Topic Paper 3A: Population and Housing

3A

CYNGOR SIR YNYS MÔN
ISLE OF ANGLESEY COUNTY COUNCIL

CYNGOR GWYNEDD COUNCIL

Anglesey & Gwynedd Joint Local Development Plan

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Background

This is one of a range of topic papers prepared to offer more detailed information and explain the approach of the Plan to different topics and issues affecting the Joint Local Development Plan Area. This paper will look specifically at **Population and Housing**. It will explain the background which will help to identify the issues, objectives and options for the Deposit Plan.

The Deposit Plan is the second statutory stage in the preparation of the Joint Local Development Plan (JLDP). The JLDP shapes the future growth of communities in the Joint Local Development Plan Area and will set out the policies and land allocations against which planning applications will be assessed.

The Deposit Plan will be submitted to the Welsh Government, which will appoint an independent inspector to assess the soundness of the Plan in the Examination in Public. If the inspector considers the Plan to be sound it will be recommended for adoption. When adopted the JLDP will supersede the Gwynedd Unitary Development Plan (2009) for the Gwynedd Local Planning Authority Area and the Gwynedd Structure Plan (1993) and Ynys Môn Local Plan (1996) for the Ynys Môn Local Planning Authority.

This topic paper can be read in isolation or in conjunction with the other Topic Papers and Background Papers that have been prepared to give a full picture the Joint Local Development Plan Area.

This is version 3 of the topic paper and it updates version 2 that was presented with the Deposit Plan. The table below summarises the changes that are seen in this version:

Part	Summary of the change
1. Background and purpose of the paper	Delete paragraph 1.6 given that this is the version that is submitted for the Public Examination
2. Policy context	Update the information to convey the changes in policy documents and guidance – specifically for Planning Policy Wales and Technical Advice Note 1.
7. Current Housing	7.12 – Update the information in order to provide the social housing grant levels for 2014-15 and add a new sub-section (7.12.5) that refers to the proposed Gwynedd Community Land Trust (GCLT), specifically in terms of development viability. 7.13 – Update the information for the number of affordable units that have received planning permission and that have been built on rural exception sites in 2014/15.

8. Building Trends	8.4 – Update the information for the supply of land for housing.
9. Conclusions	9.1 – Refer to the fact that neither the Gwynedd local Planning authority area nor Anglesey have a 5 year land supply for housing (base date: 1st April, 2015).

Uned Polisi Cynllunio ar y Cyd / Joint Planning Policy Unit,
Llawr 1af Swyddfa Cyngor Dinas Bangor / 1st Floor Bangor City Council Offices,
Bangor,
Gwynedd,
LL57 1DT

01286 685003 or 01766 771000
planningpolicy@gwynedd.gov.uk

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1. BACKGROUND AND PURPOSE OF THE PAPER

1.1 The purpose of this topic paper is to provide an evidence base for the Joint Local Development Plan's (JLDP) housing strategy. The information and conclusions established in this paper will directly feed into the content of the strategy and will therefore influence the JLDP's housing policies.

1.2 One of the main objectives of the JLDP is to facilitate the provision of the additional residential units that will be needed in the area during the Plan's lifetime in order to meet with the likely demand. This paper provides the information base for further work that establishes the amount of new units that the JLDP will need to facilitate, along with the specific type of units that are needed in the area e.g. in terms of size, tenure and price. It will also be helpful in considering the different options in terms of how these additional residential units should be provided and distributed. This paper brings together many sources of information that have already been published, be that formally or informally.

1.3 The conclusions reached in this paper are based on specific information and evidence for the Isle of Anglesey County Council and Gwynedd Council area (or the Gwynedd Planning Authority area when specific information is available). In order to establish a housing strategy that is both suitable and relevant, the paper will assess and consider a wide variety of factors that influence the local housing market e.g. trends in term of the size of the population, the number and size of households, the demographic characteristics of the population and trends in terms of the rate of housing development.

1.4 This paper will look at the general situation in the Plan area and assesses the needs of specific areas (e.g. wards) within the planning authority areas of Anglesey and Gwynedd. For Anglesey, information relating to the wards that were apparent prior to the 2013 ward reorganisation is used.

1.5 Whilst an attempt has been made to gather specific information for the Gwynedd planning area i.e. outside the boundaries of the Snowdonia National Park, this has not always been possible. It is therefore important to note that some of the statistical information presented in this paper is relevant to the entire Gwynedd Council area i.e. including the area within the Snowdonia National Park.

2. POLICY CONTEXT

2.1 NATIONAL

Planning Policy Wales (Edition8) January 2016 – Welsh Government

2.1.1 Planning Policy Wales (PPW) sets out the basis and the context for planning policies and decisions on planning applications in Wales. PPW is supported by a series of Technical Advice Notes (TAN) that deal with specific topics.

2.1.2 PPW outlines the Welsh Government's vision for housing. It notes that homes are an essential part of people's lives. They affect health and wellbeing, the quality of life and the opportunities that are available to people. The Welsh Government's approach, set out in the National Housing Strategy, is to:

- provide more housing of the right type and offer more choice;
- improve homes and communities, including the energy efficiency of new and existing homes; and
- improve housing-related services and support, particularly for vulnerable people and people from minority groups.

2.1.3 PPW notes that local planning authorities, when planning the provision for new housing, should consider the following matters (para. 9.2.1):

- People , Places, Futures - The Wales Spatial Plan;
- Statutory Code of Practice on Racial Equality in Housing - Wales;
- The Welsh Government's latest household projections;
- Local housing strategies;
- Community strategies;
- Local housing requirements (needs and demands);
- The needs of the local and national economy;
- Social considerations (including unmet need);
- The capacity of an area in terms of social, environmental and cultural factors (including consideration of the Welsh language) to accommodate more housing;
- The environmental implications, including sustainable building standards, energy consumption, greenhouse gas emissions and flood risk;
- The capacity of the existing or planned infrastructure; and
- The need to tackle the causes and consequences of climate change.

2.1.4 Paragraph 9.2.2 of PPW notes that local planning authorities will need to have a clear understanding of the factors influencing housing requirements in their area over the plan period. It states that the latest Welsh Government local authority level Household Projections for Wales, alongside the latest Local Housing Market Assessment, will form part of the plan's evidence base.

2.1.5 Paragraph 9.2.4 PPW notes that local planning authorities must develop policies to meet the particular challenges and circumstances that are evident in their areas in specific locations. If these policies need to diverge from national policies in order to meet specific local housing needs for market housing (which normally would have no occupancy restriction), it is noted that local planning authorities would need to carefully justify the variation with robust evidence that they deem appropriate. The justification might be in terms of land supply, environmental or social impacts, or a combination of factors. The evidence could include local studies such as those that form part of the evidence base for the development plan.

2.1.6 Paragraph 9.2.14 of PPW notes that a community's need for affordable housing is a material planning consideration that must be taken into account when forming development plan policies. Local Housing Market Assessments will provide the evidence base to support policies to deliver affordable housing through the land use planning system.

Planning Policy Wales - Technical Advice Note 1: 'Joint Housing Land Availability Studies', Welsh Government (January 2015)

2.1.7 It is noted that the Joint Housing Land Availability Study (JHLAS) is the mechanism for local planning authorities to demonstrate that they have a 5-year housing land supply by providing an agreed statement of housing land availability for development planning and development management purposes (para. 2.2).

2.1.8 It is noted that the requirement to maintain a 5-year supply of readily developable housing land in each local planning authority across Wales remains a key planning policy requirement of the Welsh Government (para. 2.1).

2.1.9 The TAN notes (para. 2.4) that the JHLAS is an extremely important piece of evidence which should inform LDP strategies, policies and allocations and is a key mechanism for monitoring the effectiveness of the LDP. Local planning authorities should integrate development plan and JHLA processes. JHLA studies provide an important part of the evidence base for plan preparation (para. 4.1).

Planning Policy Wales - Technical Advice Note 2: Planning and Affordable Housing, Welsh Government (June 2006)

2.1.10 The purpose of this Technical Advice Note is to offer practical guidelines on the role of the planning system in providing affordable housing. The need to work collaboratively is stressed, including the requirement for housing and planning authorities to undertake local housing market assessments in participation with key stakeholders (para. 3.1).

2.1.11 It is noted (paragraph 3.2) that the local planning authorities are required to:

- Include an affordable housing target in the development plan which is based on the housing need identified in the local housing market assessment.
- Indicate how the target will be achieved using identified policy approaches.
- Monitor the provision of affordable housing against the target (via the Local Development Plan Annual Monitoring Report) and where necessary take action to ensure that the target is met.

Planning Policy Wales - Technical Advice Note 6: Planning for Sustainable Rural Communities, Welsh Government (July 2010)

2.1.12 This Technical Advice Note highlights the key role the planning system has in establishing sustainable rural communities. It can ensure that there is sufficient suitable land available (if it is delivered in the right place at the right time) to provide homes and employment opportunities for local people, thereby helping to maintain rural services.

2.1.13 It notes (paragraph 2.2.1) that many rural communities can accommodate development, particularly to meet local needs. In particular, planning authorities should support developments that would help to achieve a better balance between housing and employment, encouraging people to live and work in the same locality. However, consideration must be given to the impact of proposed developments on the sustainability of the community.

2.1.14 In rural areas, especially where there are environmental constraints or social or cultural considerations, it is noted (para. 4.1.2) that planning authorities may wish to give priority to affordable housing to meet local needs. This can be done by identifying smaller villages and clusters where future housing developments are limited to affordable housing for local need. The requirement for market and general affordable housing need should be accommodated elsewhere in the planning authority's area.

2.1.15 For areas under pressure due to lack of housing, it is noted that smaller sites can be earmarked for affordable housing only, especially where housing built in the past has not met the needs of the community e.g. where the houses were too large or too expensive.

Local Housing Market Assessment Guide, Welsh Government, March 2006

2.1.16 The guide aims to enable local authorities to develop an understanding of the level and nature of housing demand and need in their local housing markets. It establishes how the local authorities can assess the housing need and demand of their communities. The guide enables authorities to derive overall figures for the number of households requiring additional housing in their areas, and to determine what this means in terms of market and affordable housing provision.

Getting started with your Local Housing Market Assessment, Welsh Government, November 2014

2.1.17 The primary aims of this guide are to:

- Supplement (but not replace) the 2006 Welsh Assembly Government guidance (noted above)
- Provide a starting point for a quantitative calculation of housing need and an assessment of the local housing market
- Introduce more consistency in approaches across Wales whilst acknowledging differences between housing markets and access to data sources
- Enable local authorities to undertake an in-house Local Housing Market Assessment (LHMA) and build local capacity and skills
- Provide a starting point on which to build a more sophisticated understanding of housing markets

People, Places, Futures - Wales Spatial Plan, Welsh Government (Update 2008)

2.1.18 The purpose of the Wales Spatial Plan is to ensure that what happens within the public sector, the private sector and the third sector in Wales is integrated and sustainable, and that actions within an area support each other and move jointly towards a vision shared for all of Wales and for different parts of Wales. The role, purpose and principles of the Spatial Plan (with a 20 year agenda) are as follows:

- Making sure that decisions are taken with regard to their impact beyond the immediate sectoral or administrative boundaries and that the core values of sustainable development govern everything we do.
- Setting the context for local and community planning;
- Influencing where money is spent by the Welsh Government through an understanding of the roles of and interactions between places;
- Providing a clear evidence base for the public, private and third sectors to develop policy and action.

2.1.19 One of the principles promoted by the Spatial Plan is 'Building Sustainable Communities'. A lack of good quality housing affects people's health and wellbeing and influences their long-term life chances. The scale of population growth that needs to be accommodated is challenging (the Welsh Government's 2008-based population projections notes that there will be an increase of 357,000 in Wales' population between 2008 and 2033). It is noted the need to maintain a mix of tenure and size of housing is also important to ensure balanced communities. It is noted that the Welsh Government was committed (as part of its 'One Wales' agreement) to deliver 6,500 new affordable houses in the period between 2007 and 2011.

2.1.20 The Spatial Plan notes that the general principles for new housing growth is:

- It should be linked to public transport nodes, including walking and cycling networks;
- It should take account of environmental constraints, including flood risk; and
- It should meet high standards of energy efficiency.

2.1.21 The Spatial Plan also states that housing near public transport nodes should be developed at higher than current densities to promote use of public transport and increase opportunities for combined heat and power systems. It is also noted that accommodating appropriate developments in smaller settlements and rural areas is vital for supporting the development of more rural communities.

2.1.22 The Spatial Plan divides Wales into separate regions. Anglesey along with the northern part of Gwynedd are located in the 'North-West Wales' region, while south Gwynedd forms part of the 'Central Wales' region.

2.1.23 The Plan's vision for the North-West Wales region is:

"A high-quality natural and physical environment supporting a cultural and knowledge-based economy that will help the area to maintain and enhance its distinctive character, retain and attract back young people and sustain the Welsh language"

2.1.24 In trying to realise this vision, the Spatial Plan acknowledges the importance of the cluster of larger towns located either side of the Menai Straits (referred to as the Menai hub) as a strong focal point for economic activity. It is also noted that two secondary focuses, namely 'Holyhead' and 'Porthmadog-Pwllheli-Penrhyndeudraeth' are recognised key growth settlements which provide services and employment opportunities to support and disseminate prosperity to the areas around them.

2.1.25 The Spatial Plan notes the following statement in relation to the housing field in North-West Wales:

"To ensure we create sustainable places with vibrant bilingual communities both for the current workforce, and to attract young skilled people back to North-West Wales, amongst other interventions we must ensure that adequate, affordable and quality housing is available within both urban and rural areas."

2.1.26 The Plan's vision for the Central Wales region is:

"High-quality living and working in smaller-scale settlements set within a superb environment, providing dynamic models of rural sustainable development, moving all sectors to higher value-added activities"

2.1.27 The Spatial Plan notes that the demographics of the area can be broadly characterised by an increasing population of older people and that the lack of affordable housing presents a number of challenges in relation to the region's ability to retain or attract young people. It is also noted that housing deprivation continues to affect many communities in the region. In particular, it notes that "a key priority is to ensure access to affordable housing (to buying or rent) in locations that are convenient for local work and services and by ensuring a range of housing types are available in a choice of high-quality environments".

The National Housing Strategy – Improving lives and communities: Homes in Wales, Welsh Government (April 2010)

2.1.28 This document notes the challenges in terms of meeting the demand for housing in Wales, the priorities and the steps that should be taken. It brings together the details of a number of strategies related to seeking to satisfy housing, homelessness and support services' needs related to housing.

2.1.29 The document highlights a number of challenges that need to be dealt with. These include the fact that the demand for housing continues to outstrip supply, that the credit crunch has increased the demand for affordable housing, an ageing population, the age and quality of the social housing stock and that public finance is very tight.

2.1.30 The approach of this document is related to improving people's lives. It is noted, for example, that it will provide more housing of the right type and offer more choice. Available public funding will need to be spent wisely and close co-operation between organisations will be important.

2.1.31 It is noted that "investment in housing and housing-related support services does not only meet people's needs for a home. It brings with it benefits for the economy, for jobs and training opportunities, for people's health and well-being, and for the environment. It also helps tackle poverty and inequalities and opens up new opportunities for people".

The Strategy for Older People in Wales 2013-2023, Welsh Government (2013)

2.1.32 The Strategy notes that the Welsh Government's challenge for the period 2013-23 is:

- to create a Wales where full participation is within the reach of all older people and their contribution is recognised and valued;
- to develop communities that are age-friendly while ensuring older people have the resources they need to live;
- to ensure that future generations of older people are well equipped for later life by encouraging recognition of the changes and demands that may be faced and taking action early in preparation.

2.1.33 In terms of housing, the strategy notes that the aim is for "Older people have access to housing and services that supports their needs and promote independence".

The Affordable Housing Toolkit, Welsh Government (June 2006)

2.1.34 This toolkit has been planned to assist local authorities and others to ensure that affordable housing needs are met on the ground (para. 2.6).

2.1.35 The toolkit deals with the following aspects:

- The national policy context;
- Assessing housing needs;
- Developing local housing strategies;
- The delivery mechanisms for providing affordable housing;
- The work of the rural housing enablers;
- The use of statutory powers in land assembly and;
- Planning good quality sustainable housing.

Empty Homes Good Practice Guidance, Welsh Government (2010)

2.1.36 This guidance has been prepared to assist local authorities with the preparation of empty homes strategies and developing effective approaches to tackling empty homes. It provides examples of good practice to draw on and includes examples of effective strategies that are currently in place. The guidance concentrates on empty homes in the private sector as void rates in the social housing sector is relatively low.

2.1.37 It notes that empty homes can cause nuisance and environmental problems. They can also represent a potential housing resource that may be currently underutilised. Bringing empty homes back into use can increasing supply in areas where there are housing shortages and pressures. This is therefore an opportunity to link suitable empty homes with housing need.

2.1.38 The problems and opportunities that exist in other local authority areas should be looked at, giving consideration to those areas where empty homes could assist in alleviating the need for housing.

MATTERS DERIVING FROM NATIONAL POLICIES/GUIDELINES

- It is necessary to assess the need within the Plan area for market and affordable housing.
- It is noted that the Welsh Government's national and sub-national household projections (in terms of assessing the need for housing) is an important starting point for identifying the likely need for new housing.
- The Joint Housing Land Availability Studies for housing are important in terms of ensuring an understanding of the level and nature of the demand and the need for housing within specific areas.
- It is crucial that a sufficient supply of land for housing is ensured.
- Policies can be developed to meet the challenges and circumstances that are evident in specific locations within the Plan area. If these policies need to diverge from national policies in order to meet specific local housing needs for market housing, there will be a need to carefully justify the variation with robust and appropriate evidence.
- The role affordable housing has in promoting sustainable rural communities.
- Reusing empty homes is a means of meeting some of the need for housing.
- A sufficient and suitable supply of residential units must be ensured in order to meet the needs of specific groups within society e.g. older people.
- The Wales Spatial Plan has an important role in creating the Local Development Plan's housing strategy. It is important to consider the impact on the area beyond the boundaries of the Plan area and matters that are broader than those that relate directly to the field of housing.
- The important role given in the Spatial Plan to specific clusters (i.e. the area surrounding the Menai Straits, Holyhead and Porthmadog-Pwllheli-Penrhyndeudraeth) and key growth settlements is also highlighted.
- A lack of quality housing affects people's health and wellbeing and influences their long term prospects in life. Affordable housing is highlighted as an important matter within the Spatial Plan as it is a way of creating sustainable places with bilingual communities.

2.2 REGIONAL

North West Wales Local Housing Market Assessment

2.2.1 An assessment of the local housing market (LHMA) has been undertaken jointly by the planning authorities of Gwynedd, Anglesey, Conwy, Denbighshire and the Snowdonia National Park in partnership with Bangor University.

2.2.2 Work has been undertaken on the preparation of an individual Local Housing Market Assessment for Anglesey, whilst Gwynedd Council have prepared an intial Housing Needs Study.

2.2.3 The North West Wales Local Housing Market Assessment considers:

- The relocation trends of tenants and home owners in local areas and to what degree they are self-contained;
- Trends of commuting to work and an analysis of the relationship between the workplace and the home;
- Areas with high and low demand for housing;
- Affordable housing e.g. in order to assist to retain young people in the region.

2.2.4 A consultation draft of the Baseline Report for the North West Wales Local Housing Market Assessment was published in March 2008 i.e. a baseline assessment of the local housing market in north-west Wales. While this report considers the need and demand for housing in the region, it does not provide a full assessment but rather a platform upon which further work will take place in future.

2.2.5 In the conclusions to this Report, the key drivers for housing markets across North West Wales are suggested. These drivers include:

- Demographic change reflecting the relationship between natural changes in resident populations offset by net migration into the area; the effects of out migration; the ageing structure of the local population; and the move towards increasing numbers of single person households and the pressure this places on housing market supply.
- The economy of the area being vulnerable to a number of changes and will receive European convergence funding support for the coming years. Predictions about changes in local economic sectors will impact the vigour of some local housing markets. Demographic change is also affecting the working age population.

2.2.6 Thirteen housing market areas have been identified in the North West Wales region. While some of these areas are located within the boundaries of a single authority (e.g. Llŷn in Gwynedd), some of the other areas are cross-boundary (e.g. the Menai housing market area – within Gwynedd and Anglesey). There are eight housing markets, that are located partially or wholly, in Gwynedd and Anglesey.

2.2.7 The Baseline Report notes that the North-West Wales housing markets are faced by a number of major challenges. They revolve around issues of affordability and supply and the future health of the economy. It is noted that there is also a challenge in relation to the culture of the planning system and its ability to deliver necessary changes in housing markets.

Isle of Anglesey Local Housing Market Assessment (2013)

2.2.8 This Local Housing Market Assessment (LHMA) report is a comprehensive analysis of the Isle of Anglesey Housing Market. It includes a review of the current local situation, a discussion of the housing market dynamics and an assessment of housing need. In addition to looking at the requirements of the existing local population this study considers the long-term requirement for housing in the Isle of Anglesey.

2.2.9 The report considers the following:

- *Accommodation required to provide housing market balance over the long-term:* This refers to providing the correct type of accommodation to correspond with changes in the age structure of the population and type of households. It also assesses the mix of tenure that should be provided and the size of housing units required within each tenure.
- *Accommodation required to provide housing market balance over the short-term:* This notes the net affordable housing need for the following 5 years and offers some solutions to solving the housing needs.

Gwynedd Council Housing Needs Study (2014)

2.2.10 This assessment has been split in to the following three parts:

i. Current Housing Need and Supply
ii. Calculating New Housing Need
iii. Bringing it all together

2.2.11 The housing need figure is apportioned against the following market areas in Gwynedd (as noted in the North West Wales Local Housing Market Assessment):

- LHMA 03 - Menai (Gwynedd)
- LHMA 04 - Caernarfon
- LHMA 05 - Llŷn Peninsula
- LHMA 06 - Porthmadog
- LHMA 07 - South Coastal Gwynedd
- LHMA 08 - Machynlleth
- LHMA 09 - Bala

2.2.12 The report notes that the LHMA is a snapshot of the housing market from a moment in time which is projected forward 5 years.

Closing the Gap: North-West Wales Spatial Development Strategy (Gwynedd Council, Conwy County Borough Council, Isle of Anglesey County Council and the Welsh Government) – July 2009

2.2.13 This strategy builds on the contents of the Wales Spatial Plan and develops it further. It outlines how the broad policies and goals of the Wales Spatial Plan will be achieved in North West Wales, providing the basis for responding to local challenges and new opportunities.

2.2.14 Of the four specific themes presented in the document, 'Places: spatial development' is the most relevant to housing matters. One of the aspects noted in relation to 'the need' is: "Responding to the challenge of the outward migration of young people and an ageing population by creating opportunities for people to live and work across North West Wales, especially in the rural areas".

2.2.15 The aim, in terms of this theme, is to"extend opportunities across North West Wales and reducing the differences that exist at present, especially between rural and urban areas". Two of the 'responses' noted for this are:

- Planning to make towns across North West Wales vibrant and modern, ensuring that they're attractive places to live, work, venture and spend leisure time; and
- Distributing and expanding opportunities beyond the towns, developing a variety of living units, affordable housing and appropriate employment sites in rural areas.

2.2.16 The strategy notes specific targets in relation to the main selected indicators e.e. 'the working age population', 'overall deprivation'.

North Wales Regional Housing Apportionment, North Wales Planning Officers (23 October 2009)

2.2.17 This document presents a joint statement and a Memorandum of Understanding between the North Wales planning authorities in relation to apportioning the Assembly Government's household projections as a basis for informing the work of preparing Local Development Plans.

2.2.18 There is a statement and an agreement in relation to the guidelines noted in the Ministerial Interim Planning Policy Statement (MIPPS) 01/2006 ('Housing') in relation to 'assessing housing needs' in development plans (which now forms part of Planning Policy Wales – Edition 5). The statement notes significant concerns regarding the 2006-based household projections, especially in relation to the method and presumptions used to calculate them in comparison with previous projections. It is noted that this has caused a significant increase in trend figures. In particular, the statement questions the reliability of the data used in relation to calculating migration trends.

2.2.19 It is noted that the Memorandum of Understanding (dated December 2008) is based on the Welsh Government's 2003-based household projections. The agreement confirms the apportionment of future housing figures to each local planning authority, not as a target, but as a working hypothesis, to provide a regional context for the continued preparation of individual Local Development Plans.

MATTERS DERIVING FROM REGIONAL POLICIES/GUIDELINES

- The North-West Wales Local Housing Market Assessment is a means of establishing housing needs across the entire region. This is useful in considering the impact of the Local Development Plan on the wider area (as is encouraged in the Spatial Plan). The North Wales Regional Housing Apportionment also notes the importance of collaboration in this field.
- Further work has been undertaken to establish the housing needs in Gwynedd and Anglesey.
- Eight specific housing market areas have been identified in Gwynedd and Anglesey (either wholly or partially located within the Plan area). These housing markets are faced by a number of challenges, including matters related to affordability, supply and the state of the economy in the future.
- The importance of housing in terms of promoting the vitality of centres within the Plan area and to distribute and spread opportunities to areas within the countryside is noted.

2.3 LOCAL

Strengthening Communities in Anglesey and Gwynedd – A Single Integrate Plan for Anglesey and Gwynedd (2013-17)

2.3.1 The purpose of the Plan is to work together in order to improve our economic, social and environmental well-being over the next 12 years. The Plan sets out the vision and the priority actions for the first 4 years.

2.3.2 The plan seeks to tackle complex issues that cannot be solved by one organization working alone; therefore, the plan has been created in partnership, taking input from partners, service users, communities and residents.

2.3.3 Resident surveys, which provided input to the process of assessing what were the most important factors so as to improve life in both counties, indicated the following factors:

- jobs and job opportunities
- health services
- low levels of crime
- education opportunities
- tackling poverty
- affordable housing
- supporting vulnerable people

2.3.4 The vision is: "*Working together to strengthen the communities of Anglesey and Gwynedd*".

2.3.5 The main goal is "*During the next 10-15 years, we will focus our efforts on making Anglesey and Gwynedd healthy, safe and prosperous places to live and work".*

2.3.6 It is noted that one of the aspects that needs to be achieved is that "People in Anglesey and Gwynedd live in safe, appropriate housing in vibrant and cohesive communities". It is proposed that the following is undertaken to achieve this:

- Increasing supply - deliver more affordable housing, more appropriate housing for changing demographic trends, making better use of our relationship with the private rented sector to meet the growing needs, empty properties back into use
- Quality and improvement- improving quality of private sector accommodation
- Mitigating the impact of welfare benefit reform - anti-poverty address emerging needs for smaller or shared accommodation
- Work together with communities to deliver housing and community regeneration action; including the reoccupation of empty properties in targeted areas and developing public spaces that are safe, attractive and encourage social interaction and community cohesion.
- Enable a supply of supported housing that responds to the needs of identified vulnerable groups.
- Consider health and sustainable development in all planning, policy and strategy development to encourage and promote healthy and sustainable environments and behaviours.
- Support communities to becoming more sustainable. For example, through being more energy efficient, producing less waste and using fewer natural resources.

