates in Section 5 of -2 to -50 FTEs and between a loss of £1.3m to a gain of £0.4m in annual GVA.

6.6 This approach of pro-rating the Welsh Government analysis would be expected to be higher than the analysis set in Section 5 because prorating the Welsh Government analysis assumes that Gwynedd claims its (relative) share of the spending of the visitor levy (once non-regional spending is accounted for).

6.7 The analysis in Section 5 assume that there is leakage of the spending of the Gwynedd levy outside of Gwynedd and does not account for Gwynedd business 'gaining' as a result of the levy from other local authorities (for example a Gwynedd business being employed on a project in Anglesey or Conwy paid for by the levy).

6.8 It should be noted that these estimates are only indicative – the approaches are not like for like. Nonetheless the similarity of the figures provides confidence in the analysis set out in Section 5.

Table 6.2: Cross checking compared to Welsh Government Approach - 100% of the Levy passed on

		Pessimistic	Core	Optimistic
Employment	<i>WG approach - Welsh level</i>	-400	-140	100
	WG approach - Gwynedd level 7%	-28	-10	7
	WG approach - Gwynedd level 15%	-60	-21	15
	Caveated Gwynedd approach (passing Levy onto visitors) – Section 5	-44 to -50 jobs	-22 to -26 jobs	-2 to -3 jobs
Annual GVA (£m)	<i>WG approach - Welsh level</i>	-7.5	2.1	11.1
	WG approach - Gwynedd level 7%	-0.5	0.1	0.8
	WG approach - Gwynedd level 15%	-1.1	0.3	1.7
	Caveated Gwynedd approach (passing Levy onto visitors) – Section 5	-£1.1m to -£1.3m	-£0.3m to -£0.4m	£0.4m

6.9 Taking the same approach for the scenario where businesses absorb the levy, then applying the 7% to 15% range would result in between 25 and 54 additional jobs (compared to 19 to 21 in Section 5) and between -£2.3m and -£4.8m (compared to -£2.7m in Section 5).

Table 6.3: Cross checking compared to Welsh Government Approach – 0% of the levy passed on

			Core
Employment	WG approach - Welsh level	Jobs	360
	WG approach - Gwynedd level 7%	Jobs	25
	WG approach - Gwynedd level 15%	Jobs	54
	Caveated approach (businesses absorb) – Section 5	FTEs	19 to 21 jobs
Annual GVA	WG approach - Welsh level		-£32.3m
	WG approach - Gwynedd level 7%		-£2.3m
	WG approach - Gwynedd level 15%		-£4.8m
	Caveated approach (businesses absorb) – Section 5		-£2.7m

7 Conclusion

- 7.1 The evidence on the impact of visitor levies on local economies is relatively limited, and there are some significant gaps and uncertainty in the data. Therefore this appraisal should be read in that light.
- 7.2 We have sought to replicate the appraisal methods used by Welsh Government, making them relevant at a local level where possible, and including assumption and caveats transparently. We have also added sensitivity tests and sense checks to add robustness to the appraisal.
- 7.3 Despite the caveats associated with the evidence base and methodology, we are confident that the impact on the Gwynedd economy will be relatively small in terms of both the impact on employment and annual GVA. The table below reflects the likely range using the IPS and the GTBS (in line with the approach used by Welsh Government).
- 7.4 This analysis is relatively conservative in that it assumes there is no growth in the visitor economy and allows for a reduction in response to the levy. In practice, if the visitor economy grows then the funding raised by the levy will increase (and vice versa¹⁸), and indeed the levy spending could drive higher tourism through an improved visitor experience. There is evidence of year on year growth in other locations where visitor levies have been introduced.
- 7.5 Any growth in the visitor economy would also offset any losses to the economy (jobs and GVA) as a result of the visitors who do not come as a result of the levy and result increase the levy revenue.

Table 7.1: Summary of likely impacts

			Main analysis - Core scenario	Main analysis - Likely range ¹⁹
Employment	Caveated approach (passing Levy onto visitors)	FTEs	-22 to -26 jobs	-50 to -2 jobs
	Caveated approach (businesses absorb)	FTEs	19 to 21 jobs	19 to 21 jobs
	Combined range	FTEs	-26 to 21 jobs	-50 to 21 jobs
Annual GVA (£m)	Caveated approach (passing Levy onto visitors)		-£0.3m to -£0.4m	-£1.3m to £0.4m
	Caveated approach (businesses absorb)		-£2.7m	-£2.7m
	Combined range		-£2.7m to -£0.3m	-£2.7m to +£0.4m
Revenue	Combined range			£2.4m to £2.8m

¹⁸ Conversely if tourism reduced for reasons other than the levy, the revenue funding would decrease.

¹⁹ This includes a range of pessimistic to optimistic based on the elasticities in the Welsh Government analysis

- 7.6 The STEAM data estimates the current Gwynedd visitor economy is 4 to 5 times larger than the IPS / GBTS data – therefore using the STEAM data results in significantly higher impacts. For example the change in jobs is -26 to +21 in the core scenario of the main analysis, and this becomes -240 to +198 using the STEAM data. Similarly the revenue increases between £11.2m and £13.8m (although note this is likely to be an overestimate). This highlights the uncertainty in the data and therefore the inherent uncertainty in forecasting the impact of the levy.

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DRAFT Equality Impact Assessment

Visitor Levy Proposal
for Cyngor Gwynedd

JANUARY 2026

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1 Introduction

- 1.1 This Equality Impact Assessment (EQIA) considers the potential equality impacts related to Cyngor Gwynedd imposing a visitor levy.
- 1.2 This document provides information Cyngor Gwynedd to support their consideration of imposing a visitor levy with regard to its Public Sector Equality Duty (PSED).
- 1.3 In addition it also consider the potential effect on the Welsh Language and considers the socio-economic status in the context of the Socio-Economic Duty

Overview of the Visitor Levy

- 1.4 The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 (the '2025 Act') gives councils in Wales the choice to introduce a charge on overnight stays. Known as a 'visitor levy', councils can choose to introduce the levy in their area from April 2027.
- 1.5 The levy is chargeable at two separate rates:
 - Campsite pitches and shared rooms (hostels and dormitories): 75p per person plus VAT, per night
 - All other types of visitor accommodation: £1.30 per person plus VAT, per night
- 1.6 There are exemptions¹; Visitors will not pay the visitor levy if they are:
 - under 18 years of age and staying on a campsite pitch or in shared rooms (such as a hostel or a dormitories)
 - staying for more than 31 nights in a single booking
 - in emergency or temporary housing arranged by the local council
- 1.7 The funds from the levy will be reinvested for the purposes of destination management and improvement in the area. Section 44 of the 2025 Act stipulates that councils must use the proceeds of the levy for:
 - mitigating the impact of visitors;
 - maintaining and promoting use of the Welsh language;
 - promoting and supporting the sustainable economic growth of tourism and other kinds of travel;
 - providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people).

Purpose of this Equality Impact Assessment

¹ The visitor levy: a small contribution for a lasting legacy. Available [here](#)

- 1.8 In considering whether to impose a visitor levy, Cyngor Gwynedd is required to consider potential equality effects that may relate to the protected characteristics under the 2010 Equality Act (the '2010 Act').² The purpose of this EQIA is to provide information to assist the council in its role as the local authority when discharging its PSED.
- 1.9 **Section 2** of this report provides context by setting out the legislative and policy context and **Section 3** explains the methodology applied in this EQIA, considering both disproportionate and differential effects.
- 1.10 The Welsh Government has already conducted an EQIA of imposing a visitor levy across Wales.³ **Section 4** summarises the findings of this EQIA. **Section 5** looks at the effect of imposing a visitor levy in Gwynedd and the potential ways in which these effects may interact with protected characteristics.
- 1.11 **Section 6** considers the potential effect on the Welsh Language and **Section 7** considers the socio-economic status in the context of the Socio-Economic Duty.
- 1.12 A separate **Economic Impact Assessment** has been conducted – this is cross-referenced where relevant in this EQIA.

² The Equality Act 2010.

³ Welsh Government, 2025. Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025: Equality Impact Assessment [here](#)

2 Legislative and policy context

The Equality Act

2.1 The 2010 Act forms the basis of anti-discrimination law in Great Britain. Section 4 of the 2010 Act defines various protected characteristics which are covered by the Act:

- Age;
- Disability;
- Gender reassignment;
- Marriage and civil partnership;
- Pregnancy and maternity;
- Race;
- Religion and belief;
- Sex
- Sexual orientation

2.2 The 2010 Act requires authorities to have due regard to equality considerations when exercising their functions. This Public Sector Equality Duty (PSED) requires public authorities to have due regard to the need to:

- Eliminate discrimination, harassment, victimisation and any other that is prohibited by or under this Act;
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- Foster good relations between persons who share a relevant protected characteristic and those that do not share it.

2.3 The need to advance equality of opportunity includes the need to (as set out in Section 149 (3) of the 2010 Act):

- Remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic;
- Take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it;
- Encourage persons who share a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low

The Well-being of Future Generations Act 2015 and the Socio-Economic Duty

- 2.4 The Welsh Government's **Well-being of Future Generations Act 2015**⁴ (WFGA) sets out seven goals for improving Wales' social, economic, environmental and cultural well-being. These provide a legally binding common purpose for national and local governments as well as for local health boards and other public bodies. The goal of 'A More Equal Wales' aims to create a society that enables people to fulfil their potential, regardless of background or circumstance.
- 2.5 Sections 1 to 3 of the Equality Act set out **The Socio-Economic Duty**, and these sections took effect in Wales in 2021. The duty means that an authority "must, when making decisions of a strategic nature about how to exercise its functions, have due regard to the desirability of exercising them in a way that is designed to reduce the inequalities of outcome which result from socio-economic disadvantage". In doing so, the authority must take account of guidance issued by Welsh ministers.
- 2.6 This guidance⁵ defines socio-economic disadvantage as "living in less favourable social and economic circumstances than others in the same society", and that this can include both "communities of interest" and "communities of place".

Other relevant policy

- 2.7 The **Future Wales: National Plan 2040** (2021)⁶ is to shape a future that is sustainable, healthy, equitable and fair. Each region is encouraged to build on their existing strengths and pursue opportunities to achieve greater prosperity and well-being.
- 2.8 Two of the twelve future Wales outcomes mention tourism, including the importance in of 'attracting the interest and expenditure of tourists and providing a distinctive and trusted brand for Welsh businesses' and providing sustainable transport options.
- 2.9 Tourism and leisure is recognised as a major and growing employer and contributor to the Welsh rural economy. The plan stats that sustainable forms of tourism, including opportunities for active, green and cultural tourism, should be explored. Tourism is also a 'focus' of the North Wales Coastal Settlements regional Growth Area (Policy 21).
- 2.10 The Plan also highlights increasing the prevalence of the Welsh language is also a priority.
- 2.11 **The Economic mission: priorities for a stronger economy (2023)**, sets out the Welsh Government's priorities for building a more prosperous, equal, and greener economy. This includes:
- A just transition and green prosperity
 - A platform for young people, fair work, skills and success
 - Stronger partnerships for stronger regions and our everyday economy

⁴ Welsh Government. Well-being of Future Generations Act 2015.
<https://www.legislation.gov.uk/anaw/2015/2/contents/enacted>

⁵ Welsh Government. 2021. A More Equal Wales: The Socio-Economic Duty.

⁶ Welsh Government. 2021. Future Wales: The National Plan 2040.

- Investing for growth.

2.12 The economic mission outcomes underpin the four priorities: a more prosperous economy, a greener economy and a more equal economy. It defines as more prosperous economy is one that operates within safe environmental limits and advances the well-being of current and future generations. An active government that drives economic development to grow the economy and reduce inequalities.

2.13 The **Strategic Equality and Human Rights Plan 2025-2029** (2025)⁷ fulfils the Welsh Government's duties in relation to specific protected characteristics under the Equality Act and commitments to Human Rights. It sets out the long term aim for Wales as 'Wales is a nation based on equity, anti-discrimination, and inclusion, through strengthening and advancing equality and human rights.'

2.14 The **Economic Contract**⁸ is an agreement between the Welsh Government and the businesses it supports to identify how partnership working will improve economic resilience and make Wales a more attractive place to work. The Contract commits businesses to providing public investment contributions that prioritise social and environmental needs, including access to Fair Work and the promotion of wellbeing. In response to these contributions, the Contract commits the Welsh Government to setting out the non-financial support it will provide to businesses in return.

Gwynedd Policy

2.15 The vision of the **Anglesey and Gwynedd Joint Local Development Plan 2011-2026** (2017)⁹ (JLDP) is to put plans and projects in place that will promote prosperous, healthy and safe communities. Strategic objectives include:

- To safeguard and strengthen the Welsh language and culture, and to promote its use as an essential part of community life.
- To increase employment and economic activity rates and reduce unemployment rates, so that all are closer to the national averages.

2.16 The plan acknowledges tourism as a key economic sector and priority, and that there is a need to 'improve and manage the 'all year' tourist provision in the area in a sustainable way whilst at the same time promoting the heritage, the Welsh language and Welsh culture of the area'.

2.17 Cyngor Gwynedd's vision set out in the **Council Plan 2023-2028**¹⁰ underpinned by seven priority fields: Tomorrow's Gwynedd, A Prosperous Gwynedd, A Homely Gwynedd, A Caring Gwynedd, A Welsh Gwynedd, A Green Gwynedd, An Efficient Gwynedd.

2.18 **Gwynedd's Strategic Equality Plan 2024-2028** establishes five objectives:

- Objective 1: Employment: Acting to improve equality in the workplace

⁷ Welsh Government. 2025. Strategic Equality and Human Rights Plan 2025-2029

⁸ <https://businesswales.gov.wales/economic-contract>

⁹ Isle of Anglesey County Council and Cyngor Gwynedd Council. 2017. Anglesey and Gwynedd Joint Local Development Plan 2011-2026.

¹⁰ Gwynedd County Council. Council Plan 2023-2028.

- Objective 2: Information - Improving our data about people with equality characteristics
- Objective 3: Systems: Ensuring that the Council is an anti-discriminatory organisation, by improving our internal systems
- Objective 4: Services: Ensuring equality within our day-to-day work
- Objective 5: Schools: Improve equality within education

3 Methodology – EQIA

Approach

- 3.1 All interventions will have a range of impacts, with potentially both positive and negative impacts.
- 3.2 Everyone affected by an intervention will have some protected characteristics as defined by the 2010 Act, and there will be varying degrees of intersectionality (such as age, race and sex), and people will not all be equally affected. That does not however, necessarily constitute an equality effect.
- 3.3 To identify which effects are relevant to equality considerations, equality assessments distinguish equality effects as those that have either a disproportionate or differential effect upon persons who share a relevant protected characteristic compared to persons who do not share it, as explained below:
 - **Disproportionate:** there may be a disproportionate equality effect where people with a particular protected characteristic make up a greater proportion of those affected than in the wider population.
 - **Differential:** there may be a differential equality effect where people with a protected characteristic are affected differentially to the general population as a result of vulnerabilities or restrictions they face because of that protected characteristic.
- 3.4 The scale and significance of such impacts cannot always be quantified. Therefore, the consideration of equality effects includes a descriptive analysis of the potential impacts and identifying whether such impacts are adverse or beneficial.
- 3.5 Equality effects are complex and impacts are difficult to accurately and comprehensively predict. People's protected characteristics are personal and not always known, and not all of the people who will live near, work in or visit the area in future are already there today. For this reason, the EQIA can only consider effects that can reasonably be foreseen.
- 3.6 Any decision taken by a public body may involve a need to consider and balance a range of both positive and negative effects of different types. There may be reasonable mitigation measures that can eliminate or reduce some disproportionate or differential equality effects, but some impacts may not always be avoidable.

