



CONTENTS

1.0	BACKGROUND AND PURPOSE OF THE PAPER	4
2.0	POLICY CONTEXT	5
2.1	NATIONAL.....	5
2.2	REGIONAL.....	11
2.3	LOCAL.....	14
3.0	THE CURRENT POPULATION	23
3.1	Mid-year population estimate (2001 onwards).....	23
3.2	The Population's Spatial Distribution	24
3.3	Analysis of the population of the Joint Local Development Plan area ..	31
3.4	The historic distribution of the population	33
3.5	Population trends.....	35
3.6	Migration.....	36
3.7	Labour supply (October 2011 – September 2012).....	39
3.8	Household income - 2012.....	40
4.0	POPULATION PROJECTIONS	42
4.1	Population projections (2008-based) – Welsh Government.....	42
4.2	Projections of the number of births, deaths and natural change (2008-based) – Welsh Government	42
4.3	Projections of fertility rate (2008-based) – Welsh Government.....	43
4.4	Assumed migration levels for the period 2008-2033 (2008-based) – Welsh Government.....	43
4.5	Change in the population: Key years and specific age groups (2008- based)	43
4.6	Comparing the structure of the population in 2010 with the population projections for 2026.....	46
5.0	CURRENT HOUSEHOLDS	49
5.1	Estimated number of households 1991-2010	49
5.2	Average household size 1991-2010	50
5.3	The number of specific types of households 1991-2010	51
6.0	HOUSEHOLD PROJECTIONS	54
6.1	Household projections 2008-33 (2008-based) – Welsh Government ..	54
6.2	Projections for average household size 2008-33 (2008-based) – Welsh Government.....	54
6.3	Projections for specific types of households 2008-33 (2008-based) – Welsh Government.....	55
6.4	Comparison of the 2006 and 2008 based annual housing projections for Gwynedd and Anglesey with the 2003 based projections together with the current provision.....	57
7.0	CURRENT HOUSING	59
7.1	Tenure	59
7.2	Type of housing	61

7.3	Age of the housing stock	62
7.4	Condition of the housing stock.....	62
7.5	Housing sales.....	66
7.6	House prices.....	68
7.7	Number of residential units sold according to price (2011).....	71
7.8	Affordability	74
7.9	Annual need for affordable housing	75
7.10	Empty properties	76
7.11	Unoccupied homes and second residences/holiday accommodation...77	
8.0	BUILDING TRENDS	82
8.1	Completed residential units: 2001-2012	82
8.2	Planning permissions for residential units.....	84
8.3	Analysis of the new residential units completed in the period between April 2011 ac April 2012.....	85
8.4	Housing land availability in the Gwynedd and Anglesey Planning Authority areas	86
8.5	Joint Housing Land Availability Studies – Distribution of the residential units.....	87
8.6	Annual supply of affordable housing	89
9.0	CONCLUSIONS.....	91
9.1	The main issues/messages arising from the topic paper	91
9.2	The main differences between Gwynedd and Anglesey	92
9.3	Housing objectives.....	92
9.4	Further Steps.....	92
	REFERENCES.....	93

1.0 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 will establish 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.
- 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.
- 1.6 As this paper deals with a continuously changing situation, there will be a need to update it periodically up until the point when the information is submitted to the Inspector prior to the Public Examination. This will mean that the information provided and the conclusions derived from it will be concurrent, thus ensuring that the JLDP is as relevant and 'sound' as possible.
- 1.7 This topic paper has been updated as much as possible in order to include information from the 2011 Census. However, due to the timing of the Census information being released and the work of interpreting this information, it has not been possible to update all aspects of this paper. The work of updating this information will be done as soon as possible.

2.0 POLICY CONTEXT

2.1 NATIONAL

Planning Policy Wales (Edition 5) November 2012 – 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 the starting point for assessing housing requirements is the Assembly Government's latest household projections per local authority. Where local planning authorities seek to deviate from the Assembly Government projections, they must justify their own preferred policy-based projections by explaining the rationale behind them in terms of the issues listed at paragraph 2.1.3 above.

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 (June 2006)

2.1.7 The purpose of the Joint Housing Land Availability Studies (JHLAS) is to (paragraph 2.1):

- monitor the provision of market and affordable housing;
- provide an agreed statement of residential land availability for development planning and control purposes; and
- set out the need for action in situations where an insufficient supply is identified.

2.1.8 Local Planning Authorities must ensure that sufficient land is genuinely available to provide to provide a 5 year supply of land for housing. This land supply must inform the strategy contained in the development plan (para. 2.2).

2.1.9 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.

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

- 2.1.17 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.

2.1.18 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.

2.1.19 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.

2.1.20 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.

2.1.21 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.

2.1.22 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"

2.1.23 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.

2.1.24 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.”

2.1.25 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”

2.1.26 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)

2.1.27 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.

2.1.28 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.

2.1.29 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.

2.1.30 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 2008-2013, Welsh Government (2008)

2.1.31 This Strategy follows on from the Strategy for Older People in Wales for the period 2003-08. One of the core features of the Strategy is the emphasis it places on the engagement, participation and empowerment of older people.

One key aim is to ensure equality and dignity and identify ways of remedying the unfairness that is often experienced in later life.

2.1.32 One of the four themes the strategy concentrates on is 'Well Being and Independence'. With this it attempts to improve the health and well being of older people through initiatives to promote health, as well as high quality, responsive and appropriately regulated health, social care and housing services. These will enable older people to live as actively and independently as possible in a suitable and safe environment of their choice.

The Affordable Housing Toolkit, Welsh Government (June 2006)

2.1.33 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).

2.1.34 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)

2.1.35 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.

2.1.36 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 increase supply in areas where there are housing shortages and pressures. This is therefore an opportunity to link suitable empty homes with housing need.

2.1.37 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) is undertaken jointly by the planning authorities of Gwynedd, Anglesey, Conwy, Denbighshire and the Snowdonia National Park in partnership with Bangor University. The outcome of this assessment will be of assistance when determining housing needs across the entire region.
- 2.2.2 Work has been progressing on the preparation of an individual Local Housing Market Assessment for Anglesey, whilst Gwynedd Council is at an initial stage of preparing its own LHMA (in conjunction with Conwy County Borough Council).
- 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.

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

2.2.8 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.

- 2.2.9 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".
- 2.2.10 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.
- 2.2.11 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)

- 2.2.12 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.
- 2.2.13 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.
- 2.2.14 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.
- 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

GWYNEDD

Community Strategy – ‘Improving Gwynedd Together’ (2011)

- 2.3.1 It is noted that the vision statement in relation to the Community Strategy is *“By 2021, our vision is that Gwynedd will have embraced the challenges and opportunities of a changing world to become a more vibrant, prosperous, open and cohesive community that values and promotes its unique cultural and natural assets and makes a positive contribution to a more sustainable world.”*
- 2.3.2 The purpose of the Community Strategy is to promote economic, social and environmental welfare in Gwynedd. As the aims of this document were developed, it was agreed to aim for 5 main outcomes, namely:
- An area where the economy is thriving
 - An area with a sustainable environment
 - An area where children and young people succeed
 - An exciting area to live in with vibrant communities
 - An area with good health and the best care in the community
- 2.3.3 With regard to the outcome that refers to ‘An exciting area to live in with vibrant communities’, some of the experiences that are aimed for are that ‘More young people and families of working age choose to remain in the county to live and work’ and that ‘Suitable housing for the needs of Gwynedd residents’ is achieved.
- 2.3.4 With regard to ensuring that ‘More young people and families of working age choose to remain in the county to live and work’, it is noted that ‘Young people perceive living and working in Gwynedd as the adventurous choice, with more young people and working age families choosing and able to stay

in the county to live and work' and that 'Several towns in the county will have rediscovered their purpose as centres for work and services, and are lively and attractive places for residents and visitors' are some of the experiences that aimed for.