2.3.7 To know that a difference is being made in terms of supporting people to address their housing needs and live in sustainable and vibrant communities the following information will be considered:

- Number of empty properties
- Need for affordable housing.
- Number of housing units (affordable and market) developed annually.
- Percentage (%) of respondents satisfied with the cleanliness of their community
- Percentage (%) of respondents who believe they can influence decisions affecting their local area

GWYNEDD

Gwynedd Local Housing Strategy 2013-17

2.3.8 The Strategy includes a range of interventions that will help people be able to have access to housing, improve the quality of existing housing and the ability to respond to society's needs locally. The strategy is based on what is realistic but also recognizes the need to explore new ways of working and different funding models to what has been in place historically.

2.3.9 Vision for Gwynedd's Housing Strategy:

- Provide a choice for people to live in a home which is suitable for them in terms of affordability and choice of different tenures
- Introduce schemes which will help improve energy efficiency within the home and to be proactive in reducing fuel poverty
- That housing and support services are co-ordinated effectively to help vulnerable people
- Co-ordinate the strategic role on housing matters in Gwynedd

2.3.10 The purpose is to ensure that the responsibilities of the Council and its main partners work together to:

- contribute to an effective local housing market
- develop a range of responses to help people to access suitable and sustainable housing.

Empty Homes Strategy 2009-2012, Gwynedd Council and its Partners (October 2009)

2.3.11 The Empty Homes Strategy is a sub-strategy that lies below the main Gwynedd Local Housing Strategy (2009-2012).

2.3.12 Lack of housing on a national level leads to an increase in homelessness and problems in relation to affordability. The aim of this strategy is to encourage, and where appropriate, require the owners of empty homes (empty for more than six months), to release the potential of these wasted resources.

2.3.13 There is an under supply of housing to meet the high demand for property across all tenures and price brackets. Returning empty properties back into use can make a significant contribution to increasing overall housing supply and meeting housing demand.

Gwynedd Council Strategic Plan 2013-17

2.3.14 The Strategic Plan is Gwynedd Council's main plan. The purpose of the plan is to set the Council's vision and priorities to 2017 and describe what the Council will do to achieve them. The Strategic Plan describes the difference the Council wants to make for the people of Gwynedd.

2.3.15 The Council's vision for 2013 - 17 is: "*Supporting the People of Gwynedd to Thrive in Difficult Times".*

2.3.16 The Council will support the people of Gwynedd to thrive by focusing on a series of priorities across specific thematic areas such as children and young people; care; the economy and the environment.

2.3.17 It is noted that one of the priorities within the 'Environment' theme is 'Promoting a Suitable Supply of Housing for Local People'.

Older People Accommodation Strategy, Gwynedd Council

2.3.18 The vision of this strategy is as follows:

> "In order to achieve a level of health and well-being for the older people in Gwynedd which is comparable to the best in Europe by 2018 Gwynedd and its partners aim to provide its older people with the appropriate accommodation, care and support options that enable them to achieve a safe, comfortable and sustainable home - in pleasant surroundings - appropriate to their stage in life".

Private Sector Housing Policy 2014, Gwynedd Council

2.3.19 Gwynedd Council's Private Sector Housing Service Vision is "To improve both the supply of suitable housing to meet local needs and standards of health and wellbeing by providing an effective intervention in the private sector housing stock to address structural decline, where reasonable and practical, and other hazards to the health and safety of the occupants".

2.3.20 The six main guiding principles that are reflected in the Policy are:

- That initiatives provide gain for the maximum number of people.
- The initiatives have a direct, positive impact on health.
- That initiatives produce energy saving whenever possible.

- That initiatives have the potential to draw in additional funding.
- That initiatives increase the supply of affordable and sustainable housing.
- That initiatives maximise opportunities to work jointly with partners, other agencies, and other Services within the Council.

Gwynedd Regeneration Strategy 2007-2013 - Part of The Gwynedd Regeneration Framework, Gwynedd Council

2.3.21 The aim of this strategy is to set a clear context for regeneration efforts in Gwynedd from 2007 to 2013.

2.3.22 The vision is to "is to develop and support active, sustainable, healthy and viable communities, with the confidence to venture, and with the desire and ability to contribute their own solutions to the challenges and make the most of new opportunities." One of the main challenges noted in the strategy is to "Meet the local housing need, taking into account the high number of empty dwellings within the county, and ensure the availability of appropriate and affordable housing".

Gwynedd Council Affordable Housing Delivery Statement 2007 -2011

2.3.23 The overall aim of Gwynedd Council's Affordable Housing Delivery Statement is to provide a clear statement of how the Council intends to improve delivery of affordable housing as part of its strategic housing and planning functions within the Gwynedd Local Planning Authority area between 2007 and 2011.

2.3.24 The Gwynedd Council Affordable Housing Delivery Statement will build on work already undertaken to deliver affordable housing in Gwynedd. Increasing the supply and quality of affordable housing in the County has been a Gwynedd Council corporate priority since 2004.

ISLE OF ANGLESEY

Anglesey Economic Regeneration Strategy 2004 –2015

2.3.25 The strategy's vision is to 'create a prosperous future for Anglesey through sustainable Economic Regeneration'. Amongst other features, it is noted, that by 2015, the hope is that Anglesey will have:

- A thriving and prosperous economy with quality employment opportunities created by innovative employers with effective support services and a skilled and adaptable workforce;
- Vibrant and sustainable communities within a diverse rural economy;
- Thriving and prosperous towns acting as drivers for economic growth

Anglesey Local Housing Strategy 2014-19

2.3.26 The purpose of the 5 year Housing Strategy is to present a vision of continuous improvement for housing and housing related services on Anglesey. It describes what seeks to be achieved on Anglesey by 2019. By setting out the most important outcomes for housing it allows resources and work streams to be directed towards these goals and defines how the Council will work with partners in the public, private and voluntary sector to achieve them.

2.3.27 Achieving change in the housing sector is often something that can only be achieved over the medium to long term. This is one reason why a housing strategy that looks five years and beyond is of particular importance. Looking at the long term patterns of population, economic, social change can allow the right decisions on developing affordable homes, the targeting of available public funds for housing and setting up the right partnerships to be put in place to respond to this.

2.3.28 The main outcomes to be achieved by 2019 are:

- Development – right homes for the island's future
- Housing stock and communities are improved
- Preventing housing crisis and increasing housing options
- Support to promote housing independence
- Homes for longer lives
- The links between housing and the wider economy are fully realised

Empty Homes Strategy (July 2010)

2.3.29 The purpose of the Strategy is to bring back into residential use homes that have been empty for more than six months in order to:

- Increase the supply of affordable homes
- Improve the sustainability of communities and the built environment
- Maximise the use of the existing housing stock

2.3.30 It is noted that the demand for affordable homes continues to increase despite the recent market downturn. The Welsh Government's National Housing Strategy, 'Improving Lives and Communities' (April 2010), notes that "the demand for housing continues to outstrip supply, which needs to be met by new houses and bringing back into use empty properties". As a priority it notes the following: "Make the best use of homes that are unoccupied".

Isle of Anglesey County Council Corporate Plan 2013-17

2.3.31 The priorities that are the basis of this corporate plan are:

- Supporting the most vulnerable
- Developing the economy
- Raising the standards of and modernising our schools

2.3.32 The Corporate Plan promises the following during the period 2013-17:

- Transform Older Adult Social Care
- Regenerating our Communities and Developing the Economy
- Improving Education, Skills and Modernising our Schools
- Increasing our Housing Options and Reducing Poverty
- Transforming our Leisure and Library Provision
- Becoming Customer, Citizen and Community Focused
- Transforming our Information and Communication Technologies (ICT)

2.3.33 With regard to the 'Increasing our Housing Options and Reducing Poverty' goal it is noted that the aim is to "enable safe and appropriate homes that allow individuals to gain maximum benefit for access to jobs, leisure amenities, education and thereafter gain the associated social and economic benefits".

2.3.34 The Council note that they will be working hard to develop the housing market for local people with particular emphasis being placed on working with partners to plan, develop and establish a greater number of affordable housing options for citizens. However, with major global energy companies working towards a significant investment in Anglesey, they note that they will be working with landlords in the social and private sector to maximise the number and quality of homes for contractors and trying to minimise any negative impact that this influx could have on local people.

Affordable Housing Delivery Statement 2007-2011, Isle of Anglesey County Council

2.3.35 In relation to the Statement's aim, it is noted that the Isle of Anglesey County Council is committed to maximising the provision of affordable homes to its residents and, in the process, creating well-integrated and sustainable communities.

2.3.36 This Statement seeks to clarify the requirements for affordable housing, setting out a reasonable and pragmatic approach for providing them. The Council will seek to balance the affordability, for both the developers and the purchasers.

Anglesey Older People Strategy 2007 -2010

2.3.37 In relation to the field of housing, it is noted that this strategy looks at the provision of high quality services and support which enable older people to live as independently as possible in a suitable and safe environment.

2.3.38 Some of the steps noted in the strategy include ensuring that older people are able to follow their preference to live in their own homes as long as possible; that a study is undertaken of the current and future demographics of the area; and that a clear strategy is developed for the development of older people's accommodation.

Energy Island - Background

2.3.39 The Anglesey Energy Island Programme is a collective effort between several stakeholders within the public and private sector working in partnership to put Anglesey at the forefront of energy research and development, production and servicing, bringing with it potentially very significant economic rewards. It is noted that the Energy Island Programme could contribute nearly £12 billion to the Anglesey and North Wales economy over a period of 15 years.

2.3.40 The programme aims to be a vehicle for employment growth and development opportunities**.** By harnessing a rich mix of energy streams, including nuclear, wind, tidal, biomass and solar; together with associated servicing projects, it is the aim to achieve economic, social and environmental gains for Anglesey and the wider North Wales region.

2.3.41 The Energy Island Programme is involved with more than the energy industry. It also deals, for example, with transport links, housing and tourism and leisure facilities.

Wylfa Nuclear New Build: Accommodation Facilities for Construction Workers Study – Key Findings and Position Statement (March 2011)

2.3.42 In March 2010, Horizon Nuclear Power announced Wylfa as their preferred site for developing a nuclear plant. (Horizon Nuclear Power has subsequently been aquired by Hitachi Ltd, who have maintained the commitment to develop a new plant at Wylfa).

2.3.43 This statement notes that new power station will safeguard skills locally, and provide multiplier effects in related industries such as construction, with positive effects on Anglesey, North Wales and the Welsh economy. The intention is that the power station will be operational by 2020.

2.3.44 Meeting the accommodation needs of the workers who would build the proposed new power station would be an integral part of the Energy Island programme. It is expected that the number of jobs (i.e. in relation to building the power station) will reach a peak in 2017 with approximately 6,000 people employed. In comparing the construction work with the development of Sizewell B (which represent the best comparator available to Wylfa), it is anticipated that approximately 419 permanent homes and 1,600 temporary units will be required at the peak of the construction period.

2.3.45 Isle of Anglesey County Council's preferred option to meet the needs of the construction workers is to provide a mix of accommodation. The recommended mix is:

- 1/3 of workers accommodated in purpose built accommodation (a minimum on-site to meet operational requirements but the majority off-site)
- 1/3 in private rented accommodation (mix of new and existing)
- 1/3 in tourist accommodation (mix of new and existing)

MATTERS DERIVING FROM LOCAL POLICIES/GUIDELINES

- Need to improve supply, quality, affordability, sustainability and the suitability of the housing stock.
- Housing has an important part to play in terms of improving the population's health and quality of life and to enable people to stay in their communities.
- Link between housing and economic regeneration.
- The importance of empty homes in assisting to increase the supply and to satisfy the need for housing.
- There is a need to meet the residential requirements of specific groups within society e.g. older people, gypsies and travellers, students.
- An obvious challenge in relation to housing the workers responsible for constructing a new nuclear power station on the Wylfa site.

3. THE CURRENT POPULATION

3.1 Mid-year population estimate (2001 onwards)

Year	Gwynedd's Population	Anglesey's Population
2001	116,844	67,806
2002	117,344	67,879
2003	118,022	68,140
2004	118,721	68,753
2005	118,641	69,095
2006	119,070	69,388
2007	119,398	69,700
2008	119,746	69,916
2009	120,344	69,884
2010	121,155	69,833
2011[1]	121,523	69,913

Source: The Statistical Directorate, Welsh Government

- A 4.0% increase (4,679 people) in Gwynedd's population in the period between 2001 and 2011.
- A 3.1% increase (2,107 people) in Anglesey's population in the period between 2001 and 2011.
- A continual annual increase in Gwynedd's population during this period, with the exception of 2004-2005.
- A continual annual increase in Anglesey's population until 2008. A reduction can then be seen in the population level for the subsequent two years prior to an increase in 2011.

[1] The figure for 2011 is based on 2011 census estimates, updated to be consistent with the annual series of mid-year population estimates (It is noted that the actual population figures for Gwynedd and Anglesey in the 2011 census was: Gwynedd 121,874; Anglesey: 69,751).. The mid-year figures for the previous years has been revised in to take into account the 2011 Census.

3.2 The Population's Spatial Distribution

3.2.1 Distribution of the population - Urban and rural areas[2]

Gwynedd

Category	Type of area (wards)	Sub-category	Number of wards	Population size		Percentage of the population		Percentage of the population (urban/rural)
Urban	Urban	Less sparse	9	18,808		17.7%		**17.7%**
Rural	Town and fringe	Less sparse	10	22,485	43,529	21.2%	41.1%	**82.3%**
		Sparse	11	21,044		19.9%		
	Villages, hamlets and isolated dwellings	Less sparse	8	12,606	43,669	11.9%	41.2%	
		Sparse	22	31,063		29.3%		

Anglesey

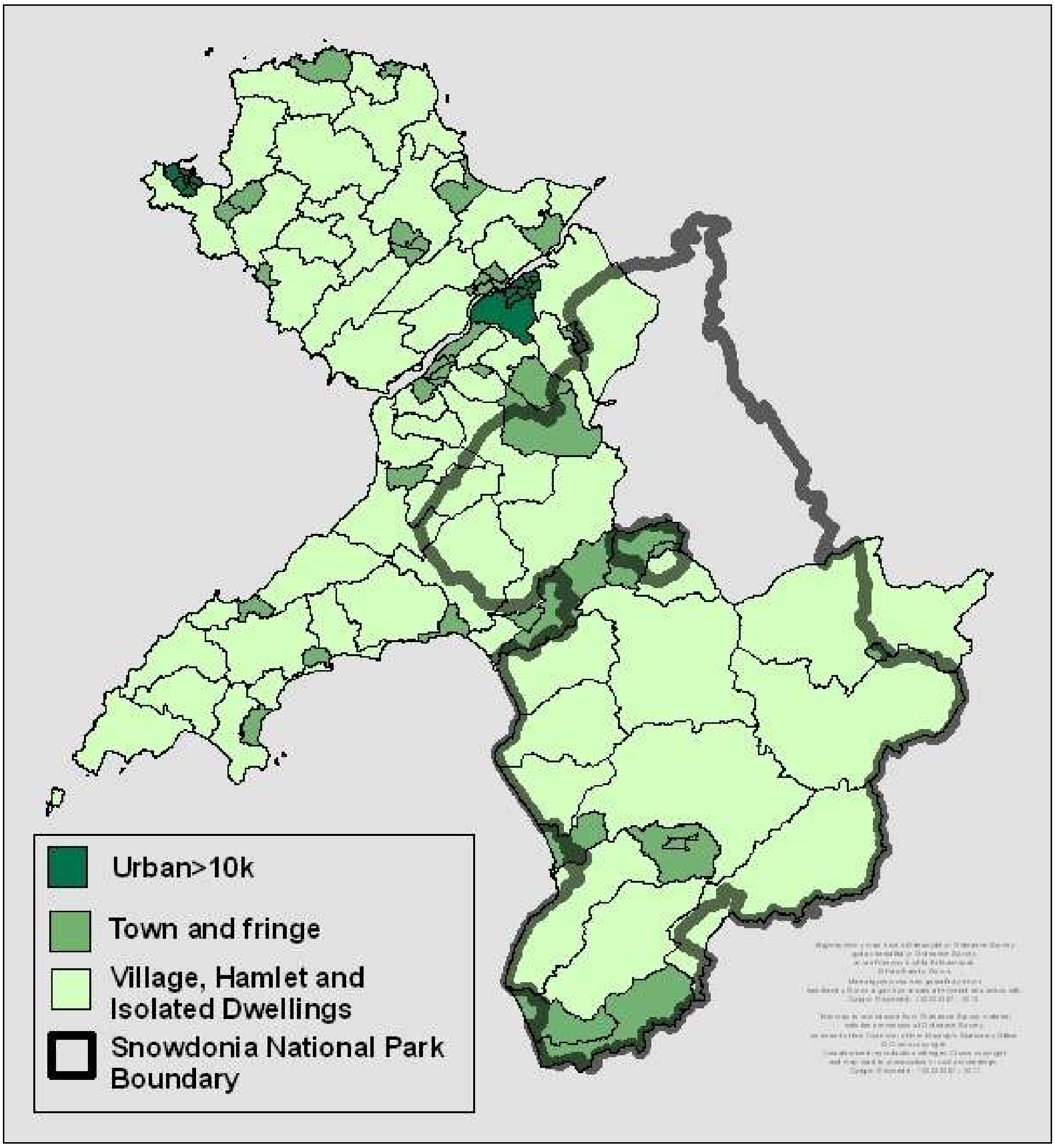
Category	Type of area (wards)	Sub-category	Number of wards	Population size		Percentage of the population		Percentage of the population (urban/rural)
Urban	Urban	Sparse	7	11,431		16.4%		**16.4%**
Rural	Town and fringe	Less sparse	5	8,421	22,283	12.1%	31.9%	**83.6%**
		Sparse	8	13,862		19.9%		
	Villages, hamlets and isolated dwellings	Less sparse	6	11,445	36,037	16.4%	51.7%	
		Sparse	14	24,592		35.3%		

- The figures in relation to the population size are based on 2011 Census information for the population of Gwynedd and Anglesey's wards.

[2] Based on the definition of 'urban' and 'rural' areas as noted in the joint project between DEFRA, the Office for National Statistics, the Countryside Council for Wales and the Wales Assembly Government (2004). The definition was delivered by the Rural Evidence Research Centre at Birbeck College.

The tables in this section are based on the way in which individual wards have been defined in accordance with this project.

- It is noted that an ‘urban’ area is defined as a location with a population that exceeds 10,000 people. The Bangor area (Gwynedd) and the Holyhead area (Anglesey) are the only locations that meet this definition.
- The other two types of area i.e. 'town and fringe' and 'villages, hamlets and isolated dwellings’ are defined as 'rural' areas.
- The information in the Gwynedd table refers to wards that are located entirely or mostly within the Gwynedd Planning area. It is noted that information regarding the Llanuwchllyn ward has not been included in the table above, since the vast majority of the ward is situated within the Snowdonia National Park, with only a very small part of it situated outside the National Park area.



- The vast majority of the population of the Gwynedd (i.e. the wards entirely or mostly located within the Gwynedd Planning Authority area) and Anglesey Planning Authority areas live in areas defined as being 'rural'.
- The highest percentage of the population of both authorities live in wards defined as 'Sparse villages, hamlets and isolated dwellings' (29.3% in Gwynedd and 35.3% in Anglesey), namely the wards defined as being the most rural.
- The most prominent type of 'area', in terms of the number of wards within the Gwynedd and Anglesey Planning Authority areas, is 'Sparse villages, hamlets and isolated dwellings'.

3.2.2 Percentage of the population living in the main centres of Gwynedd and Anglesey[3]

Gwynedd

Settlement	Type of settlement		Population
	JLDP definition	**Wales Spatial Plan definition**	
Bangor	Sub-regional Centre	Key settlement of national importance	16,358
Caernarfon	Urban Service Centre	Primary key settlement	9,615
Blaenau Ffestiniog	Urban Service Centre	Cross-boundary Settlement	4,875
Pwllheli	Urban Service Centre	Primary key settlement	4,076
Porthmadog	Urban Service Centre	Primary key settlement	3,507
TOTAL			**38,431**
Gwynedd's population (2011 Census)			121,523
Percentage of Gwynedd's population living in the main centres (based on the 2011 Census)			**31.6%**

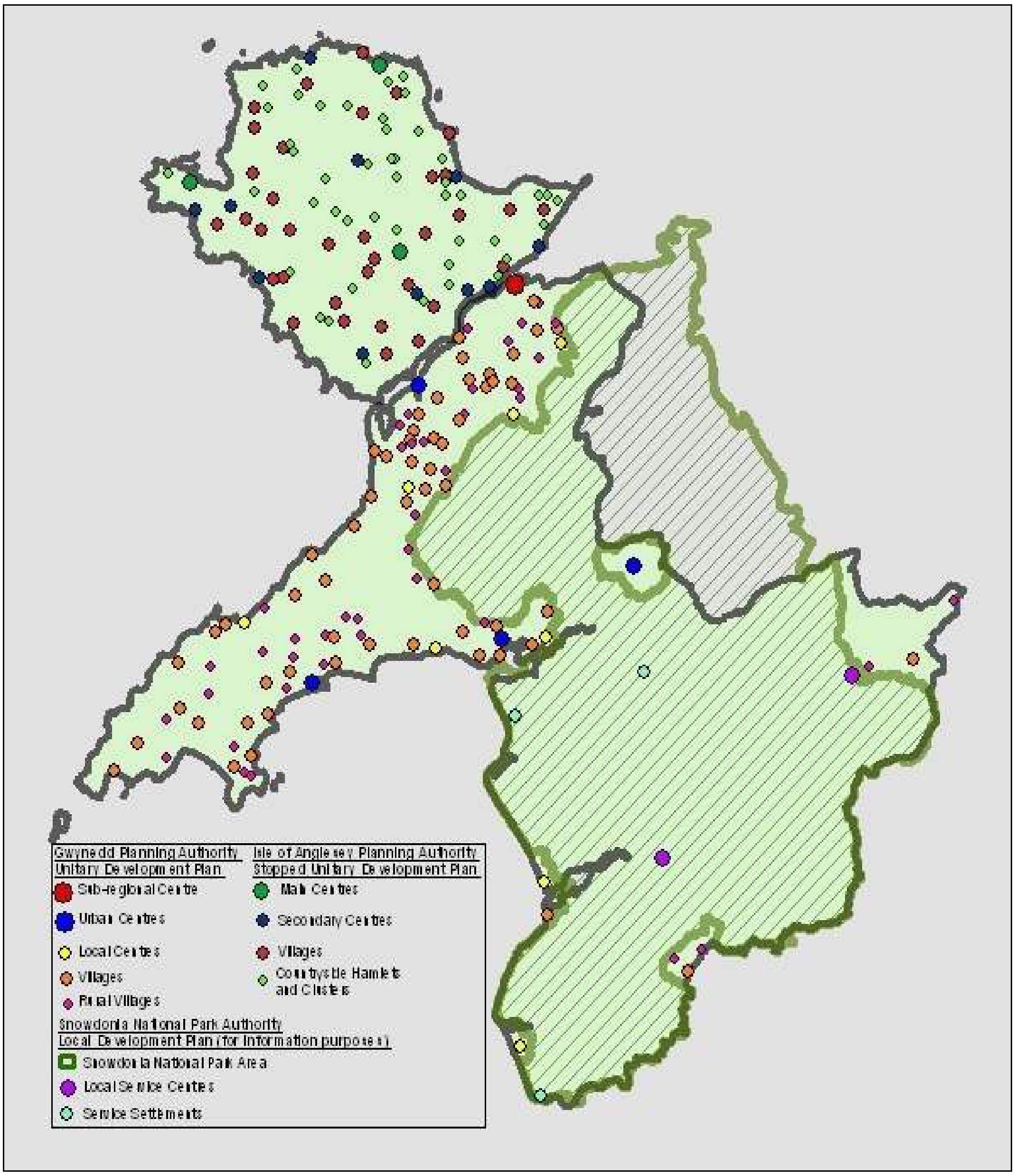
[3] As defined in the Joint Local Development Plan.

Ynys Môn

Settlement	Type of settlement		Population
	JLDP definition	Wales Spatial Plan definition	
Amlwch	Urban Service Centre	Key settlement	3,789
Holyhead	Urban Service Centre	Primary key settlement	11,431
Llangefni	Urban Service Centre	Primary key settlement	5,116
TOTAL			**20,336**
Anglesey's population (2011 Census)			69,913
Percentage of Anglesey's population living in the main centres (based on the 2011 Census)			**29.1%**

- The vast majority of Gwynedd's population live outside the Sub-regional Centre and the four Urban Service Centres (as defined in the JLDP). This underlines the information noted in part 3.2.1 which shows, that in essence, Gwynedd is a rural area.
- Similarly, the vast majority of Anglesey's population live outside the Urban Service Centres (as defined in the JLDP). Again, it is noted that in essence, Anglesey is a rural area.
- Given the important role they have within the Plan area (and the broader region in Bangor's case), the defined centres, mentioned above, have a relatively low population. Four of the Urban Service Centres have a population of less than 5,000. This emphasises the rural nature of the Plan area.

3.2.3 Settlement distribution within the settlement hierarchy[4]



- A high number of settlements have been identified within the settlement strategy of the Gwynedd Unitary Development Plan and the Stopped Anglesey Unitary Development Plan (205 settlements: 95 in Anglesey and 110 in the Gwynedd planning authority area).
- A high number of these defined settlements are small in size i.e. ‘villages’ and ‘rural villages / ‘countryside hamlets and clusters’. 91 of these settlements have been defined as ‘villages’ (44.4%) with 87 settlements defined as ‘rural villages’ / ‘countryside hamlets and clusters’ (42.4%).
- While many of the smaller settlements have been clustered around the area’s main centres, it is noted that others are more remote in nature.