Scope of Assessment

- 3.7 The main objective of an EQIA is to provide Cyngor Gwynedd with information, with regard to the likely impact on the protected characteristics identified in the 2010 Equality Act, to inform their decision making.
- 3.8 There are three broad groups of people who may be affected by the visitor levy:

- Those who are (or may be in the future) employed in tourism jobs (or related sectors) whose employment may be affected by the introduction of the levy – this equally applies to business owners who may be affected.
- Residents who live in the area who may be affected by the introduction of the levy – through change in visitor numbers and / or who benefit from the investment of the levy spending
- Visitors (or others who are staying overnight) who are required to pay the levy

3.9 Within these groups there will be people with different protected characteristics and there will be varying degrees of intersectionality.

3.10 The starting point for the assessment is the Welsh Government all-Wales level EQIA¹¹ (WG EQIA), including the assessment, consultation / engagement and mitigation. We then consider whether there are any Gwynedd specific characteristics that may alter the findings of the WGIA and lead to disproportionate or differential effects. This is set out in Section 4 while the local EQIA is set out in Section 5.

3.11 Later sections consider the potential effect on the Welsh Language and considers the socio-economic status in the context of the Socio-Economic Duty.

¹¹ Welsh Government, 2025. Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025: Equality Impact Assessment [here](#)

4 Summary of the Welsh Government national level EQIA

4.1 The WG EQIA draws on a range of statistical data and figures on all protected characteristics and engagement with stakeholders including charities, disability groups and faith organisations to identify and (where possible) mitigate potential negative equality impacts.

4.2 The WG EQIA states that:

‘The overall aim of the levy is to generate additional revenue for local authorities that choose to use a levy and it is not expected there are “direct” impacts on those with protected characteristics.’

4.3 The assessment identified that a visitor levy will affect local authorities, visitors, local residents and businesses where a levy is implemented, either directly or indirectly. A ‘direct impact’ of the visitor levy was defined as any potential impact of having to pay or charging the levy. An ‘indirect impact’ was defined as potential impacts due to the existence of a levy.

4.4 The WG EQIA acknowledges that existing research on the impacts of introducing a visitor levy on protected characteristics is limited so uses qualitative information and some data to make inferences as to potential “indirect” impacts. The same caveats apply to the local assessment.

Overall position on refunds and exemptions

4.5 Welsh Government conducted formal engagement on the Act, including with regard to exemptions. Generally, those in favour of applying exemptions to certain groups typically did so on the basis that:

4.5.1 exemptions should be applied to promote fairness and equality of outcome by supporting groups with protected characteristics, and

4.5.2 that certain groups should not be classified as visitors and therefore, should not be imposed upon a levy.

4.6 Those who disagreed with applying exemptions, did so on the basis that exemptions could introduce complexities, increase administrative burden for tax authorities and visitor accommodation providers, and could be unfair since all visitors benefit from the visitor services and infrastructure.

4.7 Ultimately, Welsh Government is clear that there needs to be a clear policy basis for a reduced rate or exemption based on protected characteristics. The approach is therefore to minimise the use of exemption but use a lower levy rate.

4.8 To ensure a level of progressivity is met and those on lower incomes are not dissuaded or unable to meet the extra costs associated with the levy, there are two rates set out in the Bill a lower rate for hostels and campsites and a higher rate for all other visitor accommodation.

4.9 The Welsh Ministers can assess and revise the visitor levy rates that are set in legislation should adverse impacts materialise.

4.10 The legislation sets out two categories of stays in relation to the levy, that will be either, exempted or refunded:

- **Exemptions** include stays arranged by local authorities, those who are homeless, accommodation for asylum seekers, private hospitals, approved premises, care homes and gypsy and traveller sites.
- **Refunds** may be provided where it is not possible to provide an exemption. This includes stays where there is a risk to the health, safety or welfare if an individual stayed at their sole or main residence, where an individual was homeless (and the stay was not exempt), and stays by those in receipt of a disability benefit where the person was accompanied by a person providing care, support or assistance.

4.11 Exemptions are made for the following groups and situations:

- Overnight stays at a gypsy and traveller site
- Home office arranged stays as part of their statutory obligations.
- Local authority arranged emergency stays in visitor accommodation as part of their duties under the Housing Act (Wales) 2014.
- Ministry of Justice arranged stays as part of their statutory obligations.
- Those under the age of 18 are not included in the calculable charge for lower-rated stays.

4.12 Similarly, refunds are available in cases where it is not possible to provide an exemption, such as:

- Stays related to temporary emergency housing arranged by charitable organisations in visitor accommodation on behalf of homeless people including those fleeing domestic abuse and asylum seekers.
- Disabled persons in receipt of a qualifying disability benefit who has paid visitor levy whilst staying in visitor accommodation and who are accompanied by a carer.
- Stays where there is a risk to the health, safety or welfare if an individual stayed at their sole or main residence (for example stays arranged by charities for vulnerable persons or where fire, flood or other disaster has rendered a property uninhabitable or where emergency services have advised not to stay at the property for such reasons).

4.13 As part of the consultation process, Welsh government officials engaged with policy teams in Welsh Government and the third sector to gain a better understanding of the lived experiences of vulnerable groups requiring visitor accommodation.

4.14 As a result of this engagement, the following actions were undertaken with respect to exemptions and refunds:

- Exemptions:
 - Making clear in the 2025 Act, the types of stays in visitor accommodation not subject to a visitor levy to ensure policy aims are realised

- Ability to introduce new, modify or remove exemptions should there be emerging evidence of any disproportionate impact.
- Refunds – ability to add to the list of scenarios in which a refund may apply, should emerging evidence suggest so.

Protected characteristics

4.15 Table 4-1 below summarises the impact on each protected characteristic and measures to mitigate the impacts in the WG EQIA.

Table 4-1: Impact on protected characteristics – WG EQIA

Protected characteristic	Potential Impact	Mitigation
Age	<p>No direct negative or positive impacts. Some secondary impacts identified for children and young people.</p> <p>The ability to pay a levy may affect those with lower incomes, e.g. younger or lower people differently.</p>	Under 18s are excluded from the levy for lower-rated stays.
Disability	It could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit. This is because disabled persons requiring a carer would potentially face additional costs due to the levy applying to the carer, should those additional costs be incurred by the disabled person.	Refund mechanism for persons in receipt of a disability benefit who are accompanied by a person providing care, support or assistance.
Gender reassignment	No direct negative impact.	Stays in private hospitals are exempt from a levy.
Marriage and civil partnership	No direct negative impact	
Pregnancy and maternity	No direct negative impact.	
Race	No direct negative impact	<p>Gypsy, Roma and Travellers sites provided by a local authority or registered social landlord are exempt from a levy.</p> <p>Exemptions / refunds are available for vulnerable groups, e.g. asylum seekers and those fleeing domestic abuse</p>

Protected characteristic	Potential Impact	Mitigation
Religion and belief	No direct negative impact. The levy may affect affordability for religious tourism but free accommodation is exempt.	<p>The Welsh Revenue Authority (WRA) will offer non-digital processes to accommodate those whose faith may restrict digital engagement.</p> <p>Free accommodation exempt from a levy and stays in lower rated accommodation have a lower levy charge.</p> <p>Revenue generated from the levy could be used for the preservation and maintenance of religious sites.</p>
Sex	No direct negative impact.	
Sexual orientation	No direct negative impact.	

4.16 As a result of the stakeholder engagement, additional mitigation measures that will be implemented include:

- Local authorities publishing a report on the amount of revenue generated and how the revenue has been / will be used for the purposes of destination and improvement in the local area where it is spent (reflected in Section 45 of the 2025 Act)
- Welsh Ministers carrying out a review of the operation and effect of the 2025 Act and publishing a review on a 5-year cycle (reflected in Section 63 of the 2025 Act)
- Monitoring the use of data such as Visit Wales surveys, the Tourism Barometer and engagement with local authorities and businesses.
- WRA monitoring and reviewing the effectiveness of levy administration through engagement with local authorities and businesses and reporting on the amount of revenues collected.

4.17 The findings of this national level assessment and the mitigation measures are considered below where appropriate.

5 Local equality impact assessment

- 5.1 The following section provides baseline data on the demographics of the local population and visitors with respect to the protected characteristics as defined by the 2010 Act where available data exists. It also provides a comparison against baseline demographic data for Wales with respect to the protected characteristics. Appendix A includes a summary of the relevant data for the resident population and is cross-referred to here as necessary.
- 5.2 Consultation with stakeholders is forecast to commence in 2026. Comments through the consultation process will inform the next stage of the EQIA (as appropriate).
- 5.3 Mitigation measures and recommendations set out within the EQIA draw upon those presented in the WG EQIA already conducted by the Welsh Government of imposing a levy across Wales and those mentioned in the 2025 Act.

Protected Characteristics

Age

5.4 The potential impact with respect to age is considered for:

- Visitors
- Local population in terms of employment

Visitors

- 5.5 The WG EQIA noted that 'It may be that those at ages typically associated with lower incomes (for instance, younger people), are less able to afford the extra cost of visitor accommodation'.
- 5.6 Those under the age of 18 staying in lower rated stays are not required to pay the levy for lower rated stays. This will help mitigate any potential negative effects on young people as they may be more likely to stay in lower rated visitor accommodation (although the WG EQIA notes that there is no data to confirm this assertion).
- 5.7 The WG EQIA also notes that extra costs might not discourage those earning less to go on holiday, but it might alter behaviour in other ways, such as staying for a shorter period or spending less.
- 5.8 The WG EQIA does not specifically consider the potential impact on older people.
- 5.9 Table 5-1 below shows the age distribution of visitors to Gwynedd and Wales. There appears to be a smaller proportion of younger visitors to Gwynedd than to Wales as a whole and a larger population of older people (although the data is not like for like).
- 5.10 While interpreting the table, it should be noted that:
- The Gwynedd visitor age profile is from 2019, whereas the all-Wales visitor age profile is from 2024.

- The Gwynedd visitor age profile is across both day and overnight visitors whereas the all-Wales visitor age profile is for domestic overnight visitors

Table 5-1: Age profile of visitors

	16 – 24	25 – 34	35 – 44	45 – 54	55 – 64	65+
Gwynedd (% of visitors) ¹²	3	18	22	24	18	15
Wales (% of trips) ¹³	20	27	19	13	13*	7*

Note: where a figure is followed with a single asterisk, the base size is below 100 and the figure should be treated as indicative.

5.11 The extent to which there is likely to be a differential impact on young people is (in part) mitigated by the exemption for under-18s from the lower band of the Levy. There does not appear to be a disproportionate impact (as the data suggests there are fewer young Welsh visitors to Gwynedd than Wales as a whole).

5.12 A higher proportion of older visitors to Gwynedd could lead to disproportionate impact as a result adverse impact of the increase in the cost of the trip. On the other hand, the WG EQIA also notes the following benefits, which is relevant to visitors and residents (emphasis added):

5.12.1 ‘The additional revenue could also indirectly benefit older and younger residents by improving the overall quality of life in the community, should the funds be used to enhance infrastructure, making the destination more accessible for more people’.

5.12.2 ‘The funds could also support cultural preservation efforts, which could help to protect and promote local heritage and traditions, benefiting older people who may have a deeper connection to these cultural elements¹², and conversely younger people by maintaining or creating new facilities for younger generations to use’

Employment

5.13 The age profile of Gwynedd residents is in line with than the Welsh and North Wales average – refer to Appendix A for more detail.

5.14 The WG EQIA notes that those employed in tourism often have jobs that are more insecure, i.e. part-time working or spending less time working for the same employer. Additionally, those employed in the tourism sector are generally younger.

5.15 The WG EQIA also draws on the national level economic impact assessment and notes the impact of a visitor levy on employment as being between +100 FTE jobs to around -400 FTE jobs. The range arises due to the uncertainty in the extent to which a downturn in demand for tourism services will be offset by expenditure of visitor levy revenues.

5.16 The equivalent number for Gwynedd is between -50 and +21 FTE jobs (refer to the Economic Impact Assessment for more data). Any loss of jobs could be felt disproportionately by young people.

¹² Wales Visitor Survey 2019 for Gwynedd Council. Available [here](#)

¹³ Domestic GB tourism statistics (overnight trips): annual report 2024. Available [here](#)

5.17 The WG EQIA noted that 38% of tourism workers were aged between 16-29 in 2022 across Wales. More recent data shows that over the period July 2024 – June 2025, 26% of Welsh residents worked in the Distribution, hotels and restaurants sector were aged between 16-24.¹⁴ This is the same as in Gwynedd where the equivalent figure is also 26%. There are particularly high proportion of people ages 16-19 (16%) working in the sector in Gwynedd, compared to the Welsh average (10%).

Table 5-2: Employment by age (Distribution, hotels and restaurants)¹⁵ – resident (July 2024 – June 2025)¹⁶

Age group	Gwynedd	Wales
16 – 19	800 (16%)	24,400 (10%)
20 – 24	1,300 (10%)	34,300 (15%)
25 – 49	6,300 (47%)	97,200 (43%)
50+	5,200 (37%)	70,500 (31%)
Total	13,400 (100%)	226,400 (100%)

5.18 While there could be a disproportionate effect (due to higher likelihood of young people being employed in the tourism sector), the magnitude of any negative effect is likely to be very small – there are is a maximum reduction of 50 FTE jobs, equivalent to loss of 0.1% of employment in Gwynedd, and that is a worst case scenario. There could also be a positive effect (estimated of up to 21 FTE jobs).

5.19 The WG EQIA also notes that ‘should the additional revenue raised stimulate improvements to the local infrastructure and services, this could see an increase in visitors to the area, spurring more employment opportunities in the tourism sector’.

Age overall

5.20 WG concludes there are ‘nil’ potential direct impacts with regard to Age once mitigation (including the under-18 exemption for lower bound accommodation) is taken into account.

5.21 There are possible impacts related to a higher proportion of older visitors to Gwynedd, and a young workforce, but any impacts of the levy are likely to be small – and will to some extent be offset by the spending of the levy. Therefore, it is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.

5.22 A further assessment of the likely impact on younger or older people could be carried out once further information is available on how the fund will be spent.

Sex

5.23 The potential impact with respect to sex is considered for:

¹⁴ Office for National Statistics. Annual Population Survey

¹⁵ *Ibid*

¹⁶ *Ibid*

- Visitors
- Local population in terms of employment

Visitors

5.24 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, and do not make any distinction based on sex.

5.25 The WG EQIA notes that studies have reported men being more amenable to paying a visitor levy - this may be due to the interaction of gender and income, where women have lower incomes on average than men

5.26 While interpreting the table below, it should be noted that:

- The Gwynedd visitor profile is from 2019, whereas the all-Wales visitor profile is from 2024.
- The Gwynedd visitor profile is across both day and overnight visitors whereas the all-Wales visitor profile is for domestic overnight visitors.

5.27 Table 5-3 below shows that there are similar proportions of female and male visitors visiting Gwynedd and Wales as a whole (although the data is not like for like) and in both cases there is a larger proportion of female visitors

5.28 While interpreting the table below, it should be noted that:

- The Gwynedd visitor profile is from 2019, whereas the all-Wales visitor profile is from 2024.
- The Gwynedd visitor profile is across both day and overnight visitors whereas the all-Wales visitor profile is for domestic overnight visitors.