- 2.3.5 With regard to the objective of ensuring 'Suitable housing for the needs of Gwynedd residents', the aim is to ensure 'Improved quality and condition of the County's housing stock', 'Additional provision of various affordable housing for local residents' and 'Increasing the use of existing property in response to the housing needs of our residents'.

Gwynedd Local Housing Strategy: Executive Summary 2009-2012, Gwynedd Council and its Partners

- 2.3.6 The document provides a summary of the strategic direction of the local housing position across all tenures in Gwynedd for the period 2009-2012 and beyond. The strategy has five strategic themes, namely:

- Strengthening the strategic housing role in Gwynedd
- Supply and affordability
- Quality
- Suitability
- Sustainability

- 2.3.7 The strategy also develops the following projects:

- Programme to deliver affordable housing
- Bringing vacant properties back into residential use
- Developing housing options for older people and adults with learning disability
- Homelessness services
- Accreditation schemes for landlords
- Housing support for vulnerable groups to enable them to continue living independently
- Mortgage rescue schemes

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

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

- 2.3.9 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.

- 2.3.10 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's Three Year Business Plan – 2011-14

- 2.3.11 The Three Year Plan is a strategic plan that summarises the improvement objectives that the Council wishes to address between 2011 and 2014.
- 2.3.12 The Vision of the Environment and Infrastructure Programme within the Plan is to “promote an environment that’s safe, with suitable housing, and convenient and useful connections for Gwynedd and it’s inhabitants in light of the changes that are happening locally and in the world around us”. In this regard, one of the ‘results’ the Council is working towards is ‘A supply of suitable housing in the County’.
- 2.3.13 Two of the experiences noted that describe the ‘results’ in greater detail is ‘Improved access to affordable housing, to own and to rent’ and ‘More suitable housing supply available in the County’.

Older People Accommodation Strategy, Gwynedd Council

- 2.3.14 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 Strategy 2007-10, Gwynedd Council

- 2.3.15 The vision of this strategy is “to work with others to improve the supply of affordable and sustainable private sector housing to meet local needs, to contribute to corporate objectives in terms of housing options and to aim for a level of repair in the private sector housing stock which will reduce the need for major investment within ten years of assessment”.

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

- 2.3.16 The aim of this strategy is to set a clear context for regeneration efforts in Gwynedd from 2007 to 2013.
- 2.3.17 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

- 2.3.18 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.

2.3.19 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

Community Strategy – ‘Improving Anglesey Life’ 2005-2015 (July 2005)

2.3.20 The community strategy provides a comprehensive overarching strategic framework for action to improve the economic, social, environmental and cultural well-being of the people, communities and nature of Anglesey. The community strategy is based on six key strategic aims, with the vision of making Anglesey ‘The Island of Choice’, namely a thriving and successful island and a place where people want to be.

2.3.21 The six strategic aims are as follows:

- Creating a prosperous future for Anglesey through sustainable economic regeneration;
- Promoting healthy and active individuals and communities;
- Protecting and enhancing the island’s rich, diverse and high quality environment;
- Promoting a safe island in which people can live securely in their homes and communities, free from the fear of crime;
- Supporting strong, vibrant and inclusive communities;
- Supporting fully bi-lingual communities in which the Welsh language, culture and heritage can flourish and prosper.

2.3.22 The aim of ‘supporting strong, vibrant and inclusive communities’, highlights how housing quality is an important factor in determining the health and the quality of life of individuals and families. Another issue that is highlighted is the lack of affordable housing in Anglesey. One of the supporting objectives for meeting this strategic aim is to ‘ensure that local housing needs are met through enabling local people to access appropriate and affordable housing’.

2.3.23 It is noted that work is being undertaken to update the Community Strategy for the period 2012-2025.

Health, Social Care and Well-being Strategy for Anglesey 2011-14

2.3.24 The Strategy focuses on future planning and commissioning priorities for service delivery to improve the health and wellbeing of the population of Anglesey.

2.3.25 It is noted that the health of individuals and the population of which they are part, is the product of a entire complex series of factors. These ‘factors’ combine to have greater impact on the more deprived and vulnerable groups in society, causing social inequalities in health.

2.3.26 One of the 'priority themes' is 'Promoting Independence' and the stated outcome is that 'vulnerable adults are empowered to live independent, safe and fulfilled lives in the environment of their choice'. In relation to the field of housing, the hope is that vulnerable adults in Anglesey will receive the 'support to live in their own homes for as long as possible' and that they have 'access to a range of appropriate and affordable housing'.

Anglesey Economic Regeneration Strategy 2004 –2015

2.3.27 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 (2007)

2.3.28 This strategy considers the Council's strategic housing function, and how it interacts with other corporate objectives and other strategies e.g. in the fields of education, economic regeneration, health and the community strategy. This function requires the local authority to take an informed overview of the entire housing market in Anglesey.

2.3.29 It is noted that the six priorities of the Isle of Anglesey County Council Housing Service are:

- To increase the amount of affordable housing and choice, with a focus on social rented provision. This will include the improvement of all social housing to meet the Welsh Housing Quality Standard by 2012 and maintain it thereafter.
- Tackling homelessness
- Improving the quality of housing across all tenures
- Working towards achieving sustainable housing options for vulnerable households
- Tackling fuel poverty and increasing energy efficiency
- Community sustainability and social inclusion

2.3.30 It is noted that the Housing Service is of the opinion that the main influence on housing needs in Anglesey is the reduction in the number of social housing available for rent.

Empty Homes Strategy (July 2010)

2.3.31 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

2.3.32 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's Corporate Business Plan 2012 – 2015

2.3.33 The Corporate Business Plan sets out the Council's priorities for 2012-15. It informs decision-making at all levels of the Council and:

- Shows how the Council will make a real difference to Anglesey;
- Sets the framework the Council will use to plan, drive and deliver its services;
- Influences the way the Council shapes its budget; and
- Helps the Council to monitor progress and to take stock of its achievements.

2.3.34 The key outcomes, which the Council will be working towards, have been developed to address citizens' priorities - whilst also taking into account national, local and political views. They are as follows:

- Anglesey has a thriving and prosperous rural economy
- People in Anglesey achieve their full potential
- People in Anglesey are healthy and safe
- People in Anglesey enjoy, protect and enhance their built and natural environment for future generations
- People in Anglesey are proud of their Council

2.3.35 In relation to the third priority i.e. 'People in Anglesey are healthy and safe', the Plan aims to ensure that the housing needs of the island are met:

- By securing permission for associated development at key sites in order for the building process aligned to the proposed new nuclear site to be started.
- By implementing the preferred option of the position statement adopted by the Council on the accommodation needs of construction workers associated with the proposed new nuclear build through adopting a mixed approach whereby:
 - 1/3 of workers accommodated in purpose built accommodation
 - 1/3 in privately rented accommodation
 - 1/3 in tourist accommodation
- By securing the Welsh Housing Quality Standards of Council housing stock by December 2012
- By improving the existing housing stock and bringing empty homes back into use, through working with owners of properties to return them to affordable use.
- By increasing the supply of affordable housing
- By developing measures to make better use of the existing Council Housing stock to address changing housing needs.

- By implementing opportunities to reduce the Authorities maintenance liability and achieve additional capital receipts, in the smallholdings estate.

Anglesey Life 2010

2.3.36 Anglesey Life 2010 aims to provide an overview of the main factors influencing quality of life of individuals and communities on Anglesey.

2.3.37 In relation to the field of housing, it is noted that house prices have risen substantially in Anglesey, while salaries remain low in comparison. It is noted that there has been a reduction in the number of homelessness presentations on Anglesey, although the average length of stay of homeless families in Bed and Breakfast accommodation has increased.