4 The Gwynedd Unitary Development Plan and the Stopped Anglesey Unitary Development Plan.

- It can be seen that many opportunities exist in relation to the range of settlements, where, in theory, new housing can be located. These opportunities are very dispersed.
- In order to show the link between settlements in the Gwynedd planning authority area and centres located within the Snowdonia National Park, settlements defined as Local Service Centres (Bala and Dolgellau) and Service Settlements (Harlech and Trawsfynydd) in the Snowdonia Local Development Plan are noted. (Note: Llanberis is a Service Settlement in the Snowdonia Local Development Plan, but it is shown on the above map on the basis that it is defined as a Local Centre in the Gwynedd Unitary Development Plan)

3.2.4 Settlements defined as 'villages'[5] in the Gwynedd Unitary Development Plan and the Stoppped Anglesey Unitary Development Plan that include fewer than 120 houses[6]

The threshold of 120 houses was selected in order to convey the small size of some of the settlements defined as 'villages' in the Gwynedd UDP and the Stopped Anglesey UDP. This is significant given their status in the settlement hierarchy of these plans and the recognised and important role they have within the communities of Gwynedd and Anglesey.

Gwynedd

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Rhoshirwaun	20	46	Y Garreg/ Llanfrothen	85	196
Llanwnda	24	59	Brynrefail	85	208
Dinas Dinlle	30	70	Tudweiliog	90	218
Sarn Mellteyrn	50	123	Llandwrog	90	209
Llanengan	54	117	Clynnog Fawr	93	222
Botwnnog	56	137	Pentrefelin	105	250
Rhydyclafdy	64	150	Edern	110	236

[5] **Villages** (Gwynedd Unitary Development Plan) – Usually, they have basic facilities and services such as a shop, post office or school and some have a public house or garage. Local residents usually travel to one of the Service Centres to visit shops and to access more specialist services.
Villages – (Stopped Anglesey Unitary Development Plan) – Away from the main and secondary centres there are a series of villages which are important to the pattern of life on the island. The villages often depend upon the main and secondary centres for services.

[6] The number of houses has been established by a desktop study (i.e. by noting the number of residential units within the settlement boundary of settlements) and therefore it is an estimate. The population has been established by multiplying the number of houses with the average household size within the ward where the village is located (information from the 2011 Census).

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Pontllyfni	75	179	Nantlle	115	270
Caeathro	75	176	Efailnewydd	120	282
Dinas	75	183	Garndolbenmaen	120	285
Llandygai	76	183	Llandderfel	120	299
Aberdaron	78	179	Penisarwaun	120	293

Anglesey

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Llanddeusant	42	102	Brynteg	110	227
Bethel	83	197	Llangristiolus	118	280
Rhydwyn	87	208	Malltraeth	119	283
Pentre Berw	103	242			

Source: Background information collated by the Joint Planning Policy Unit, Regulatory Department (Planning, Transportation and Public Protection), Gwynedd Council

3.2.5 Settlements defined as 'rural villages[7]' within the Gwynedd Unitary Development plan and as 'countryside hamlets and clusters' [8] in the Stopped Anglesey Unitary Development Plan which include fewer than 30 houses[9]

The threshold of 30 houses was selected in order to convey the smaller size of some of the settlements defined as 'rural villages/countryside hamlets and clusters' in the Gwynedd UDP and the Stopped Anglesey UDP. This is significant given their status in the settlement hierarchy of these plans and the recognised and important role they have within the communities of Gwynedd and Anglesey.

[7] **Rural Villages** – Only limited development, which is required to meet genuine needs arising from the local community, will be permitted. Additionally, it will be required that any development must blend with the form and character of the Rural Village in question as regards location, size, scale, design and materials used.

[8] **Countryside hamlets and clusters** - The hamlets and clusters have been defined by reference to the physical layout of the settlement concerned and whether a distinct grouping of ten or more dwellings can be identified an ordnance survey map. The settlement should also give the impression of being in a group and not that of housing dispersed over a wider area.

[9] The number of houses has been established by a desktop study (i.e. by noting the number of residential units that have been identified on the relevant inset maps) and therefore it is an estimate. The population has been established by multiplying the number of houses with the average household size within the ward where the rural village/hamlet and cluster is located (information from the 2011 Census).

Gwynedd

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Boduan	15	35	Rhosfawr	24	55
Llanarmon	15	37	Penrhos	24	56
Pentreuchaf	20	47	Bryncroes	25	61
Llanfaglan	20	49	Llaniestyn	26	63
Llangian	22	48	Saron	29	71
Pant Glas	22	53			

Anglesey

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Hebron	14	33	Ty'n Lon (Glan yr Afon)	20	47
Maenaddwyn	14	33	Capel Mawr	23	55
Bachau	16	39	Capel Parc	23	54
Trefor	18	42	Llanynghenedl	24	55
Rhosgoch	18	42	Penygroes	25	61
Penygraigwen	19	44	Llangwyllog	27	64
Llangadwaladr	20	48	Cerrigman	28	65

Source: Background information collated by the Joint Planning Policy Unit, Regulatory Department (Planning, Transportation and Public Protection), Gwynedd Council

- The rural nature of the Joint Local Development Plan area is displayed by the substantial number of small settlements (in terms of the number of houses and the size of the population) that have been defined as 'villages' or 'rural villages/countryside hamlets and clusters' in the Gwynedd UDP and the Stopped Anglesey UDP.
- The rural nature of the area is highlighted by the fact that settlements of this size have a recognised role within the communities of Gwynedd and Anglesey (based on the way in which settlements were defined in the development plans).
- 24 settlements that have fewer than 120 houses have been defined as 'villages' in the Gwynedd planning area and 7 settlements have been defined in the same way in Anglesey.
- 11 settlements that have fewer than 30 houses have been defined as a 'rural village' in the Gwynedd planning area and 15 settlements (with fewer than 30 houses) have been defined as 'countryside hamlets and clusters' in Anglesey.

3.3 Analysis of the population of the Joint Local Development Plan area

3.3.1 Analysis of Gwynedd's population according to age and sex (mid-2011)

Age	Men	Women	All	Age	Men	Women	All
0-4	3,428	3,318	6,746	**50-54**	3,879	3,951	7,830
5-9	3,223	3,014	6,237	**55-59**	3,627	3,735	7,362
10-14	3,370	3,241	6,611	**60-64**	4,274	4,185	8,459
15-19	3,890	4,048	7,938	**65-69**	3,746	3,781	7,527
20-24	5,065	4,842	9,907	**70-74**	2,770	2,949	5,719
25-29	3,360	3,008	6,368	**75-79**	2,153	2,638	4,791
30-34	3,160	2,921	6,081	**80-84**	1,510	2,268	3,778
35-39	3,285	3,322	6,607	**85-89**	804	1,467	2,271
40-44	3,839	4,022	7,861	**90+**	285	948	1,233
45-49	4,072	4,125	8,197				
TOTAL					59,740	61,783	121,523

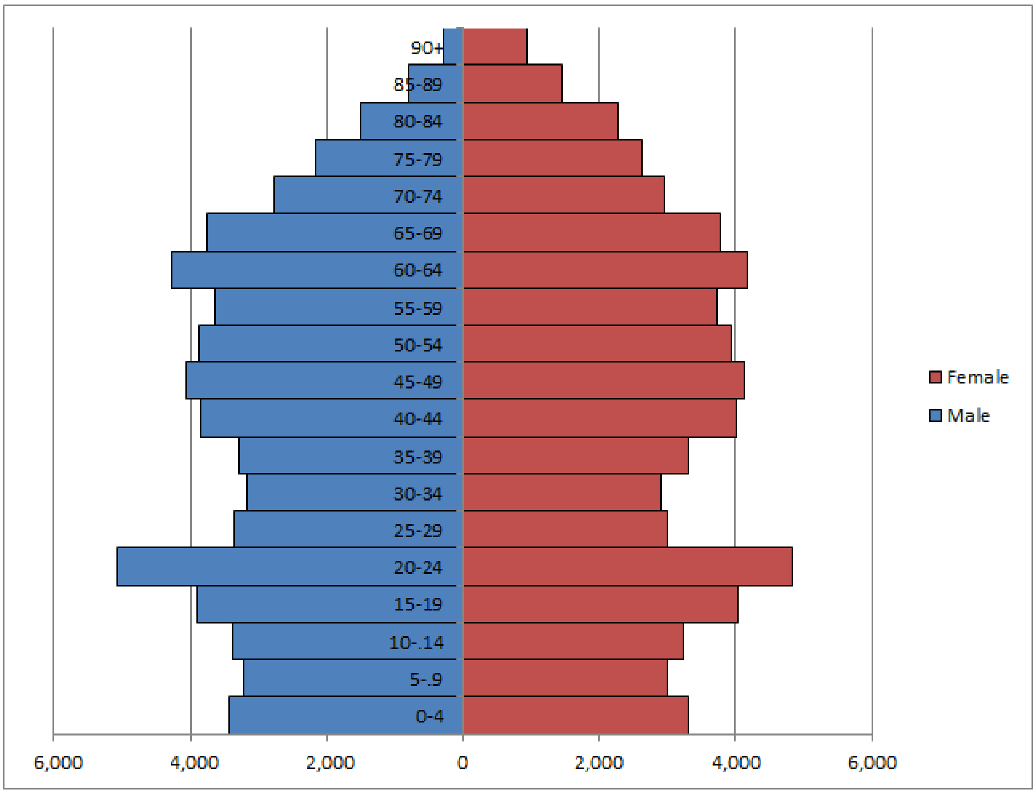
Source: Stats Wales

Analysis of Anglesey's population according to age and sex (mid-2011)

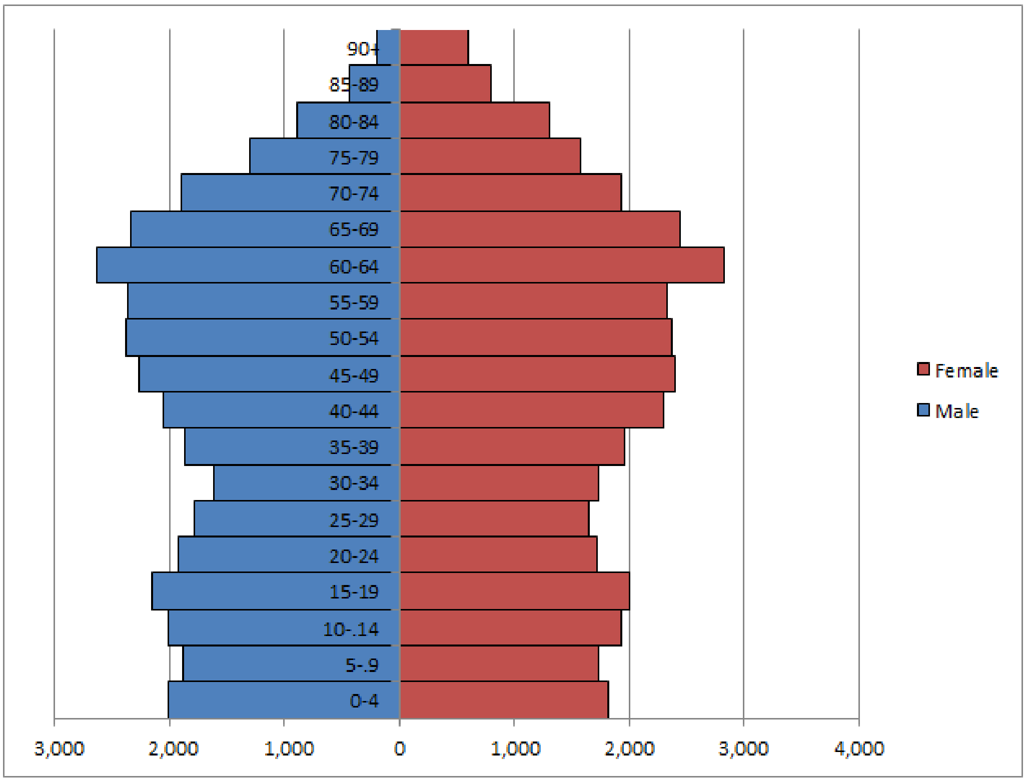
Age	Men	Women	All	Age	Men	Women	All
0-4	2,007	1,827	3,834	**50-54**	2,388	2,372	4,760
5-9	1,888	1,731	3,619	**55-59**	2,361	2,334	4,695
10-14	2,018	1,932	3,950	**60-64**	2,636	2,827	5,463
15-19	2,160	2,008	4,168	**65-69**	2,342	2,442	4,784
20-24	1,929	1,726	3,655	**70-74**	1,894	1,931	3,825
25-29	1,778	1,652	3,430	**75-79**	1,301	1,583	2,884
30-34	1,608	1,741	3,349	**80-84**	894	1,310	2,204
35-39	1,872	1,957	3,829	**85-89**	430	797	1,227
40-44	2,060	2,305	4,365	**90+**	198	607	805
45-49	2,271	2,396	4,667				
TOTAL					34,366	35,547	69,913

Source: Stats Wales

3.3.2 Population pyramid – Gwynedd (mid-2011)



Population pyramid – Anglesey (mid-2011)



Source: Stats Wales

Gwynedd

- More people within the 20-24 age group in Gwynedd in 2011 than in any other age group. It is likely that the students who attend Bangor University are an important factor in relation to this.
- Following this, the two most populated age groups were 60-64 and 45-49.
- The percentage of the population in the 30-34 age group in 2011 was relatively low compared with some of the other age categories on either side of it.

Anglesey

- The pattern of the population pyramid for Anglesey in 2011 is slightly different to the population pyramid for Gwynedd.
- The proportion of the population in the 20-24 age category is lower in Anglesey than in Gwynedd.
- More people included in the 60-64 age group in Anglesey in 2011 than in any other age group.
- Following this, the most populated age categories were 65-69, 50-54, 55-59, 45-49, 40-4 4 and 15-19 (all with more than 4,000 people).
- It is noted that the number of people in the four age groups between 20 and 39 years old were all fewer than 4,000.

3.4 The historic distribution of the population

Gwynedd

Year	Total population	0-15 years old (number and percentage of the population)	16-64 years old (number and percentage of the population)	65+ years old (number and percentage of the population)
2001	116,844	22,603 *(19.3%)*	72,016 *(61.6%)*	22,225 *(19.0%)*
2002	117,231	22,578 *(19.3 %)*	72,236 *(61.6%)*	22,417 *(19.1%)*
2003	117,787	22,477 *(19.1%)*	72,696 *(61.7%)*	22,614 *(19.2%)*
2004	118,340	22,170 *(18.7%)*	73,463 *(62.1%)*	22,707 *(19.2%)*
2005	118,100	21,825 *(18.5%)*	73,450 *(62.2%)*	22,825 *(19.3%)*
2006	118,370	21,718 *(18.3%)*	73,672 *(62.2%)*	22,980 *(19.4%)*
2007	118,585	21,517 *(18.1%)*	73,890 *(62.3%)*	23,178 *(19.5%)*
2008	118,590	21,170 *(17.9%)*	73,893 *(62.3%)*	23,527 *(19.8%)*
2009	118,767	20,946 *(17.6%)*	73,908 *(62.2%)*	23,913 *(20.1%)*
2010	119,007	20,765 *(17.4%)*	74,108 *(62.3%)*	24,134 *(20.3%)*
2011	121,523	20,868 *(17.2%)*	75,336 *(62.0%)*	25,319 *(20.8%)*
Difference 2001-11 (percentage)	+4.0%	-7.7%	+4.6%	+13.9%

Anglesey

Year	Total population	0-15 years old (number and percentage of the population)	16-64 years old (number and percentage of the population)	65+ years old (number and percentage of the population)
2001	67,806	13,219 *(19.5%)*	41,775 *(61.6%)*	12,812 *(18.9%)*
2002	67,862	13,099 *(19.3 %)*	41,782 *(61.6%)*	12,981 *(19.1%)*
2003	68,050	12,947 *(19.0%)*	41,935 *(61.6%)*	13,168 *(19.4%)*
2004	68,271	12,880 *(18.9%)*	42,013 *(61.5%)*	13,378 *(19.6%)*
2005	68,483	12,772 *(18.6%)*	42,120 *(61.5%)*	13,591 *(19.8%)*
2006	68,647	12,666 *(18.5%)*	42,225 *(61.5%)*	13,756 *(20.0%)*
2007	68,763	12,526 *(18.2%)*	42,205 *(61.4%)*	14,032 *(20.4%)*
2008	68,799	12,369 *(18.0%)*	42,017 *(61.1%)*	14,413 *(20.9%)*
2009	68,768	12,328 *(17.9%)*	41,732 *(60.7%)*	14,708 *(21.4%)*
2010	68,592	12,289 *(17.9%)*	41,286 *(60.2%)*	15,017 *(21.9%)*
2011	69,913	11,890 *(17.0%)*	42,294 *(60.5%)*	15,729 *(22.5%)*
Difference 2001-11 (percentage)	+3.1%	-10.0%	-1.2%	+22.8%

Source: Stats Wales

- The percentage of the population who are under 16 years of age has decreased every year between 2001 and 2011 in Gwynedd and Anglesey. There has been a significant decrease in the number of individuals within this age category in both local authority areas between 2001 and 2011.
- The number of people over 65 years old has increased annually in Gwynedd and Anglesey between 2001 and 2011. There was a significant increase in the number of individuals in this age category in both local authority areas between 2001 and 2011.
- The percentage of the population who are over 65 years old has increased annually in Gwynedd and Anglesey between 2001 and 2011 (with the exception of 2003-04 in Gwynedd, where the figure was constant).
- The same trends can be seen in Gwynedd and Anglesey in terms of these aspects.

3.5 Population trends

Gwynedd

Year	Population at beginning of mid-year	Births (1)	Deaths (2)	Natural change (3)	Migration (net) (4)	Total population change	Population at end of mid-year
2000-01	116,699	1,202	1,382	-180	325	145	116,844
2001-02	116,844	1,189	1,385	-196	696	500	117,344
2002-03	117,344	1,158	1,316	-158	836	678	118,022
2003-04	118,022	1,160	1,406	-246	945	699	118,721
2004-05	118,721	1,190	1,336	-146	66	-80	118,641
2005-06	118,641	1,316	1,275	41	388	429	119,070
2006-07	119,070	1,279	1,282	-3	331	328	119,398
2007-08	119,398	1,253	1,343	-90	438	348	119,746
2008-09	119,746	1,298	1,340	-42	640	598	120,344
2009-10	120,344	1,355	1,350	5	806	811	121,155
2010-11	121,155	1,232	1,283	-51	419	368	121,523

Anglesey

Year	Population at beginning of mid-year	Births (1)	Deaths (2)	Natural change (3)	Migration (net) (4)	Total change in the population	Population at end of mid-year
2000-01	67,898	652	835	-183	91	-92	67,806
2001-02	67,806	639	750	-111	184	73	67,879
2002-03	67,879	652	804	-152	413	261	68,140
2003-04	68,140	717	777	-60	673	613	68,753
2004-05	68,753	656	789	-133	475	342	69,095
2005-06	69,095	727	775	-48	341	293	69,388
2006-07	69,388	704	741	-37	349	312	69,700
2007-08	69,700	763	775	-12	228	216	69,916
2008-09	69,916	795	836	-41	9	-32	69,884
2009-10	69,884	778	858	-80	29	-51	69,833
2010-11	69,833	817	781	36	44	80	69,913

Source: Stats Wales

(1) Number of live births during the specific period
(2) Number of deaths during the specific period
(3) (Births minus Deaths): during the specific period

(4) (Inward migration minus Outward migration). **These figures refer to internal migration (within the UK) and international migration.**

- As noted in part 3.1 the population of Gwynedd has increased annually since 2001 with the exception of 2004-05. There was a regular annual increase in the population of Anglesey until 2008. A reduction can then be seen in the population level for the subsequent two years prior to an increase in 2011. This raises the question of whether there is a connection between this trend and the economic recession?
- It is noted that the natural change in the population has been negative in every year noted in Anglesey. For Gwynedd, this figure is negative for every year apart from 2005-06 and 2009-10 when a small increase was seen.
- The migration rate has been positive in each year noted above in both Gwynedd and Anglesey.
- From the information noted in the tables, it can be interpreted that migration, rather than natural change, is the reason for the general increase in the population during this period.
- With respect to this point, there is a question as to whether losing prominent employers (e.g. Anglesey Aluminium and Eaton Electrical) and the broader recession lead to an increase in economic outmigration from Anglesey during recent years thereby leading to a decrease in the population?

3.6 Migration

Note: Data refers to internal migration (within the UK) only. These figures do not consider international migration.

3.6.1 Gwynedd: Migration within the United Kingdom 2007 – 2013 (figures in thousands)

Year	2012-13	2011-12	2010-11	2009-10	2008-09	2007-08	2006-07
Age	**Net**	**Net**	**Net**	**Net**	**Net**	**Net**	**Net**
Every age	**-380**	**-80**	**-100**	**580**	**190**	**-270**	**-130**
0-4	-30	10	-10	30	30	-50	0
5-9	10	30	0	-30	-20	10	-30
10-14	-40	-10	-10	-10	-20	30	30
15-19	790	940	840	1,190	910	610	700
20-24	-1,080	-740	-650	-460	-470	-780	-750
25-29	-340	-180	-230	-170	-220	-230	-170
30-34	-90	-150	-40	-40	-40	-60	-80
35-39	-50	20	-40	20	10	0	40
40-44	-10	-50	0	10	10	30	10
45-49	-20	0	30	0	20	40	50
50-54	0	40	20	-10	40	70	70
55-59	60	10	20	70	50	70	60
60-64	30	40	20	-10	-10	40	60

Year	2012-13	2011-12	2010-11	2009-10	2008-09	2007-08	2006-07
Age	Net	Net	Net	Net	Net	Net	Net
65-69	-10	30	-20	-10	80	90	90
70-74	-40	-30	-10	-40	-20	0	-50
75+	-20	-40	-20	-50	-60	-30	-50
0-14	-50	30	-30	-10	-20	-10	0
15-29	-630	10	-40	570	220	-410	-210
30-44	-150	-180	-70	-10	-30	-20	-30
45-64	70	90	90	130	90	220	240
65+	-80	-40	-50	-100	-80	-50	-120

Anglesey: Migration within the United Kingdom 2007 – 2013 (figures in thousands)

Year	2012-13	2011-12	2010-11	2009-10	2008-09	2007-08	2006-07
Age	Net	Net	Net	Net			
Every age	**50**	**70**	**-60**	**-10**	**-20**	**80**	**150**
0-4	0	30	-10	20	50	50	20
5-9	10	20	-10	20	30	0	40
10-14	0	10	10	10	-10	-10	10
15-19	-170	-220	-200	-240	-220	-190	-220
20-24	140	100	30	50	50	50	80
25-29	-20	-20	40	0	-30	20	-20
30-34	0	-10	-30	10	30	20	10
35-39	-30	40	10	10	0	-20	30
40-44	10	20	10	0	10	0	40
45-49	10	20	20	20	20	10	20
50-54	60	40	30	40	10	20	30
55-59	50	40	40	50	30	40	80
60-64	40	70	40	40	10	40	50
65-69	30	10	20	0	20	30	40
70-74	-20	-30	-10	-20	-20	10	-10
75+	-70	-40	-30	-20	-10	-10	-40
0-14	20	70	-20	40	70	40	70
15-29	-50	-150	-130	-190	-200	-110	-160
30-44	-20	60	-20	20	40	0	80
45-64	160	160	140	150	70	110	180
65+	-60	-70	-30	-30	-10	40	-10

Source: Office for National Statistics

Neutral – No increase or decrease | Net increase | Net decrease

3.6.2 Gwynedd and Anglesey: The general situation in terms of migration within the United Kingdom 2001-02 to 2012-13 (figures in thousands)

	Gwynedd	Anglesey
Year	Net	Net
2012-13	-380	50
2011-12	-80	70
2010-11	-100	-60
2009-10	580	-10
2008-09	190	-20
2007-08	-270	80
2006-07	-130	150
2005-06	120	230
2004-05	170	400
2003-04	840	220
2002-03	670	350
2001-02	520	130

Source: Office for National Statistics

- Gwynedd – The net difference between people moving in and out of Gwynedd (from the rest of the United Kingdom) has been negative in recent years (2010-11 onwards) i.e. more people moving out of the local authority area than were moving in. Positive figures on the whole prior to this.
- Anglesey – On the whole it is noted that the net difference between people moving in and out of Anglesey (from the rest of the United Kingdom) has been positive i.e. more people moving into the local authority area than were moving out. Net increase has been lower in the more recent two years in the table. In the period between 2008-09 and 2010-11 it is noted that more people moved out of Anglesey than moved in.

Gwynedd

- Generally a net reduction is seen, based on migration, in the population who are in their twenties, whilst there is some net increase in the population of the age groups between 45-64.
- A significant net increase, based on migration, is seen in the population within the 15-19 age group in every year in question. It is likely that one of the main reasons for this is due to the students who move to Bangor in order to study at the University. In the same manner, it is likely that an element of the net reduction for people in their twenties relates to the fact that students move away from Bangor after they have finished their courses.

- In each year in question, it is seen that there is a net reduction, based on migration in the population in the 20-24. 25-29 and 30-34 age categories. There was either a net increase, no change or a small reduction with regards to the 50-54, 55-59 and 60-64 age categories. It is noted that there has been a net reduction every year in terms of the population in the over 65 age group.

Anglesey

- A net reduction is seen, based on migration, in the population of the 15-19 age group for each year in question. Whilst there has been a small increase every year in the net rate of the population in the 20-24 age group. In general, it is noted, for all the years in question, that there has been a net reduction in the population of the 15-29 age group.
- In each of the specified years, an increase in the population in the 45-49, 50-54, 55-59 and 60-64 age categories. Reduction in the population aged over 65 in every year apart from one.

3.7 Labour supply (July 2013 – June 2014)

Gwynedd

	Number	Gwynedd	Wales	Great Britain
Economically active[10]	56,700	74.5%	75.0%	77.5%
In employment	69.9%	69.5%	72.1%	70.3%
Employees	54.2%	59.5%	61.6%	60.8%
Self employed	15.0%	9.1%	9.9%	9.1%
Unemployed[11]	3,700	6.4%	7.1%	6.8%

Anglesey

	Number	Anglesey	Wales	Great Britain
Economically active	31,700	74.6%	75.0%	77.5%
In employment	29,400	69.4%	69.5%	72.1%
Employees	23,500	57.0%	59.5%	61.6%
Self employed	5,300	11.0%	9.1%	9.9%
Unemployed	2,200	7.4%	7.1%	6.8%

Source: The Office for National Statistics' Annual Population Survey

[10] The numbers noted relate to individuals who are aged 16 and over. The percentages relate to individuals who are aged between 16-64 years old.

[11] The numbers and percentages relate to individuals who are aged 16 and over. The percentages refer to the percentage of those who are economically active.

- The percentage of the population of Gwynedd and Anglesey who are economically active is lower than the equivalent percentage for the whole of Wales and Great Britain.
- The percentage of the population that are unemployed in Gwynedd is lower than the percentages for Wales and Great Britain.
- The percentage of the population that are unemployed in Anglesey is higher than the percentages for Wales and Great Britain.
- The percentage of the population that are self-employed in Gwynedd and Anglesey is higher than the equivalent percentages noted for Wales and Great Britain.