Table 5-3: Visitor distribution by sex

	Gwynedd ¹⁷	Wales ¹⁸
Female	58%	59%
Male	42%	40%
All persons	100%	100%

NB that percentages may not sum to 100% due to rounding

5.29 The WG EQIA also notes that surveys suggest that:

- A majority (58%) of respondents agreed that tourists should contribute towards the costs of maintaining and investing in the destinations they stay in. Very few (13%) disagreed
- There was agreement that tourists should contribute to maintaining and investing in destinations and this correlates strongly with social grade and 'financial means'

¹⁷ Wales Visitor Survey 2019 for Gwynedd Council. Available [here](#)

¹⁸ Domestic GB tourism statistics (overnight trips): annual report 2024. Available [here](#)

5.30 WG concludes there are ‘nil’ potential direct impacts with regard to Sex. There are no Gwynedd specific characteristics that would change the findings of the WG EQIA.

Employment

5.31 In terms of employment, The WG EQIA also notes that across Europe, the share of women in the tourism workforce is also often higher. However, Table 5-4 below shows that the employment in Distribution, Hotels and Restaurants is roughly split evenly between men and women in both Gwynedd and Wales.

Table 5-4: Employment by sex (Distribution, Hotels and Restaurants)¹⁹

	Gwynedd	Wales
Female	5,613 (50%)	132,116 (49%)
Male	5,720 (50%)	137,360 (51%)
All persons	11,333 (100%)	269,476 (100%)

5.32 It is not anticipated that there would be a disproportionate or differential impact in Gwynedd as a result of the levy on females or males working in the tourist sector.

Marriage and Civil Partnership

5.33 Provisions in the 2025 Act are not expected to have any impact on marriage and civil partnership characteristic. Overnight visitor accommodation for weddings / civil partnership ceremonies will be subject to a levy.

5.34 There are slightly higher proportions of single people in Gwynedd than the North Wales or Wales average and a slightly lower proportions of people who are married or in a civil partnership, or are divorced, separated or widowed – refer to Appendix A for more detail.

5.35 WG concludes there are ‘nil’ potential direct impacts with regard to Marriage and Civil Partnership. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.

Gender Reassignment

5.36 Provisions of the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on gender reassignment.

5.37 However, consideration in the 2025 Act is given to those requiring medical treatment for gender reassignment process and private hospital stays do not get charged a levy.

5.38 WG concludes there are ‘nil’ potential direct impacts with regard to Gender reassignment. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.

¹⁹ Office for National Statistics. Census 2021

Sexual Orientation

5.39 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on sexual orientation.

Visitors

5.40 Evidence suggests that 10% of trips taken to Wales were undertaken by LGBTQ+ visitors from January to December 2024.²⁰ The WG EQIA notes that there is no evidence to suggest that visitors with this sexual orientation characteristics would be disadvantaged through the provisions of the 2025 Act. The equivalent data for Gwynedd is unavailable.

Employment

5.41 In the general population there are similar proportions of people who are gay, lesbian or bisexual in Gwynedd as there are across North Wales and Wales. In terms of employment, the table below show that:

- There are similar proportions of bisexual and gay or lesbian workers employed in the distribution, hotels and restaurants sector in Gwynedd (4%) compared to Wales (4%)
- There are slightly higher proportions of bisexual and gay or lesbian workers employed in the distribution, hotels and restaurants sector (4%) than the average across all sectors in Gwynedd (2%).

Table 5-5: Employment of residents by Sexual Orientation in Gwynedd²¹

		Straight or Heterosexual	Gay or Lesbian	Bisexual	All other sexual orientations	Not answered	TOTAL
Distribution, hotels and restaurants	Gwynedd	89%	2%	2%	0%	7%	100%
	Wales	90%	2%	2%	0%	6%	100%
All sectors	Gwynedd	91%	1%	1%	0%	7%	100%
	Wales	91%	2%	1%	0%	5%	100%

Sexual Orientation – overall

5.42 WG concludes there are ‘nil’ potential direct impacts with regard to Sexual Orientation. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA

Race

²⁰ Domestic GB tourism statistics (overnight trips): annual report 2024. Available [here](#)

²¹ Office for National Statistics. Census 2021

5.43 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on race.

5.44 As the WG EQIA notes, the impact of visitor levies on race can vary depending on specific contexts and implementation approaches, and where the revenue raised is spent. Proactive measures can be taken to ensure that the benefits of tourism are distributed more equitably among all segments of the population, with community engagement and inclusive decision-making processes being crucial to address potential negative impacts on minority ethnic groups.

5.45 As set out in Section 5, there is a refund mechanism that allows for refunds where groups are housed in visitor accommodation temporarily and this is paid for by a supporting charity, in emergency situations

Visitors

5.46 Table 5-6 below shows the ethnicity profile of domestic Wales overnight tourism in 2024 and the ethnicity profile of visitors to Gwynedd.

Table 5-6: Ethnicity profile of visitor trips and visitors

Ethnicity of respondent	Wales (% of trips) ²²	Gwynedd (% of visitors) ²³
White	80%	97%
Mixed / Multiple ethnic groups	3%**	
Asian / Asian British	6%*	
Black / African / Caribbean / Black British	7%*	
Chinese	0%**	3%
Arab	0%**	
Other ethnic group	0%**	
Prefer not to say / Don't know / Unspecified	3%**	
Total	100%	100%

Note: where a figure is followed with a single asterisk, the base size is below 100 and the figure should be treated as indicative. Where a figure is followed with a double asterisk, the base size is below 30 and users are advised to not use this estimate.

Note: percentages may not sum to 100% due to rounding

5.47 While interpreting the table above, it should be noted that:

- The Gwynedd visitor profile is from 2019, whereas the all-Wales visitor profile is from 2024.
- The Gwynedd visitor profile is across both day and overnight visitors whereas the all-Wales visitor profile is for domestic overnight visitors

²² Domestic GB tourism statistics (overnight trips): annual report 2024. Available [here](#)

²³ Wales Visitor Survey 2019 for Gwynedd Council. Available [here](#)

- Because the Gwynedd and Welsh visitor profiles are derived from different data sources, the categories are slightly different.

5.48 None the less this suggests that there is a lower proportion of visitors to Gwynedd who are from an ethnic minority group, compared to the Wales average.

Employment

5.49 In terms of employment, the table below shows that:

- There are lower proportions of people who are from an ethnic minority group employed in the distribution, hotels and restaurants sector in Gwynedd (9%) compared to Wales (12%)
- There are slightly higher proportions of people who are from an ethnic minority group employed in the distribution, hotels and restaurants sector (9%) than the average across all sectors in Gwynedd (7%) – this means a change in employment levels could affect this group (albeit any change is likely to be small).

Table 5-7: Employment of residents by ethnicity²⁴

		Asian, Asian British or Asian Welsh	Black, Black British, Black Welsh, Caribbean or African	Mixed or Multiple ethnic groups	White: English, Welsh, Scottish, Northern Irish or British	White: Irish	White: Gypsy or Irish Traveller, Roma or Other White	Other ethnic group	Total
Distribution, hotels and restaurants	Gwynedd	3%	0%	1%	91%	0%	4%	1%	100%
	Wales	4%	1%	1%	88%	0%	5%	1%	100%
Total	Gwynedd	2%	0%	1%	93%	1%	3%	0%	100%
	Wales	3%	1%	1%	91%	0%	4%	1%	100%

Gypsy Roma and Traveller sites

5.50 The WG EQIA also notes that Gypsy, Roma and Travellers lifestyle is inherently transient and involves movement across local authority boundaries.

5.51 The WG EQIA mentions that a discussion between Welsh Government officials and Tros Gynnal Plant Cymru highlighted that if the designated permanent and transient sites were exempt from paying a levy then there would unlikely be a significant impact on Gypsy Roma Travellers.

²⁴ Office for National Statistics. Census 2021

- 5.52 Gypsy, Roma and Traveller sites that are provided by a local authority or registered social landlord are exempted from a levy. There were 12 registered sites in Gwynedd in the last count (January 2025), although it should be noted that data collection has paused to allow for a review of the process.
- 5.53 The WG EQIA notes that Gypsy Roma Travellers use a number of public and private sites across Wales, including seasonal sites, land suitable for negotiated stopping, mainstream holiday sites for seasonal travel. Members of the Gypsy Roma Traveller community who use visitor accommodation other than for their main or usual place of residence would be subject to the levy.
- 5.54 The Act provides Welsh Ministers with powers to create new national exemptions should there be evidence of negative impact on any particular group.

Asylum seekers and refugees

- 5.55 The WG EQIA notes that given asylum seekers will have limited or no recourse to funds, application of a levy could have a negative impact. However, the 2025 Act allows accommodation for asylum seekers arranged by local authorities to be exempt from paying a levy. There is also a refund mechanism to allow charities to recoup the costs from the levy for any eligible stays.
- 5.56 In September 2025, there were 3,331 asylum seekers in Wales in receipt of Home Office support that were housed in Contingency Accommodation (hotel), Initial Accommodation, Dispersal Accommodation (longer term accommodation) or receiving subsistence only.²⁵
- 5.57 Similarly, in September 2025, 44 asylum seekers in Gwynedd in receipt of Home Office support that were housed in Dispersal accommodation.²⁶
- 5.58 The WG EQIA notes that there are difficulties in identifying how many refugees there are in Wales and its entirety as there is lack of data on where refugees settle. Nevertheless, latest evidence suggests that there were 11 cases of resettlement in Wales in Q2 of 2025 (in Denbighshire, Flintshire, Wrexham, Carmarthenshire and Powys).²⁷
- 5.59 Again, the 2025 Act provides Welsh Ministers with powers to create new national exemptions should there be evidence of negative impact of any particular group.

Race – overall conclusion

- 5.60 WG concludes there are 'nil' potential direct impacts with regard to Race. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.
- 5.61 Visitors to Gwynedd and employees in the distribution, hotels and restaurants sector are more likely to be white, than the average across Wales.

²⁵ Home Office. Immigration system statistics data tables. Available [here](#)

²⁶ Home Office. Immigration system statistics data tables. Available [here](#)

²⁷ Home Office. Immigration system statistics data tables. Available [here](#)

5.62 As noted by the WG EQIA, proactive measures can be taken to ensure the benefits of tourism, including the spending of the fund, are distributed more equitably among all segments of the population.

Violence against Women, Domestic Abuse and Sexual Violence (VAWDASV)

5.63 The WG EQIA sets out the engagement that Welsh Government has undertaken with service providers and survivors to understand the lived experience more fully and understand the levels of these types of scenarios.

5.64 Exemptions and mechanisms for refund have been included in the Act and guidance will be prepared with regard to the application process (with regard to the disclosure of personal details). Further information is set out in Section 4.

Religion and Belief

5.65 The WG EQIA estimated that there were 174,456 domestic tourists that “visited a cathedral, church, abbey or other religious building” in 2023.

5.66 The WG EQIA notes that there is no direct correlation between visitor levies and religion, belief or non-belief. It also notes that tourism-related policies or taxes might interact with an individuals’ freedom to practice religion, depending on the nature of the visit. Introducing a visitor levy might affect the affordability of visiting such places, potentially influencing the number of pilgrims or tourists visiting religious sites due to the levy increasing the cost of stay for visitors staying overnight in visitor accommodation.

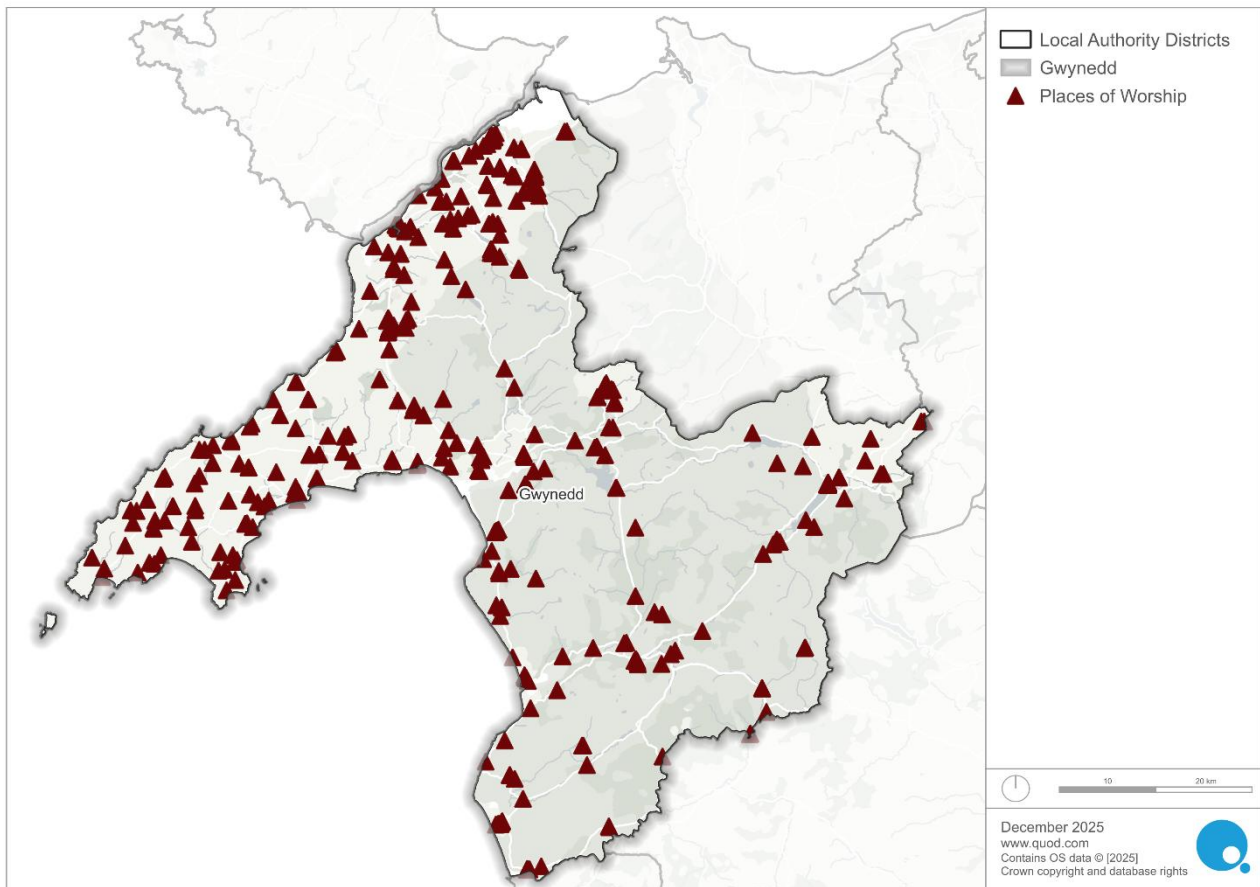
5.67 In undertaking the national level assessment, Welsh Government officials met with the Inter-faith Council for Wales in 2023 and also received a response to a further request for feedback in June 2024 via their representation in the Third Sector Partnership Group.

5.68 The levy would not apply to accommodation that was free of charge. However, the levy will apply to stays in lower rated overnight visitor accommodation (an issue raised through engagement as faith groups often arrange camping trips), although the lower rate may mitigate potential negative impacts.

5.69 The equivalent data for number of tourists visiting a religious building in Gwynedd is unavailable.

5.70 However, Figure 5-1 shows there are 350 places of worship in Gwynedd. Note that mapping of the places of worship is indicative and may not always be complete and there is no clear legal definition of places of worship.

Figure 5-1: Places of worship in Gwynedd



5.71 There may be an adverse impact on those who do not engage with digital processes as part of their faith. To mitigate any potential impact there will be a non-digital service when required.