2.3.38 The provision of decent housing of adequate quality, which is affordable and safe, is a basic requirement for sound mental, physical and social health and wellbeing for individuals, families and communities. There is a strong relationship between housing quality, poverty and quality of life. Increasing the provision of adequate, affordable and quality housing is also crucial to retaining young people in the area and to attract people back to make a contribution to the economy of their home area.

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

2.3.39 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.

2.3.40 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

2.3.41 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.

2.3.42 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

2.3.43 Anglesey has a relatively weak economy characterised by the lowest Gross Value Added in the UK, economic inactivity and deprivation and high levels of out-migration of young and working age people. The closure of major

employers on the Island has further contributed to high levels of unemployment and below average incomes.

2.3.44 The Isle of Anglesey County Council aspires to provide a sustainable economy and to foster sustainable communities. With this in mind the Energy Island initiative, championed by the County Council, aims to establish Anglesey as a centre of excellence for research and development and to demonstrate, produce and service low carbon energy. Anglesey has a strong tradition of low carbon and renewable energy generation. It is noted that the programme has the potential to bring in more than £2.3 billion to Anglesey and North West Wales over the next 15 years through a range of energy related projects. By 2025, the aim is that Anglesey will be a prosperous economy with a high quality of life which attracts and retains the economically active population and revitalises priority areas of need.

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

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

2.3.46 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. A final decision regarding the new build proposal construction of the new power station will be made at the end of 2013 and the intention is that the power station will be operational by 2020.

2.3.47 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.

2.3.48 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.

3.0 THE CURRENT POPULATION

3.1 Mid-year population estimate (2001 onwards)

Year	Gwynedd's Population	Anglesey's Population
2001	116,844	67,806
2002	117,231	67,862
2003	117,787	68,050
2004	118,340	68,271
2005	118,100	68,483
2006	118,370	68,647
2007	118,585	68,763
2008	118,590	68,799
2009	118,767	68,768
2010	119,007	68,592
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. The mid-year figures for the previous years will be revised in due course to take into account the 2011 Census.

3.2 The Population's Spatial Distribution

3.2.1 Distribution of the population - Urban and rural areas²

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

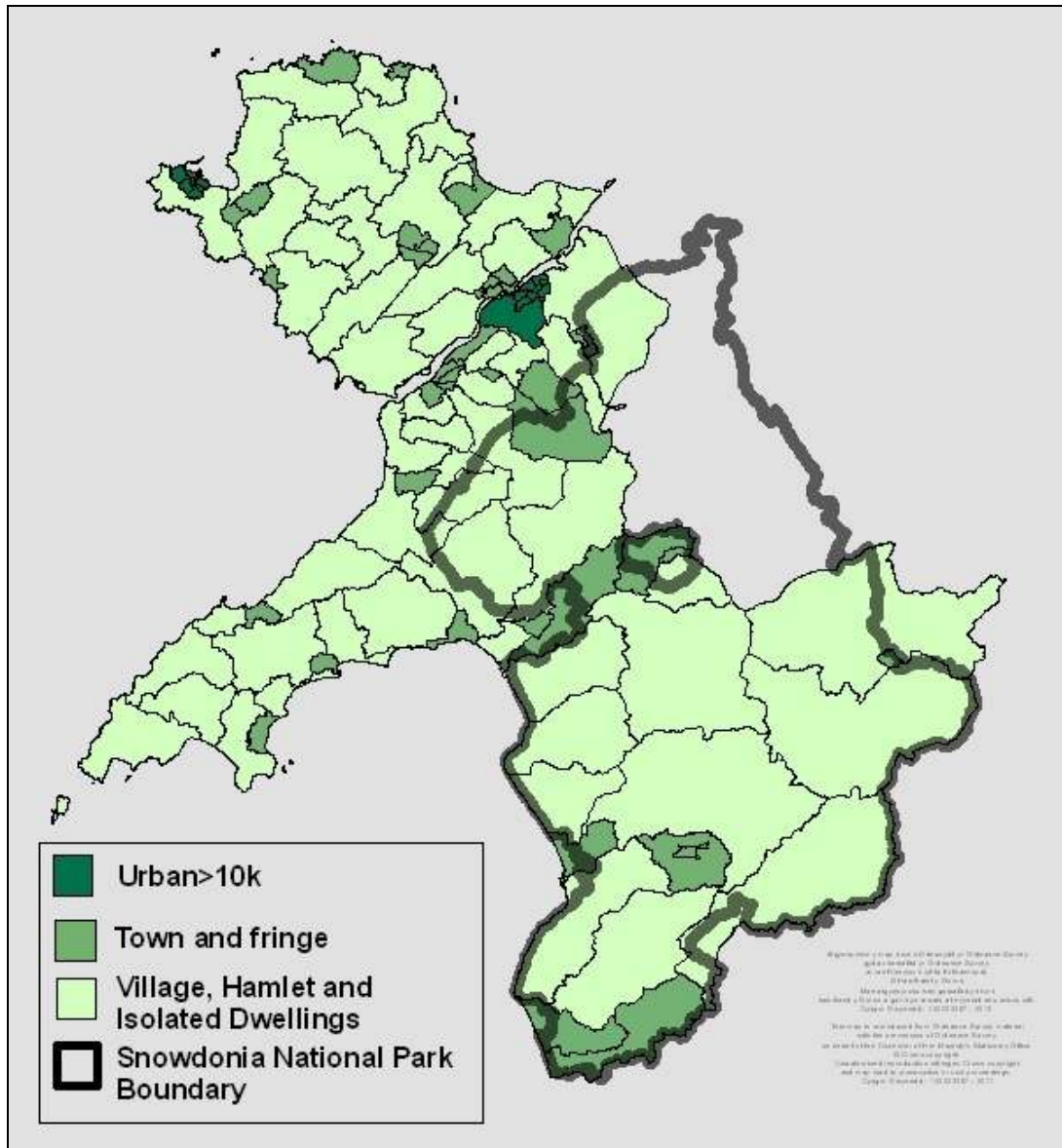
Category	Type of area (wards)	Sub-category	Number of wards	Population size		Percentage of the population		Percentage of the population (urban/rural)
Urban	Urban	Sparse	7	11,431		16.4%		16.4%
Rural	Town and fringe	Less sparse	5	8,421	22,283	12.1%	31.9%	83.6%
		Sparse	8	13,862		19.9%		
	Villages, hamlets 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 Anglesey³

Gwynedd

Settlement	Type of settlement		Population
	GUDP definition	Wales Spatial Plan definition	
Bangor	Sub-regional Centre ⁴	Key settlement of national importance	16,358
Caernarfon	Urban Centre ⁵	Primary key settlement	9,615
Blaenau Ffestiniog	Urban Centre	Cross-boundary Settlement	4,875
Pwllheli	Urban Centre	Primary key settlement	4,076
Porthmadog	Urban 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%

Ynys Môn

Settlement	Type of settlement		Population
	UDP definition	Wales Spatial Plan definition	
Amlwch	Main Centre	Key settlement	3,789
Holyhead	Main Centre	Primary key settlement	11,431
Llangefni	Main 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%