3.8 Household income – 2013

Area	Median income	Lower quartile income	Number of households below 60% of Great Britain's median	Percentage of households below 60% of Great Britain's median	Number of households below Great Britain's lowest quartile	Percentage of households below Great Britain's lowest quartile	Total households
Gwynedd	£22,111	£12,237	20,611	38.7%	20,575	38.6%	53,297
Anglesey	£23,937	£13,112	11,050	35.5%	11,029	35.4%	31,150
Wales	£24,713	£13,415	457,036	34.3%	456,167	34.2%	1,332,201
Great Britain	£28,024	£14,852	7,854,706	29.8%	7,838,805	29.8%	26,323,250
United Kingdom	£27,969	£14,826	8,089,828	29.9%	8,073,469	29.9%	27,046,021

Source: CACI Paycheck, 2013

- It should be borne in mind that the figures in the table note the general situation in Gwynedd and Anglesey. As in the case of all the other statistical information, the situation varies from one area to another within Gwynedd and Anglesey.
- Both Gwynedd and Anglesey's median income is lower than the figure for the whole of Wales and is much lower than the figures for Great Britain / the United Kingdom.
- There is a higher percentage of households with an income that is below 60% of the UK's median income (namely the UK Government's definition of poverty) in Gwynedd and Anglesey compared to the whole of Wales.

The percentage is significantly higher in Gwynedd when compared to the percentage figure for Wales.

THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- The population of Gwynedd has increased annually since 2011 (with the exception of 2004-05). The population of Anglesey increased annually between 2001 and 2008. Whilst it decreased for two successive years after this, the population increased again in 2011.
- Apart from two small increases in Gwynedd in 2005-06 and 2009-10, the natural change in the population of both Gwynedd and Anglesey has been negative every year between 2000-01 and 2010-11.
- The net migration rate (in comparison to the rest of Britain and internationally) has been positive each year during the period 2000-01 and 2010-11 for both Gwynedd and Anglesey.
- Migration, rather than natural change is the reason for the general increase in the population.
- Generally, based on migration within the United Kingdom alone in the period 2007-13, a net decrease can be seen in the population of people in their twenties living in Gwynedd whilst there is a small net increase in the population of people aged 45-64. An obvious increase can also be seen in the population within the 15-19 age group. In Anglesey, once again, based on migration within the United Kingdom alone, a net decrease can be seen in the population within the 15-19 age group with an increase in the population of people aged 45-64 years old.
- These migration trends (within the United Kingdom) could lead to an ageing population in Gwynedd and Anglesey i.e. an increase in the population who are nearing retirement age with a reduction in the population of younger age groups.
- Since 2001 there has been an evident decrease in the percentage of the population who are under 16 years old in Gwynedd and Anglesey.
- During the same period there has been an evident increase in the number and percentage of the population of Gwynedd and Anglesey who are over 65 years old. The population of Gwynedd and Anglesey is ageing.
- The population's spatial distribution, the size of the main centres along with the size and population of other defined settlements, indicate that the Plan area is a rural area.
- Gwynedd and Anglesey's median income is lower than the corresponding figures for the whole of Wales and Great Britain/United Kingdom.
- A significant percentage of households in Gwynedd and Anglesey have an income that is below 60% of the UK's median income (i.e. the UK Government's definition of poverty).

4. POPULATION PROJECTIONS

The information noted in this chapter is based upon the 'central' or principal projection noted in the 2011-based population projection (which is based upon a 5 year average migration trend).

4.1 Population projections (2011-based) – Welsh Government

(The change in the population is based on comparison with the information for the base year, namely 2011)

	2011 (basis of the information)		2016		2021	
	Population	**Change**	**Population**	**Change**	**Population**	**Change**
Gwynedd	121,523	-	123,126	1.3%	125,195	3.0%
Anglesey	69,913	-	70,178	0.4%	70,257	0.5%
	2026		**2031**		**2036**	
	Population	**Change**	**Population**	**Change**	**Population**	**Change**
Gwynedd	127,557	5.0%	129,851	6.9%	131,847	8.5%
Anglesey	69,877	-0.1%	69,065	-1.2%	68,053	-2.7%

- It is projected that the population of Gwynedd will continually increase until 2036.
- It is projected that the population of Anglesey will increase until 2021. It is then projected that the population will decrease continually to a level below the population in 2011.

4.2 Projections of the number of births, deaths and natural change (2011-based) – Welsh Government

(This information relates to the select years noted)

	2011/12			2016/17		
	Births	**Deaths**	**Natural Change**	**Births**	**Deaths**	**Natural Change**
Gwynedd	1,221	1,328	-107	1,270	1,277	-7
Anglesey	8090	800	9	782	777	5
	2021/22			**2026/27**		
	Births	**Deaths**	**Natural Change**	**Births**	**Deaths**	**Natural Change**
Gwynedd	1,377	1,266	+111	1,367	1,278	89
Anglesey	713	788	-75	643	817	-174

- Gwynedd: The natural change in the population was negative during 2011/12. It is projected that the change will be positive by 2021/22 and 2026/27.
- Anglesey: Small positive change during 2011/12. It is projected that the natural change in the population will be negative by 2021/22 and 2026/27.
- The above projections are compared with the fact that, apart from two small increases in Gwynedd in 2005-06 and 2009-10, the natural change in the population has been negative for both authorities every year between 2000-01 and 2010-11 (as noted in section 3.5).

4.3 Projections of fertility rate (2011-based) – Welsh Government

(This information relates to the select years noted)

	2011/12	2015/16	2025/26
Gwynedd	1.77	1.76	1.66
Anglesey	2.25	2.22	2.09

- It is projected that the fertility rate in Gwynedd and Anglesey (i.e. the average number of children that women would bear if the female population experienced the age-specific fertility rates for the year in question throughout their childbearing lifespan) will decrease gradually by the two select years noted.

4.4 Assumed migration levels for the period 2011-2036 (2011-based) – Welsh Government

The figures below reflect the migration figures as noted in the principal projection information compared with the actual ten-year average migration figures for the period 2001-11.

	Migration (net)		Internal migration (net)		International migration (net)	
	Principal	10-year average	Principal	10-year average	Principal	10-year average
Gwynedd	390	460	50	260	330	200
Anglesey	40	170	30	150	10	20

- It is projected that there will be an annual net increase of approximately 390 people in Gwynedd and 40 people in Anglesey, based on the migration rate only. These projected figures are lower than the actual ten-year average for the period 2001-11.
- It is projected that more people will move into the Plan area than will move out.

4.5 Change in the population: Key years and specific age groups (2011-based)

(This information relates to the select years noted)

4.5.1 Projections of the number of people belonging to specific age groups

Gwynedd

	2011	2016	2021	2026	2031	2036
Children (0-15 years old)	20,868	20,294	20,550	20,470	21,072	21,421
Population that is 65 years old and over	25,319	27,537	28,679	30,307	32,170	33,377
Population total	121,523	123,126	125,195	127,557	129,851	131,847

Anglesey

	2011	2016	2021	2026	2031	2036
Children (0-15 years old)	11,890	12,238	12,740	12,402	11,527	10,818
Population that is 65 years old and over	15,729	17,689	18,951	20,241	21,372	22,199
Population total	69,913	70,178	70,257	69,877	69,065	68,053

Source: Stats Wales

4.5.2 Growth rate projections for the specific age groups (compared with the baseline 2011 figures) for the select years

Gwynedd

	2011	2016	2021	2026	2031	2036
Children (0-15 years old)	-	-2.8%	-1.5%	-1.9%	+1.0%	+2.6%
Population that is 65 years old and over	-	+8.8%	+13.3%	+19.7%	+27.1%	+31.8%
Population total	-	+1.3%	+3.0%	+5.0%	+6.9%	+8.5%

Anglesey

	2011	2016	2021	2026	2031	2036
Children (0-15 years old)	-	+2.9%	+7.1%	+4.3%	-3.0%	-9.0%
Population that is 65 years old and over	-	+12.5%	+20.5%	+28.7%	+35.9%	+41.1%
Population total	-	+0.4%	+0.5%	-0.1%	-1.2%	-2.7%

Source: Stats Wales

4.5.3 Projections of the percentage of the population belonging to the specific age groups in the select years

Gwynedd

	2011	2016	2021	2026	2031	2036
Children (0-15 years old)	17.2%	16.5%	16.4%	16.0%	16.2%	16.2%
Population that is 65 years old and over	20.8%	22.4%	22.9%	23.8%	24.8%	25.3%
Population total	100%	100%	100%	100%	100%	100%

Anglesey

	2011	2016	2021	2026	2031	2036
Children (0-15 years old)	17.0%	17.4%	18.1%	17.7%	16.7%	15.9%
Population that is 65 years old and over	22.5%	25.2%	27.0%	29.0%	30.9%	32.6%
Population total	100%	100%	100%	100%	100%	100%

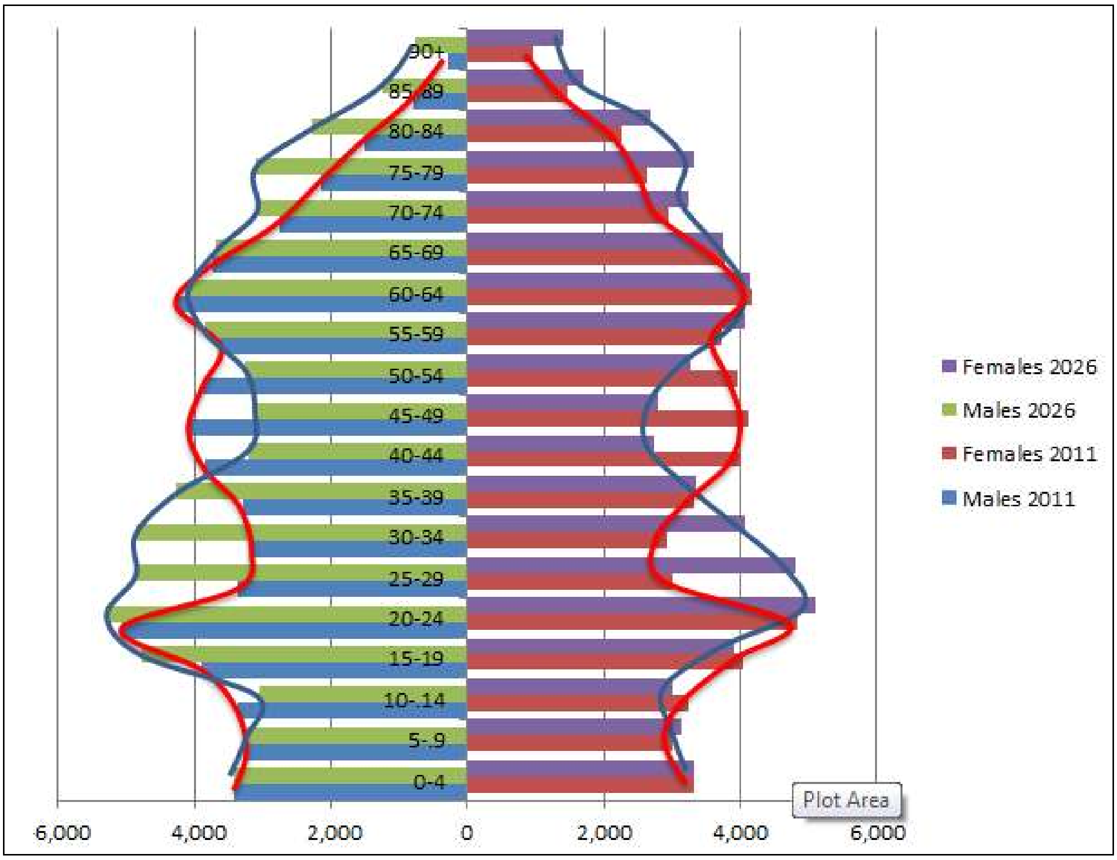
Source: Stats Wales

- A continual increase in the percentage of the population aged 65 years old or older in Gwynedd and Anglesey.
- A significant rate of increase in the size of the population aged 65 years old or older (compared with the baseline 2011 figure) in Gwynedd and Anglesey in each of the select years.

- Gwynedd: Contrary to the 65 years old or older population, it is projected that the percentage of the population in the 'children' category will be lower in the select years than in 2011 (i.e. the base year).
- Anglesey: It is projected that the percentage of the population in the 'children' category will increase in the initial select years before decreasing in the later years.

4.6 Comparing the structure of the population in 2011[12] with the population projections for 2026

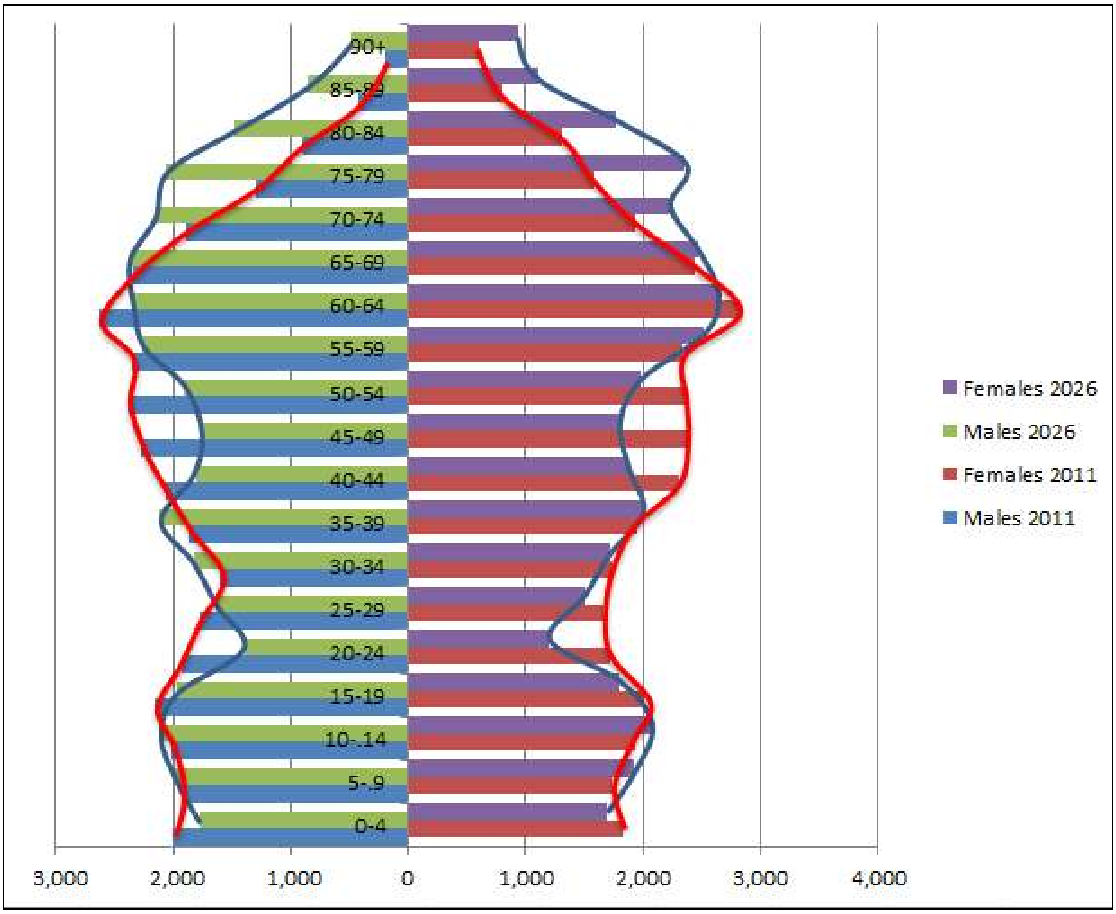
Gwynedd



Population structure 2011 Population structure 2026

[12] 2011 census estimate, The Statistical Directorate, Welsh Government

Anglesey



Population structure 2011 — Population structure 2026

- The above graphs compare the population structure in 2011 with the population projections for 2026 (namely the end of the Joint Local Development Plan period). [The 2011 population pyramid for Gwynedd and Anglesey can be seen in section 3.3 of this topic paper].

Gwynedd

- In the age groups up to 20-24 years old and in the age groups over 60 years old, the pattern in terms of the population structure is relatively similar for the two periods noted.
- The main differences can be seen in the age groups between 25-29 and 55-59 years old. It is projected that there will be significantly more people within the 25-29, 30-34 and 35-39 age categories by 2026. However there will be significantly less people in the 40-44, 45-49 and 50-54 age categories by that year.
- The graph notes that more people will belong to all 65+ age categories by 2026 (males and females).

Anglesey

- It is projected that the structure of the population in 2026 will be relatively similar to that in 2011.
- It is suggested that the population within the 40-55 year old age categories will be higher by 2026.
- The graph notes that significantly more people will belong to all 65+ age categories by 2026 (males and females) whilst the population in the age categories up to 19 years old will remain somewhat similar.

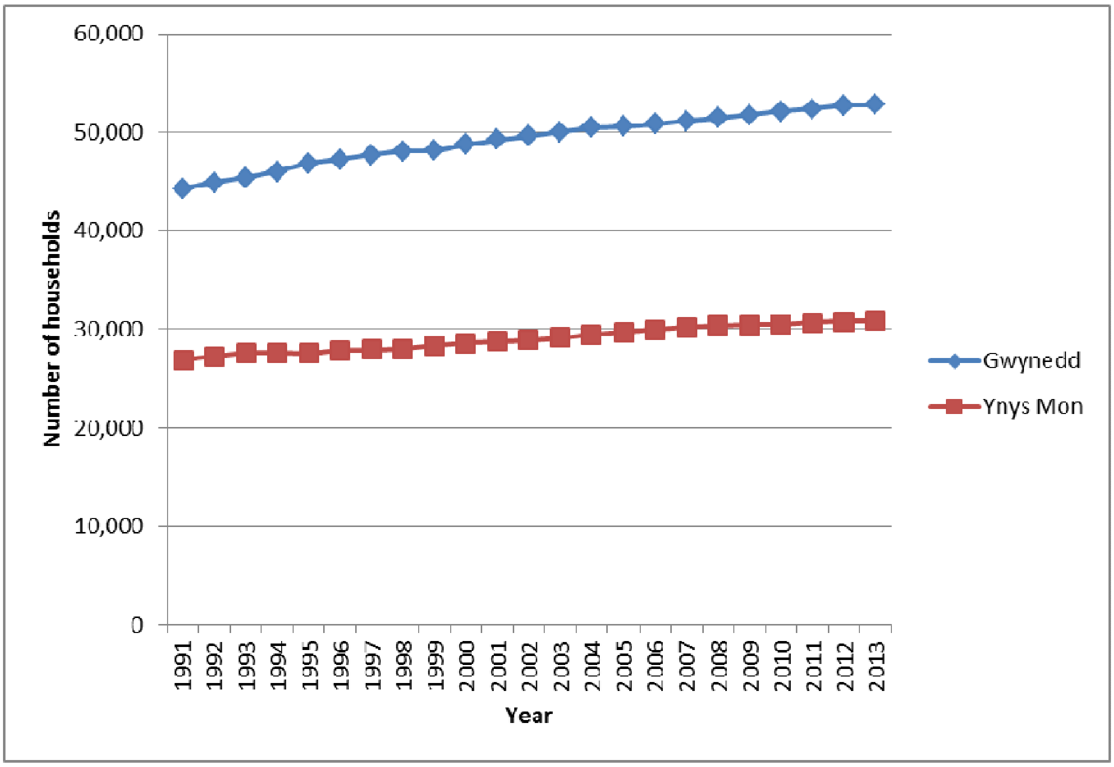
THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- The population of Gwynedd will continually increase until 2036.
- It is projected that the population of Anglesey will increase until 2021. It is then projected that the population will decrease continually to a level below the population in 2011.
- Only (net) migration will contribute towards the increase in the population of Gwynedd at the beginning of the period, with natural change contributing to this by 2021/22. A small increase in terms of natural population change in Anglesey in the initial period but a decrease by 2021/22.
- There will be a continual increase in the percentage of the population that is 65 years old or older in Gwynedd and Anglesey. Whilst the percentage of the population that are children will decrease in Gwynedd by 2026, there is more variance in the projections for Anglesey in this respect.
- Whilst some change is anticipated to the population structure during the life of the Plan, it is noted that, generally, the population of Gwynedd and Anglesey will continue to grow older.

5. CURRENT HOUSEHOLDS[13]

5.1 Estimated number of households 1991-2013

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Gwynedd	44,295	44,883	45,408	46,002	46,846	47,242	47,732	48,098	48,165	48,750
Anglesey	26,894	27,241	27,620	27,617	27,586	27,870	27,928	28,016	28,369	28,591
	2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**
Gwynedd	49,252	49,598	50048	50,491	50,578	50,881	51,145	51,443	51,781	52,146
Anglesey	28,784	28,927	29,136	29,477	29,713	29,923	30,167	30,371	30,454	30,530
	2011	**2012**	**2013**							
Gwynedd	52,411	52,729	52,804							
Anglesey	30,655	30,779	30,840							



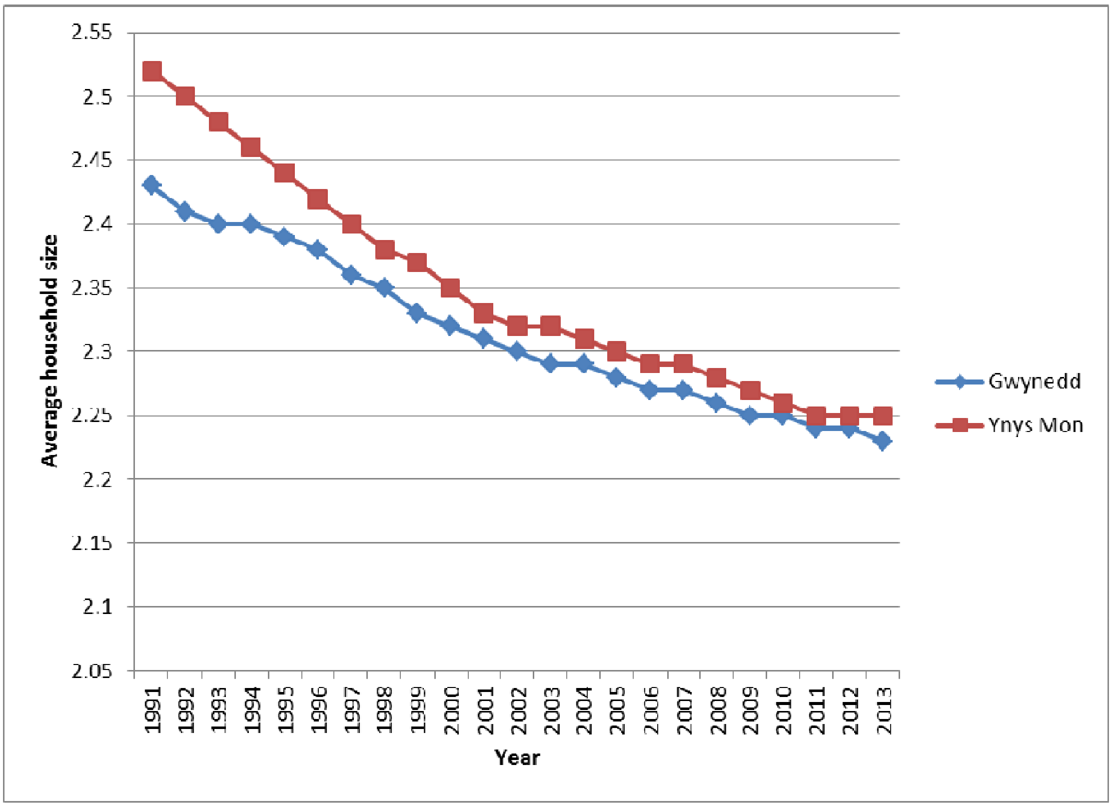
Source: Stats Wales - Household estimates are based on mid-year population estimates for Wales produced by the Office for National Statistics for mid-1991 to mid-2013.

[13] Definition of a 'household' [as noted in 'Household Projections for Wales (2011-based), Welsh Government]: *"A household is defined as one person living alone, or a group of people (not necessarily related) living at the same address with common housekeeping – that is, sharing either a living room or sitting room or at least one meal a day".*

- The number of households in Gwynedd has increased gradually every year between 1991 and 2013.
- Apart from the period 1993-95, there was a gradual and continuous increase in the number of households in Anglesey between 1991 and 2013.
- There were 8,509 more households in Gwynedd in 2013 compared to 1991.
- There were 3,946 more households in Anglesey in 2013 compared to 1991.

5.2 Average household size 1991-2013

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Gwynedd	2.43	2.41	2.40	2.40	2.39	2.38	2.36	2.35	2.33	2.32
Anglesey	2.52	2.50	2.48	2.46	2.44	2.42	2.40	2.38	2.37	2.35
	2001	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**	**2009**	**2010**
Gwynedd	2.31	2.30	2.29	2.29	2.28	2.27	2.27	2.26	2.25	2.25
Anglesey	2.33	2.32	2.32	2.31	2.30	2.29	2.29	2.28	2.27	2.26
	2011	**2012**	**2013**							
Gwynedd	2.24	2.24	2.23							
Anglesey	2.25	2.25	2.25							



Source: Stats Wales

- The average household size in Gwynedd decreased gradually between 1991 and 2013 (some years when the figure remained consistent).
- The average household size in Anglesey decreased gradually between 1991 and 2013 (some years when the figure remained consistent).
- There was a significant decrease in the average household size between 1991 and 2013 in Gwynedd and Anglesey (Gwynedd: from 2.43 to 2.23 people; Anglesey: from 2.52 to 2.25 people).