5.72 WG concludes there are 'nil' potential direct impacts with regard to Religion and Belief. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.

Disability

5.73 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence and do not make any distinction based on disability.

Population

5.74 There were approximately 22,500 people who were disabled under the Equality Act in Gwynedd in 2021 accounting for 19.2% of the total population - lower than the Welsh average of 21.6%.²⁸

Visitors

²⁸ Census 2021

5.75 The WG EQIA identified that according to historic evidence, there may be some scenarios where disabled people may face higher costs for staying in visitor accommodation and identified some barriers and challenges for disabled people including:

- Environmental barriers: The UK Disability Survey research report 2021 showed that 57% of disabled people reported being unable to go on holiday due to accessibility issues, i.e. access into public buildings.
- There is a lack of information and awareness about the availability and quantity of accessible tourism facilities and services, and the rights and entitlements of disabled people as tourists. Information on accessible destinations is a key factor in increasing tourism opportunities among disabled individuals.
- Booking a holiday may lead to extra costs due to a lack of availability of accessible and affordable accommodation and transport options, especially in rural and remote areas, and during peak seasons. In a recent survey by Leonard Chesire Disability, published in Enable Magazine, 8 in 10 disabled people said they faced barriers and difficulties staying at UK hotels and resorts. Over 70% flagged issues finding accessible rooms. Costs of accessible accommodation are also a common barrier to taking a break for around 6 in 10 survey respondents, with accessible rooms often seen as more expensive.

5.76 The WG EQIA noted a number of other challenges including:

- Limited choices and opportunities for disabled people and those with impairments - that can affect their quality and satisfaction with their tourism experiences.
- Lack of accessibility for some disabled people in campsites and hostels leading to further strain on travel budgets – this is mitigated to some extent by the lower rate in the legislation
- Additional cost and or limited options for people who need a carer, specialist equipment or guide dog

5.77 Recognising that there is an overall lack of data and evidence, Welsh Government officials met with representatives from Disability Wales, Autistic UK and the Fair Treatment for the Women of Wales in formulating the WG EQIA.

5.78 The WG EQIA identified that it could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit.

5.79 WG EQIA considers a number of options for refunds for both disabled people and carers. Ultimately, the option including in the Act was to issue refunds for disabled people in receipt of a qualifying disability benefit who has paid a visitor levy while staying in a visitor accommodation and accompanied by a person providing care.

5.80 The WG EQIA acknowledges (in part because it does not include carers) that this option does 'not fully eliminating the risks of indirect discrimination, it was perceived to be a proportionate response which balances the need to address the indirect discrimination but also ensure the integrity and efficiency of the tax system'.

5.81 In terms of tourism activity, 31% of all trips to Wales include somebody who is disabled or has an impairment. Additionally, 20% of all overnight trips taken to Wales from January to

December 2024 were by those taking care of people with medical conditions.²⁹ Some of these trips relate to stays with friends and family in their own homes rather than visitor accommodation and it does not mean that these visitors were accompanying the person they care for rather than they simply have this type of caring responsibility. The equivalent data for Gwynedd is unavailable.

Employers and employment

- 5.82 The WG EQIA also notes the WRA will collect and manage levy. For accommodation providers, it is anticipated that the day-to-day operation of the levy will have minimal impact on business owners who have visual and / or hearing impairments due to the multiple ways a person can interact with the WRA – digital system for filing and remitting returns to the WRA alongside the provision of a telephone and paper service, where necessary.
- 5.83 Additionally, the WG EQIA notes that disabled workers are more likely to end up in insecure work than non-disabled workers. Of the workers working in tourism in Wales, 18% are disabled – a similar proportion to the average across all industries.³⁰
- 5.84 The equivalent data for Gwynedd is presently unavailable.

Disability overall

- 5.85 The WG EQIA identified that it could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit but that the option (not including an exemption) was a proportionate response.
- 5.86 Once mitigation (including refund for person in receipt of a disability benefit) is included, no other impacts were identified and it is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.
- 5.87 It is also noted that Ysbyty Gwynedd is a hospital located in Gwynedd but as above hospital stays are exempt from the levy.
- 5.88 Proactive measures can be taken to ensure the benefits of tourism, including the spending of the fund, are distributed more equitably among all segments of the population – this could include measures to improving accessibility for disabled people to tourist sites.

Pregnancy and maternity

- 5.89 Provisions in the 2025 Act apply to all visitors staying in overnight visitor accommodation that is not their usual place of residence, do not make distinction based on pregnancy and maternity.
- 5.90 The ONS does not provide statistics on the number of people who are pregnant. Therefore, this baseline analysis considered live birth data³¹ as a proxy. The latest available data from

²⁹ Domestic GB tourism statistics (overnight trips): annual report 2024. Available [here](#)

³⁰ Welsh Government. Welsh tourism sector business and labour market statistics. Available [here](#)

³¹ Office for National Statistics, 2024. Live Births.

2024 indicate the general fertility rate³² is lower (42.7) in Gwynedd than the average for Wales (45.7).

5.91 Agani, it is noted that Ysbyty Gwynedd is a hospital located in Gwynedd but as above hospital stays are exempt from the levy.

5.92 WG concludes there are 'nil' potential direct impacts with regard to Pregnancy and maternity. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.

Summary of impact on groups who share a protected characteristic

5.93 Table 5-8 below summarises the findings of the equality impact assessment against protected characteristics.

Table 5-8: Summary of impacts

Protected characteristic	Potential impacts	Potential mitigation where required
Age	<p>WG concludes there are 'nil' potential direct impacts with regard to Age once mitigation (including the under-18 exemption for lower bound accommodation) is taken into account. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.</p> <p>There are possible impacts related to a higher proportion of older visitors to Gwynedd, and a young workforce, but any impacts of the levy are likely to be small – and will to some extent be offset by the spending of the levy.</p>	<p>Under 18s are excluded from the levy for lower-rated stays</p> <p>Future use of the levy</p>
Disability	<p>The WG EQIA identified that it could be construed as indirect discrimination to apply a visitor levy to carers accompanying a disabled person requiring care as part of their visit but that the option (not including an exemption) was a proportionate response.</p> <p>Once mitigation (including refund for person in receipt of a disability benefit) is included, no other impacts were identified and it is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.</p>	<p>Refund mechanism for persons in receipt of a disability benefit who are accompanied by a person providing care, support or assistance.</p> <p>Future use of the levy</p>

³² Office for National Statistics, 2021. Census.

Protected characteristic	Potential impacts	Potential mitigation where required
Gender reassignment	WG concludes there are 'nil' potential direct impacts with regard to Gender reassignment. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.	Stays in private hospitals are exempt from a levy.
Marriage and civil partnership	WG concludes there are 'nil' potential direct impacts with regard to Marriage and Civil Partnership. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.	No potential impacts identified
Pregnancy and maternity	WG concludes there are 'nil' potential direct impacts with regard to Pregnancy and maternity. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.	No potential impacts identified
Race	Visitors to Gwynedd and employees in the distribution, hotels and restaurants sector are more likely to be white, than the average across Wales. WG concludes there are 'nil' potential direct impacts with regard to Race. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.	Gypsy, Roma and Travellers sites provided by a local authority or registered social landlord are exempt from a levy. Exemptions / refunds are available for vulnerable groups, e.g. asylum seekers and those fleeing domestic abuse Future use of the levy
Religion and belief	WG concludes there are 'nil' potential direct impacts with regard to Religion and Belief. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA.	The WRA will offer non-digital processes to accommodate those whose faith may restrict digital engagement. Free accommodation exempt from a levy and stays in lower rated accommodation have a lower levy charge.

Protected characteristic	Potential impacts	Potential mitigation where required
		Future use of the levy
Sex	<p>WG concludes there are 'nil' potential direct impacts with regard to Sex. There are no Gwynedd specific characteristics that would change the findings of the WG EQIA.</p> <p>It is not anticipated that there would be a disproportionate or differential impact in Gwynedd as a result of the levy on females or males working in the tourist sector.</p>	No potential impacts identified
Sexual orientation	WG concludes there are 'nil' potential direct impacts with regard to Sexual Orientation. It is not anticipated that there would be any Gwynedd specific characteristics that would change the findings of the WG EQIA	No potential impacts identified

6 Welsh Language

- 6.1 The Wellbeing of Future Generations Act states that Welsh public bodies must carry out sustainable development to improve the country’s economic, social, environmental and cultural wellbeing. One Wellbeing Goal for achieving this is to create a society that promotes and protects the Welsh language. In accordance with this, this EqIA considers the potential impact of the Visitor Levy on the prevalence of the Welsh language in Gwynedd.
- 6.2 The Welsh Government has undertaken a national Welsh Language Impact Assessment of the Act³³.
- 6.3 The Welsh Government also undertook a consultation exercise as part of this assessment. This found that whilst most respondents did not have specific views concerning the impact of the visitor levy on the Welsh language, a small number of respondents expressed concern about the impact on the perception of Wales, and that any decline in tourism resulting from a levy could reduce opportunities to use the Welsh language, as well as having a potentially negative impact on Welsh speaking communities. On the other hand, some respondents highlighted that revenues raised through a levy could be used to promote and facilitate the use of the Welsh language.

The Welsh Language in Gwynedd – and in the tourist and food sector

- 6.4 Historically a heartland of the Welsh language, Gwynedd remains one of the strongest Welsh speaking areas in Wales.
- 6.5 The 2021 Census identifies the prevalence of skills in the Welsh language across Wales. The proportion of residents who have some skill in Welsh (reading, writing, speaking or understanding spoken Welsh) is significantly higher in Gwynedd (74%) than across North Wales (39%) and Wales (25%).
- 6.6 Additionally, the proportion of Gwynedd residents who can speak, read and write Welsh (55%) is almost double the average for North Wales (24%) and over three times the Wales average (14%).

Table 6.1: Welsh Language (Census 2021)

Measure		Gwynedd	North Wales	Wales
Welsh Language Skills	Any skills in Welsh (reading, writing, speaking or understanding spoken Welsh)	74%	39%	25%
	Can understand spoken Welsh only	7%	7%	5%
	Can speak, read and write Welsh	55%	24%	14%
	No skills in Welsh	26%	61%	75%

³³ [Visitor Accommodation \(Register and Levy\) Etc. \(Wales\) Act 2025: Welsh Language Impact Assessment](#)

6.7 The distribution, hotels and restaurants sector has slightly fewer Welsh speakers than the average across all sectors but it is still very high (59% of residents aged 16 years and over in employment in the sector).

Table 6.2: Welsh Language - residents aged 16 years and over in employment in the sector (Census 2021)

	Gwynedd	North Wales	Wales
All sectors	68%	29%	17%
Distribution, hotels and restaurants	59%	25%	14%

6.8 The WLIA notes that the visitor levy could potentially impact the Welsh language if it were introduced in areas where relatively high proportions of Welsh-speakers work in the accommodation and food services industry. These could be positive and negative.

Potential for positive impacts

6.9 The WLIA notes that there could be positive impacts resulting from:

- A boost to the local economy through the spending of the levy leading to an increase in employment in the tourism sector – the Economic Impact Assessment suggested there could be between -50 and +21 jobs so this is likely to be relatively small impact .
- Positive impact in terms of exposure to Welsh language
- Use the revenue from the levy to promote and support the Welsh language or to fund initiatives that improve the infrastructure and services in areas which currently have (or until recent decades have had) a relatively high percentage of Welsh-speakers. This could promote the visibility, vitality, and viability of the Welsh language, as well as increase the awareness and appreciation of visitors and residents alike.

6.10 We have identified four broad areas where spending of the Levy could benefit the Welsh language – note this is indicative and will need to be confirmed through governance processes and in line with the Act were the Levy to be adopted:

1. Strengthening Welsh Language Infrastructure and Promotion, including:

- Community initiatives promoting Welsh language use
- Local cultural events, festivals, and Welsh-medium visitor experiences
- Grants to organisations delivering Welsh-medium services

2. Supporting Sustainable Tourism That Respects Welsh Identity, including:

- Welsh cultural programmes
- Interpretation and signage in Welsh
- Preservation of local heritage

These could strengthen Welsh identity in the visitor experience.

3. Mitigating Pressures on Welsh-speaking Communities, including:

- Managing tourism pressures in communities with high proportions of Welsh speakers

- Infrastructure provision, maintenance or improvement (paths, car parks etc)

4. Economic Opportunities for Welsh Speakers, including:

- Welsh-medium customer service training
- Encouraging tourism businesses to use Welsh in branding
- Alignment with existing schemes (e.g. ARFOR) that link language and economic development.

6.11 If the visitor levy boosts economic resilience in areas with relatively high rates of overnight stays where Welsh-speakers are prevalent, it could help support the delivery of one of 'Cymraeg 2050' objectives: creating favourable conditions for the Welsh language to thrive.

6.12 It is acknowledged that were (some of) the levy spending not to be targeted on Welsh language initiatives, then the opportunity would be lost.

Potential for negative impacts

6.13 The WLIA also notes some potential negative impact:

- The potential negative economic impact of the levy – although as above, there are anticipated to be a maximum of a loss of -50 jobs in a worst case scenario) and so this impact is likely to be relatively minimal.
- The potential impact on overnight trips that aim to support the Welsh language and Welsh-medium education. This could have education and cultural impacts. However, under 18s will not have to pay the levy when staying in hostel style accommodation or on campsite pitches. Reliefs are applied to overnight stays that are supplied by education providers as part of the supply of a course of study offered to pupils or students.

Summary

6.14 Overall, there is strong prevalence of Welsh speakers in Gwynedd, including in the tourism sector.

6.15 A visitor levy in Gwynedd could have both positive and negative impacts on the Welsh language. There could be small negative impacts associated with a reduction in visitor spending, or there could be a small increase as a result of the employment supported through spending of the levy.

6.16 Similarly there could be positive impacts associated with the outcome of the spending of the levy – that will depend on the how the fund is spent (which will be developed including feedback through consultation).

7 Socio-Economic Status

- 7.1 Although socio-economic status is not a protected characteristic, it is relevant to the socio-economic duty in the Equality Act and therefore is included in this EqIA. There are multiple aspects to socio-economic status, which are considered below.
- 7.2 We consider the socio-economic status of residents of Gwynedd as well as North Wales to account for those who may commute to Gwynedd for work (note that there are multiple TTWAs and so North Wales is taken as capturing those who commute in to work) Those local / regional stats are compared to national (Welsh level) statistics.
- 7.3 The impact of the Visitor Levy is estimated to be between -50 and +21 FTE jobs (refer to the Economic Impact Assessment for more data) – this is a very small impact in the context of the Gwynedd economy (a loss of 50 jobs is equivalent to loss of -0.1% of all employment).
- 7.4 We do not consider directly the socio-economic status of visitors, since those visitors who are able to travel are by definition able to fund leisure activities and are able to change how (or where) they spend their leisure spending.

Health and lifestyle

- 7.5 Health and lifestyle factors can be taken as indicators of socio-economic status. Higher rates of obesity, smoking and alcohol consumption are often associated with areas of high deprivation and low socio-economic status.
- 7.6 According to ONS data³⁴, in 2022-2024, life expectancy at birth was higher in Gwynedd for both men and women than North Wales (across the BCUHB - Betsi Cadwaladr University Health Board) and Wales averages. Life expectancy is taken as an indicator of socio-economic status in the WGFA and the Welsh National Plan.

Table 7.1: Health and Lifestyle indicators

		Gwynedd	North Wales (BCUHB)	Wales
Life expectancy at birth (years) (2018-20)	Male	78.8	78.4	78.3
	Female	83.3	82.4	82.2

- 7.7 Table 7.2 demonstrates that self-assessed health in Gwynedd is broadly in line with averages for North Wales and Wales. There are slightly lower numbers of people who are disabled as defined by the Equality Act.