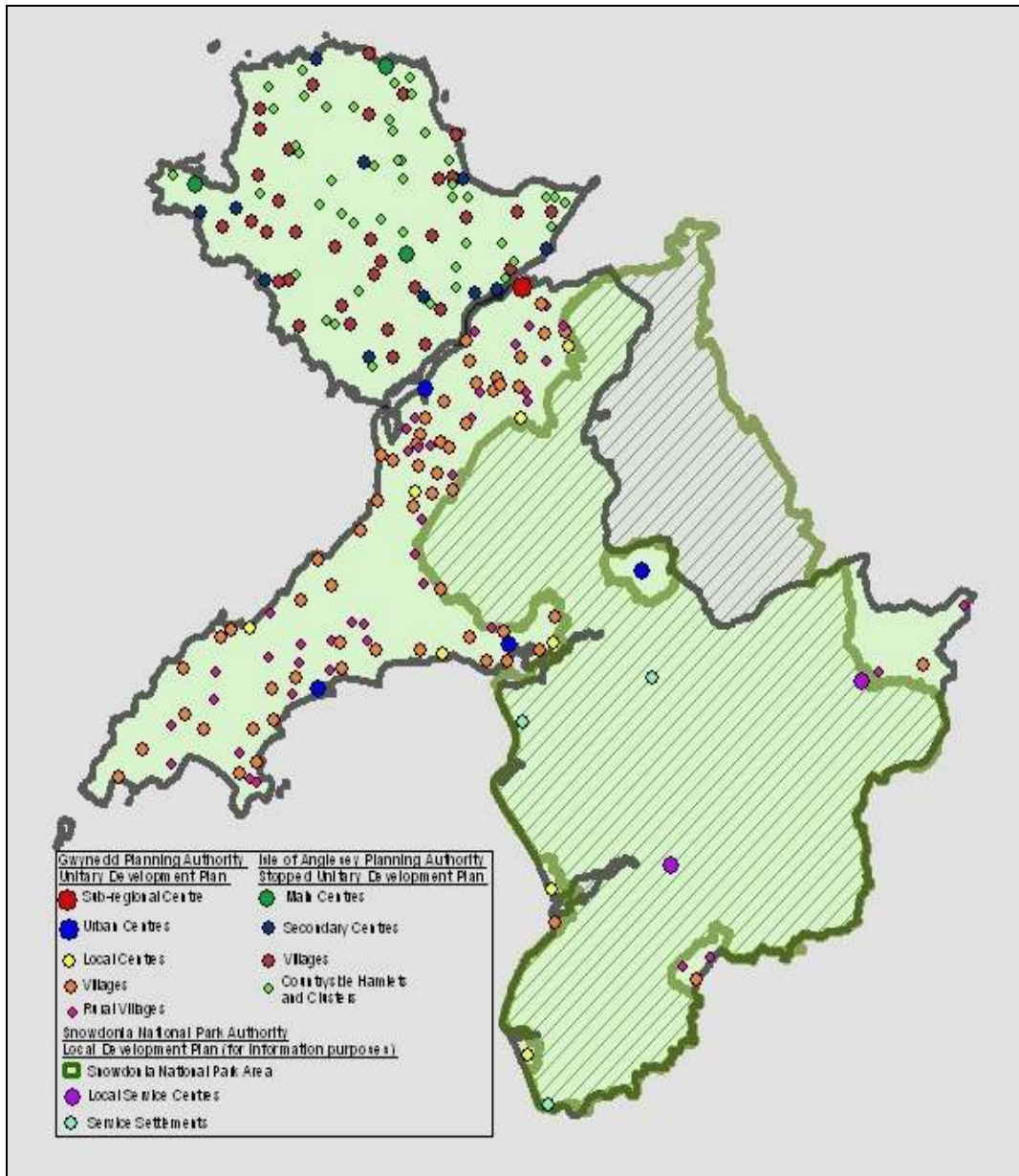
³ As defined in the Gwynedd Unitary Development Plan (GUDP) and the Stopped Anglesey Unitary Development Plan (UDP).

⁴ **Sub-regional Centre** – It provides a range of services and facilities e.g. transport, health and retail, for the whole of North West Wales.

⁵ **Urban Centres** – Strategic role and importance within their catchment areas and within the County. They are easily reached from the rest of the area and provide a wide range of community services and facilities and a high standard of public transport links. They serve areas outside their neighbouring communities.

- The vast majority of Gwynedd's population live outside the Sub-regional Centre and the four Urban Centres (as defined in the UDP). 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 Main Centres (as defined in the Stopped UDP). 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 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 hierarchy⁶



⁶ The Gwynedd Unitary Development Plan and the Stopped Anglesey Unitary Development Plan.

- 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.
- 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’⁷ in the Gwynedd Unitary Development Plan and the Stopped Anglesey Unitary Development Plan that include fewer than 120 houses⁸

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	48	Y Garreg/ Llanfrothen	85	196
Llanwnda	24	60	Brynrefail	85	213
Dinas Dinlle	30	72	Tudweiliog	90	207

⁷ **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.

⁸ 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 2001 Census).

Sarn Mellteyrn	50	120	Llandwrog	90	216
Llanengan	54	124	Clynnog Fawr	93	214
Botwnnog	56	134	Pentrefelin	105	252
Rhydyclafdy	64	154	Ederm	110	242
Pontllyfni	75	173	Nantlle	115	288
Caeathro	75	180	Efailnewydd	120	288
Dinas	75	188	Garndolbenmaen	120	288
Llandygai	76	182	Llandderfel	120	300
Aberdaron	78	187	Penisarwaun	120	300

Anglesey

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Llanddeusant	42	109	Brynteg	110	248
Bethel	83	202	Llangristiolus	118	287
Rhydwyn	87	216	Malltraeth	119	290
Pentre Berw	103	250			

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’⁹ within the Gwynedd Unitary Development plan and as ‘countryside hamlets and clusters’¹⁰ in the Stopped Anglesey Unitary Development Plan which include fewer than 30 houses¹¹

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.

⁹ **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.

¹⁰ **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 on 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.

¹¹ 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 2001 Census).

Gwynedd

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Boduan	15	36	Rhosfawr	24	58
Llanarmon	15	38	Penrhos	24	58
Pentreuchaf	20	48	Bryncroes	25	60
Llanfaglan	20	52	Llaniestyn	26	60
Llangian	22	51	Saron	29	73
Pant Glas	22	51			

Anglesey

Settlement	Number of houses	Population (estimate)	Settlement	Number of houses	Population (estimate)
Hebron	14	34	Ty'n Lon (Glan yr Afon)	20	50
Maenaddwyn	14	34	Capel Mawr	23	56
Bachau	16	41	Capel Parc	23	58
Trefor	18	45	Llanynghenedl	24	58
Rhosgoch	18	46	Penygroes	25	65
Penygraigwen	19	48	Llangwyllog	27	66
Llangadwaladr	20	49	Cerrigman	28	71

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-2010)

Age	Men	Women	All	Age	Men	Women	All
0-4	3,276	3,228	6,504	50-54	3,547	3,783	7,330
5-9	3,106	2,927	6,033	55-59	3,630	3,722	7,352
10-14	3,471	3,315	6,786	60-64	4,340	4,252	8,592
15-19	4,378	4,434	8,812	65-69	3,428	3,593	7,021
20-24	5,090	5,026	10,116	70-74	2,630	2,984	5,614
25-29	3,194	3,077	6,271	75-79	2,048	2,587	4,635
30-34	2,746	2,737	5,483	80-84	1,430	2,202	3,632
35-39	3,281	3,327	6,608	85-89	775	1,510	2,285
40-44	3,475	3,780	7,255	90+	246	701	947
45-49	3,863	3,868	7,731				
TOTAL					57,954	61,053	119,007