5.3 The number of specific types of households 1991-2013

Gwynedd

	Type of household							
Year	1 person	2 person (no children)	2 person (1 adult, 1 child)	3 person (2 adults, 1 child)	3 person (1 adult, 2 children)	4 person (2+ adults, 1+ children)	4 person (1 adult, 3 children)	5+ person (2+ adults, 1+ children)
1991	13,232	13,705	667	2,798	506	4,697	174	3,594
1992	13,522	13,864	746	2,827	554	4,700	188	3,543
1993	13,781	14,010	823	2,851	602	4,702	203	3,493
1994	14,009	14,159	909	2,890	655	4,727	219	3,467
1995	14,366	14,341	999	2,945	709	4,774	236	3,454
1996	14,619	14,418	1,078	2,961	757	4,766	250	3,401
1997	14,911	14,538	1,158	2,978	808	4,759	266	3,352
1998	15,164	14,644	1,232	2,979	855	4,726	280	3,288
1999	15,322	14,704	1,293	2,947	891	4,642	291	3,193
2000	15,625	14,887	1,372	2,956	940	4,628	306	3,148
2001	15,914	15,038	1,449	2,968	988	4,616	321	3,104
2002	16,182	15,156	1,441	2,952	977	4,587	322	3,094
2003	16,499	15,328	1,429	2,937	964	4,557	323	3,083
2004	16,801	15,483	1,421	2,931	950	4,526	321	3,066
2005	17,004	15,499	1,409	2,907	935	4,478	320	3,040
2006	17,278	15,570	1,406	2,898	926	4,451	321	3,027
2007	17,539	15,633	1,402	2,892	916	4,425	321	3,013
2008	17,808	15,729	1,398	2,886	906	4,399	321	2,997
2009	18,069	15,789	1,403	2,893	899	4,386	322	2,991
2010	18,305	15,838	1,410	2,902	891	4,377	323	2,991
2011	18,567	15,891	1,403	2,884	881	4,340	324	2,974
2012	18,810	15,966	1,403	2,837	880	4,320	329	2,979
2013	18,967	15,911	1,391	2,841	869	4,264	330	2,953
Difference 1991-2013 (number and percentage)	+5,735 +43.3%	+2,296 +16.1%	+724 +108.5%	+43 +1.5%	+363 +71.7%	-433 -9.2%	+156 +89.7%	-641 -17.8%

Source: Stats Wales

Anglesey

Year	Type of household							
	1 person	2 person (no children)	2 person (1 adult, 1 child)	3 person (2 adults, 1 child)	3 person (1 adult, 2 children)	4 person (2+ adults, 1+ children)	4 person (1 adult, 3 children)	5+ person (2+ adults, 1+ children)
1991	6,960	8,440	498	1,887	360	3,339	125	2,201
1992	7,148	8,577	551	1,902	390	3,301	135	2,155
1993	7,340	8,715	603	1,918	423	3,281	147	2,122
1994	7,422	8,750	648	1,908	451	3,218	157	2,058
1995	7,538	8,779	684	1,888	472	3,137	164	1,983
1996	7,707	8,878	736	1,906	501	3,112	175	1,945
1997	7,832	8,941	779	1,889	527	3,048	184	1,887
1998	7,959	9,027	817	1,875	550	2,982	192	1,827
1999	8,150	9,186	860	1,874	576	2,946	201	1,792
2000	8,304	9,324	900	1,863	599	2,886	209	1,742
2001	8,427	9,452	941	1,857	619	2,832	216	1,696
2002	8,574	9,515	933	1,845	601	2,817	212	1,686
2003	8,731	9,588	930	1,843	586	2,810	207	1,680
2004	8,916	9,694	930	1,855	573	2,820	204	1,683
2005	9,075	9,767	930	1,862	559	2,814	200	1,675
2006	9,228	9,824	931	1,867	544	2,802	196	1,665
2007	9,401	9,907	928	1,871	528	2,787	190	1,652
2008	9,564	9,975	927	1,871	513	2,766	185	1,636
2009	9,681	9,999	922	1,867	498	2,741	181	1,618
2010	9,793	10,028	914	1,859	483	2,715	177	1,599
2011	9,918	10,066	912	1,854	470	2,697	173	1,586
2012	10,036	10,083	915	1,855	462	2,693	172	1,584
2013	10,110	10,086	916	1,851	454	2,683	171	1,580
Difference 1991-2013 (number and percentage)	**+3,150** **+45.3%**	**+1,646** **+19.5%**	**+418** **+83.9%**	**-36** **-1.9%**	**+94** **+26.1%**	**-656** **-19.6%**	**+46** **+36.8%**	**-621** **-28.2%**

Source: Stats Wales

- A significant increase in the number of single person households in Gwynedd and Anglesey between 1991 and 2013.
- A significant increase also in the number of households in Gwynedd and Anglesey where children (either 1, 2 or 3 children) live with one adult.
- A small increase or a decrease in the number of more 'traditional' households during this period.

- Gwynedd: A small increase seen in the number of households with two adults and one child, but an evident decrease in the number of four person households (2+ adults, 1+ children) and 5+ person households (2+ adults, 1+ children).
- Anglesey: A decrease in the number of households with two adults and one child, and also 4 person households (2+ adults, 1+ children) and 5+ person households (2+ adults, 1+ children).

THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- A gradual annual increase in the number of households since 1991 in Gwynedd and since 1995 in Anglesey.
- The average household size had decreased to 2.23 in Gwynedd and 2.25 in Anglesey by 2013.
- A much greater number of single person and one adult with children households in Gwynedd and Anglesey by 2013.

6. HOUSEHOLD PROJECTIONS

The information noted in this chapter is based upon the 'central' or principal projection noted in the 2011-based household projection (which is based upon a 5 year average migration trend).

6.1 Household projections 2011-36 (2011-based) – Welsh Government

(This information relates to the select years noted)

	2011	2016	2021	2026	2031	2036	Percentage change (2008-36)
Gwynedd	52,411	53,657	55,184	56,711	57,924	58,985	+12.5%
Anglesey	30,655	31,107	31,419	31,541	31,477	31,269	+2.0%

- A continual increase in the number of households in Gwynedd until 2036.
- A continual increase in the number of households in Anglesey until 2026, followed by a decrease in the number of households.
- Gwynedd: Approximately 4,300 more households in 2026 (i.e. the end of the LDP period) compared to 2011. This equates to an increase of approximately 287 households a year during this period.
- Anglesey: Approximately 866 more households in 2026 (i.e. the end of the LDP period) compared to 2011. This equates to an increase of approximately 59 households a year during this period.

6.2 Projections for average household size 2011-36 (2011-based) – Welsh Government

(This information relates to the select years noted)

	2011	2016	2021	2026	2031	2036
Gwynedd	2.24	2.22	2.20	2.18	2.17	2.16
Anglesey	2.25	2.23	2.21	2.18	2.15	2.13
Wales	2.31	2.28	2.25	2.23	2.20	2.18

- The average household size in Gwynedd and Anglesey will continue to decrease periodically until 2036. It is anticipated that this will correspond with the tendency across the whole of Wales.

6.3 Projections for specific types of households 2011-36 (2011-based) – Welsh Government

(This information relates to the select years noted)

Gwynedd

Type of household	2011	2016	2021	2026	2031	2036	Percentage change (2011-36)
1 person	18,567	19,623	20,845	22,056	23,057	24,002	+29.3%
2 person (No children)	15,891	16,221	16,567	16,777	16,748	16,506	+3.9%
2 person (1 adult, 1 child)	1,403	1,373	1,367	1,380	1,406	1,473	+5.0%
3 person (No children)	3,190	3,143	3,056	2,948	2,843	2,743	-14.0%
3 person (2 adults, 1 child)	2,884	2,809	2,837	2,909	2,958	3,010	+4.4%
3 person (1 adult, 2 children)	881	844	826	827	837	845	-4.1%
4 person (No children)	1,254	1,365	1,395	1,392	1,391	1,387	+10.6%
4 person (2+ adults, 1+ children)	4,340	4,153	4,049	4,027	4,088	4208	-3.0%
4 person (1 adult, 3 children)	324	333	353	382	411	436	+34.6%
5+ person (No children)	590	765	868	946	1,038	1,084	+83.7%
5+ person (2+ adults, 1+ children)	2,974	2,912	2,897	2,935	3,008	3,094	+4.0%
5+ person (1 adult, 4+ person)	112	116	123	131	139	147	+31.3%

Anglesey

Type of household	2011	2016	2021	2026	2031	2036	Percentage change (2011-36)
1 person	9,918	10,436	10,925	11,384	11,762	12,112	+22.1%
2 person (No children)	10,066	10,152	10,117	9,982	9,825	9,534	-5.3%
2 person (1 adult, 1 child)	912	910	909	902	884	859	-5.8%
3 person (No children)	2,064	2,018	1,955	1,889	1,835	1,779	-13.8%
3 person (2 adults, 1 child)	1,854	1,828	1,791	1,754	1,699	1,659	-10.5%
3 person (1 adult, 2 children)	470	430	409	398	376	347	+26.2%
4 person (No children)	676	695	691	677	688	724	+7.1%
4 person (2+ adults, 1+ child)	2,697	2,643	2,615	2,561	2,462	2,355	-12.7%
4 person (1 adult, 3 children)	173	167	171	169	159	147	-15.0%
5+ person (No children)	170	188	199	212	238	262	+54.1%
5+ person (2+ adults, 1+ children)	1,586	1,564	1,554	1,526	1,463	1,407	-11.3%
5+ person (1 adult, 4+ person)	70	77	84	87	86	85	+21.4%

- There will be a continual and significant increase in the number of single person households in Gwynedd and Anglesey.
- The situation in terms of the number of households where children (either 1, 2, 3 or 4+ children) live with one adult is variable both in Gwynedd and Anglesey. In some instances it is projected that there will be a percentage increase in a certain type of household, whilst in other instances there is a projected decrease.
- It is anticipated that there will be a decrease in the number of more ‘traditional’ households in Anglesey by 2036 i.e. 2 adults with children [2 adults and 1 child; 4 person (2+ adults, 1+ children); and 5+ person (2+ adults, 1+ children)]. The situation is more variable in Gwynedd.

6.4 Comparison of the 2006, 2008 and 2011 based annual housing projections for Gwynedd[14] and Anglesey with the 2003 based projections together with the current provision

This table compares the number of residential units that would need to be provided annually in accordance with the Welsh Government's 2006-based, 2008-based and 2011-based household projections (the 2011-based projections are the most recent) with the information derived from the 2003-based projections. A comparison is made with the 2003-based projections as these were the apportionment figures agreed upon by all North Wales planning authorities in a Memorandum of Understanding (December 2008). The need deriving from household projections is also compared with the provision in the current development plans and to the average number of residential units that have been completed in recent years.

<table>
<tr><th rowspan="2">Planning Authority</th><th rowspan="2">Annual housing provision[15]</th><th rowspan="2">Completion rate for new residential units: annual average (2004 – 2014)</th><th rowspan="2">Annual housing apportionment (2003-based)</th><th colspan="2">Welsh Government Projections 2006-based[16]</th><th colspan="2">Welsh Government Projections 2008-based[17]</th><th colspan="2">Welsh Government Projections 2011-based[18]</th><th rowspan="2">Difference compared with the UDPs and Snowdonia LDP</th></tr>
<tr><th>Increase 2006 – 2021 (number of houses)</th><th>Annual (number of houses)</th><th>Increase 2008 – 2023 (number of houses)</th><th>Annual (number of houses)</th><th>Increase 2011 – 2026 (number of houses)</th><th>Annual (number of houses)</th></tr>
<tr><td rowspan="2">Gwynedd Planning Authority</td><td rowspan="2">278</td><td rowspan="2">187</td><td rowspan="2">270</td><td rowspan="4">8,640</td><td rowspan="4">576</td><td rowspan="4">6,375</td><td rowspan="4">425</td><td colspan="2">Principal projection (based on a 5 year migration trend)</td><td rowspan="2">+ 5[19] (+1.5%)</td></tr>
<tr><td>5,004</td><td>334</td></tr>
<tr><td rowspan="2">Snowdonia National Park Authority</td><td rowspan="2">53 [20]</td><td rowspan="2">59</td><td rowspan="2">50</td><td colspan="2">10 year migration trend</td><td rowspan="2">+53 (+16.1%)</td></tr>
<tr><td>5,732</td><td>382</td></tr>
<tr><td rowspan="4">Anglesey</td><td rowspan="4">120</td><td rowspan="4">205</td><td rowspan="4">175</td><td rowspan="4">3,795</td><td rowspan="4">253</td><td rowspan="4">4,020</td><td rowspan="4">268</td><td colspan="2">Principal projection (based on a 5 year migration trend)</td><td rowspan="2">-54 (-45.0%)</td></tr>
<tr><td>990</td><td>66</td></tr>
<tr><td colspan="2">10 year migration trend</td><td rowspan="2">+3 (+2.5%)</td></tr>
<tr><td>1,845</td><td>123</td></tr>
</table>

Source: Anglesey and Gwynedd Joint Planning Policy Unit

[14] Information relating to household projections is relevant to the whole of Gwynedd. Therefore, the situation in the Snowdonia National Park Authority area must also be considered.

[15] The provision noted in the Gwynedd Unitary Development Plan (adopted July 2009), the Eryri Local Development Plan (2011) and the Stopped Anglesey Unitary Development Plan 2005.

[16] The indicative figure for the need for new housing during this period has been determined by applying the 'households/residential units' ratio to the Welsh Government's household projections.

[17] The indicative figure for the need for new housing during this period has been determined by applying the 'households/residential units' ratio to the Welsh Government's household projections.

[18] The indicative figure for the need for new housing during this period has been determined by applying the 'households/residential units' ratio to the Welsh Government's household projections.

[19] It is presumed that 96% of Snowdonia National Park's annual provision is located in Gwynedd.

[20] This figure is relevant for the entire Snowdonia National Park area i.e. it also includes the part within the Conwy County Borough Council area.

- Gwynedd: The figure for the annual housing provision deriving from the Welsh Government's principal 2011-based household projections is very similar to what is provided for in the Gwynedd Unitary Development Plan and the Eryri Local Development Plan.
- If applying the proportion regarding the annual provision of houses that are to be located in the Gwynedd Planning Authority area (i.e. 278 ÷ 331 = 0.84) to the figure in the last column of the table, the Welsh Government's principle household projections (2011-based) suggest that only 4 more units are required to be provided annually in the planning authority area than what is provided for in the Gwynedd Unitary Development Plan, however an additional 53 units would be required on the basis of the 10 year migration trend variant.
- The annual number of houses needed according to the 2011-based projections (principle and 10 year migration trend) is significantly lower than the figures noted within the 2008 and 2006 based projections.
- The figure with respect to the number of houses that need to be provided annually, in accordance with the Welsh Government's household projections (2011-based), is higher than the annual completion rate (between 2004-14) for new residential units (principle and 10 year migration trend).
- Anglesey: The figure for the annual housing provision deriving from the Welsh Government's principle 2011-based household projections is somewhat lower than what is provided for in the stopped Anglesey Unitary Development Plan.
- The figure for the annual housing provision deriving from the Welsh Government's 10 year migration trend 2011-based household projections is 3 units higher than what is provided for in the stopped Anglesey Unitary Development Plan. It is therefore substantially higher than the principle figure.
- The annual number of houses needed according to the 2011-based projections (principle and 10 year migration trend) is significantly lower than the figures noted within the 2008 and 2006 based projections.
- The figure with respect to the number of houses that need to be provided annually, in accordance with the Welsh Government's household projections (2011-based), is lower than the annual completion rate (between 2004-14) for new residential units (principle and 10 year migration trend).

THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- The number of households in Gwynedd will continue to increase gradually until 2036. In Anglesey it is projected that there will be a continuous increase in the number of households until 2026, which will then be followed by a decrease.
- It is projected that the size of households in Gwynedd and Anglesey will decrease gradually until 2036.
- Single person households will significantly increase in number until 2036.
- The figure for the annual housing provision deriving from the Welsh Government's principle 2011-based household projections is very similar to what is provided for in the Gwynedd Unitary Development Plan. The annual housing provision increases if the 10 year migration variant to the 2011-based projections is applied.

- The figure deriving from the 2011-based household projections for Anglesey is somewhat lower than what is provided for in the stopped Anglesey Unitary Development Plan. The figure that is based upon the 10 year migration variant is substantially higher as it is a little marginally higher than what is provided for in in the stopped Anglesey Unitary Development Plan.
- The figure with respect to the number of houses that need to be provided annually, in accordance with the Welsh Government's household projections (2011-based), is higher than the annual completion rate (between 2004-14) for new residential units in Gwynedd but is lower for Anglesey (both in terms of the principle and 10 year migration trends).
- The annual number of houses needed according to the 2011-based projections (both in terms of the principle and 10 year migration trends) is lower than the figures noted within the 2008 and 2006 based projections.

7. CURRENT HOUSING

7.1 Tenure

7.1.1 Tenure of residential units in Gwynedd, Anglesey and the whole of Wales (2011)

ALL OCCUPIED HOUSEHOLD SPACES				
	Total	Owned (Owner-occupied – including part ownership)	Socially rented	Privately rented or living rent-free
Gwynedd	**52,473**	**34,495 (65.7%)**	**8,561 (16.3%)**	**9,417 (17.9%)**
Anglesey	**30,594**	**21,034 (68.8%)**	**4,487 (14.7%)**	**5,073 (16.6%)**
Wales	**1,302,676**	**883,130 (67.8%)**	**214,911 (16.5%)**	**204,635 (15.7%)**

Source: 2011 Census (Table KS402EW)

7.1.2 Tenure: Urban/rural wards

Gwynedd Planning Authority Area[21]

Rank	Percentage of the homes:		
	Owned	Socially rented	Privately rented
Highest	Bethel (82.8%)	Peblig (57.1%)	Menai Bangor (58.1%)
2nd highest	Llanwnda (81.6%)	Marchog (56.6%)	Deiniol (57.1%)
3rd highest	Porthmadog West (80.2%)	Cadnant (40.3%)	Garth (31.4%)
4th highest	Penisarwaun (79.3%)	Hendre (33.6%)	Hirael (29.6%)
5th highest	Groeslon (78.9%)	Llanbedrog (27.6%)	Tudweiliog (27.4%)
Lowest	Deiniol (21.2%)	Porthmadog West (4.2%)	Peblig (5.8%)
2nd lowest	Menai Bangor (29.6%)	Cwm y Glo (5.2%)	Llanwnda (5.9%)
3rd lowest	Marchog (33.0%)	Morfa Nefyn (5.9%)	Groeslon (7.4%)
4th lowest	Peblig (33.3%)	Aberdaron (6.0%)	Bethel (7.6%)
5th lowest	Hendre (37.5%)	Menai Caernarfon (6.3%)	Llanllyfni (7.7%)

Source: 2011 Census (Table KS402EW)

[21] The information in the table only refers to wards that are located entirely or mostly within the Gwynedd Planning Authority area. It is noted that information regarding the Llanuwchllyn ward has not been included in the table above, since the vast majority of the ward is situated within Snowdonia National Park, with only a very small part of it situated outside the National Park area.

Key:

Urban ward – Located wholly or partly in one of the Centres (Sub-regional Centre, Urban Service Centre or Local Service Centre) that are defined in the deposit Joint Local Development Plan

Rural ward – A ward located outside one of the Centres defined in the deposit Joint Local Development Plan.

Anglesey

Rank	Percentage of the homes:		
	Owned	Socially rented	Privately rented
Highest	Cwm Cadnant (85.1%)	Tudur (54.2%)	Holyhead Town (39.4%)
2nd highest	Trearddur (83.1%)	Morawelon (49.1%)	Cadnant (26.9%)
3rd highest	Llanbedrgoch (80.3%)	Maeshyfryd (31.0%)	Llanfair yn Neubwll (25.6%)
4th highest	Brynteg (80.3%)	London Road (29.1%)	Beaumaris (20.4%)
5th highest	Llanddyfnan (79.9%)	Porthyfelin (23.8%)	Rhosneigr (18.2%)
Lowest	Tudur (35.2%)	Trearddur (1.7%)	Cefni (6.3%)
2nd lowest	Morawelon (42.0%)	Llanddyfnan (3.2%)	Morawelon (6.7%)
3rd lowest	Holyhead Town (45.4%)	Brynteg (3.4%)	Tudur (7.4%)
4th lowest	Maeshyfryd (49.3%)	Cwm Cadnant (4.5%)	Valley (7.5%)
5th lowest	London Town (50.4%)	Llanbedrgoch (4.9%)	Parc a'r Mynydd (8.7%)

Source: 2011 Census (Table KS402EW)

Key:

Urban ward – Located wholly or partly in one of the Centres (Sub-regional Centre, Urban Service Centre or Local Service Centre) that are defined in the deposit Joint Local Development Plan

Rural ward – A ward located outside one of the Centres defined in the deposit Joint Local Development Plan

- The vast majority of residential units in Gwynedd (65.7%) and Anglesey (68.8%) at the time of the 2011 Census were owned by those who occupied them. The figure for Anglesey is higher than the percentage for the whole of Wales, whilst the figure for Gwynedd is lower than this percentage.
- A significant percentage of residential units in Gwynedd (16.3%) and Anglesey (14.7%) are socially rented. Both figures however are lower than the all Wales percentage (16.5%).
- Houses that are socially rented either are more prominent in the urban wards of the Gwynedd and Anglesey Planning Authorities, than the rural wards.
- It is noted that the majority of wards that have the highest percentages of houses that are rented privately (in Gwynedd and Anglesey) are urban wards.

- In Gwynedd and Anglesey, houses that are owner-occupied are more prominent (in terms of percentages) in the rural wards as compared to the urban wards.

7.2 Type of housing

Note: The figures are based on the number of households

The percentages noted in the table are based on the number of households in unshared dwellings

	All households	Unshared dwellings										Shared dwelling
		Unshared dwellings:: Total	Whole house or bungalow				Flats, Maisonette or Apartment				Caravan or other mobile or temporary structure	
			Total	Detached	Semi-detached	Terrace (including end terrace)	Total	Purpose built block of flats or tenement	Part of a converted or shared hous (including bedsits)	In a commercial building		
Gwynedd	52,473	52,387 (The basis of the Percentages)	47,013 (89.7%)	17,804 (34.0%)	12,7667 (24.4%)	16,442 (31.4%)	5,124 (9.8%)	3,294 (6.3%)	1,116 (2.1%)	714 (1.4%)	250 (0.5%)	86
Anglesey	30,594	30,577 (The basis of the Percentages)	28,229 (92.3%)	14,534 (47.5%)	6,783 (22.2%)	6,912 (22.6%)	2,136 (7.0%)	1,437 (4.7%)	413 (1.4%)	286 (0.9%)	212 (0.7%)	17
Wales	1,302,676	1,300,696 (The basis of the Percentages)	1,136,208 (87.4%)	361,141 (27.8%)	414,386 (31.9%)	360,681 (27.7%)	160,486 (12.3%)	123,580 (9.5%)	26,124 (2.0%)	10,782 (0.8%)	4,002 (0.3%)	1,980

Source: 2011 Census (Table UVQS402EW)

Gwynedd (Information based upon unshared dwellings)

- 35.0% of households live in detached houses or bungalows.
- 31.4% of households live in terraced housing. This is higher than the Wales average (27.7%).
- The percentage of households who live in semi-detached houses in Gwynedd (24.4%) is much lower than the corresponding percentage for the whole of Wales (31.9%).
- The percentage of households living in flats in Gwynedd (9.8%) is slightly lower than the figure for the whole of Wales (12.3%).

Anglesey (Information based upon unshared dwellings)

- 47.5% of households live in detached houses or bungalows. This is much higher than the average figure for the whole of Wales (27.8%).

- The percentage of households living in semi-detached houses (22.2%) is much lower than the corresponding percentage for the whole of Wales (31.9%).
- 22.6% of all households live in terraced housing, which is lower than the Wales average (27.7%).
- The percentage of households who live in flats in Anglesey (7.0%) is lower than the figure for the whole of Wales (12.3%).

7.3 Age of the housing stock

<u>Gwynedd</u>

- The Welsh House Condition Survey 1998 (Welsh Government) notes that the housing stock in Gwynedd is much older than the general housing stock across Wales. The Survey noted that nearly half the stock in Gwynedd (47%) was built before 1919, compared with 32% for Wales. Amongst Wales' Unitary Authorities, only Rhondda Cynon Taf (54%) had a higher proportion of houses that had been built before 1919, whilst the adjoining authorities of Anglesey and Conwy had proportions of 32% and 28% respectively.

<u>Anglesey</u>

- The Welsh House Condition Survey 1998 (Welsh Government) notes that 32% of Anglesey's housing was built before 1919 (which is the same percentage as for the whole of Wales).
- In a survey of the condition of Anglesey's private housing stock (June 2008) [a sample of 1,812 dwellings], it was noted that around 24.3% of houses in this sample had been built before 1919.

7.4 Condition of the housing stock

* It is noted that there is no comparative information available for the two planning authority areas in terms of this field. A survey of housing condition in Gwynedd was undertaken in 2003. The information for Anglesey however relates to private sector housing only (Private Sector House Condition Survey 2008). The Welsh House Condition Survey that was conducted in 1998 provides information about the condition of the housing stock in both authorities.

Gwynedd

7.4.1 Unfit housing per tenure

Tenure	Percentage of units that are unfit within tenure sector	Percentage of all unfit units belonging to the particular tenure sector
Owner occupied	8.6	73.5
Social housing	3.2	4.1
Private rented	17.6	22.1
Total Gwynedd stock	9.0	100.0

Source: Gwynedd House Condition Survey, 2003

7.4.2 Defective housing per tenure

Note: Defective housing refers to units that may deteriorate in standard and be classed in the 'unfit' category.

Tenure	Percentage of units that are defective within tenure sector	Percentage of all defective units belonging to particular tenure sector
Owner-occupied	18.0	76.0
Social housing	16.3	10.9
Private rented	21.2	13.1
Total Gwynedd stock	18.2	100.0

Source: Gwynedd House Condition Survey, 2003

7.4.3 Review of Private Housing Sector, Glyndŵr University, 2014

As a follow-up to the housing survey undertaken in 2003, Gwynedd Council's Strategic Housing Unit has commissioned a survey of the private housing sector in Gwynedd. This is not a traditional survey of the condition of the housing stock but a desk top review of the work that has been undertaken within the County in recent years in order to establish if an improvement has been seen.

It is noted that the private sector, in the context of private rental, has grown in recent years at the expense of owner-occupation.

On the basis of a review of evidence of the work undertaken in the County, it can be said that the condition of properties has not improved dramatically. The report suggests that approximately 4,500 properties have been improved, mainly through co-ordinated work / intervention by the Council. This means that on average 410 properties are improved every year. These figures are based on a number of different information sources.

Gwynedd and Anglesey

7.4.4 Unfit dwellings per tenure (Welsh House Condition Survey 1998, Welsh Government)

Tenure	Percentage of units that are 'unfit'		
	Wales	Gwynedd	Anglesey
Owner-occupied	7.6%	11.3%	3.9%
Social housing	8.2%	5.6%	3.1%
Private rented housing	18.4%	15.5%	10.2%
All units types	8.5%	10.5%	4.4%

Anglesey [Private Sector House Condition Survey 2008 – sample of 1812 private dwellings]

7.4.5 Distribution of category 1[22] hazards by area

Areas[23]	Percentage of units where a category 1 risk is evident
Anglesey	22.3%
Cybi	11.5%
Alaw	18.2%
Eilian	19.8%

[22] Category 1 hazards are identified on the basis of an evaluation of the potential risks to health and safety from any deficiencies identified in dwellings (based on the Housing Health and Safety Rating System). 29 hazards are identified, arranged in four main groups, reflecting the basic health requirements. The Housing Act 2004 puts Local Authorities under a general duty to take appropriate action in relation to a Category 1 hazard.