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<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/healthandlifeexpectancies/datasets/lifeexpectancyforlocalareasoftheuk>

Table 7.2: Health and Disability (2021 Census)

		Gwynedd	North Wales (BCUHB)	Wales
Self-Assessed Health	Very good & Good	81%	80%	79%
	Fair	13%	14%	14%
	Bad & Very Bad	6%	6%	7%
Disability under the Equality Act	Day-to-day activities limited a lot	8%	9%	10%
	Day-to-day activities limited a little	11%	11%	11%

7.8 The JLDP still aims to improve this by promoting prosperous, healthy and safe communities. The visitor levy could have negative impacts on health if it leads to an increase in unemployment or economic activity, but the impact of jobs is expected to be very low. Conversely, the levy could have a positive impact on health if it were to increase employment (though the spending of the levy) and through the spending of the levy if it (for example) encouraged community cohesion or improved local assets that have a positive impact on health and wellbeing.

Qualifications

7.9 The WFGA identifies the qualification level of a population as a wellbeing indicator.

7.10 Overall, Gwynedd's population's highest level of qualification is slightly higher than the other spatial levels³⁵. The proportion of young adults with further or higher education-level qualifications (19%) is slightly higher than the Welsh average (18%) – this pattern is repeated across all spatial scales.

7.11 Gwynedd has a lower proportion of people with no qualifications – 16% of adults over 16, compared to 19% and 20% across North Wales and Wales, respectively.

Table 7.3: Qualifications (Census 2021) - % of residents over 16

Measure		Gwynedd	North Wales	Wales
No qualifications	Total	16%	19%	20%
	Aged 16-24	9%	12%	11%
	Aged 25-64	11%	12%	14%
	Aged 65+	32%	35%	38%
GCSEs or A-Level equivalent	Total	41%	41%	40%
	Aged 16-24	69%	66%	66%
	Aged 25-64	42%	44%	42%
	Aged 65+	25%	26%	24%
Further or Higher Educations	Total	35%	31%	32%

³⁵ Office for National Statistics, 2021. Census.

	Aged 16-24	19%	17%	18%
	Aged 25-64	41%	37%	38%
	Aged 65+	29%	25%	24%
	Total	8%	9%	8%
Other qualifications	Aged 16-24	4%	5%	5%
	Aged 25-64	7%	7%	7%
	Aged 65+	14%	15%	14%

Economic activity

7.12 The rate of economic activity in Gwynedd (77%) is broadly in line with than the other spatial levels, 78% in North Wales and 76% across Wales). The WFGA identifies the proportion of people not in employment or education as a key wellbeing indicator. There is high levels of economic inactivity in those aged 16 to 19 at all spatial levels, and this is particularly pronounced at a Gwynedd level.

7.13 The rate of unemployment in Gwynedd (6%) is higher than across North Wales (4%) and Wales (5%). Again there is higher unemployment amongst young people (particularly 16 – 19) and this is more pronounced in Gwynedd.

7.14 Promoting economic activity in young people, as well as retaining those who are economically active, are priorities of the Welsh National Plan and Anglesey and Gwynedd’s JLDP.

7.15 Claimant count data shows similar patterns with 3% of residents claiming benefits principle for the reason of being unemployed – in line with the national average.

7.16 The visitor levy could result in a small increase or small decrease in employment – as set out above this magnitude of the impact means that the overall effect on economic activity and unemployment is likely to be small.

Table 7.4: Economic Activity and Unemployment

Measure		Gwynedd	North Wales	Wales
Economic activity rate (APS Oct 2024-Sep 2025)	Total (16 - 64)	77%	78%	76%
	Aged 16-19	54%	45%	43%
	Aged 20-24	59%	69%	70%
	Aged 25-34	91%	89%	86%
	Aged 35-49	86%	86%	86%
	Aged 50+	42%	41%	39%
Unemployment rate (APS Oct 2024-Sep 2025)	Total (16 - 64)	6%	4%	5%
	Aged 16-19	38%	*	29%
	Aged 20-24	*	*	11%
	Aged 25-34	6%	*	3%
	Aged 35-49	*	*	3%
	Aged 50+	3%	*	3%
Claimant Count (Dec 2025) - Claimants as a proportion of residents		3%	*	3%

* Figure not available at this spatial level.

Income

7.17 The National Plan identifies wages as a key indicator of socio-economic status.

7.18 The Annual Survey of Hours and Earnings provides data on residents' and workers' pay and hours worked based. In 2025, the average gross weekly pay for a resident in Gwynedd was £542, lower than Wales (£602). Workers in Gwynedd also less than the Welsh average (£541 compared to £590).

7.19 The 10th percentile for weekly wage in Gwynedd is broadly in line with the Welsh average for both residents (£221 compared to £223) and workers (£213 compared to £217).

7.20 Data by sector is not available at a lower than country (Wales) level. The accommodation and food sector in Wales is typically paid less well than the average across all jobs, in part (but not entirely) due to the high occurrence of part time work. Again to the extent that the levy resulted in a change in income, there could be a (small) change in income.

Table 7.5: Gross Weekly Pay 2025

	Measure	Resident - all sector		Worker - all sector		Worker - Accommodation and Food
		Gwynedd	Wales	Gwynedd	Wales	Wales
Median	Full time	£ 669	£ 719	£ 665	£ 704	£519
	Part time	£ 304	£ 292	£ 299	£ 290	£201
	All	£ 542	£ 602	£ 541	£ 590	£293
10th percentile	Full time	£ 478	£ 487	£ 481	£ 483	£415
	Part time	£ 114	£ 90	£ 100	£ 92	x
	All	£ 221	£ 223	£ 213	£ 217	£82

* Figure not available at this spatial level.

Deprivation

7.21 The Welsh Government's Index of Multiple Deprivation (2025) combines indicators including a range of social, economic, and housing factors, to yield a deprivation score for all areas across Wales (Lower Layer Super Output Areas [LSOAs]). There are eight domains of deprivation that are investigated:

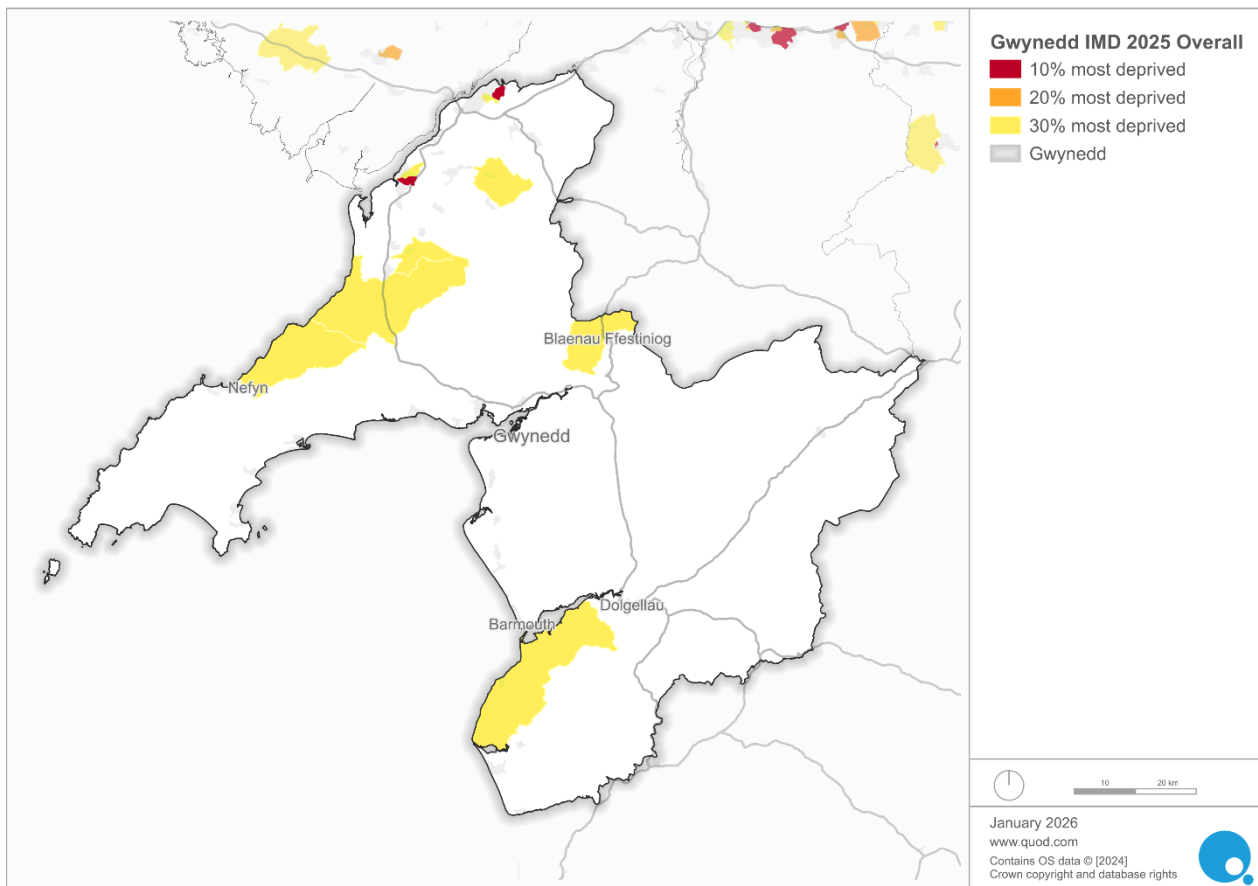
- Income
- Employment
- Health
- Education

- Access to services
- Housing
- Community safety
- Physical environment

7.22 All areas are ranked relative to one another according to their level of deprivation. **Gwall! Ffynhonnell y cyfeirnod heb ei ganfod.** below shows the relative levels of deprivation in Gwynedd – areas shown in red are within the 10% most deprived, areas in orange are within the 10% - 20% most deprived areas and areas in yellow are within the 20% - 30% most deprived.

7.23 As shown in **Gwall! Ffynhonnell y cyfeirnod heb ei ganfod.**, there are some areas in Gwynedd that are within the 20% - 30% most deprived areas in Wales and small areas in Bangor and Caernarfon that fall amongst the top 10% most deprived areas in Wales.

Figure 7.1: IMD map for Gwynedd



7.24 The use of funds from the levy will be reinvested for the purposes of destination management and improvement in the area, including providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people), and mitigating the impact of visitors. Depending on the use of the fund, it could reduce deprivation (or indicators of deprivation) and / or res as a result of investment.

Housing and living situation

7.25 According to the 2021 Census, 2% of households in Gwynedd live in overcrowded homes (occupancy rating of bedrooms of -1 or less). This is consistent with the other spatial areas. The proportion of household who have a car (82%) is broadly in line with the North Wales (83%) or Wales (81%) average.

7.26 The 2021 Census also provides data on housing tenure. In Gwynedd, the proportion of owner-occupied households (66%) is in in line with the Wales average and higher than North Wales average (68%). When looking at tenure by age of household representative, Gwynedd has slightly lower proportions of owner-occupied households across all age groups than north v and Wales national averages. The proportion of socially and privately rented households is slightly higher across the different spatial levels.

7.27 To the extent that the visitor demand did fall as a result of this levy (which is likely to be relatively small), this could relieve some pressure on the private rented sector.

Table 7.6: Housing and living situation

Measure		Gwynedd	North Wales	Wales
Overcrowding (occupancy rating of -1 and -2 or less, bedrooms)		2%	2%	2%
Owner-occupied households	Total**	66%	68%	66%
	Aged 16-64**	59%	62%	60%
	Aged 65+**	78%	79%	79%
Privately rented households	Total**	18%	17%	17%
	Aged 16-64**	22%	22%	22%
	Aged 65+**	9%	8%	7%
Socially rented households	Total**	17%	16%	16%
	Aged 16-64**	18%	17%	18%
	Aged 65+**	14%	13%	14%
One or more car or van in household		82%	83%	81%

** By household reference person.

Overall impact on socio-economic status

7.28 Health and lifestyle indicators suggest that Gwynedd generally broadly in line than regional and national averages. Youth unemployment and low incomes remains a challenge and there a pockets of high deprivation.

7.29 Any employment effects from the levy are likely to be relatively small (and could be marginally positive or marginally negative).

7.30 The use of funds from the levy will be reinvested for the purposes of destination management and improvement in the area, including providing, maintaining and improving infrastructure, facilities and services for use by visitors (whether or not they are also for use by local people),

and mitigating the impact of visitors. Depending on the use of the fund, it could reduce deprivation (or indicators of deprivation) and / or res as a result of investment.

8 Appendix A – Resident data

Table 8.1: Resident summary

Measure		Gwynedd	North Wales	Wales
Population				
Population		117,400	686,900	3,100,000
Age Structure				
Age Structure	Aged 0-15	17%	17%	18%
	Aged 16-64	60%	59%	61%
	Aged 65+	23%	23%	21%
Gender				
Male / Female		49% / 51%	49% / 51%	49% / 51%
Gender identity				
Gender identity different from sex registered at birth total		0.4%	0.3%	0.5%
Sexual Orientation				
Gay, Lesbian or Bisexual		3%	2%	3%
Not Answered		9%	8%	8%
Marital Status				
Single		40%	35%	37%
Married / Civil Partnership		42%	45%	44%
Divorced / Separated / Widowed		18%	20%	19%
Fertility				
General Fertility Rates (number of live births a year per 1,000 women aged 15 to 44 years)		42.7	*	45.7
Ethnicity				
Ethnicity	Asian/Asian British	2%	1%	3%
	Black/Black British	0%	0%	1%
	Mixed/Multiple	1%	1%	2%
	White	96%	97%	94%
	Other	1%	0%	1%
Place of Birth				
Place of Birth	UK	95%	94%	93%
	Europe (excluding UK)	3%	4%	3%
	Africa	1%	1%	1%
	Middle East and Asia	2%	1%	2%
	Americas and Caribbean	1%	0%	0%
	Antarctica and Oceania	0%	0%	0%

Main Languages	English or Welsh	98%	97%	97%
	European	1%	2%	2%
	Outside of UK and Europe	1%	1%	2%
Religion				
	Christian	46%	50%	44%
	Buddhist	0%	0%	0%
	Hindu	0%	0%	0%
	Jewish	0%	0%	0%
	Muslim	1%	1%	2%
	Sikh	0%	0%	0%
	Other religion	1%	0%	1%
	No religion	44%	42%	47%
	Not Answered	7%	7%	6%
Health				
Self-Assessed Health	Very good & Good	81%	80%	79%
	Fair	13%	14%	14%
	Bad & Very Bad	6%	6%	7%
Disability under the Equality Act	Day-to-day activities limited a lot	8%	9%	10%
	Day-to-day activities limited a little	11%	11%	11%

INTEGRATED IMPACT ASSESSMENT

This document assesses what impact the policy, procedure, plan, etc. will have on the county's population and will be implemented based on a number of legislations.

- **Equality Act 2010.** The Act places a duty on public organisations to give due attention to the impact of any new (or amended) policy, procedure or plan, etc. on persons with protected characteristics. We are required to:
 - eliminate unlawful discrimination, harassment and victimisation and other conduct that is prohibited by the Act.
 - promote equality of opportunity between people who share a relevant protected characteristic and those who do not.
 - foster good relations between people who share a protected characteristic and those who do not.