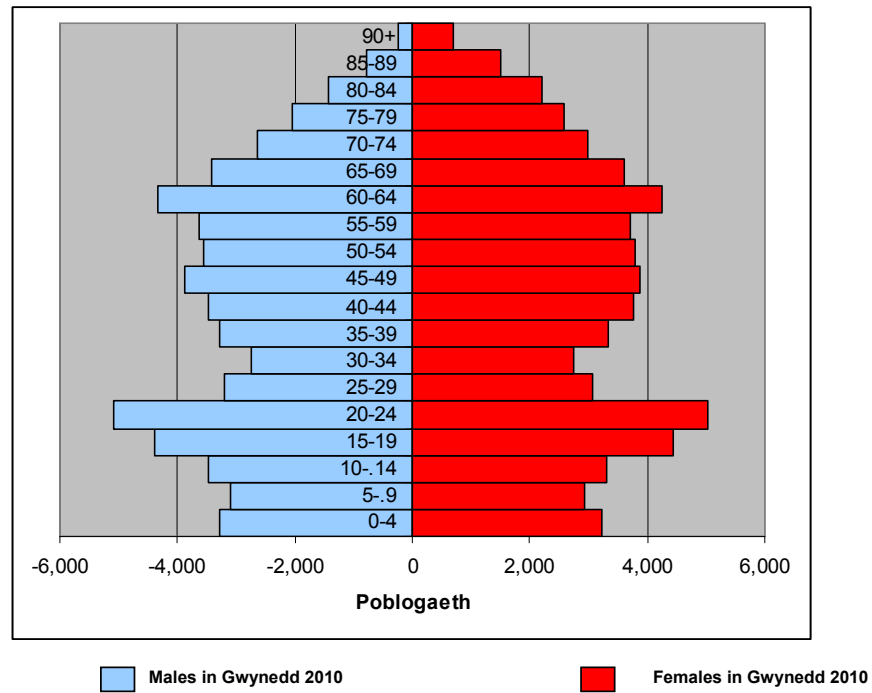
Source: Stats Wales

Analysis of Anglesey's population according to age and sex (mid-2010)

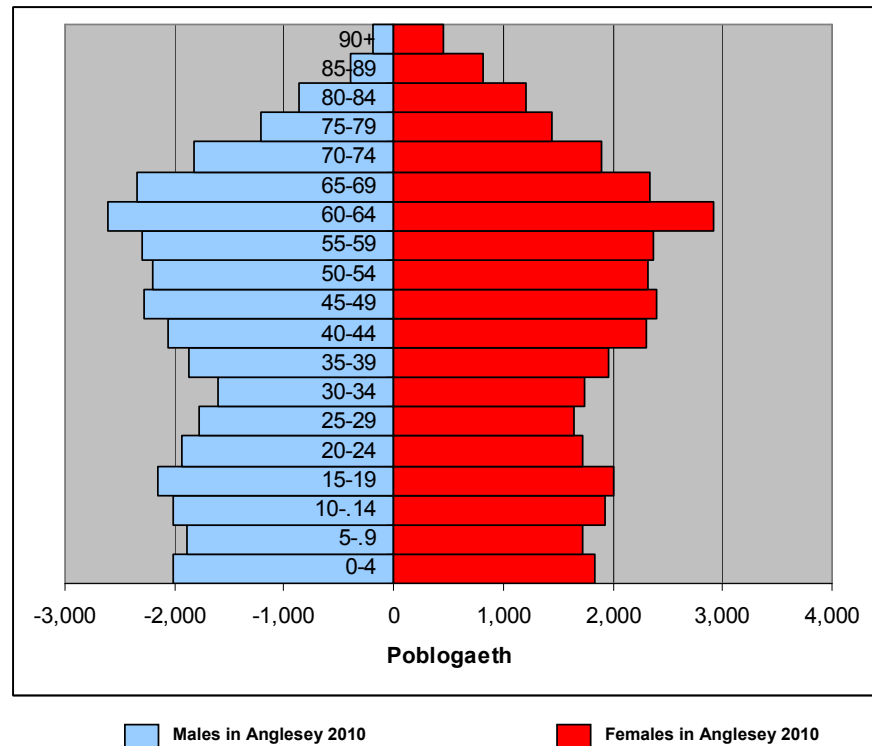
Age	Men	Women	All	Age	Men	Women	All
0-4	2,007	1,827	3,834	50-54	2,204	2,324	4,528
5-9	1,888	1,731	3,619	55-59	2,286	2,369	4,655
10-14	2,018	1,932	3,950	60-64	2,607	2,919	5,526
15-19	2,160	2,008	4,168	65-69	2,345	2,340	4,685
20-24	1,929	1,726	3,655	70-74	1,828	1,899	3,727
25-29	1,778	1,652	3,430	75-79	1,217	1,449	2,666
30-34	1,608	1,741	3,349	80-84	863	1,212	2,075
35-39	1,872	1,957	3,829	85-89	393	818	1,211
40-44	2,060	2,305	4,365	90+	194	459	653
45-49	2,271	2,396	4,667				
TOTAL					33,528	35,064	68,592

Source: Stats Wales

3.3.2 Population pyramid – Gwynedd (mid-2010)



Population pyramid – Anglesey (mid-2010)



Source: Stats Wales

Gwynedd

- More people within the 20-24 age group in Gwynedd in 2010 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 15-19 and 60-64.
- The percentage of the population in the 30-34 age group in 2010 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 2010 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 2010 than in any other age group.
- Following this, the most populated age categories were 65-69, 45-49, 55-59, 50-54 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	116.7	1.2	1.4	-0.2	0.3	0.1	116.8
2001-02	116.8	1.2	1.4	-0.2	0.6	0.4	117.2
2002-03	117.2	1.2	1.3	-0.2	0.7	0.6	117.8
2003-04	117.8	1.2	1.4	-0.2	0.8	0.6	118.3
2004-05	118.3	1.2	1.3	-0.1	-0.1	-0.2	118.1
2005-06	118.1	1.3	1.3	0.0	0.2	0.3	118.4
2006-07	118.4	1.3	1.3	0.0	0.2	0.2	118.6
2007-08	118.6	1.3	1.3	-0.1	0.1	0.0	118.6
2008-09	118.6	1.3	1.3	0.0	0.2	0.2	118.8
2009-10	118.8	1.4	1.4	0.0	0.2	0.2	119.0

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	67.9	0.7	0.8	-0.2	0.1	-0.1	67.8
2001-02	67.8	0.6	0.8	-0.1	0.2	0.1	67.9
2002-03	67.9	0.7	0.8	-0.2	0.3	0.2	68.1
2003-04	68.1	0.7	0.8	-0.1	0.3	0.2	68.3
2004-05	68.3	0.7	0.8	-0.1	0.3	0.2	68.5
2005-06	68.5	0.7	0.8	0.0	0.2	0.2	68.6
2006-07	68.6	0.7	0.7	0.0	0.2	0.1	68.8
2007-08	68.8	0.8	0.8	0.0	0.0	0.0	68.8
2008-09	68.8	0.8	0.8	0.0	0.0	0.0	68.8
2009-10	68.8	0.8	0.9	-0.1	-0.1	-0.2	68.6

Source: Stats Wales

Note: The above figures are all in thousands

(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. 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 or neutral (zero) in every year noted in Gwynedd and Anglesey.
- Gwynedd: The migration rate has been positive in each year noted above with the exception of 2004-05 (when it was negative.)