[23] The sub-areas are divided as follows:
Cybi: Holyhead Town, Kingsland, London Road, Maeshyfryd, Morawelon, Parc a'r Mynydd and Porthyfelin wards
Alaw: Llanfaethlu, Llanfair yn Neubwll, Trearddur, Trewalchmai and Valley wards
Eilian: Amlwch Port, Amlwch Rural, Llanbadrig, Llaneilian and Mechell wards
Eleth: Brynteg, Llanbedrgoch, Llanddyfnan, Llanerch-y-medd, Moelfre and Pentraeth wards
Cefni: Bodffordd, Cefni, Cyngar, Llanfihangel Esgeifiog and Tudur wards
Menai: Beaumaris, Braint, Cadnant, Cwm Cadnant, Gwyngyll, Llangoed and Tysilio wards
Aethwy: Aberffraw, Bodorgan, Llanidan, Rhosneigr and Rhosyr wards

Areas[23]	Percentage of units where a category 1 risk is evident
Eleth	41.7%
Cefni	18.1%
Menai	16.2%
Aethwy	33.4%

Source: Isle of Anglesey Private Sector House Condition Survey 2008

7.4.6 Distribution of category 1 hazards by tenure

Tenure	Percentage of units where a category 1 risk is evident
Owner occupied	21.0%
Private rented	35.4%
Vacant/other	22.6%

Source: Isle of Anglesey Private Sector House Condition Survey 2008

7.4.7 Unfit dwellings[24] by area

Areas	Percentage of unfit dwellings
Anglesey	2.0%
Cybi	1.2%
Alaw	1.3%
Eilian	1.2%
Eleth	0.8%
Cefni	4.2%
Menai	2.5%
Aethwy	3.4%

Source: Isle of Anglesey Private Sector House Condition Survey 2008

[24] The four main elements that result in dwellings being classified as unfit are:

- Repair (250 dwellings or 47.4% of all unfit dwellings);
- Cooking & food preparation facilities (169 dwellings or 32.1% of all unfit dwellings);
- Bath/shower & wash hand basin (129 dwellings or 24.5% of all unfit dwellings); and
- Dampness (113 dwellings or 21.4% of all unfit dwellings).

7.4.8 Unfit dwellings by tenure

Tenure	Percentage of unfit dwellings
Owner occupied	1.4%
Private rented	5.7%
Vacant/other	3.3%

Source: Isle of Anglesey Private Sector House Condition Survey 2008

- In Gwynedd, it is noted that the majority of ‘unfit’ or ‘defective’ housing are houses that are owner-occupied (the most common housing tenure).
- With respect to the three types of housing tenure, it is the ‘private rented’ sector that has the greatest problems in terms of the percentage of units that are ‘unfit’ / ‘defective’ in Gwynedd and Anglesey.
- The 1998 Survey identifies that, on the whole, the condition of dwellings is worse in Gwynedd compared to Anglesey. This is possibly partly related to the fact that the housing stock in Gwynedd is older that Anglesey's housing stock (see section 7.3).
- While it is noted that the information that is specific for Anglesey concentrates on private housing only, it is apparent that problems (i.e. unfit units or units that contain a category 1 hazard) are more evident in the private rented sector in comparison with the other private sectors (when considering percentages).
- Clear differences exist between different areas of Anglesey in terms of the condition of the private housing stock (within this sample).

7.5 Housing sales

7.5.1 Annual sale of residential units according to type

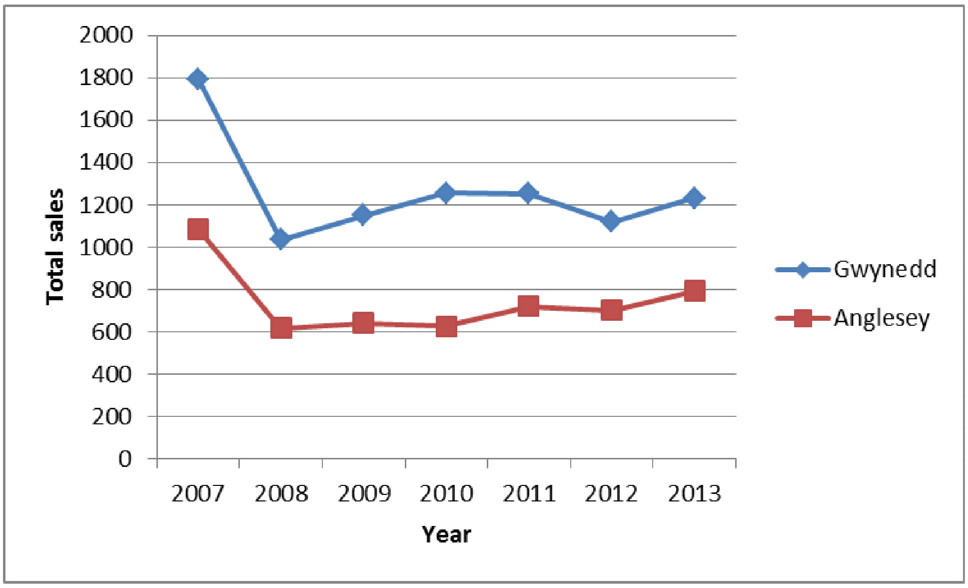
Gwynedd

Year	2nd hand house sales	2nd hand flat sales	New build house sales	New build flat sales	Total sales
2007	1,661 (92.8%)	89 (5.0%)	23 (1.3%)	16 (0.9%)	1,789
2008	951 (92.1%)	58 (5.6%)	16 (1.5%)	8 (0.8%)	1,033
2009	1,074 (93.5%)	44 (3.8%)	16 (1.4%)	15 (1.3%)	1,149
2010	1,158 (92.3%)	52 (4.1%)	25 (2.0%)	19 (1.5%)	1,254
2011	1,175 (93.8%)	55 (4.4%)	18 (1.4%)	4 (0.3%)	1,252
2012	1,055 (94.2%)	46 (4.1%)	13 (1.2%)	6 (0.5%)	1,120
2013	1,133 (92.1%)	55 (4.5%)	31 (2.5%)	11 (0.9%)	1,230

Anglesey

Year	2nd hand house sales	2nd hand flat sales	New build house sales	New build flat sales	Total sales
2007	1,000 (92.5%)	19 (1.8%)	58 (5.4%)	4 (0.4%)	1,081
2008	529 (85.7%)	21 (3.4%)	65 (10.5%)	2 (0.3%)	617
2009	561 (87.7%)	17 (2.7%)	62 (9.7%)	- (0.0%)	640
2010	582 (93.0%)	14 (2.2%)	28 (4.5%)	2 (0.3%)	626
2011	667 (92.6%)	22 (3.1%)	21 (2.9%)	10 (1.4%)	720
2012	614 (87.5%)	27 (3.8%)	42 (6.0%)	19 (2.7%)	702
2013	728 (92.0%)	27 (3.4%)	26 (3.3%)	10 (1.3%)	791

Source: Land Registry



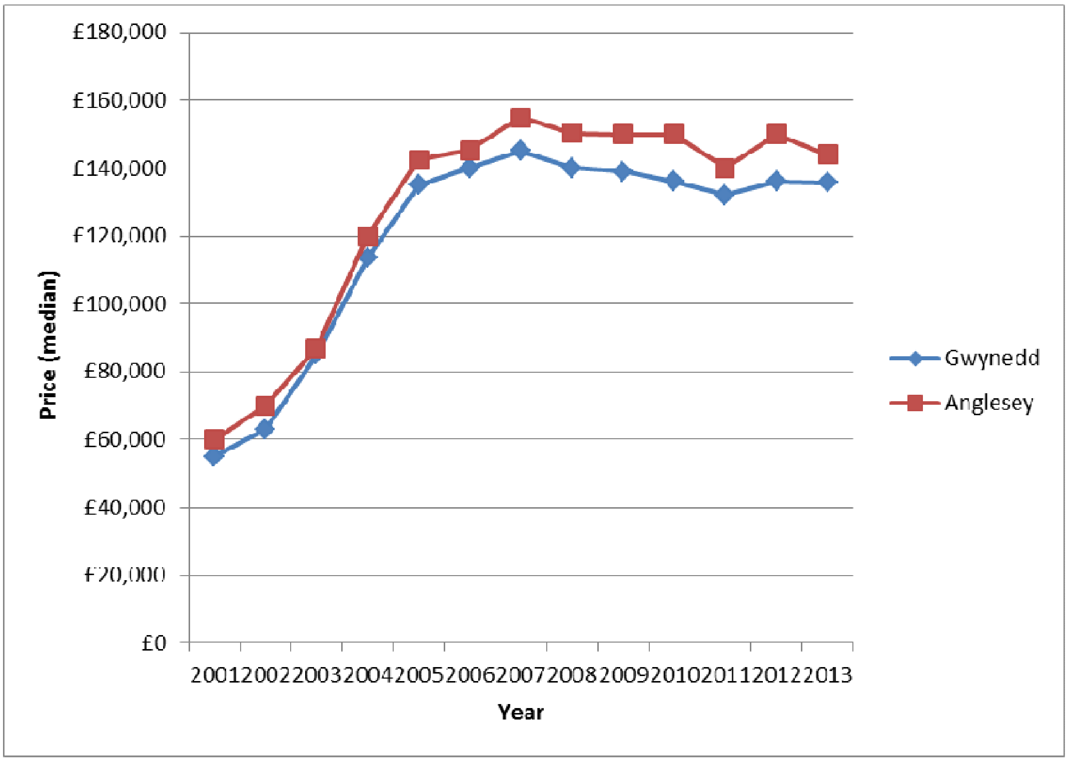
- Second hand housing units (i.e. housing units that are not new build) form the vast majority of residential sales in Gwynedd and Anglesey. These percentages have been slightly higher in Gwynedd (between 92.1% and 94.2% of all sales during the select years) compared to Anglesey (between 85.7% and 93.0% of all sales during the select years).
- New build house sales (i.e. as a percentage of the total number of sales) have been more prevalent in Anglesey than in Gwynedd.
- There was an evident reduction in the total sales between 2007 and 2008 (a reduction of 42.3% in Gwynedd and 42.9% in Anglesey). This probably reflects the economic problems that became evident in the UK in 2008. A small increase in sales after this period with the situation becoming more consistent (with the number of sales much lower than the 2007 level).

7.6 House prices

7.6.1 Prices of residential units – Median based on sales

Year	Gwynedd		Anglesey	
	Price (£)	Number of sales	Price (£)	Number of sales
2001	£55,000	2,429	£59,995	1,261
2002	£63,000	2,480	£70,000	1,490
2003	£85,000	2,268	£87,000	1,359
2004	£113,500	1,875	£120,000	663
2005	£135,000	847	£142,500	466
2006	£140,000	1,792	£145,250	1,090
2007	£145,000	1,807	£155,000	1,197
2008	£140,000	1,097	£150,250	641
2009	£139,000	1,205	£149,999	667
2010	£136,000	1,311	£150,000	665
2011	£132,000	1,252	£140,000	719
2012	£136,000	1,120	£150,000	702
2013	£135,750	1,228	£144,000	787

Source: Land Registry



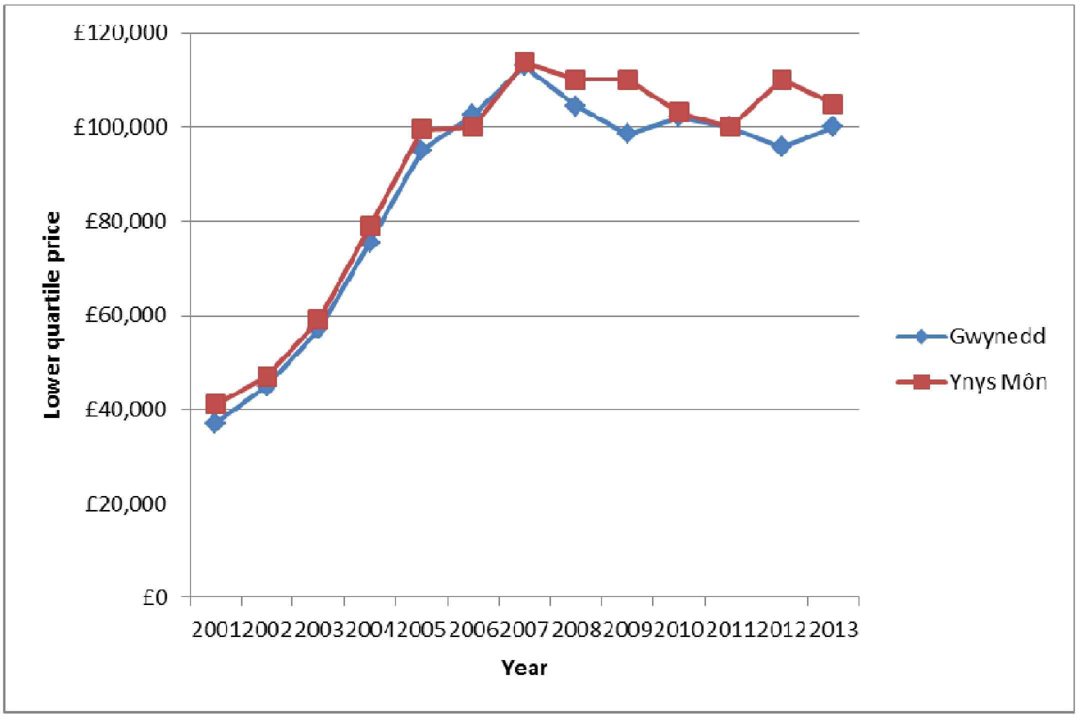
- House prices in Gwynedd increased each year until 2007 (a 163.6% increase in the median house price in Gwynedd between 2001 and 2007). Following this, a clear decrease in the average prices was seen. There was a decrease in house prices every year between 2008 and 2011 before increasing slightly in 2012. This trend probably reflects the economic problems that came to light in Britain in 2008.
- A similar trend was seen in Anglesey, with a continuous increase until 2007 and a decrease after that. There was an increase in 2012 prior to another decrease in 2013. There was an increase of 158.4% in median house prices in Anglesey between 2001 and 2007.
- There was a clear reduction in the number properties that were sold in Gwynedd and Anglesey in the year between 2007 and 2008. In general, there has been a small increase in sales since then. It is presumed that this reflects the impact of the recession upon the housing market, as people were not willing/couldn't afford to sell their houses for a price that is lower than what they bought their houses for. This means that fewer houses are available to be sold.

7.6.2 Lower quartile house prices[25]

Year	Gwynedd		Anglesey	
	Price (£)	Number of sales	Price (£)	Number of sales
2001	£37,000	2,429	£41,000	1,261
2002	£44,963	2,480	£47,000	1,490
2003	£57,000	2,268	£59,000	1,359
2004	£75,500	1,875	£78,950	663
2005	£95,000	847	£99,500	466
2006	£102,500	1,792	£100,000	1,090
2007	£113,000	1,807	£113,750	1,197
2008	£104,500	1,097	£110,000	641
2009	£98,500	1,205	£110,000	667
2010	£102,000	1,311	£103,000	665
2011	£100,000	1,252	£100,000	719
2012	£95,625	1,120	£110,000	702
2013	£100,000	1,228	£105,000	787

Source: Land Registry

[25] If listing all the residential units within the sample in a specific period according to value (from the highest value to the lowest value), the 'lower quartile house price' refers to the value of the property that is exactly 75% of the way down the list.



- Gwynedd: Lower quartile house prices increased every year between 2001 and 2007. There was a clear decrease by 2008, before it subsequently evened out.
- Anglesey: Lower quartile house prices increased every year between 2001 and 2007. There was a constant decrease every year after this before increasing in 2012.

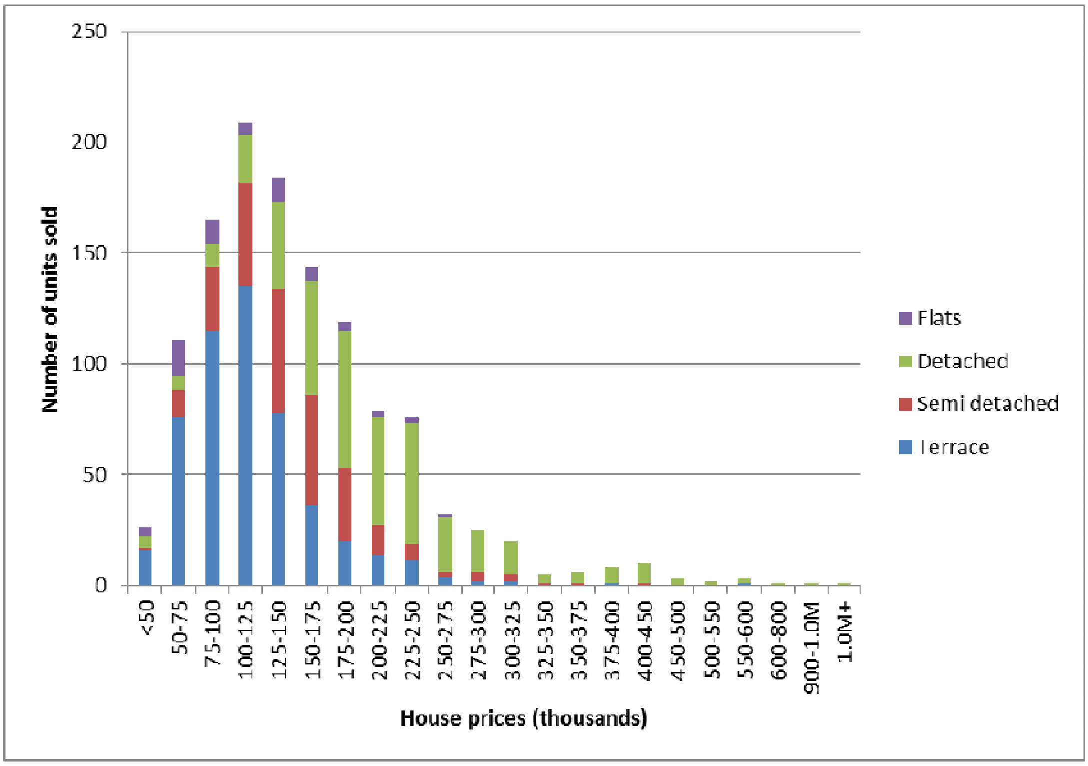
7.7 Number of residential units sold according to price (2013)

Gwynedd

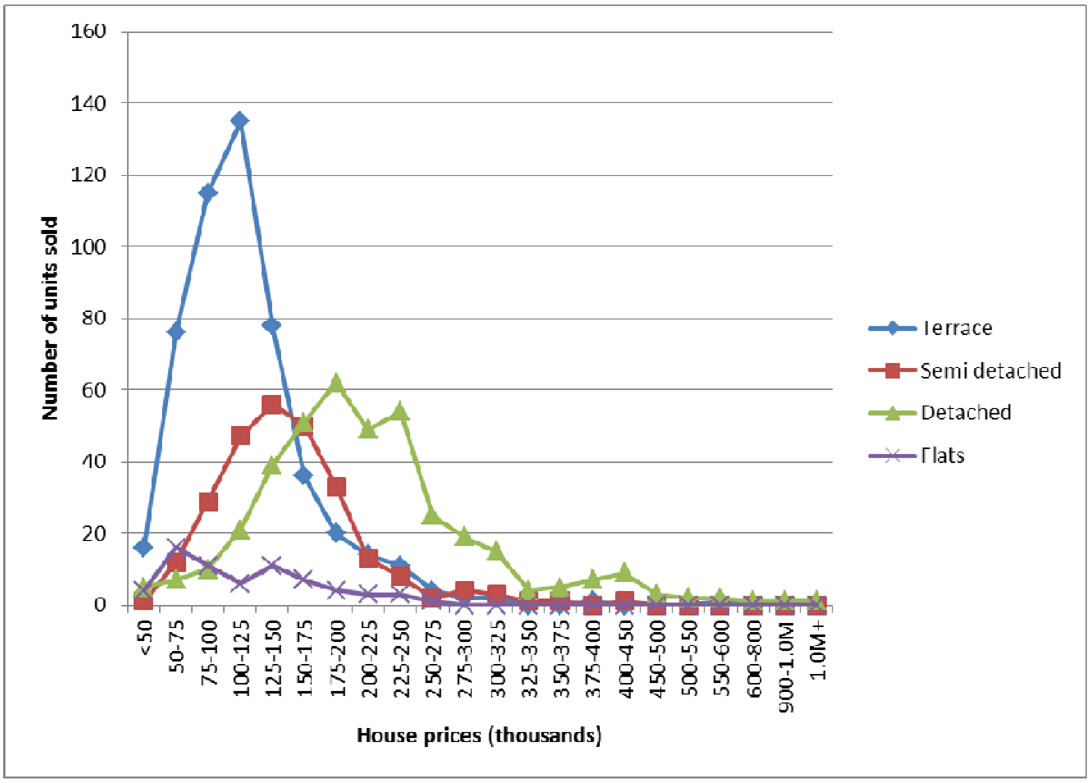
<table>
<tr><td></td><td colspan="11">Price (£ thousands)</td><td></td></tr>
<tr><td>Type of unit</td><td><50</td><td>50-75</td><td>75-100</td><td>100-125</td><td>125-150</td><td>150-175</td><td>175-200</td><td>200-225</td><td>225-250</td><td>250-275</td><td>275-300</td><td></td></tr>
<tr><td>Terrace</td><td>16</td><td>76</td><td>115</td><td>135</td><td>78</td><td>36</td><td>20</td><td>14</td><td>11</td><td>4</td><td>2</td><td></td></tr>
<tr><td>Semi-detached</td><td>1</td><td>12</td><td>29</td><td>47</td><td>56</td><td>50</td><td>33</td><td>13</td><td>8</td><td>2</td><td>4</td><td></td></tr>
<tr><td>Detached</td><td>5</td><td>7</td><td>10</td><td>21</td><td>39</td><td>51</td><td>62</td><td>49</td><td>54</td><td>25</td><td>19</td><td></td></tr>
<tr><td>Flats</td><td>4</td><td>16</td><td>11</td><td>6</td><td>11</td><td>7</td><td>4</td><td>3</td><td>3</td><td>1</td><td>0</td><td></td></tr>
<tr><td>Total</td><td>26</td><td>111</td><td>165</td><td>209</td><td>184</td><td>144</td><td>119</td><td>79</td><td>76</td><td>32</td><td>25</td><td></td></tr>
<tr><td>Type of unit</td><td>300-325</td><td>325-350</td><td>350-375</td><td>375-400</td><td>400-450</td><td>450-500</td><td>500-550</td><td>550-600</td><td>600-800</td><td>800-1.0M</td><td>1.0M+</td><td>Total</td></tr>
<tr><td>Terrace</td><td>2</td><td>0</td><td>0</td><td>1</td><td>0</td><td>0</td><td>0</td><td>1</td><td>0</td><td>0</td><td>0</td><td>511</td></tr>
<tr><td>Semi-detached</td><td>3</td><td>1</td><td>1</td><td>0</td><td>1</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>261</td></tr>
<tr><td>Detached</td><td>15</td><td>4</td><td>5</td><td>7</td><td>9</td><td>3</td><td>2</td><td>2</td><td>1</td><td>1</td><td>1</td><td>392</td></tr>
<tr><td>Flats</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>66</td></tr>
<tr><td>Total</td><td>20</td><td>5</td><td>6</td><td>8</td><td>10</td><td>3</td><td>2</td><td>3</td><td>1</td><td>1</td><td>1</td><td>1230</td></tr>
</table>