In Wales, the specific duty notes the need to undertake an impact assessment following specific guidelines to consider the impact that any changes in policy or procedure (or the creation of a new policy or procedure), will have on persons with protected equality characteristics. A timely assessment should be made before any decision is taken on any relevant change (i.e. that affects people with protected equality characteristics).

- **Socio-economic Duty.** Wales has implemented this further duty which is part of the Equality Act 2010 and places a duty to address socio-economic disadvantages in strategic decisions.
- **Welsh Language Standards (Section 44 Welsh Language Measure (Wales) 2011).** The Council is required to consider the impact that any change in policy or procedure (or the creation of a new policy or procedure), will have on opportunities for people to use the Welsh language and to ensure that the Welsh language is not treated less favourably than English. This document therefore ensures that these decisions safeguard and promote the use made of the Welsh language.
- **Well-being of Future Generations Act 2015.** The Council has a duty to put the five ways of working in place and to respond to the seven national well-being goals.
- **Armed Forces Act 2021.** Councils must give due attention to the impact of this proposal on those who serve or who have served in the Armed Forces, as well as their families.

Assessment 10/04/2026: Visitor Levy

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STEP 1 - Main Aims and Objectives of the Policy or Practice

1. What kind of document or procedure is being assessed?

- Local implementation of National Strategy/Plans/Legislation (refer to any national EqlA and consider local impact)
- New and revised policies, practices or procedures (which modify service delivery or employment practices)

2. What are the aims, objectives and intended outcomes of the policy or practice?

Cyngor Gwynedd is considering introducing a Visitor Levy for all eligible holiday accommodation and overnight stays as outlined in the Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 within Cyngor Gwynedd's local authority boundaries from 1 October 2027. This will be for all accommodation providers who will have to register on a national register of accommodation providers.

The Levy will be charged at a per person per night rate as outlined in the act. The Levy will be collected by the accommodation provider. The initial rates will be as outlined in the act:

Type of accommodation	Rate (per person, per night)
Tent Campsites and shared bedrooms (such as hostels and dorms)	£0.75p (0.90p inc. VAT)
All other types of holiday accommodation	£1.30 (£1.56 inc. VAT)

Exceptions

You will not be expected to pay the levy if you are:

- Under 18 and staying in a camp or shared room (such as a hostel or dorm);
- Staying for more than 31 nights in one stay; and
- In emergency or temporary accommodation arranged by a local council.

Refunds

The following will be eligible to apply for a refund from the Welsh Revenue Authority:

- Disabled people who pay extra levy costs when they have a carer; and
- People fleeing domestic violence.

3. Who are the main consultative groups (stakeholders)?

The Guidance identifies the following as mandatory consultees that should be included when developing the Levy:

- Locals, i.e. people who live, work or study in the Local Authority area.
- Community councils in the Local Authority area.
- Public Services Board (according to Section 4 of the Well-being of Future Generations (Wales) Act 2015 for the Local Authority area).

- The main advice for an area abutting the area of the consulting council, i.e. neighbouring councils, so that they are aware of the plans. Authorities may also wish to consider whether there are any opportunities for collaboration. In the case of Gwynedd this includes Anglesey, Conwy, Denbighshire and Powys.
- National Park Authority for a National Park where any part of it is in the Local Authority area.
- A corporate joint-committee, which includes as a member at least one senior operational member of the main council.
- Establishments which represent businesses who work in the field of tourism, or who participate in activities which are associated with tourism, in the main council area; and/or promote or facilitate tourism in the council area.
- Where there is a proposal to introduce the levy, the consultation should include every person noted in the report by virtue of section 47(5) (c) of the Act (which refers to the proposed membership of the tourist levy partnership forum), which is not otherwise a mandatory consultee.

The Council will work through the structures of the Gwynedd & Eryri Partnership 2035 as well in order to develop the proposals and consult locally.

STEP 2 - Engagement Data and Impact Assessment

4. Has there been any attempt to comply with the duty to engage in accordance with what is described above and has enough information been gathered to proceed?

Yes

Details of the engagement. Note any consultation or engagement you have conducted or intend to conduct.

Action	Dates	Information
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Public Consultation	May – July 2026	If the consultation is approved by the Full Council, a formal public consultation process will be held, following the Gunning guidelines being implemented to gather views.
Develop the Gwynedd and Eryri Plan 2035	2019 - 2023	Extensive consultation was undertaken when developing the Strategic Plan for the sustainable visitor economy in the area.
Informal consultation	2023 - 2025	Informal discussions were held and views were sought through the Gwynedd Residents Questionnaire and the Gwynedd Business Questionnaire.

5. What information is available about the impact on each of the following characteristics and subjects?

	Evidence, Information and Relevant Data	Potential Positive and/or Negative Impact
Race	<p>We have considered the consultations undertaken when developing the Gwynedd and Eryri Plan 2035, as well as what is noted above in terms of initial questionnaires and engagement with businesses, individuals and communities.</p> <p>When developing the Gwynedd and Eryri Plan 2035, a lot of local research and statistics was used to draw up our operational principles and priorities.</p> <p>The research and statistics include:</p> <ul style="list-style-type: none"> • Review of Local Tourism Accommodation (2018/19, Cyngor Gwynedd) 	<p>We have not identified any impact.</p> <p>The Levy is in a place to be paid by all who are eligible, which includes people living in Wales as well as visitors from other countries. Everyone will be able to benefit from investments made with the income of the Levy locally. We will seek to engage inclusively by providing an easy-read version. We can consider translating to other languages that are not Welsh or English.</p>

- Visit Wales and Cyngor Gwynedd Visitor Review (2019, Beaufort Research)
- Benefiting from Tourism Review - consideration of options to fund future priorities (May 2019, Blue Chip Tourism and RJS Associates Ltd).
- Review of the Destination Management Partnership (October 2019, Blue Chip Tourism and RJS Associates Ltd)
- Eryri Plan (2020, Eryri National Park)
- Yr Wyddfa and Ogwen Sustainable Parking and Transport Strategy (2020, Eryri National Park)
- Cyngor Gwynedd Plan (2018, Cyngor Gwynedd)
- Managing the use of dwellings as holiday homes (December 2020, Cyngor Gwynedd)
- Research into the motor homes situation in Gwynedd (September 2021, Cyngor Gwynedd)

We have also considered the national impact assessments that have been drawn up by the Welsh Government when developing the legislation. Good practice from other areas has also been considered, e.g. Edinburgh.

Integrated impact assessments provided by the Welsh Government based on the public consultation, statistics and research they commissioned.

The assessment notes that tourism brings positive and negative impacts to Wales - e.g., through economic benefits, employment, site conservation, etc., but also it brings challenges to communities due to the pressures on

	<p>local services and shared infrastructure with residents and the challenges of second homes and environmental impacts.</p> <p>We have commissioned an Economic and Equality Impact Assessment by an experienced advisor.</p>	
Disability	See previous evidence noted under Race.	<p>There is a provision in the act for the Welsh Revenue Authority to issue refunds to people who receive a disability benefit who are in the company of someone who provides care, support or advice for them. The consultation will use an easy-read version, and we can offer a bold print option upon request.</p> <p>Investments from the Levy could improve services and access in sites by, e.g. installing ramps, accessible-to-all public facilities, improving access to beaches or the coast path with purposeful wheelchairs, for example.</p>
Gender	See previous evidence and information.	<p>We have not identified any impact.</p> <p>The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from investments made with the income of the Levy locally.</p> <p>Investments from the Levy income will be prioritised to skills plans or to improve salaries in the sector and extend the season locally. Many of the industry's workforce are women and this could have a positive impact on their employment.</p>

Age	See previous response in terms of evidence.	<p>Young people under 18 years of age are not expected to pay on a lower scale, which is positive for educational visits or visits to camp-sites or hostels.</p> <p>The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from investments made with the income of the Levy locally.</p> <p>We can consider providing the engagement information in an accessible way as required. Investments from the Levy income will be prioritised to support projects that could benefit all ages, e.g., access projects for older people, dementia-friendly spaces, events and activities for children and families, etc.</p>
Religion and Belief	See previous response to evidence and information.	<p>We have not identified any impact.</p> <p>The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from investments made with the income of the Levy locally.</p> <p>Investments from the Levy income will be prioritised to support projects that could benefit everyone.</p>
Sexual Orientation	See previous evidence and information.	<p>We have not identified any impact.</p> <p>The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from investments made with the income of the Levy locally.</p>

		Investments from the Levy income will be prioritised to support projects that could benefit everyone.
Gender reassignment	See previous evidence and information.	We have not identified any impact. The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from investments made with the income of the Levy locally. Investments from the Levy income will be prioritised to support projects that could benefit everyone.
Marriage and civil partnership	See previous evidence and information.	We have not identified any impact. The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from investments made with the income of the Levy locally. Investments from the Levy income will be prioritised to support projects that could benefit everyone.
Pregnancy and Maternity	See previous evidence.	We have not identified any impact. The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from investments made with the income of the Levy locally. Investments from the Levy income will be prioritised to support projects that could benefit everyone.

<p>The Welsh Language</p>	<p>Please see the previous response.</p>	<p>According to the Welsh Government assessment, impacts on the Welsh language could emerge if the levy reduces the competitiveness and profitability of the tourism sector, which employs Welsh speakers, including those visitors from holding educational visits to destinations in Wales. The levy could support the tourism industry and employment opportunities or enterprises in Welsh language regions. It is likely that there will be a very small impact/no measurable impact due to the levy on the use of Welsh except for realising that there may be fewer opportunities to use Welsh should there be a loss in terms of the demand. There is no evidence to show that people will leave their communities due to the tourism levy.</p>
<p>Socio-economic Considerations</p>	<p>Please see the previous response.</p>	<p>According to the Welsh Government integrated assessment, higher taxes may prevent travellers who are on a budget or individuals on a lower income from visiting areas that adopt a levy, raising possible concerns about fairness and inclusivity. However, the levy has been planned with two rates that will be applied per person, per night. The basic rate will be £1.30 for most types of accommodation and the lower rate for hostels and camp-sites will be £0.75. Adding a lower rate acknowledges that the cost of this type of accommodation is lower compared to others. In addition, young people aged under 18 years of age will not be included in the fee calculated for the tourist levy for lower-rate stays. This means that</p>

		<p>they will not have to pay the levy when it is transferred by a provider that will not be included in the levy's calculations (i.e. there is no levy to transfer). In order to reduce the risk for the levy to become a barrier to people at a socio-economic disadvantage who go on holidays in Wales, Welsh Ministers can also assess, and change the rates noted in the legislation. The intention is for the revenue from the levy to help mitigate against any detrimental impacts by providing benefits of improvements to the local area, by using the revenue to help maintain and regenerate the local services and infrastructure.</p>
<p>Those Who Serve or Who Have Served in the Armed Forces, As Well As Their Families</p>	<p>Please see the previous response.</p>	<p>We have not identified any impact.</p> <p>There is a provision in the act for the Welsh Revenue Authority to issue refunds to people who receive a disability benefit who are in the company of someone who provides them care, support or advice. The consultation will use an easy-read version, and we can offer a bold print option upon request.</p> <p>Investments from the Levy could improve services and access in sites by, e.g. installing ramps, accessible-to-all public facilities, improving access to beaches or the coast path with purposeful wheelchairs, for example.</p>
<p>Human Rights</p>	<p>Please see previous responses.</p>	<p>We have not identified any impact.</p> <p>The Levy is in place to be paid by all who are eligible. Everyone will be able to benefit from</p>

		investments made with the income of the Levy locally.
Other	None	None

6. Are there any data or information gaps, and if so, what are they and how do you intend to address them?

Gaps exist in the evidence regarding the impact of introducing a Levy in a local area and we have commissioned support in an attempt to respond to this, considering the research carried out by the Welsh Government - but some gaps will remain due to the reliability of the available data.

Hopefully, some of these gaps can be addressed in the public consultation, should the Full Council give its approval to this step.

7. When considering other key decisions that affect these groups, is there an increasing impact (cumulative impact)?

It is not believed that there will be a cumulative impact on any groups.

8. What does the proposal include to demonstrate you have given due regard to the Public Sector Equality Duty (to promote equal opportunity; help to eliminate unlawful discrimination, harassment, or victimisation and foster good relations and wider community cohesion) as covered by the three aims of the General Duty in the Equality Act 2010?

The Levy will support the implementation of the Gwynedd and Eryri Plan 2035, which encourages respect and understanding of the culture, language, special characteristics and communities of the area. Levy income investments could include working with groups who represent characteristics in order to implement specific projects and remove discrimination.

Through engagement with groups that represent people with specific characteristics we will be able to identify what groups in our communities, and the people who are visiting, need in order to ensure fairness for all.

The Local Levy Partnership Forum and the implementation of the Gwynedd and Eryri Plan 2035 will ensure that various voices are heard. Projects supported by the Levy income locally will support specific activities to promote equal opportunities within our communities and for those who are visiting.

Establishing a Levy Partnership Forum as part of the operational arrangements of Gwynedd and Eryri 2035 will ensure that action is prioritised based on the views of the Partnership and key partners.

The structure of Gwynedd and Eryri 2035 is a partnership which encourages collaboration amongst the Gwynedd and Eryri tourism sector, local communities and enterprises, and public authorities.

Establishing the communication plan will be essential in order to manage the message, should Gwynedd adopt the levy and avoid any animosity or allegations that we are racist.

9. How does the proposal show that due regard has been given to the need to address inequality due to socio-economic disadvantage? (Note that this relates to closing the inequality gap, rather than just improving outcomes for everyone.)

In developing the Gwynedd and Eryri Plan 2035, several factors which created frustration to communities due to visitor numbers in some areas and the impact of second homes, employment conditions in the sector and the need to respond by having a sustainable visitor economy plan in place, were considered.

The activities supported by implementing the Levy in Gwynedd seek to help improve the local provisions, e.g., improving public transport could improve residents' access to employment opportunities. It could lead to extending the season, which in turn would improve employment opportunities throughout the year in the sector.

It is proposed to engage with representatives of protected groups when developing and prioritising the annual Action Plan by the Sustainable Visitor Economy Partnership and the prioritisation method adopted by the Levy Partnership Forum. This will allow us to identify any barriers that face people with protected characteristics within the communities and potential visitors.

10. How does the proposal show implementation in line with the requirements of the Welsh Language Standards (Welsh Language Measure (Wales) 2011), to ensure that the Welsh language is not treated less favourably than the English language, and to ensure opportunities for people to use the Welsh language? Also, how does the proposal operate in accordance with the requirements of the Council's Welsh Language Strategy to take advantage of every opportunity to promote the Welsh language (beyond providing bilingual services) and increase opportunities to use and learn the language in the community?

Should the Levy be adopted in Gwynedd, it will support the implementation of the Gwynedd and Eryri Plan 2035. The Plan will promote the visitor economy to all and will encourage respect and understanding of culture, language, the area's special characteristics and communities, with the following vision and principles:

"A visitor economy for the benefit and well-being of the people, environment, language and culture of Gwynedd and Eryri"

We have adopted specific principles to promote the Welsh language:

- I. Celebrate, Respect and Protect our Communities, Language, Culture and Heritage
- I. Maintain and Respect our Environment
- I. Ensure that the advantages to Gwynedd and Eryri communities outweigh any disadvantages

As a result of investing the Levy income to realise the vision and principles, it is expected that more and better understanding and use of the Welsh language will exist in the visitor economy, as well as more stable career opportunities within the sector for local people.

The income from the Levy can also support research and development activities to support and develop the Welsh language in our communities and businesses. It will also help implement aspects of the Cyngor Gwynedd Language Strategy 2023-2033, in the priority fields of work and service, communities and research and technology.