- **Anglesey:** The migration rate has been positive in each year noted above up to 2006-07. Following that, the rate has been neutral (2007-08 and 2008-09) or negative (2009-10).
- 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 has led 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 2008 – 2011 (figures in thousands)

Year Age	2011			2010			2009			2008		
	In	Out	Net	In	Out	Net	In	Out	Net	In	Out	Net
Every age	5.5	5.6	-0.1	6.0	5.4	0.6	5.5	5.3	0.2	5.1	5.3	-0.3
0-4	0.3	0.3	0.0	0.3	0.2	0.0	0.2	0.2	0.0	0.2	0.2	-0.1
5-9	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
10-14	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
15-19	1.3	0.5	0.8	1.7	0.5	1.2	1.4	0.5	0.9	1.1	0.5	0.6
20-24	1.4	2.0	-0.7	1.4	1.9	-0.5	1.4	1.9	-0.5	1.2	2.0	-0.8
25-29	0.5	0.8	-0.2	0.5	0.7	-0.2	0.5	0.7	-0.2	0.5	0.7	-0.2
30-34	0.3	0.4	0.0	0.3	0.4	0.0	0.3	0.3	0.0	0.3	0.3	-0.1
35-39	0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.3	0.0
40-44	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0
45-49	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0
50-54	0.2	0.2	0.0	0.2	0.1	0.1	0.2	0.1	0.0	0.2	0.1	0.1
55-59	0.2	0.1	0.0	0.2	0.1	0.1	0.2	0.1	0.0	0.2	0.1	0.1
60-64	0.2	0.1	0.0	0.2	0.2	0.0	0.1	0.1	0.0	0.2	0.1	0.0
65-69	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
70-74	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.1	0.1	0.0
75+	0.1	0.2	0.0	0.1	0.2	0.0	0.1	0.2	-0.1	0.1	0.2	0.0
0-15 ¹²	0.5	0.5	0.0	0.5	0.5	0.0	0.5	0.5	0.0	0.5	0.5	0.0
16-24	2.7	2.5	0.2	3.1	2.4	0.7	2.8	2.4	0.4	2.2	2.4	-0.2
25-44	1.3	1.6	-0.3	1.4	1.5	-0.2	1.3	1.5	-0.2	1.3	1.5	-0.3
45-64	0.7	0.6	0.1	0.7	0.6	0.1	0.7	0.6	0.1	0.8	0.6	0.2
65+	0.3	0.3	-0.1	0.3	0.4	-0.1	0.2	0.3	-0.1	0.3	0.3	0.0

¹² For the year 2011, the figures are relevant for the 0-14 and 15-24 age groups rather than 0-15 and 16-24.

Anglesey: Migration within the United Kingdom 2008 – 2011 (figures in thousands)

Year	2011			2010			2009			2008		
Age	In	Out	Net	In	Out	Net	In	Out	Net	In	Out	Net
Every age	2.2	2.3	-0.1	2.3	2.3	0.0	2.3	2.3	0.0	2.2	2.1	0.1
0-4	0.1	0.2	0.0	0.2	0.2	0.0	0.2	0.1	0.0	0.2	0.1	0.1
5-9	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
10-14	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
15-19	0.1	0.3	-0.2	0.1	0.3	-0.2	0.1	0.3	-0.2	0.1	0.3	-0.2
20-24	0.4	0.4	0.0	0.4	0.4	0.1	0.5	0.4	0.0	0.4	0.3	0.1
25-29	0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.3	0.0	0.3	0.2	0.0
30-34	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0
35-39	0.2	0.1	0.0	0.2	0.1	0.0	0.2	0.2	0.0	0.1	0.2	0.0
40-44	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
45-49	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
50-54	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
55-59	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
60-64	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
65-69	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.0	0.0	0.1	0.0	0.0
70-74	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
75+	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0	0.1	0.1	0.0
0-15 ¹³	0.3	0.3	0.0	0.4	0.3	0.0	0.4	0.3	0.1	0.3	0.3	0.0
16-24	0.5	0.7	-0.2	0.5	0.7	-0.2	0.5	0.7	-0.2	0.5	0.6	-0.1
25-44	0.7	0.7	0.0	0.8	0.7	0.0	0.7	0.7	0.0	0.7	0.7	0.0
45-64	0.5	0.3	0.1	0.5	0.3	0.1	0.4	0.3	0.1	0.4	0.3	0.1
65+	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0	0.2	0.2	0.0

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 1998-99 to 2009-10 (figures in thousands)

Year	Gwynedd			Anglesey		
	In	Out	Net	In	Out	Net
2010-11	5.5	5.6	-0.1	2.2	2.3	-0.1
2009-10	6.0	5.4	0.6	2.3	2.3	0.0
2008-09	5.5	5.3	0.2	2.3	2.3	0.0
2007-08	5.1	5.3	-0.3	2.2	2.1	0.1
2006-07	5.3	5.4	-0.1	2.4	2.3	0.2

¹³ For the year 2011, the figures are relevant for the 0-14 and 15-24 age groups rather than 0-15 a 16-24.

2005-06	5.4	5.3	0.1	2.3	2.1	0.2
2004-05	5.2	5.0	0.2	2.4	2.0	0.4
2003-04	5.5	4.7	0.8	2.4	2.2	0.2
2002-03	5.7	5.0	0.7	2.5	2.2	0.3
2001-02	5.5	5.0	0.5	2.5	2.3	0.1
2000-01	5.9	5.8	0.1	2.6	2.9	-0.3
1999-2000	6.2	5.9	0.3	2.6	3.1	-0.5
1998-99	4.8	5.4	-0.6	2.1	2.4	-0.3

Source: Office for National Statistics

- For the majority of the years noted in the table, it can be seen that the net difference between people moving in and out of Gwynedd and Anglesey (from the rest of the United Kingdom) has been positive i.e. more people moving into the local authority areas than were moving out.
- Gwynedd – Net reduction in terms of migration in the year 2010-11. Whilst a net increase was seen in the previous two years, it is noted that negative figures were evident in the two years prior to that.
- Anglesey – Net reduction in terms of migration in the year 2010-11. Prior to that an annual net increase was seen between 2001 and 2008 with neutral figures in the two subsequent years.

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 50-59.
- 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 the four years in question, it is seen that there is a net reduction, based on migration in the population in the 25-44 age category, whilst there is a net increase in each of these years in terms of the 45-64 age group. It is noted that there has been a net reduction in three of the four years in terms of the population in the over 65 age group, with a net increase in three of the years in terms of the 16-24 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 in the net rate of the population in the 20-24 age group in two of the four years in question, it is noted, for all the years in question, that there has been a net reduction in the population of the 16-24 age group.

- The migration rate for the majority of the age groups in Anglesey is neutral. However, it is noted that there has been some increase, based on migration, in the 45-64 age group in the four years in question.

3.7 Labour supply (October 2011 – September 2012)

Gwynedd

	Number	Gwynedd	Wales	Great Britain
Economically active ¹⁴	56,400	72.7%	73.4%	76.7%
	52,800	67.9%	70.5%	70.3%
	41,400	54.8%	60.5%	60.8%
	10,100	11.6%	9.6%	9.1%
Unemployed ¹⁵	3,800	6.7%	8.4%	7.9%

Anglesey

	Number	Anglesey	Wales	Great Britain
Economically active	32,600	77.3%	73.4%	76.7%
	31,000	73.7%	70.5%	70.3%
	25,200	60.4%	60.5%	60.8%
	5,500	12.5%	9.6%	9.1%
Unemployed	2,200	6.5%	8.4%	7.9%

Source: The Office for National Statistics' Annual Population Survey

- The percentage of the population of Anglesey who are economically active is higher than the equivalent percentage for the whole of Wales and Great Britain.
- In Gwynedd however the percentage of the population 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 and Anglesey is lower than the percentages for Wales and Great Britain.

¹⁴ 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.

¹⁵ 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 that are self-employed in Gwynedd and Anglesey is higher than the equivalent percentages noted for Wales and Great Britain.

3.8 Household income - 2012

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	£22,369	£11,786	20,764	39.1	17,214	32.4	53,169
Anglesey	£23,770	£12,504	11,520	36.6	9,454	30.1	31,448
Wales	£24,848	£12,841	474,632	35.2	389,965	29.0	1,346,924
Great Britain	£28,413	£14,312	8,115,325	30.8	6,597,268	25.0	26,389,630
United Kingdom	£28,318	£14,273	8,367,236	30.9	6,803,223	25.1	27,112,351

Source: CACI Paycheck, 2012

- 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.
- The natural change in the population of Gwynedd and Anglesey has been either negative or neutral every year between 2000-01 and 2009-10.
- The net migration rate (in comparison to the rest of Britain and internationally) has been positive each year during the period 2000-01 and 2009-10, with the exception of 2004-05 in Gwynedd and 2009-10 in 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 2008-11, 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. On the whole, the net difference is neutral within the majority of age groups, with some 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).