Source: Land Registry, 2013

Number of sales according to price – All types of residential units



Number of sales according to price – Specific types of residential units

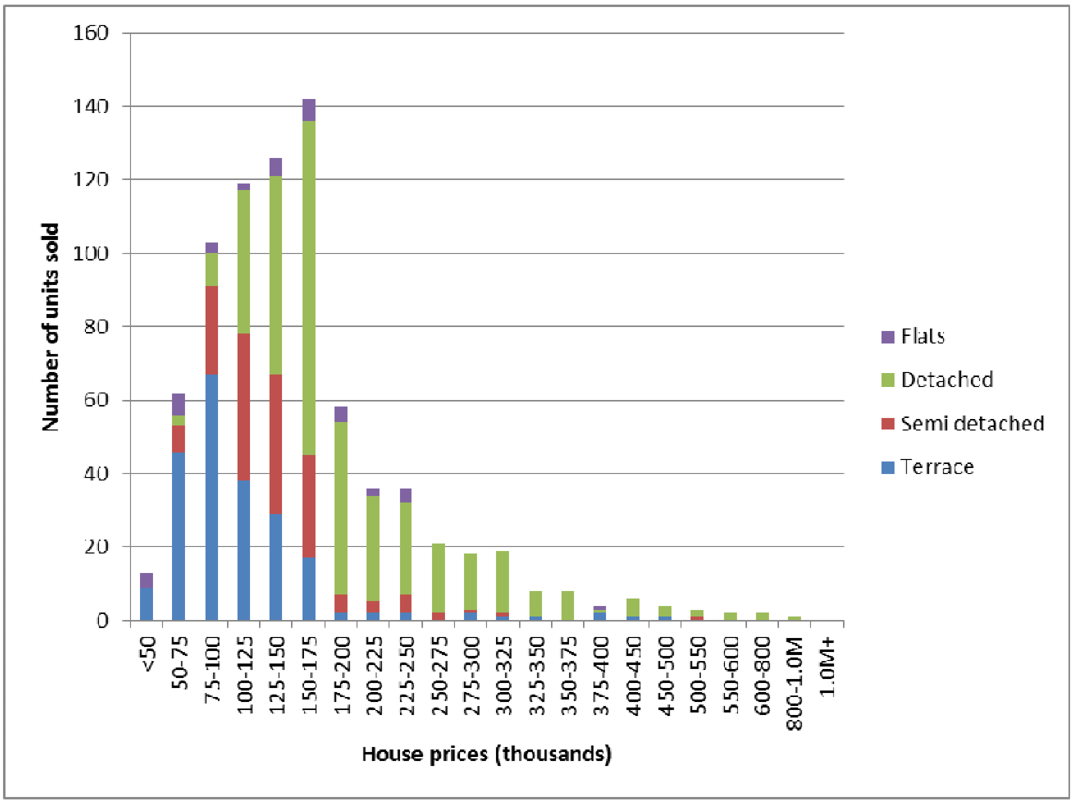


Anglesey

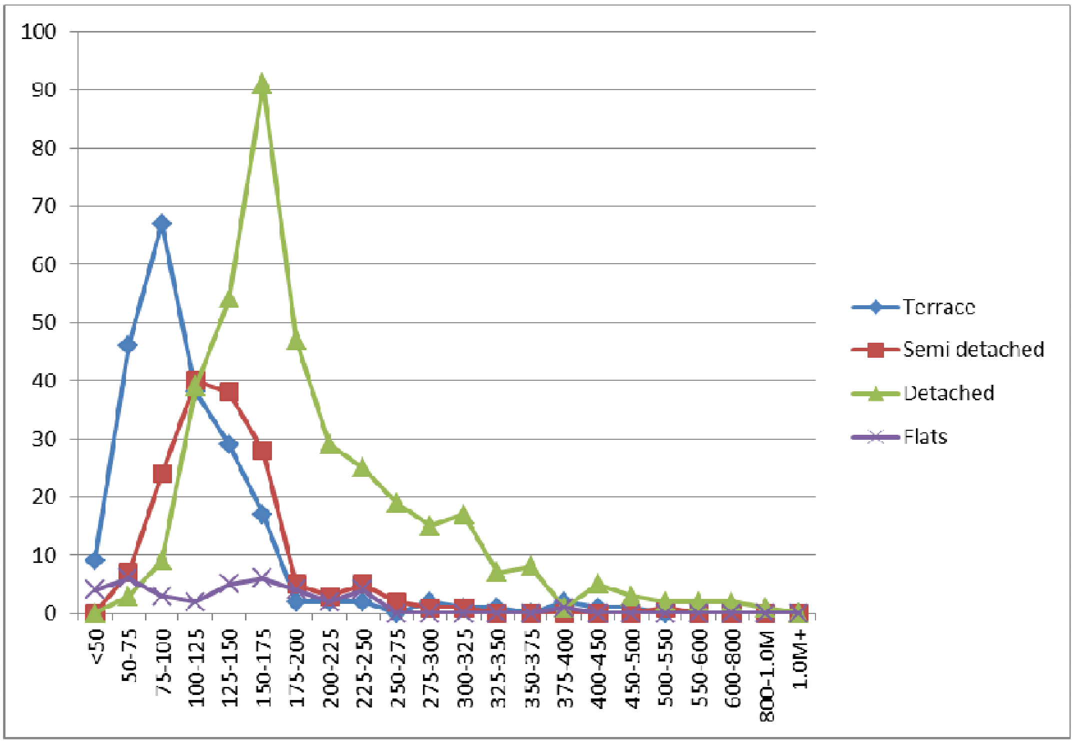
	Price (£ thousands)											
Type of unit	**<50**	**50-75**	**75-100**	**100-125**	**125-150**	**150-175**	**175-200**	**200-225**	**225-250**	**250-275**	**275-300**	
Terrace	9	46	67	38	29	17	2	2	2	0	2	
Semi-detached	0	7	24	40	38	28	5	3	5	2	1	
Detached	0	3	9	39	54	91	47	29	25	19	15	
Flats	4	6	3	2	5	6	4	2	4	0	0	
Total	**13**	**62**	**103**	**119**	**126**	**142**	**58**	**36**	**36**	**21**	**18**	
Type of unit	**300-325**	**325-350**	**350-375**	**375-400**	**400-450**	**450-500**	**500-550**	**550-600**	**600-800**	**800-1.0M**	**1.0M+**	**Total**
Terrace	1	1	0	2	1	1	0	0	0	0	0	220
Semi-detached	1	0	0	0	0	0	1	0	0	0	0	155
Detached	17	7	8	1	5	3	2	2	2	1	0	379
Flats	0	0	0	1	0	0	0	0	0	0	0	37
Total	**19**	**8**	**8**	**4**	**6**	**4**	**3**	**2**	**2**	**1**	**0**	**791**

Source: Land Registry, 2013

Number of sales according to price – All types of residential units



Number of sales according to price – Specific types of residential units



Gwynedd

- More terraced houses were sold in Gwynedd during 2013 than any other type of residential unit.
- More residential units (i.e. all types of residential units) were sold within the price category £100,000-125,000 in Gwynedd in 2013 than in any other price category. The second most common price category was £125,000-150,000 with £75,000-100,000 being the third.
- The most prominent price category for terraced housing was £100,000-£125,000, with a substantial number also been sold in the price category £75,000 to £100,000.
- The most prevalent price category for semi-detached house sales was £125,000-£150,000 with a substantial number also sold for between £100,000-125,000 and £150,000-175,000.
- £175,000-£200,000 was the most prevalent price category for detached house sales in Gwynedd.

Anglesey

- More detached houses were sold in Anglesey during 2013 than any other type of residential unit.
- More residential units (i.e. all types of residential units) were sold within the price category £150,000-175,000 in Anglesey in 2013 than in any other price category. The most common price categories after that were £125,000-150,000 and then £75,000-100,000.

- The most prominent price category for terraced housing was £75,000-£100,000.
- The most prevalent price category for semi-detached house sales was £100,000-125,000, with a substantial number also being sold for between £125,000 and £150,000.
- £150,000-175,000 was the most prevalent price category for detached house sales in Anglesey.

7.8 Affordability Ratio (2013)[26]

<table>
<tr><th colspan="2">Local Authority</th><th>Affordability ratio</th><th>Local Authority</th><th>Affordability ratio</th></tr>
<tr><td colspan="2">Gwynedd</td><td>6.1</td><td>Anglesey</td><td>6.0</td></tr>
<tr><th colspan="2">Selection of specific wards</th><th>Affordability ratio</th><th>Selection of specific wards</th><th>Affordability ratio</th></tr>
<tr><td rowspan="5">Wards with the highest affordability ratio</td><td>Llanbedrog</td><td>15.3</td><td>Rhosneigr</td><td>9.9</td></tr>
<tr><td>Abersoch</td><td>13.0</td><td>Cadnant</td><td>8.7</td></tr>
<tr><td>Llanengan</td><td>10.3</td><td>Beaumaris</td><td>8.3</td></tr>
<tr><td>Aberdaron</td><td>9.6</td><td>Aberffraw</td><td>7.9</td></tr>
<tr><td>Pwllheli South</td><td>9.4</td><td>Llanddyfnan</td><td>7.8</td></tr>
<tr><td rowspan="6">Wards with the lowest affordability ratio</td><td>Diffwys & Maenofferen (Blaenau Ffestiniog)</td><td>3.3</td><td>Llanfair-yn-Neubwll</td><td>3.3</td></tr>
<tr><td>Cwm y Glo</td><td>3.6</td><td>Kingsland, Holyhead</td><td>3.7</td></tr>
<tr><td>Penygroes</td><td>3.9</td><td>Braint</td><td>3.7</td></tr>
<tr><td>Llanllyfni</td><td>4.1</td><td>Holyhead Town</td><td>4.0</td></tr>
<tr><td rowspan="2">Bowydd & Rhiw (Blaenau Ffestiniog)</td><td rowspan="2">4.1</td><td>Porthyfelin</td><td>4.1</td></tr>
<tr><td>London Road, Holyhead</td><td>4.1</td></tr>
</table>

Source: Land Registry and CACI Paycheck

[26] The affordability ratio is based on the median house price to median income ratio.

- In 2013, median house prices in Gwynedd were 6.1 times greater than the median income. In Anglesey, this figure was 6.0. It is noted that these figures are higher than the ideal ratio, which are 2.9 for an individual income and 3.5 for dual income.
- There are obvious differences in the affordability ratio between different wards in the planning authorities of Gwynedd and Anglesey.
- In Gwynedd, median house prices are significantly higher than the median income in some wards in the Llŷn Peninsula.
- Whilst on the whole, the values of the highest affordability ratios in the Anglesey wards are lower than the corresponding figures in Gwynedd, clear differences can be seen between the values of the highest and lowest ratios.

7.9 Annual need for affordable housing

- The Anglesey Local Housing Market Assessment and a Housing Needs Study in Gwynedd provide a snapshot of the scale of affordable housing likely to be required in Anglesey and Gwynedd. It is noted that this figure is approximately 1,344 housing units per annum for 5 years to meet backlog and emerging needs
- This is based upon approximately 709 affordable units per annum in Gwynedd and 635 affordable units per annum in Anglesey.
- These figures have been based on distributing the affordable housing need over a period of 5 years and they based upon Welsh Government methodology which calculates 25% of household income on housing costs.
- The assessments also indicated that across the Plan area most of the need was for social rented units rather than shared ownership dwellings.
- It is noted that this is not a statement of the number of affordable houses that will need to be built, as a portion of the need could also be met by alternative means.

7.10 Empty properties

Wards with the greatest number of empty properties

The information in these tables refer to residential units that have been empty for 6 months or more.

Gwynedd Planning Authority[27]

Ward	Number of empty properties
Bowydd and Rhiw	35
Criccieth	32
Abermaw	27
Diffwys and Maenofferen	24
Pwllheli (North)	24
Corris / Mawddwy	23
Teigl	23
Llanystumdwy	23

Source: Private Housing Sector Service, Gwynedd Council, 7/1/13

Anglesey[28]

Community Council Area	Number of empty properties
Holyhead	130
Amlwch	85
Llangefni	52

Source: Isle of Anglesey County Council Housing Services, 1st April, 2014

- The majority of wards / Community Council areas that have the highest number of long-term empty properties are urban in nature.
- Data from the Gwynedd Council's Private Housing Sector Service (7/1/13) notes that there are 1,078 long-term empty properties in Gwynedd.
- In April 2014, there were 855 empty properties in Anglesey (information provided by Isle of Anglesey County Council's Housing Service).
- A study by Shelter Cymru (July 2008) noted that Gwynedd had the eighth highest number of long-term empty properties amongst all of Wales' Local Authorities (the study noted that there were 1,308 empty properties in Gwynedd). It was noted that Anglesey had the 18th highest number of empty properties (716 empty properties).

[27] Gwynedd Local Planning Authority area only
[28] Empty homes that are unfurnished and exempt from having to pay Council Tax (February 2010)

7.11 Unoccupied homes and second homes

7.11.1 Household spaces with no usual residents (Household spaces) – 2011 Census

	Gwynedd	Anglesey	Wales
Household spaces with no usual residents (number)	8,602	3,589	82,845
Household spaces with no usual residents (percentage)	14.1%	10.5%	6.0%
All household spaces	61,075	34,183	1,385,521

Source: Table KS401EW, 2011 Census

7.11.2 Selection of specific wards[29] - 2011 Census

	Household spaces with no usual residents			
	GWYNEDD		ANGLESEY	
	Ward	Percentage	Ward	Percentage
Wards with the highest percentages	Abersoch	54.0	Rhosneigr	42.7
	Llanengan	34.7	Trearddur	31.6
	Gorllewin Porthmadog	33.0	Moelfre	25.8
	Aberdaron	30.1	Llanbedrgoch	18.0
	Morfa Nefyn	28.2	Llangoed	15.9
Wards with the lowest percentages	Glyder	2.4	London Road	1.8
	Dewi	2.7	Morawelon	2.4
	Marchog	2.7	Tudur	2.5
	Peblig	2.9	Kingsland	3.3
	Cadnant	3.0	Tysilio	3.8

Source: Table KS401EW, 2011 Census

- The information in this table refers to empty homes as well as second homes/holiday accommodation (combined). This information was not split in the 2011 Census as it was in the 2001 Census.

[29] Only wards situated within the Gwynedd Planning Authority area were considered in this table.

- The percentage of household spaces with no usual residents in Gwynedd is much higher than the corresponding percentage for the whole of Wales.
- The percentage of household spaces with no usual residents in Anglesey is also significantly higher than the corresponding percentage for the whole of Wales.
- The wards with the lowest percentages of household spaces with no usual residents are located within urban areas.
- The wards with the highest percentages of household spaces with no usual residents are, in general terms, popular coastal locations.

7.11.3 Second homes – Council Tax information, Gwynedd and Anglesey (November 2013)[30]

Local Authority		Percentage of second homes	Local Authority	Percentage of second homes
Gwynedd		**6.1**	**Anglesey**	**8.0**
Selection of Community Council areas		**Percentage of second homes**	**Selection of Community Council areas**	**Percentage of second homes**
Community Council areas with the highest percentage of second homes	Llanengan	39.8	Llanfaelog	25.5
	Aberdaron	24.5	Trearddur	25.3
	Betws Garmon	22.7	Rhoscolyn	21.6
	Llanbedrog	21.1	Moelfre	18.1
	Arthog	19.6	Cylch y Garn	11.8
	Nefyn	18.6	Llaneugrad	11.4
	Pistyll	16.6	Llanddona	10.8
Community Council areas with the lowest percentage of second homes	Caernarfon	0.5	Llangefni	1.1
	Bontnewydd	0.8	Holyhead	1.5
	Bangor	0.8	Llanfairpwllgwyngyll	1.6
	Bethesda	1.0	Trewalchmai	1.9
	Pentir	1.5	Llanfachraeth	2.0

Source: Finance Service, Isle of Anglesey County Council and Finance Department, Gwynedd Council

[30] Information deriving from Council Tax information (Finance Service, Isle of Anglesey County Council and Finance Department, Gwynedd Council), November 2013. Information on the basis of Community Council areas.

- A significant percentage of second homes in certain Community Council areas within Gwynedd and Anglesey.
- In general, the Community Council areas with the highest percentages of second homes in Gwynedd and Anglesey are located in coastal locations.
- Overall, the Community Council areas with the lowest percentages of second homes are more urbanised locations.

7.12 Funding Affordable Housing

7.12.1 Social Housing Grant levels

Gwynedd

Year	Social Housing Grant level
2011/12	£2,046,743.00
2012/13	£1,620,102.62
2013/14	£1,435,533.97
2014/15	£1,435,534.00
2015/16	£1,435,000.00

Source: Housing Service, Gwynedd Council

Anglesey

Year	Social Housing Grant level
2011/12	£1,096,318
2012/13	£1,055,128
2013/14	£934,924
2014/15	£934,924
2015/16	£934,924

Source: Housing Services, Isle of Anglesey County Council

7.12.2 Comments from the former Anglesey Rural Housing Enabler (2015)

- The Social Housing Grant level has reduced in Anglesey. However the Council have recently been successful in receiving additional grants (such as slippage money from Social Housing Grants). In total, for example, the grants received by the Isle of Anglesey County Council for the years noted above were as follows:

  2011/12: £1,096,318.23
  2012/13: £2,080,382.17
  2013/14: £1,108,263.84

2014/15: £1,093,924.00

- It is noted however that this additional money is not guaranteed. The level of additional grant varies from year to year. For instance in 2011/2, no additional grant was received.
- The Welsh Government offer another funding source to Housing Associations, namely the Revenue Grant. This money is for paying the annual interest on mortgages by housing associations to develop social housing
- Isle of Anglesey County Council has been successful with applications for Smaller Housing Grant with the possibility of receiving an extra £700,000 in 2015. This will enable the provision of approximately 9-10 two bedroom units.
- Whilst Social Housing Grant is reducing, these other funding sources have helped to close the gap. However, these additional grants are not guaranteed and there is a need to apply for them. The challenge therefore is to ensure that there are enough schemes in progress to take advantage if/when the money is available.
- To make the Social Housing Grant go further, some Housing Associations have also developed intermediate rent housing where the grant pays for 25% of the cost of the unit (as opposed to 58% for social housing). This means that they can raise more rent. Such a scheme does not work everywhere and there is a need to look at local demand and income/affordability. With these schemes there is a means of fully buying the property at a later date (after approximately 5 years) but this cannot happen on an exception site.

7.12.3 Additional affordable housing delivered by Capital Grant Funding[31] - Information for the whole of Wales

	2009-10	2010-11	2011-12	2012-13	2013-14
Number of affordable units delivered					
With capital grant funding	1,817	2,127	1,548	1,274	1,357
Without capital grant funding	553	359	884	768	1,059
Total	2,370	2,486	2,432	2,042	2,416
Percentage delivered					
With capital grant funding	77	86	64	62	56
Without capital grant funding	23	14	36	38	44
Total	100	100	100	100	100

[31] Capital Grants Funding includes Social Housing Grant (SHG), any recycled Social Housing Grant (RCG) or Strategic Capital Investment Fund (SCIF) and the Housing Finance Grant but excludes those housing units funded from other sources.

Source: 'Affordable Housing Provision in Wales 2013-14' report (published: 23rd October, 2014), Welsh Government

7.12.4 <u>Comments from 'Innovative financing of affordable housing: International and UK perspectives' report, Joseph Rowntree Foundation (March 2013)</u>

- In a challenging fiscal context, innovation is needed to stretch limited public subsidy and increase private contributions to help deliver additional affordable housing.
- The financial crisis and its ramifications have initiated a fundamental reassessment of how to provide non-market housing, who will receive it and on what terms. Affordable housing policy, while financially much reduced, is remarkably fluid and subject to innovations and novelty. It remains essential that such innovation be securely located in a long-term policy framework that is coherent, progressive, inclusive for those in pressing housing need, and consistent with tackling market failures.

7.12.5 <u>Proposed Gwynedd Community Land Trust (GCLT) – Viability and deliverability</u>

- Work has been undertaken by Resonance Ltd to assess the potential to form a Gwynedd Community Land Trust (GCLT) – an 'umbrella' organisation that resources individual, local Community Land Trusts to meet site-specific, community housing need.
- Community Land Trusts aim to deliver homes and community assets in places where needs cannot be met by other mechanisms. They ensure homes are affordable in perpetuity and sold to those with locally identified need. The GCLT would aim to enable the provision of 'intermediate market' homes by, or on behalf of, localised CLTs. There is a strong community element to CLTs – it aims to bring communities together to try to meet local affordable housing demand. .
- A specific and prominent aspect of this proposal is that GCLT has the ability, where necessary, to create cross-subsidies by developing and selling a proportion of the completed homes within a scheme on the open market.
- For the GCLT to be successful, specific schemes have to be financially viable. If there is no profit, schemes will not be delivered. Providing a small open market element within specific schemes would help to achieve this and consequently to provide affordable housing to meet local needs. Given that particular schemes are governed by Community Land Trusts, they would have control over who would occupy the open market dwellings. Profit should be minimal in order to be able to deliver the maximum number of affordable housing. The open market dwellings should only help to ensure the viability of schemes. This profit will be recycled within the GCLT to deliver more affordable housing to meet local needs. This profit would also help to fund an officer to work with community in order to bring a scheme forward.

- To demonstrate the importance of providing a minimal number of open market housing to ensure the viability of schemes, Resonance undertook general viability / costings exercise for potential CLT schemes. Two of these (specific scheme details removed) are noted below and they demonstrate how providing a minimal number of open market housing in specific circumstances would assist the provision of affordable housing units.

Example 1: (Source: Resonance Ltd)

						NOTES	**Total**
	Size/Type	Number	Gross Internal Area m²	Loan			£
Rental Units				0		*1*	0
	Rental 1 bed	0		0			0
	Rental 2 bed	0		0			
	Rental 3 bed	0		0			0
For Sale Units				Open Market Value	% Open Market Value		Equity sale
	Discounted Sale 1 bed	0		0	70%	*2*	
	Discounted Sale 2 bed	0		0	70%		0
	Discounted Sale 3 bed	7		225,000	60%		945,000
	Discounted Sale 4 bed	0		0	70%		0
	Open Market Sale 1 bed	0		0	100%		0
	Open Market Sale 2 bed	0		0	100%		0
	Open Market Sale 3 bed	2		225,000	100%		450000
	Open Market Sale 4 bed	0		0	100%		0
Grants							0
TOTALS		9					**1,395,000**
Build & selling Period		12	Months				

LAND			Plot m²	Total		£	
	Land	£30k x 9		270,000			
	Valuations		0	0			
	Legals - Acquisition / plot		312.5	2,813		272,813	
PLANNING/BUILDING REGS							
	Legal Section 106 fee			0			
	Planning fee			2,970			
	Building regulations fee			3,132		6,102	
CONSTRUCTION			£/m²				
	Build Cost	*(Rental Units only)*		0	*3*		
	Build Cost	*(Sales Units only)*		787,200			
	Infrastructure			146,790			
	Abnormals			0			
	Build contingency		2.5%	19,680		953,670	
FEES							
	Architect			6,500			
	Others (e.g. engineer)		0	10,500			
	Quantity Surveyor / Project Manager / CDM		0	5,000			
	10 year guarantees		1,200	10,800		32,800	1,265,385
OTHER		*subtotal (Rental Units only)*	0				
		subtotal (Sales Units only)	992,572				992,572
	CLT development agency fees			0			
	CLT project fee		2.50%	24,814		24,814	*CLT*
FINANCE		*subtotal including CLT fees*	1,017,386				
	Bank Fees (arrangement)		0.00%	0	*4*		
	Interest over Build Period		4.00%	41,450			
	Legal and Valuation		2.50%	5,755		47,205	

SALES		*(Sales Units only)*				
	Agents OR	CLT is 'agent'	0.00%	0		*CLT*
	Legals		857	6,000	6,000	
VAT			0%		0	
TOTAL					**1,343,403**	
SURPLUS/DEFICIT					**51,597**	
CLT EQUITY		Part-equity home	30.00%		283,500	
		Rental home			0	
TOTAL					283,500	
(NB: only realisable subject to terms of s106 agreement)						
NOTES						
1	2 three bed and 2 two bed rental homes at Local Housing Authority rental levels.					
2	2 three bed and 2 two bed shared equity homes at 67% of Open Market Value.					
3	Build cost has been assumed at £1150 per square metre but that a Design & Build Contract in the sum of £600,000 will be entered into with a construction company.					
4	Finance costs in construction estimated on basis of CLT being the borrower					

- It is therefore seen that the surplus of such a scheme would be £51,597 (7 affordable housing units, 2 open market units). However, if all the units would be affordable (at the same percentage discount as with all the affordable housing proposed), this would lead to a deficit of a £128,403. The scheme would therefore not be financially viable and it not likely that it would be delivered - at the expense of 7 affordable housing units.

Example 2: (Source: Resonance Ltd)

						NOTES	Total
	Size/Type	Number	Gross Internal Area m^2	Loan			£
Rental Units				0		*1*	0
	Rental 1 bed	0		0			0
	Rental 2 bed	0		0			
	Rental 3 bed	0		0			0
For Sale Units				Open Market Value	% Open Market Value		Equity sale
	Discounted Sale 1 bed	0		0	70%	*2*	
	Discounted Sale 2 bed	0		0	70%		0
	Discounted Sale 3 bed	7		185,000	70%		906,500
	Discounted Sale 4 bed	0		0	70%		0
	Open Market Sale 1 bed	0		0	100%		0
	Open Market Sale 2 bed	0		0	100%		0
	Open Market Sale 3 bed	2		185,000	100%		370000
	Open Market Sale 4 bed	0		0	100%		0
Grants							0
TOTALS		9					**1,276,500**
Build+Sold Period		12	Months				
LAND			Plot m^2	Total		£	
	Land	£20k x 9		180,000			
	Valuations		0	0			
	Legals - Acquisition* /plot		312.5	2,813		182,813	
PLANNING/BUILDING REGS							
	Legal Section 106 fee*			0			
	Planning fee			2,970			
	Building regulations fee			3,132		6,102	

CONSTRUCTION			£/m²				
	Build Cost	*(Rental Units only)*		0	*3*		
	Build Cost	*(Sales Units only)*		787,200			
	Infrastructure			146,790			
	Abnormals			0			
	Build contingency		2.5%	19,680		953,670	
FEES							
	Architect			6,500			
	Others (e.g. engineer)		0	10,500			
	QS / PM* / CDM		0	5,000			
	10 year guarantees		1,200	10,800		32,800	1,175,385
OTHER		*subtotal (Rental Units only)*	0				
		subtotal (Sales Units only)	992,572				992,572
	CLT development agency fees			0			
	CLT project fee		2.50%	24,814		24,814	*CLT*
FINANCE		*subtotal including CLT fees*	1,017,386				
	Bank Fees (arrangement)		0.00%	0	*4*		
	Interest over Build Period		4.00%	41,450			
	Legal and Valuation*		2.50%	5,755		47,205	
SALES		*(Sales Units only)*					
	Agents OR	CLT is 'agent'	0.00%	0			*CLT*
	Legals*		857	6,000		6,000	
VAT			0%			0	
TOTAL						**1,253,403**	
SURPLUS/DEFICIT						**23,097**	
CLT EQUITY		Part-equity home		30.00%		271,950	
		Rental home				0	
TOTAL						271,950	

(NB: only realisable subject to terms of s106 agreement)							
NOTES							
1	2 three bed and 2 two bed rental homes at Local Housing Authority rental levels.						
2	2 three bed and 2 two bed shared equity homes at 67% of Open Market Value.						
3	Build cost has been assumed at £1150 per square metre but that a Design & Build Contract in the sum of £600,000 will be entered into with a construction company.						
4	Finance costs in construction estimated on basis of CLT being the borrower						

- It is therefore seen that the surplus of such a scheme would be £23,097 (7 affordable housing units, 2 open market units). However, if all the units would be affordable (at the same percentage discount as with all the affordable housing proposed), this would lead to a deficit of a £87,903. The scheme would therefore not be financially viable and it not likely that it would be delivered - at the expense of 7 affordable housing units.

Comments

- Social Housing Grant has reduced significantly in recent years.
- It is noted however that other grants and sources of money are available to fund affordable housing. However these funding sources are not guaranteed. They cannot be relied upon to fund affordable housing projects. For instance, it is noted that some of the additional grant received by the Isle of Anglesey County Council derives from slippage money from the Social Housing Grant. If every Authority used all their grant money, then this additional money would not be available.
- Vitally important to ensure that other sources fund new affordable housing to meet demand.
- Innovation is vitally important to ensure additional affordable units in circumstances where there is a reduction in grants or where there is less certainty in receiving grant money.
- Significant increase in the number of affordable units provided without Capital Grant funding in Wales in recent years. The percentage of affordable units provided without such grant money has also increased significantly.
- It is important to ensure new and innovative ways of providing new affordable units without depending on grants, especially the Social Housing Grant.
- Community Land Trusts is an example of such an innovative approach – however it is vital that schemes are financial viability in order for the affordable housing to be provided.

7.13 Rural exception sites[32]

7.13.1 Rural exception sites – developments and permissions

Gwynedd

Year	Affordable units that received planning permission on rural exception sites	Affordable units built on rural exception sites
2011-12	4	17
2012-13	2	2
2013-14	0	2
2014-15	2	3

Anglesey

Year	Affordable units that received planning permission on rural exception sites	Affordable units built on rural exception sites
2011-12	1	1
2012-13	22[33]	0
2013-14	1	0
2014-15	18	1

7.13.2 Information from the Gwynedd Rural Housing Enabler (2015)

The number of affordable housing units developed with social housing grant on rural exception sites because it wasn't possible to develop the houses within the development boundary or to be financially viable without social housing grant (2004 – 2015)[34]

Community Council	Settlement	Background	Number of affordable units completed with Social Housing Grant	A need for Social Housing Grant to make the scheme viable?