11. How does this proposal meet the requirements of the Well-being of Future Generations Act by implementing the five ways of working, and respond to the seven national well-being goals, including creating a More Equal Wales?

1. There is a duty to act in accordance with the principle of sustainable development, which is to seek to ensure that the needs of the present are met without jeopardising the ability of future generations to meet their needs.
2. In acting in accordance with this general duty the Council needs to take into account the importance of long-term impact, being integrated, inclusive, collaborative and preventative in the development and implementation of the proposal in question.
3. In accordance with the requirements of the Act, Cyngor Gwynedd has adopted well-being objectives. Particular attention is drawn to the following objectives which the Visitor Levy could support if adopted:

- A PROSPEROUS GWYNEDD - Strengthening the economy and supporting the people of Gwynedd to earn a worthy wage
- A WELSH GWYNEDD - Ensuring that we give every possible opportunity for our residents to use the Welsh language in the community
- A GREEN GWYNEDD - Protecting the county's natural beauty, and responding positively to the climate change crisis
- AN EFFICIENT GWYNEDD - Putting the people of Gwynedd first and treating them fairly and ensuring that the Council performs effectively and efficiently

STEP 3 - Procurement and Partnerships

12. Will this policy or practice be carried out wholly or partly by contractors or in partnership with another organisation(s)?

Yes

What action will be taken to comply with the General Equality Duty, Human Rights and Welsh language legislation and the Socio-Economic Duty in relation to procurement and/or partnerships?

Procurement:

We will follow the Council's corporate procurement arrangements, ensuring that clauses and scoring in terms of the language and the socio-economic duty, is a part of our processes.

Partnership:

Should the Levy be adopted in Gwynedd, we will be expected to work in partnership when prioritising any Levy income investment in the area and we will use the Gwynedd and Eryri Partnership 2035 in order to do so.

STEP 4 - Dealing with Negative or Unlawful Impact and Strengthening the Policy or Practice

I3. When considering proportionality, does the policy or practice have a significantly positive or negative impact or create unequal outcomes?

Significant Positive Impact:

Considering the current evidence, some negative impacts could arise, however; reinvesting the money generated by the levy has the potential to support positive outcomes on the industry, our communities, the environment and the Welsh language.

Adopting a Levy in the Gwynedd area could support the realisation of the vision and principles of the Gwynedd and Eryri Plan 2035. By operating through the Partnership's structure, establishing the Gwynedd Levy Partnership Forum, and implementing the plan effectively and inclusively, monitoring implementation through new measures, it will be possible to consider and respond to any negative impacts in a positive way.

Significant Negative Impact:

The Welsh Government's integrated assessment notes:

- Changes in visitor spend - to provide for the additional cost of the levy, some visitors may spend less in other areas (e.g., secondary spending on meals or entertainment). This may affect the wider business revenue in the local area, which benefits from visitor spending.
- Changes in visitor numbers - in the most extreme scenario, some visitors may choose to visit different local authority areas, i.e., those who do not charge a levy, or even another country, in order to avoid the added cost of the levy. Research suggests that this is more likely in the initial introductory period, but these impacts may reduce as the acceptance of the levy increases.
- The visitor levy may have mixed impacts on different groups with protected characteristics, subject to exemptions and how the revenue is used.
- The visitor levy may have positive or negative impacts on the environment, subject to the changes in visitor numbers and re-investment of the revenue.

14. Any intentional negative impact and why it is believed that there is justification for operating in this way should be explained (for example, on the grounds of improving equal opportunities or developing good relationships between those who share a protected characteristic and those who do not or due to objective justification or positive action)

The Welsh Government has noted some key themes through the impact assessment process:

- The visitor levy may generate an additional income for local authorities to invest in services and infrastructure that is associated with tourism.
- Changes in visitor spend - in order to provide for the additional cost of the levy, some visitors may spend less in other areas (e.g., secondary spending on food or entertainment). This may affect the wider business revenue in the local area, which benefits from visitor spending.
- Changes in visitor numbers - in the most extreme scenario, some visitors may choose to visit different local authority areas, i.e., those who do not charge a levy, or even another country, in order to avoid the added cost of the levy. Research suggests that this is more likely in the initial introductory period, but these impacts may reduce as the acceptance of the levy increases.
- The visitor levy may have mixed impacts on different groups with protected characteristics, subject to exemptions and how the revenue is used.
- The visitor levy may have positive or negative impacts on the environment, subject to the changes in visitor numbers and re-investment of the revenue.
- Adopting the levy may also lead to improving employment within the sector by extending the season.

Although some negative impacts have been raised and recorded, re-investing the money generated from the levy by local authorities has the potential to support this industry, for example by improving the Wales tourism offer or the quality of our current attractions. In the longer term, this can strengthen Wales's offer and support the ongoing trend of sustainable growth in visitor numbers.

Adopting and implementing the Levy in Gwynedd will be a vehicle to securing a sustainable visitor economy in Gwynedd and Eryri.

The Gwynedd Levy Partnership Forum will meet within the operating structure of Gwynedd and Eryri 2035, in order to measure any negative impacts. The Levy Partnership Forum includes representation from key partners, the sector and communities.

15. Will any of the negative impacts identified count as unlawful discrimination albeit they are unavoidable (e.g. budget cuts)?

No

Note the reason for stating this and the justification for proceeding

It is not anticipated that any impact will count as unlawful discrimination.

16. What other measures or changes could be included to strengthen or change the policy/practice to demonstrate that due regard has been given to equal opportunity; help to eliminate unlawful discrimination, harassment, or victimisation; and foster good relations and wider community cohesion; as covered by the improvement aim of the General Duty in the Equality Act 2010?

There will be continuous monitoring of the Levy by Cyngor Gwynedd Officers and also within the Gwynedd Levy Partnership Forum, if a decision to proceed is made.

It is expected that an annual formal review of the Levy and its contribution to the Gwynedd and Eryri 2035 Action Plan will be carried out annually by the Levy Partnership Forum and within the G&E2035 Partnership management structure.

We will revisit this impact assessment annually, but more often than this if matters arise from engagements or other work.

17. What measures or other changes could be included to strengthen or change the policy/practice to demonstrate that due regard has been given to the need to reduce inequalities of outcome as a result of socio-economic disadvantage?

Any feedback from the consultation process will be considered when drawing up a final impact assessment before any decision is made at Full Council.

The Gwynedd and Eryri Plan 2035 will include a range of new measures identified to enable us to measure the impact of the visitor economy on a range of fields.

It is intended to monitor the implementation of the Levy in Gwynedd should it be adopted based on how much money is collected locally and how this money will be invested in the area for the benefit of our communities, our businesses and the local environment.

By establishing the Levy Partnership Forum, we will discuss investment priorities and any matters that could arise regarding the levy about disproportionate outcomes or negative side-effects and could adapt and change priorities and direction, if needed.

18. What other measures or changes could be included to strengthen or change the policy/practice to demonstrate that due regard has been given to the need to increase opportunities for people to use the Welsh language and in treating the Welsh language no less favourably than the English language as set out in the Welsh Language (Wales) Measure 2011 and to reduce or prevent any adverse effects that the policy/practice may have on the Welsh language?

The Levy investment priorities name the Welsh language and Welsh culture as priority fields. The Levy could support:

- Campaigns to promote culture and the Welsh language
- Sense of place and the Welsh Offer support for businesses via training
- Projects to conserve built and living cultural heritage
- Support for the Slate Landscape World Heritage Site and its activities
- Supporting a programme of cultural events
- Supporting communities to increase their use of Welsh

19. Is there enough information to make a balanced judgement and to proceed?

Yes

STEP 5 - Decision to Proceed

20. Given the information gathered in Steps 1–4 above, is it possible to move forward with the policy or practice or not, and if so, on what basis? Choice of:

Continue with policy or practice but with amendments for improvement or to remove any areas of adverse impact identified in Step 4.

STEP 6 - Actions and Arrangements for Monitoring Outcomes and Reviewing Data

The EqIA process is an ongoing one that doesn't end when the policy/practice and EqIA is agreed and implemented. There is a specific legal duty to monitor the impact of policies/practices on equality on an ongoing basis to identify if the outcomes have changed since you introduced or amended this new policy or practice. If you do not hold relevant data, then you should be taking steps to rectify this in your action plan. To review the EHRC guidance on data collection you can review their [Measurement Framework](#)

21. What actions noted in Steps 1-5 or any additional data collection work would help to monitor the policy/practice when implemented:

Action	Dates	Timetable	Lead Responsibility	Add to the Service Plan
Hold a public consultation	May – July 2026	One-off	Roland Evans	Yes
Adapting the Impact Assessment	September 2026	continuous	Roland Evans	Yes

22. What arrangements to monitor and review the ongoing impact of this policy or practice will be implemented, including timeframes for when it should be formally reviewed:

Monitoring and Review Arrangements (including where outcomes will be recorded)	Timeframe and Frequency	Lead Responsibility	Add to the Service Plan
Annual assessment in the Gwynedd and Eryri Partnership 2035	Annually	Roland Evans	Yes

Environmental Impact Assessment

Visitor Levy in Gwynedd

1. Introduction and Context

Cyngor Gwynedd is considering the introduction of a Visitor Levy on overnight stays in eligible visitor accommodation within the county's boundaries, in accordance with the Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025. The levy is intended to support a sustainable visitor economy, providing a dedicated source of income to invest in communities overwhelmed by tourism, local infrastructure and the natural and built environment.

This assessment focuses specifically on the potential environmental impact of introducing the levy, taking into account both positive and negative impacts, as well as mitigation and consolidation measures.

2. Objectives of the Assessment

The main objectives of the Environmental Impact Assessment are:

- To identify the potential impacts of the Visitor Levy on the natural and built environment in Gwynedd.
- To assess the extent to which the levy could contribute to managing visitor pressure and improve the sustainability of destinations.
- To recommend measures to mitigate any negative impact and maximise potential environmental benefits.

3. Description of the Visitor Levy

It is proposed that the levy will be charged per person, per night, on overnight stays in registered accommodation. A standard rate and a lower rate are set out for certain types of accommodation such as campsites and hostels, with some exceptions, including young people under the age of 18 in lower rate accommodation.

The income raised is expected to be retained almost entirely locally, and invested for the benefit of communities, businesses, visitors and the environment.

4. Environmental Baseline

Gwynedd is home to a wide range of environmentally sensitive assets, including:

- Areas of outstanding natural beauty and landscapes of national importance.
- Fragile ecosystems subject to seasonal pressures due to high numbers of visitors.
- Historic towns and villages where over-tourism can affect the quality of the living environment and built heritage.

The Council's documents already recognise that these pressures need to be managed in order to ensure the long-term sustainability of Gwynedd's visitor economy.

997 Gwynedd residents responded to the Gwynedd Residents' Questionnaire: Views on Tourism in 2025, noting the following responses relevant to the Environment:

- 42.9% believe that tourism has a positive influence on the environment and nature
- 28.9% believe that tourism has a neutral influence on the environment and nature
- 26.1% believe that tourism has a negative influence on the environment and nature
- 31.4% believe that tourism has a negative influence on the cleanliness of public spaces
- 31.6% believe tourism has a negative influence on litter
- If a Levy were to be established in Gwynedd, priority would be given to Environmental Schemes from the choice of potential investment areas (Environmental/Community/Culture and Language/Infrastructure/Destination Management).

5. Potential Environmental Impacts

5.1 Positive Impacts

The introduction of a Visitor Levy could generate a number of environmental benefits, including:

- Better management of popular destinations, by investing in infrastructure such as paths, waste facilities and sanitation facilities.
- Investing in landscape conservation, biodiversity and natural heritage, mitigating damage resulting from over-tourism.
- Encouraging more sustainable tourism, by shifting the focus from growth in numbers to the value and quality of the visitor experience.
- Improving the public transport links offer to locals and visitors.

The proposed use of the income to improve the local environment has been highlighted in the Council's presentations and papers on the levy.

5.2 Potential Negative Impacts

There may be some negative impacts or indirect risks, including:

- Changes in visitor patterns, which could shift pressure towards less-prepared areas if visitors are looking for cheaper options.
- A risk that a slight reduction in the number of visitors could lead to indirect economic consequences, with potential implications for continued investment in environmental management if income is not clearly ring-fenced.

In addition to the impacts noted above, there is a risk that the introduction of a Visitor Levy on overnight stays could reinforce some inappropriate tourism behaviours, if not implemented alongside appropriate control and enforcement measures. Specifically:

- A potential increase in unauthorised wild camping, particularly in environmentally sensitive areas, which can lead to:
 - Damage to natural habitats and biodiversity.
 - An increase in waste, human excrement and water pollution.
 - Additional pressure on footpaths, common land and protected sites.
- Illegal parking of motor homes and camper vans overnight, especially on narrow lanes, in coastal areas and near popular destinations, with the following consequences:
 - A negative visual impact on the landscape and natural heritage.
 - Blocking access for local residents, emergency services and agricultural activity.
 - Additional pressure on local facilities not designed for overnight stays.
- A risk that some visitors, in attempting to avoid the costs of registered accommodation, may move towards unregulated types of stays, undermining the aims of the levy in terms of:
 - Creating a more sustainable visitor economy.
 - Ensuring that visitors contribute fairly to the costs of managing and maintaining the environment.
- These problems have already been recognised as part of the wider discussion about tourism management and visitor pressure on Gwynedd's communities, and without appropriate intervention they could increase as a result of unintentional behavioural changes.

6. Mitigation and Enhancement Measures

In order to reduce negative impacts and reinforce environmental benefits, it is recommended:

- To earmark a certain proportion of the levy income for environmental projects and destination management.
- To regularly monitor the impacts of the levy on visitor flow and environmental pressures, adapting policies if necessary.
- To work in partnership with local communities, environmental organisations and the tourism sector to ensure investments target the areas of greatest need.
- To use the levy income on designated motor home parking schemes, improved enforcement and management, and sustainable camping infrastructure where appropriate.

The intention to establish local governance and partnership arrangements has already been identified in the policy work related to the levy.

7. Conclusion

The assessment shows that the Visitor Levy in Gwynedd has the potential to have a significant positive impact on the environment, provided that the income collected is strategically and transparently invested in destination management and the protection of natural assets.

With appropriate mitigation measures, it can be ensured that the levy contributes to a sustainable visitor economy that protects the environment for the benefit of present and future generations.

It is intended to adapt this assessment to reflect any specific issues raised during the formal consultation period.

Social Impact Assessment

Gwynedd Visitor Levy

1. Introduction and Context

Cyngor Gwynedd is considering introducing a Visitor Levy on overnight stays in eligible visitor accommodation in accordance with the Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025, with a view to supporting a sustainable visitor economy and ensuring that the benefits of tourism are shared more fairly between visitors and local communities.

This assessment focuses on **the potential social impact** on people, communities and protected groups in Gwynedd, taking into account the benefits, risks and mitigation measures.

2. Objectives of the Assessment

The aim of the Social Impact Assessment is:

- To assess the potential impact of the Visitor Levy on local communities, social well-being and equitable access to services
- To identify positive and negative impacts on different groups, including protected groups
- To recommend mitigation measures to reduce any potential negative impacts
- To ensure that the principles of equity, inclusion and the well-being of future generations are central to the decision

3. Description of the Visitor Levy

It is proposed that the Levy will:

- Be charged per person, per night on overnight stays in registered accommodation
- Have different rates for types of accommodation (e.g. hostels and campsites) and certain exemptions such as:
 - Long-term stays
 - Emergency accommodation

- Refund provisions for disabled people travelling with a carer
- The income will be reinvested locally on the basis of priorities agreed through the Gwynedd Visitor Levy Forum Partnership.