4.0 POPULATION PROJECTIONS

4.1 Population projections (2008-based) – Welsh Government

(The change in the population is based on comparison with the information for the base year, namely 2008)

	2008 (basis of the information)		2013		2018	
	Population	Change	Population	Change	Population	Change
Gwynedd	118,590	-	119,713	0.9%	121,290	2.3%
Anglesey	68,799	-	69,903	1.6%	70,988	3.2%
	2023		2028		2033	
	Population	Change	Population	Change	Population	Change
Gwynedd	123,170	3.9%	124,854	5.3%	125,953	6.2%
Anglesey	71,896	4.5%	72,411	5.3%	72,563	5.5%

- It is projected that the population of Gwynedd and Anglesey will continually increase until 2033.

4.2 Projections of the number of births, deaths and natural change (2008-based) – Welsh Government

(This information relates to the select years noted)

	2008/09			2012/13			2022/23		
	Births	Deaths	Natural Change	Births	Deaths	Natural Change	Births	Deaths	Natural Change
Gwynedd	1,300	1,300	-100	1,300	1,300	0	1,400	1,200	100
Anglesey	800	800	0	800	700	0	700	800	-100

- Gwynedd: The natural change in the population was negative during 2008/09. It is projected that the change will be neutral (zero) in 2012/13 and positive during 2022/23.
- Anglesey: The change was neutral (zero) during 2008/09. It is anticipated that the natural change in the population will be neutral during 2012/13 and negative during 2022/23.
- The above projections are compared with the fact that the natural change in the population has been negative or neutral (zero) for both authorities every year between 2000-01 and 2009-10 (as noted in section 3.5).

4.3 Projections of fertility rate (2008-based) – Welsh Government

(This information relates to the select years noted)

	2008/09	2012/13	2022/23
Gwynedd	1.80	1.74	1.73
Anglesey	2.19	2.12	2.10

- 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 2008-2033 (2008-based) – Welsh Government

(The figures below refer to the annual migration level for each of the years in question i.e. 2008-2033).

	Migration (total)			Internal migration			International migration		
	In	Out	Net	In	Out	Net	In	Out	Net
Gwynedd	5,900	5,600	300	5,300	5,100	100	600	500	100
Anglesey	2,500	2,300	200	2,300	2,100	200	100	100	0

- It is projected that there will be an annual net increase of approximately 300 people in Gwynedd and 200 people in Anglesey, based on the migration rate only.
- 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 (2008-based)

(This information relates to the select years noted)

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

Gwynedd

	2008	2013	2018	2023	2028	2033
Children (0-15 years old)	21,170	20,094	19,798	20,422	20,911	20,985
Population that is 65 years old and over	23,527	26,040	27,976	29,671	31,535	33,164
Population total	118,590	119,713	121,290	123,170	124,854	125,953

Anglesey

	2008	2013	2018	2023	2028	2033
Children (0-15 years old)	12,369	12,398	12,728	12,985	12,639	12,333
Population that is 65 years old and over	14,413	16,712	18,624	20,122	21,534	22,712
Population total	68,799	69,903	70,988	71,896	72,411	72,563

Source: Stats Wales

4.5.2 Growth rate projections for the specific age groups (compared with the baseline 2008 figures) for the select years

Gwynedd

	2008	2013	2018	2023	2028	2033
Children (0-15 years old)	-	-5.1%	-6.5%	-3.5%	-1.2%	-0.9%
Population that is 65 years old and over	-	+10.7%	+18.9%	+26.1%	+34.0%	+41.0%
Population total	-	+0.9%	+2.3%	+3.9%	+5.3%	+6.2%

Anglesey

	2008	2013	2018	2023	2028	2033
Children (0-15 years old)	-	+0.2%	+2.9%	+5.0%	+2.2%	-0.3%
Population that is 65 years old and over	-	+16.0%	+29.2%	+39.6%	+49.4%	+57.6%
Population total	-	+1.6%	+3.2%	+4.5%	+5.3%	+5.5%

Source: Stats Wales

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

Gwynedd

	2008	2013	2018	2023	2028	2033
Children (0-15 years old)	17.9%	16.8%	16.3%	16.6%	16.8%	16.7%
Population that is 65 years old and over	19.8%	21.8%	23.1%	24.1%	25.3%	26.3%
Population total	100%	100%	100%	100%	100%	100%

Anglesey

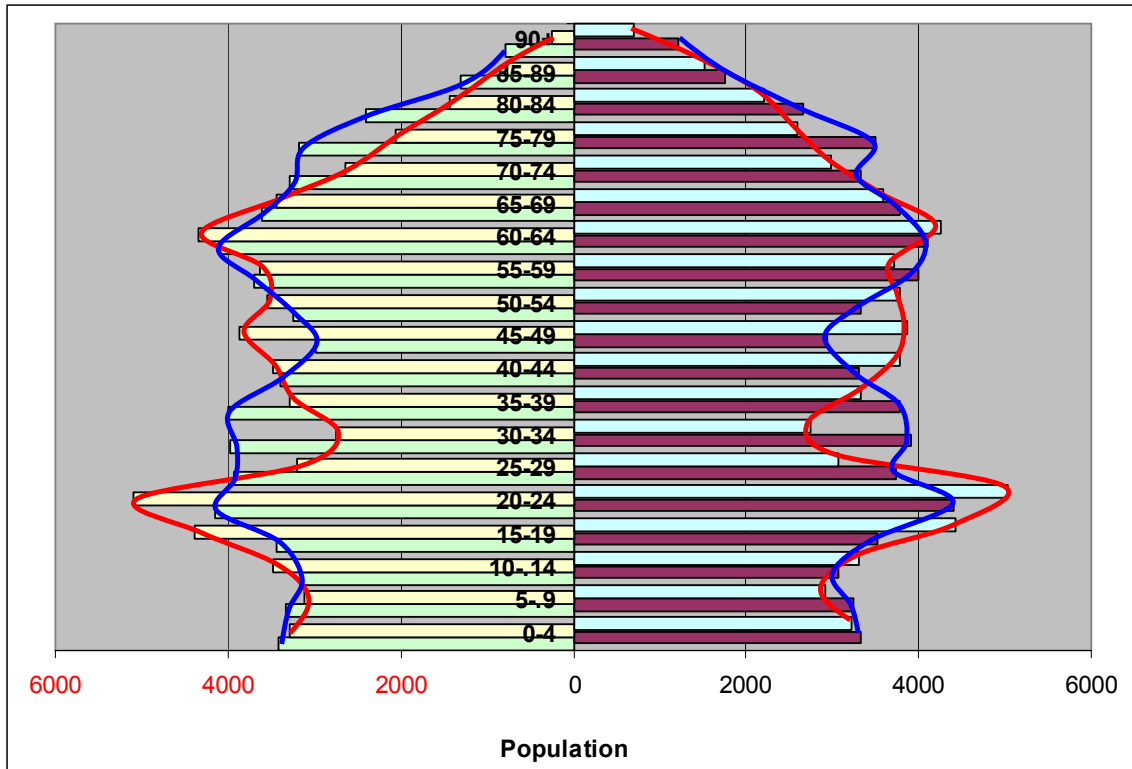
	2008	2013	2018	2023	2028	2033
Children (0-15 years old)	18.0%	17.7%	17.9%	18.1%	17.5%	17.0%
Population that is 65 years old and over	20.9%	23.9%	26.2%	28.0%	29.7%	31.3%
Population total	100%	100%	100%	100%	100%	100%

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 2008 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 size of the population in the 'children' category will be lower in the select years than in 2008 (i.e. the base year). It is also seen that the percentage of the population that belongs to this age category is lower in each of the selected years compared to 2008.
- Anglesey: It is projected that the size of the population in the 'children' category will increase in the initial select years before decreasing in the later years. It is seen that apart from 2023, the percentage of the population belonging to this age category is lower in each select year compared to 2008.