[32] Rural exception sites are a mechanism to provide affordable housing. Rural exception sites that are located outside development boundaries are focussed upon.
[33] 11 of these units are a renewal of a previous planning permission
[34] Information for sites within the Gwynedd Planning Authority area only

Llandderfel	Llandderfel,	Development site outside the development boundary on an exception site because there wasn't another site available as it was affordable housing that was considered. Sites within the development boundary not likely because the market housing that were permitted were not completed.	5 (public land)	✓
Dolbenmaen	Garndolbenmaen,	Development site outside the development boundary on an exception site because there wasn't another site available as it was affordable housing that was considered.	8 (public land)	✓
Llanbedrog	Llanbedrog	Exception land because there wasn't a site available for affordable houses within the development boundary of the village.	12	✓
Nefyn / Morfa Nefyn	Morfa Nefyn	Site on privately owned exception land and no development land available within the boundary	14	✓
Botwnnog	Botwnnog	Only privately owned exception land was available	12 (Strategic Capital Investment Fund - SCIF)	✓
Abersoch	Abersoch	Only privately owned exception land was available	20	✓

7.13.3 Comments from the former Anglesey Rural Housing Enabler (2015)

- Not aware of any exception site that has been developed without the inclusion of a housing association due to it not being viable.
- The challenge is to build quality houses that are affordable to the local income. Tai Teg[35] shows that there is interest in houses for purchasing as not everyone wants a social house but it is difficult to promote Tai Teg because there are not enough houses to offer.
- With the ability to build a small number of market housing to subsidise the affordable housing, it would be possible to provide more affordable housing. At present, the choice is 100% affordable housing or none at all. It is also possible that it would open the door to a local partnership / Community Land Trust to develop; therefore this should not be considered as an advantage only to the private sector. However, there is a need to ensure the correct balance of market/affordable housing to make the development viable with the majority being affordable. Therefore it should not be seen as an opportunity to make a profit. With an exception site, local consultation would have to be undertaken to prove the need for the housing – either market or affordable, ensuring therefore that it is less likely of being speculative.

7.13.4 Gwynedd Council and Ynys Môn County Council Affordable Housing Study – Update Viability Report (October 2014), Andrew Golland Associates (This report forms a Background Paper to the JLDP)

Comments regarding the viability of providing affordable units

- The Land Registry House Price Index, which provides the most comprehensive database on market transactions, shows that between November 2012 and August 2014 house prices in Anglesey rose by 0.08% (almost 1%). This is a very marginal increase, but nevertheless a positive one.
- However, house prices in Gwynedd over the same period fell by 2.3%. This is not a significant fall, although the direction of travel is opposite to many regions in the UK, particularly those in the South of England.
- Costs however, according to the RICS BCIS (Royal Institution of Chartered Surveyors - Building Cost Information Service) Tender Prices have risen by around 14% during the same period. This is a significant rise and one which may affect the delivery of some housing schemes.
- There are significant differences between higher and lower value areas. Whereas development in the lowest value areas (Eastern Gwynedd, Blaenau Ffestiniog and the National Park) looks very marginal (even with nil Affordable Housing) residual values are above £1.5 million per hectare in the highest value locations of the Joint Planning Area even at 30% Affordable Housing.

[35] An independent register of people interested in home ownership but who cannot currently afford to buy outright on the open market with the aim of identifying and matching people to homes that are currently or known to be becoming available.

- The impacts of a relatively static housing market and increasing build costs has been to generally decrease residual value, although appears not to have happened in the higher value sub markets where small increases in house prices in an already high value area appears to be offsetting the impacts of cost increases.
- Going forward, the RICS, BCIS source assumes around a 5% year by year increase in build cost.
- On the further assumption that build costs constitute around 60% of house prices, this would mean that increases of around 3% in house prices will need to be achieved in order for viability to be maintained.

7.13.5 <u>Additional affordable housing delivered on housing exception sites – Information for the whole of Wales</u>

	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
Number of units granted planning permission							
Local Authorities	75	68	82	33	48	87	2
National Parks	10	11	42	48	8	4	9
Total	85	79	124	81	56	91	11
Number of units delivered							
Local Authorities	34	27	10	71	42	88	37
National Parks	10	35	33	4	1	12	29
Total	44	62	43	75	43	100	66

Source: 'Affordable Housing Provision in Wales 2013-14' report (published: 23rd October, 2014), Welsh Government

<u>Comments</u>

- Relatively few affordable units developed on rural exception sites (outside development boundaries) in Gwynedd and Anglesey since 2011.
- Also, relatively few affordable units have received planning permission on rural exception sites in Gwynedd and Anglesey since 2011. A number of units permitted were for renewals of previous planning permissions. This suggests that there has been a lack of development on some of these sites.
- Number of affordable units that have received planning permission on rural exception sites in the whole of Wales has reduced in recent years. Number of affordable units that have been developed on such sites is more consistent.
- Social Housing Grant has been a necessity to develop a number of rural exception sites in Gwynedd.
- Build cost has increased more significantly in the Plan area than house prices. An increase of 3% needed in house prices to maintain viability. This is

a problem in some parts of the Plan area. Problems therefore in terms of providing affordable housing on the basis of viability.

- Link to what is noted in section 7.12 ('Funding affordable housing') – need to consider alternative and innovative ways of providing affordable housing. Consideration to providing some open market housing on rural exception sites to cross-subsidise the affordable element.

THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- A significant percentage of the occupied household spaces in Gwynedd and Anglesey at the time of the 2011 Census were socially rented.
- Houses that are socially rented are more prevalent in the urban wards as compared to the rural wards.
- Detached houses or bungalows are the most common type of dwellings in Gwynedd and Anglesey. This type of unit is especially prominent in Anglesey. There are a significant number of terraced houses in Gwynedd.
- A substantial percentage of Gwynedd's housing stock was built before 1919.
- Unfit housing is an important matter to consider.
- A clear decrease in the sales of residential units in the period after 2007.
- Average house prices in Gwynedd and Anglesey increased gradually up until the end of 2007, before decreasing and then stabilizing after this.
- Lower quartile house prices in Gwynedd and Anglesey increased gradually until 2007 before decreasing and then stabilizing after this.
- More terraced houses were sold in Gwynedd in 2013 than any other type of residential unit. In Anglesey, more detached houses were sold in 2013 than any other type of residential unit.
- The most prominent price category in terms of house sales (all types of housing) in Gwynedd in 2013 was £100,000-125,000. In Anglesey, the most prominent price category in terms of house sales (all types of housing) in 2013 was £150,000-175,000.
- The values of the affordability ratio for Gwynedd and Anglesey are significant.
- There are clear differences between different wards within the Gwynedd and Anglesey planning authorities in respect of the value of the affordability ratio.
- There are a substantial number of long-term empty properties in Gwynedd and Anglesey. On the whole, long-term empty properties are more prevalent in urban areas as compared to rural areas.
- The percentage of household spaces with no usual residents in Gwynedd and Anglesey is much higher than the corresponding percentage for the whole of Wales.
- A significant percentage of second homes in some areas of Gwynedd and Anglesey. In general, these areas are located in coastal locations.
- A significant need for affordable housing in Gwynedd and Anglesey.
- Social Housing Grant has reduced in recent years. Other grants are less reliable.
- Important to consider new and inovative ways of providing affordable housing.
- Relatively few affordable units built on rural exception sites in Gwynedd and Anglesey in recent years.
- Consider building some open market housing on rural exception sites to facilitate the provision of affordable units.

8. BUILDING TRENDS

8.1 Completed residential units: 2001-2014[36]

Gwynedd

Dependency Catchment Areas	Number of completed residential units												
	Year												
	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14
Bangor	73	41	72	75	60	33	41	37	27	38	24	72	78
Caernarfon	60	52	54	48	39	40	72	72	38	51	31	39	36
Llŷn	28	33	48	95	30	34	49	39	40	53	44	41	35
Porthmadog	26	12	12	27	25	37	42	18	13	12	10	10	6
Ffestiniog	1	0	3	1	6	8	4	5	4	1	1	2	4
Dolgellau/ Abermaw	1	1	9	25	6	7	23	4	6	4	8	6	5
Bala	1	2	0	2	8	1	1	5	1	1	0	1	1
Tywyn/ Machynlleth	14	10	12	19	22	4	18	7	20	2	3	0	11
Total	**203**	**151**	**210**	**292**	**196**	**164**	**250**	**187**	**149**	**162**	**121**	**171**	**176**

Source: Joint Planning Policy Unit, Regulatory Department (Planning, Transportation and Public Protection), Gwynedd Council

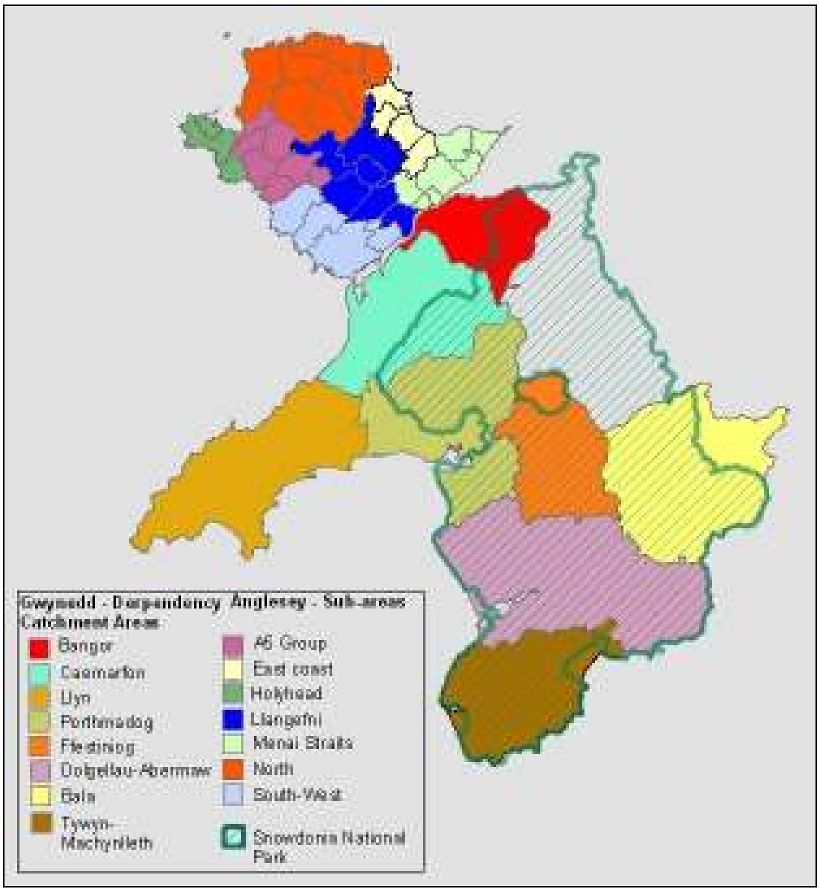
Anglesey

Sub-area	Number of completed residential units												
	Year												
	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14
	11	12	12	18	40	38	54	51	48	18	17	22	9
A5 Group	10	33	19	12	32	6	5	9	18	7	17	40	34
East Coast	37	39	5	12	55	51	33	71	62	15	15	52	34
Holyhead	56	39	64	20	46	50	46	81	49	54	22	71	40
Llangefni	19	37	9	24	16	59	67	25	24	14	14	26	13
Menai Straits	32	30	41	23	30	47	49	57	19	30	28	7	22
North	6	14	10	2	0	15	24	13	6	5	5	5	9
Total	**171**	**204**	**160**	**111**	**219**	**266**	**278**	**307**	**226**	**143**	**118**	**223**	**161**

Source: Joint Planning Policy Unit, Regulatory Department (Planning, Transportation and Public Protection), Gwynedd Council

[36] New build and conversion of buildings

Map showing the location of the Dependency Catchment Areas (deriving from the Gwynedd Unitary Development Plan) and the Housing Sub-areas (Anglesey) [referred to in the above tables]



- There is no evident pattern in terms of the number of residential units that have been completed annually in Gwynedd or Anglesey [either in terms of the planning authorities in their entirety or in terms of the specific Dependency Catchment Areas / Housing Sub-areas].
- It is noted however that there was a clear decrease in the number of units completed in 2011-12 and 2010-11 compared to the previous 5 years. There has been some increase in the number of units completed since 2011-12.
- The trends in Anglesey are consistent with those in Gwynedd. An annual increase was seen in the number of units completed between 2005 and 2009 with a clear decrease in the two years after this.
- On average, in the period between 2001-02 and 2013-14, 187 new residential units were completed annually in the Gwynedd Planning Authority area.
- On average, in the period between 2001-02 and 2013-14, 199 new residential units were completed annually in Anglesey.
- Both of these averages incorporate periods of growth and recession.

8.2 Planning permissions for residential units

Gwynedd Planning Authority

Period	Number of units that were relevant to consider for the housing land availability study	Number of units started	Number of units not started	Percentage of relevant units not started
April 2014	1586	357	1229	77.5%
April 2013	1570	307	1264	80.5%
April 2012	1550	239	1190	76.8%
April 2011	1580	255	1163	73.6%
April 2010	1668	303	1216	72.9%
April 2009	1551	263	1101	71.0%
April 2008	1481	271	960	64.8%
April 2007	1224	307	753	61.5%
April 2006	1096	226	674	61.5%

Source: Joint Planning Policy Unit, Regulatory Department (Planning, Transportation and Public Protection)

Anglesey

Period	Number of units that were relevant to consider for the housing land availability study	Number of units started	Number of units not started	Percentage of relevant units not started
April 2014	2129	161	1778	83.5%
April 2013	1906	193	1490	78.2%
April 2012	1550	239	1190	76.8%
April 2011	2091	180	1768	84.6%
April 2010	1912	186	1630	85.3%
October 2009	1982	183	1669	84.2%
April 2009	1985	183	1669	84.1%
October 2008	2041	274	1603	78.5%

Period	Number of units that were relevant to consider for the housing land availability study	Number of units started	Number of units not started	Percentage of relevant units not started
April 2008	**2002**	**329**	**1530**	**76.4%**
October 2007	**2102**	**338**	**1471**	**70.0%**
April 2007	**1661**	**287**	**1296**	**78.0%**
October 2006	**1663**	**242**	**1227**	**73.8%**
April 2006	**1322**	**209**	**1040**	**78.7%**
October 2005	**1412**	**207**	**1052**	**74.5%**

Source: Joint Planning Policy Unit, Regulatory Department (Planning, Transportation and Public Protection)

- Gwynedd – A higher percentage of residential units that had not started in April 2013 than in any of the other periods. A significant increase in the percentage of units not started since April 2006.
- Anglesey – A higher percentage of residential units that had not started in April 2010 than in any of the other periods. A significant increase in the percentage of units not started since October 2005.

8.3 Analysis of the new residential units completed in the period between April 2012 and April 2013[37]

	Gwynedd Planning Authority	Anglesey
Number of new residential units completed in the Planning Authority area in the period April 2012 – April 2013	171	223
Number of single-storey houses completed	30	17
Number of two or more storey houses completed	118	108
Number of flats completed	23	98
Number of units completed that were developed on previously developed land (as defined in Planning Policy Wales – Edition 7)	118	170

Source: Joint Planning Policy Unit, Regulatory Department (Planning, Transportation and Public Protection)

[37] This information is based on a housing land availability study held in April 2013. The information refers to new residential units that have been constructed. If a house has been converted into two residential units, it is noted as one new residential unit.

- Gwynedd Planning Authority: The vast majority of residential units completed in the period between April 2012 and April 2013 were two-storey (or more) houses.
- A substantial percentage (69.0%) of the new residential units that were completed during this period were developed on previously developed land.
- Anglesey: The majority of residential units completed in the period between April 2012 and April 2013 were two-storey (or more) houses. A significant number of flats were also completed.
- A substantial percentage (76.2%) of the new residential units that were completed during this period were developed on previously developed land.

8.4 Housing land availability in the Gwynedd and Anglesey Planning Authority areas

	Land supply in years	
Year	**Gwynedd**	**Anglesey**
2007	5.26	5.26
2008	5.53	5.68
2009	6.32	5.13
2010	5.13	4.57
2011	5.00	5.1
2012	4.8	5.8
2013	4.5	5.3
2014	3.7	4.7
2015	3.3	Under 5 years (see the explanation below)

Source: Joint Housing Land Availability Study (Welsh Government)

- The Gwynedd Planning Authority area (base date: 1st April, 2015) have less than the required five year supply of land for housing (see paragraph 9.2.3 of Planning Policy Wales, Edition 8).
- Given that Anglesey does not have an adopted Local Development Plan, in accordance with Technical Advice Note 1 that was updated in January 2015, it is not possible to demonstrate whether it has a 5-year housing land supply. There is an assumption therefore that Anglesey (base date: 1st April, 2015) does not have the required five year supply of land for housing.

8.5 Joint Housing Land Availability Studies – Distribution of the residential units.

8.5.1 Housing Land Availability Study (2013 based) – Relevant for sites that can cope with five or more residential units

Gwynedd Planning Authority

	Proposed units	Area (ha)	Category[38]						Units completed
			U/C	1	2	2*	3(i)	3(ii)	
Private sector	2476	86.45	114	73	1482	0	806	1	92
Public sector	127	8.6	0	0	85	0	32	10	0
Housing Associations	58	0.95	41	4	17	0	0	0	0
TOTAL	2661	96	155	73	1584	0	838	11	92

Source: Joint Housing Land Availability Study (Gwynedd Council), 1 April, 2013

Anglesey

	Proposed units	Area (ha)	Category						Units completed
			U/C	1	2	2*	3(i)	3(ii)	
Private sector	968	38.84	62	58	443	0	291	114	72
Public sector	129	4.83	0	0	55	0	74	0	0
Housing Associations	46	1.18	10	18	16	0	2	0	63
TOTAL	1143	44.85	72	76	514	0	367	114	135

Source: Joint Housing Land Availability Study (Isle of Anglesey County Council), 1 April, 2013

[38] *Key (Technical Advice Note 1:Joint Housing Land Availability Studies, Welsh Government, June 2006)*

U/C - Sites under construction: Sites or the phases of sites, which are under construction (relating only to the area where building is in progress).
Category 1: Sites or the phases of sites where development can commence immediately, and which are likely to be completed within the first year of the study period.
Category 2: Sites or the phases of sites where development cannot commence immediately, but where the constraint on development is likely to be removed in time for dwellings to be completed within 5 years.
Category 2*: Sites which are capable of being developed within the 5 year period but which lie within the areas where market demand is such that development is unlikely to occur within 5 years.
Category 3: Sites or the phases of sites where either:
3(i). development is unlikely within 5 years by virtue of major physical constraints or other constraints agreed upon; or
3(ii) development is unlikely to occur in the foreseeable future by virtue of major long term constraints.

8.5.2 Sites that can be developed within five years (i.e. defined to be in categories U/C, 1 and 2 above)

Gwynedd Planning Authority

Type of Development		Number of units	Percentage of units (compared with the total units that can be developed within 5 years)
Large sites (i.e. 5+ units)	Private	1669	74.7%
	Public	85	3.8%
	Housing Associations	62	2.8%
	Number of units on large sites that can be developed within 5 years	**1812**	**81.1%**
Number of units on small sites (i.e. less than 5 units) that can be developed within 5 years		**421**	**18.9%**
TOTAL (i.e. the number of units that can be developed within 5 years)		**2233**	**100%**

Anglesey

Type of Development		Number of units	Percentage of units (compared with the total units that can be developed within 5 years)
Large sites (i.e. 5+ units)	Private	563	49.9%
	Public	55	4.9%
	Housing Associations	44	3.9%
	Number of units on large sites that can be developed within 5 years	**662**	**58.7%**
Number of units on small sites (i.e. less than 5 units) that can be developed within 5 years		**466**	**41.3%**
TOTAL (i.e. number of units that can be developed within 5 years)		**1128**	**100%**

- It can bee seen that planning permissions for housing granted to public bodies/ Housing Associations form a low proportion of the residential units considered within the joint housing land availability studies for Gwynedd (April 2013).

- Private units form the majority of the supply of units that can be developed within a five year period on sites of more than five units in Gwynedd and Anglesey.
- It is noted that a significant portion of residential units that can be developed within a five year period are on smaller sites (fewer than five units), especially in Anglesey. This shows the important role smaller sites play in the Joint Local Development Plan area in relation to meeting the housing needs. It also links to what's noted in part 3.2 of this paper in relation to the area's rural and dispersed nature.

8.6 Supply of affordable housing 2009-14[39]

	Gwynedd[40]		Anglesey	
	Affordable units funded by Social Housing Grant	Affordable units not funded by Social Housing Grant	Affordable units funded by Social Housing Grant	Affordable units not funded by Social Housing Grant
2009/10	37	21	79	25
2010/11	72	34	68	16
2011/12	32	30	41	10
2012/13	57	27	106	13
2013/14	38	32	25	33
TOTAL	**236**	**144**	**319**	**97**

Source: Housing Service, Gwynedd Council and Housing Service, Isle of Anglesey County Council

- A significant number of affordable units were supplied in the Plan area during the years in question.
- A substantial percentage of the affordable units that have been supplied were funded with Social Housing Grant.
- The link with sections 7.12 and 7.13 is noted, in terms of the reduction in the level of Social Housing Grant and the importance of considering new and innovative ways of providing affordable housing.

[39] The number of affordable residential units supplied during the years noted. This includes new units and other schemes to provide affordable units.
[40] Information also includes the Snowdonia National Park area.

THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- On average, in the period between 2001-02 and 2013-14, 187 new residential units were completed annually in the Gwynedd Planning Authority area and 199 new residential units annually in the Anglesey Planning Authority area.
- In general, a higher percentage of residential units that were relevant to consider for the housing land availability study but where construction work has not started, can be seen in recent years in comparison with previous years.
- A substantial percentage of the new residential units that were completed during the period between April 2012 and April 2013 were developed on previously developed land.
- The majority of the new residential units that were completed between April 2012 and April 2013 were two-storey (or more) houses.
- Whilst Anglesey has a five year supply of land for housing, the Gwynedd planning authority area does not have a five year supply (base date: 1st April, 2013).
- Private units form the majority of the supply of units that can be developed within a five year period on sites of more than five units in Gwynedd and Anglesey.
- A significant portion of residential units that can be developed within a five year period are on smaller sites (fewer than five units), especially in Anglesey. This relates to the information in terms on the rural and dispersed nature of the Plan area.
- A significant number of affordable units were supplied in the Plan area during 2009/10 and 2013/14. A high percentage of these units were funded with Social Housing Grant.

9. CONCLUSIONS

9.1 The main issues/messages arising from the topic paper

- In essence, the Joint Local Development Plan area is a rural area.
- In general, the population of the Plan area is ageing.
- Gwynedd's population has increased and it is projected to keep increasing in the future. The population of Anglesey is more variable. Annual decreases in the population have been experienced recently with a long term decrease in the population being projected.
- Migration, rather than natural change is the reason for the general increase in the population.
- A gradual increase in the number of households in Gwynedd and Anglesey up to 2013.
- Based upon migration, a net reduction in the population that are in their twenties in Gwynedd in the period 2007-13, with an increase in the population of the 15-19 age group. In Anglesey, based upon migration, it is noted that there was a reduction in the population aged between 15-19 years old during this period. It is possible that the differences in these migration trends are related to the impact of the University in Bangor. There has also been an increase of note in the number of people aged between 45 and 64 in Anglesey during this period.
- Average household size is getting smaller.
- There has been a significant increase in the number of single person households and single parent households in Gwynedd and Anglesey. It is projected that the trend regarding the increase in single person households will continue.
- On average, in the period between 2001-02 and 2013-14, 187 new residential units were completed annually in the Gwynedd Planning Authority area and 199 new residential units annually in Anglesey.
- The number of houses that need to be provided annually, in accordance with the Welsh Government's 2011-based household projections, is higher than the recent average annual completion rate in Gwynedd but is lower than the recent completion rate for Anglesey.
- The majority of areas that have the greatest number of empty properties are urban in nature.
- The percentage of household spaces with no usual residents in Gwynedd and Anglesey is much higher than the corresponding percentage for the whole of Wales.
- A significant percentage of second homes in some areas of Gwynedd and Anglesey. In general, these areas are located in coastal locations.
- The affordability of housing in Gwynedd and Anglesey is an important matter. There are clear differences in the affordability ratio between different wards in the Plan area.

- A significant proportion of the supply of units that can be developed within a five year period in the Gwynedd and Anglesey planning authority areas, are located on small sites (i.e. with fewer than five units).
- Gwynedd and Anglesey's median income is lower than the corresponding figure for the whole of Wales. A significant percentage of households in Gwynedd and Anglesey have an income that is less than 60% of the UK's median income (i.e. the UK Government's definition of poverty).
- Social rented housing i.e. rented from the Council or from a Housing Association / Registered Social Landlord is more prevalent in the urban wards than in the rural wards.
- A clear reduction in the number of residential unit sales in the period after 2007.
- Whilst Anglesey has a five year supply of land for housing, the Gwynedd planning authority area does not have a five year supply (base date: 1st April, 2013).
- Neither the Gwynedd local planning authority area nor Anglesey have a 5 year land supply for housing (base date: 1st April, 2015).
- It appears that the housing stock in Gwynedd is older than that of Anglesey. This is possible partly due to the fact that terraced housing is much more prominent in Gwynedd when compared with Anglesey. A significant number of detached houses can be seen in Anglesey (although it must be noted that this is the most prominent type of residential unit in Gwynedd also). It is noted that more terraced houses were sold in Gwynedd during 2013 than any other type of residential unit. While in Anglesey, more detached houses were sold during that year than any other type of residential unit.
- A significant need for affordable housing in Gwynedd and Anglesey.
- Important to consider new and innovative ways of providing affordable housing.

9.2 Housing objectives

The main objectives for the Plan area, based on the priorities noted in national, regional and local strategies are:

- to facilitate a provision of various affordable housing units;
- to facilitate a sufficient provision of residential units to meet local communities' housing needs;
- to promote the supply and delivery of residential units that are suitable in terms of their location, type, size and quality;
- to ensure that the housing provision meets the needs of specific groups within society;
- to create and maintain balanced and sustainable communities;
- to promote the vitality of Centres and the countryside;
- to contribute towards improving the population's health and quality of life;
- to provide housing units that are accessible to local services and jobs;

- to ensure that housing units are delivered in a sustainable manner;
- develop specific policies to meet the challenges and circumstances that are evident in specific areas within the Plan area;
- to meet the challenge in relation to housing workers that would be responsible for developing a new nuclear power station on the Wylfa site.