4. Social Baseline

Gwynedd is a county:

- With communities of strong Welsh identity, language and culture
- That experiences significant seasonal pressures in some areas due to high levels of visits
- Where tourism contributes positively to employment, but can also:
 - Increase pressures on local services
 - Impact on housing affordability and community cohesion
 - Create tensions between the needs of visitors and residents
- 997 Gwynedd residents responded to the Gwynedd Residents' Questionnaire: Views on Tourism in 2025, noting the following responses relevant to social elements:
 - 69.5% live in a community that is frequently visited by tourists
 - 74.1% believe that tourism has more positive consequences than negative consequences on their community
 - 85.7% believe there is a positive influence on the local economy
 - 83.2% believe there is a positive influence on employment
 - 67.1% believe there is a positive influence on community vitality
 - 59.9% believe there is a positive influence on the quality of life
 - 21.2% believe there is a neutral influence on the quality of life
 - 39.4% believe there is a positive influence on the Welsh language and culture
 - 35% believe there is a neutral influence on the Welsh language and culture
- Among the 380 who believed there was a negative influence on their community, these were the main issues:
 - 67.1% - Traffic Issues
 - 63.9% - Parking Issues
 - 53.8% - Loss of available housing in communities in favour of short-term accommodation

- 50.5% - house price increases
- 48.5% - crowds of people
- 38.3% - losing the authenticity of your area, weakening its local identity, language and way of life
- 27.5% - an increase in the cost of living
- 28.8% - safety issues, disrespectful behaviour
- 21.7% - noise
- 21.9% - light pollution

As part of the development of Ardal Ni Plans 10 out of 13 Areas noted that sustainable tourism is a priority in their areas.

5. Potential Positive Social Impacts

5.1 Benefit for Local Communities

- Creating a dedicated source of income to invest in:
 - Community infrastructure
 - Public spaces, town centres and villages
 - Cultural and community activities

5.2 Improved Community Well-being

- Reinvesting the income can help:
 - Manage visitor pressures
 - Improve the quality of life of residents in popular areas
 - Support local initiatives that strengthen social cohesion

5.3 Supporting the Welsh Language and Local Culture

- The potential to target investment in:
 - Cultural enterprises
 - Community events
 - Infrastructure that strengthens social use of the Welsh language

6. Potential Negative Social Impacts and Risks

6.1 Equity and Inclusion

- The Levy could:
 - Disproportionately affect lower-income visitors or budget travellers

- Create concerns about the affordability of holidays, particularly for families or certain groups (a risk also identified by the Welsh Government)

6.2 Impact on Small Businesses

- Small or community accommodation businesses:
 - They could be concerned about the impact on demand if visitors choose not to visit Gwynedd
 - Communication support and consistency may be required to clarify the purpose of the Levy

6.3 Community Perception

- Without clear communication, there could be a risk:
 - For the Levy to be seen as a "tourism tax" rather than a community investment mechanism

7. Impact on Protected Groups

- **Disabled People:** Refund provisions reduce potential negative impacts
- **Young People:** Investing in local services and facilities can create an indirect benefit
- **Older People:** Better infrastructure and public spaces can support well-being
- **Low Income Groups:** The risk of a negative impact on affordability requires ongoing monitoring

8. Mitigation and Consolidation Measures

The following measures are proposed:

- Rigorous and ongoing community consultation on investment priorities
- Clear communication that the Levy income is:
 - Being kept locally
 - Being invested for the benefit of communities and well-being
- Regular monitoring of social impact in reviewing the Levy
- Creating a Gwynedd Levy Partnership Forum to ensure community participation

9. Conclusion

In general, the adoption of a Visitor Levy in Gwynedd can have a significant positive social impact, provided that:

- The principles of equity and inclusion are central
- The income is clearly targeted towards community benefit
- The Council continues to engage meaningfully with communities, businesses and stakeholders

With the appropriate mitigation measures, the Levy offers an opportunity to strengthen community cohesion and ensure a visitor economy that works better for the people of Gwynedd.

This Social Impact Assessment will be updated following the formal consultation to reflect views and any relevant points raised.

CYNGOR GWYNEDD

A report to a meeting of Cyngor Gwynedd

Date of Meeting: 14 May, 2026

Title of Item: Annual Review of the Council's political balance

Contact Officer: Ian Jones,
Head of Democracy Services

1. THE DECISION SOUGHT

The Council is asked to:

- adopt the list of committees and sub-committees to be established for the municipal year, as noted in **Appendix A**, and also the adoption of the seat allocation and senior salaries set out in the appendix.
- delegate the right to the Head of Democracy Services to make appointments to the committees on the basis of political balance, and in accordance with the wishes of the political groups.
- adopt the chairs of scrutiny committees on the basis of political balance as follows:

Education and Economy Scrutiny Committee
Communities Scrutiny Committee
Care Scrutiny Committee

Plaid Cymru Group
Independent Group
Independent Group

2. BACKGROUND AND RATIONALE

2.1. INTRODUCTION

2.1.1 In accordance with statutory requirements, an annual review of the Council's political balance must be carried out, which is completed at the annual meeting.

2.1.2 At the annual meeting of the full Council on the **1st of May, 2025** it was reported that the political constitution of the Council was as follows:-

Group	Number
Plaid Cymru	46
Independent	21
Labour / Liberal	2
Total	69

2.1.3 Since then, there have been changes as follows:

- Councillor Wendy Cleaver, Independent Group was elected to the Barmouth Ward in August 2025 following the death of Councillor Rob Triggs.
- Councillor Gwion Emyr, Plaid Cymru Group was elected to the Bethel and Felinheli Ward in November 2025, following the resignation of Iwan Huws.
- The above changes did not have any impact on the political balance.
- Councillor John Pughe left Plaid Cymru Group and became an individual member in December 2025. This did not lead to a review of the Council's political balance as there was no request for a review as he was not joining a political group.
- The former Labour/Liberal group has changed its name: The group is called 'Gwynedd yn Gyntaf/ Gwynedd First' since January 2026.
- Councillor Gareth Anthony Roberts left Plaid Cymru Group and became an individual member at the beginning of May, 2026.

2.1.4 The political constitution of the Council is now as follows:

Group	Number
Plaid Cymru	44
Independent	21
Gwynedd First	2
Individual member	2
Total	69

2.2 ALLOCATION OF SEATS ON COMMITTEES

2.2.1 To remind members, the four main rules in the Local Government and Housing Act 1989 in relation to the allocation of seats are set out below:-

(a) That not all the seats on a committee can be allocated to the same political group;

(b) That the majority of the seats on a committee must be allocated to a political group if the number of persons belonging to that group is a majority of the Council's membership;

(c) Subject to paragraphs (a) and (b) above, the number of seats on the ordinary committees which are allocated to each political group shall be the same proportion to the number of all the seats borne by the members of that group on the Council;

(ch) Subject to paragraphs (a), (b) and (c) above, that the number of the seats on a committee which are allocated to each political group shall be the same proportion as the number of seats borne by the members of that group on the Council.

2.2.2 In order to ensure adherence to these rules, the Council has been dealing with committees in different blocks in the past. This also makes it easier to ensure adherence to rule (c) in paragraph 2.2.1 above.

2.3 CHANGES TO THE ALLOCATION OF SEATS ON COMMITTEES

2.3.1 The table in **Appendix A** confirms which committees are to be established for the municipal year.

2.3.2 As a result of the review of the political balance, following allocation to the political groups, the changes to committee seats are as follows:

- The individual members gain two seat each. They will be on the following committees, with Plaid Cymru Group losing a seat on each committee:
- Democracy Services Committee.
- Joint Local Advisory Committee
- Language Committee
- SACRE

•
2.3.3 The Council is asked to adopt the allocation of seats in accordance with the political balance as noted in **Appendix A**.

2.4 CHAIRS AND VICE-CHAIRS

2.4.1 In accordance with the requirements of sections 66-75 of the Local Government (Wales) Measure 2011, it is a requirement to allocate persons to chair scrutiny committees in order to ensure, as far as possible, that political balance is reflected in those chairpersons and that the groups that are not represented on the executive are given a fair proportion of the chairpersons.

2.4.2 Regulations mean that there is a specific formula for calculating the Scrutiny Chairs. The formula followed is "number of group members / number of Council members x number of scrutiny committee chairs". The regulations state that 'rounding down' is required for the group that is in the executive. In this case, as the Plaid Cymru group has 44 members, it means that they have one chair ($44/69 \times 3 = 1.91$, and having to 'round down' = 1).

2.4.3 The only committees whose chairpersons are to be allocated on the basis of political balance are the Scrutiny Committees. The annual review notes that **the Chairpersons of two of the scrutiny committees are to be assigned to the Independent Group and the Chairperson of one scrutiny committee is to be assigned to the Plaid Cymru Group.**

2.4.4 In accordance with the views of the Council's Business Group, it is recommended that the chairpersons should be allocated as follows:

Education and Economy Scrutiny Committee	Plaid Cymru Group
Communities Scrutiny Committee	Independent Group
Care Scrutiny Committee	Independent Group

2.4.5 There is no statutory or constitutional provision to manage the appointments of persons as the vice-chairs or chairs of all other committees (except that a member of the executive may not chair the Licensing Committee or the Democracy Services Committee).

2.4.6 The committees themselves will elect their chairperson in these instances, subject to the procedural rules limiting the term of a Chairperson to two years.

3. ANY CONSULTATIONS UNDERTAKEN PRIOR TO RECOMMENDING THE DECISION

- 3.1 As noted above, the Council's Business Group has been consulted on the 14th April, 2026 with further consultation on the latest changes.

3.2 THE STATUTORY OFFICERS' OBSERVATIONS:

Monitoring Officer:

I have consulted on this matter and am satisfied with the appropriateness of the recommendation.

Statutory Finance Officer:

Nothing to add regarding financial propriety.

APPENDIX A - ALLOCATION OF SEATS ON COMMITTEES

A	Plaid Cymru	Independent	Gwynedd First	Individual Member	Tot
Education and Economy Scrutiny Committee	12	6	0	0	18
Communities Scrutiny Committee	12	5	1	0	18
Care Scrutiny Committee	12	5	1	0	18
Governance and Audit	8	4	0	0	12

B	Plaid Cymru	Independent	Gwynedd First	Individual Member	Tot
Democratic Services	9	4	1	1	15
Planning	10	4	1	0	15
Central/ General Licensing	10	5	0	0	15
Language	9	5	0	1	15
Chief Officers Appointment	10	5	0	0	15
Employment Appeals	5	2	0	0	7
Number of seats block A & B	97	45	4	2	148

C	Plaid Cymru	Independent	Gwynedd First	Individual Member	Tot
Pensions	4	2	1	0	7
Local Joint Consultative Committee	6	4	0	1	11
SACRE	4	2	0	1	7
Total seats A & B & C	111	53	5	4	173

Senior Salaries

In accordance with the previous decision of the Council, the senior salaries are paid as follows:

- Leader
- Deputy Leader
- 8 other Cabinet members
- The Leader of the largest Opposition Party
- Committee Chairs
 - Scrutiny Committee (x3)
 - Planning Committee
 - Licensing Committee (Central and General count as one Committee)
 - Pensions Committee
- Civic Head (Chair of the Council)
 - Deputy Civic Head (Vice-chair of the Council)

Meeting	Full Council
Date	14 May 2025
Subject	Appointment of Members to the Standards Committee – Interview Panel Recommendations
Awdur	Iwan Evans, Monitoring Officer
Decision Sought	Approval of Interview Panel's recommendation to appoint Independent Members to the Standards Committee

Background

1. The Gwynedd Standards Committee comprises five independent members, three Gwynedd councillors and one community councillor
2. The second term of one independent member came to an end in March, and another independent member stepped down from the committee in the Autumn.
3. The appointment of members of the Standards Committee is governed by the Standards Committees (Wales) Regulations 2001 (“the Regulations”). The Regulations require the Council to carry out a public recruitment exercise as specified in the Regulations and to establish an appointments panel (comprised of up to five panel members, and including one lay panel member and one community councillor), to assess applications against the criteria established by the Council for the post, and to make a recommendation on appointment to full Council.
4. The decision on appointment must be made by full Council, having regard to the recommendation of the Appointments Panel.
5. The vacancies were advertised in accordance with the statutory provisions and three applications were received.
6. In accordance with the Council's procedures an Appointments Panel was established, which comprised Mr Eifion Jones, Chair of the Standards Committee, Community Councillor Richard Parry Hughes (Community Member of the Standards Committee), Gwynedd Councillors Ioan Thomas, Chair of the Council and Councillor Anne Lloyd Jones Chair of the Democracy Services Committee and Mr Griffith Jones as a statutory lay member.
7. The Panel, with the support and advice of the Monitoring Officer, interviewed the candidates on 22nd April 2026. Given the criteria set out in the person specification for the role, the Panel recommended the appointment of Mrs Carys Edwards and Mr Neil Hawkins as independent members. The Panel considered them to be strong candidates who met the criteria for appointment and were willing to recommend them to these roles.

8. Carys who lives in Parc, Bala has held senior officer positions in the Isle of Anglesey County Council and the Welsh Government. She already serves as a lay member on the Governance and Audit Committee and the Governance and Audit Committee of Wrexham County Borough Council. She has also spent time on the management board of Grŵp Cynefin and the Management Board of Betsi Cadwaladr Health Board as an independent adviser.

9. Neil lives in Bangor and has a background in education and charity. Until 2021 he was Principal of Concord College, an international school. He chaired the charity "Humanists UK" until 2025 and serves as Chair of the charities "Befrienders Worldwide" and "Tough to Talk", suicide prevention charities.

9. The Regulations provide that the independent members' terms of office must be set at between four and six years.

Recommendation

It is recommended that the Council appoint Carys Edwards and Neil Hawkins as Independent Members of the Standards Committee for a period of 6 years.

Statutory Officers' Comments

Monitoring Officer

Responsible Officer

Chief Finance Officer

No objection from the point of view of financial propriety.

Y Gwir Anrh/Rt Hon Eluned Morgan AS/MS
Prif Weinidog Cymru/First Minister of Wales



Llywodraeth Cymru
Welsh Government

Eich cyf/Your ref ASMawrth26
Ein cyf/Our ref FM -/00161/26

Councillor Thomas
Chair of the Council
Cyngor Gwynedd

AnnesSion@gwynedd.llyw.cymru

30 March 2026

Dear Ioan,

I write in response to your letter regarding the proposal recently adopted by Cyngor Gwynedd, namely that the Council objects to the UK Government's Digital ID system and calls on the Welsh Government to also do the same.

Digital identity is almost entirely a non-devolved matter, and the new national digital identity system was originally announced by the Prime Minister last September.

I am aware that the UK Government launched a public consultation on the system on 10 March - [Making public services work for you with your digital identity](#), and it will end on 5 May.

The Senedd elections will be held on 7 May. Therefore, it will be a matter for the new Welsh Government to respond to the consultation. The new Government must consider the implications in terms of Wales and how the proposals will work for UK services and services that are specific to Wales. They will also need to consider matters such as digital inclusion and low digital skills, access to public services, equality and the potential impacts on privacy and civil freedom.

Yours sincerely,

Eluned Morgan

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Rydym yn croesawu derbyn gohebiaeth yn Gymraeg. Byddwn yn ateb gohebiaeth a dderbynnir yn Gymraeg ac ni fydd gohebu yn Gymraeg yn arwain at oedi.

We welcome receiving correspondence in Welsh. Any correspondence received in Welsh will be answered in Welsh and corresponding in Welsh will not lead to a delay in responding.