4.6 Comparing the structure of the population in 2010¹⁶ with the population projections for 2026

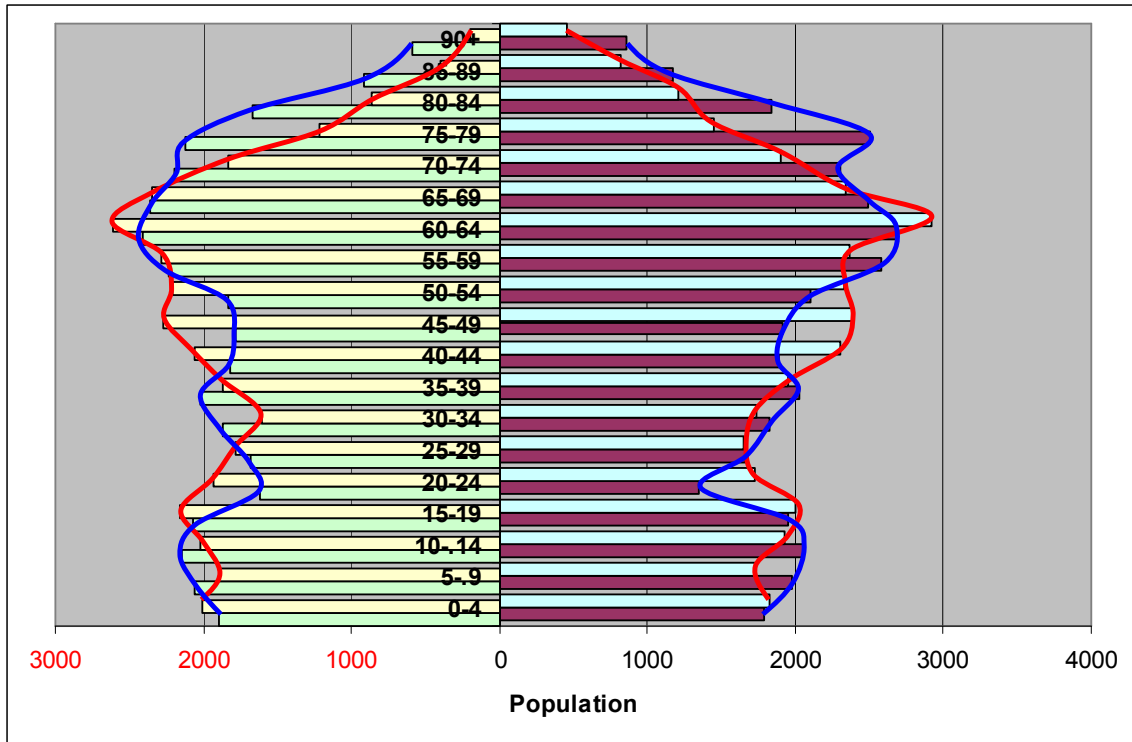
Gwynedd



- Males in Gwynedd 2010
 - Males in Gwynedd 2026
 - Population structure 2010
- Females in Gwynedd 2010
 - Females in Gwynedd 2026
 - Population structure 2026

¹⁶ Mid-2010 population estimate, Stats Wales

Anglesey



- The above graphs compare the population structure in mid-2010 (estimated) with the population projections for 2026 (namely the end of the Joint Local Development Plan period). [The mid-2010 population pyramid for Gwynedd and Anglesey can be seen in section 3.3 of this topic paper].

Gwynedd

- On the whole, the pattern in terms of the population structure is quite similar for the two periods noted. The line denoting the structure of the population is slightly more stable in 2026 compared to 2010, with fewer differences in the population of the different age groups. It is noted that the population of the 20-24 year old and 45-49 year old age groups are significantly lower in 2026 compared to 2010.
- On the other hand, the graph suggests that the population in their thirties in Gwynedd in 2026 will be significantly higher than in 2010.
- The graph notes that more people will belong to all 65+ age categories by 2026 (males and females).

Anglesey

- On the whole, it is projected that the structure of the population in 2026 will be similar to that in 2010.
- It is suggested that the population within the 40-55 year old age categories will be higher by 2026.
- The graph notes that more people will belong to all 65+ age categories by 2026 (males and females).

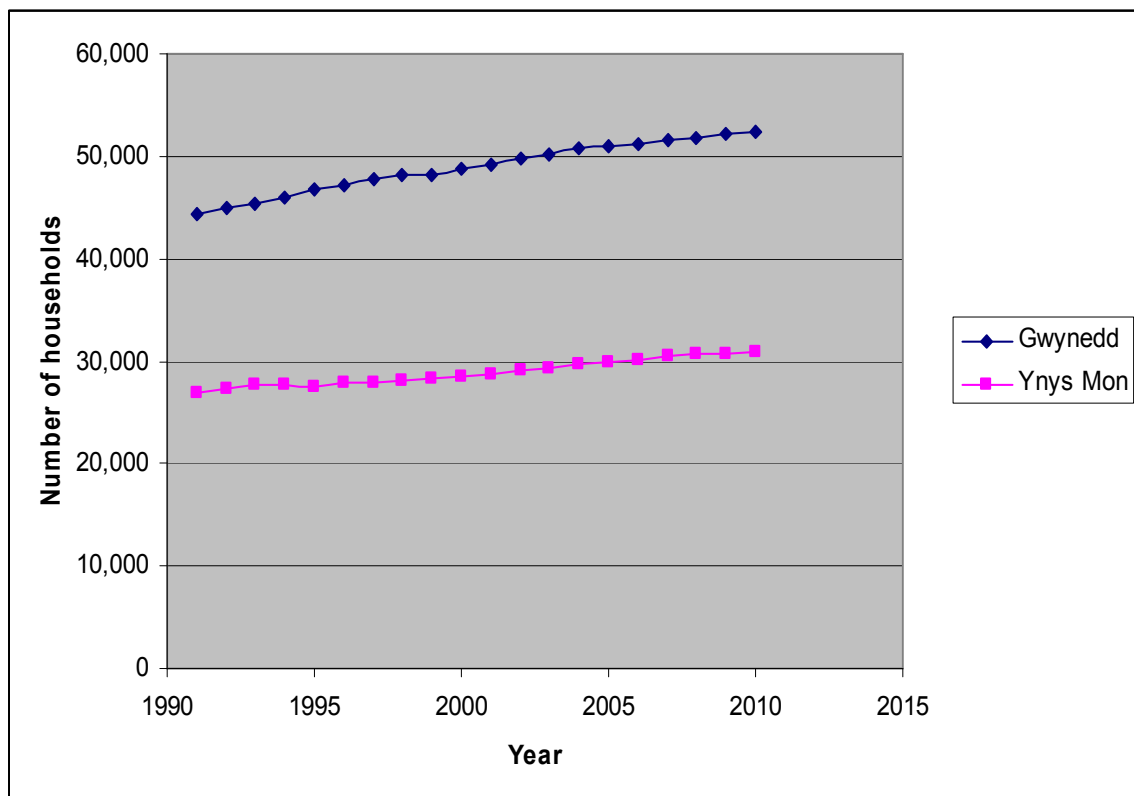
THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- The population of Gwynedd and Anglesey will continually increase until 2033.
- 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 2022/23. Only (net) migration will contribute towards the increase in the population of Anglesey during this period.
- 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, 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.

5.0 CURRENT HOUSEHOLDS¹⁷

5.1 Estimated number of households 1991-2010

	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	49,256	49,690	50,220	50,728	50,881	51,242	51,575	51,865	52,163	52,450
Anglesey	28,782	29,029	29,315	29,612	29,895	30,149	30,404	30,621	30,785	30,886



Source: Stats Wales

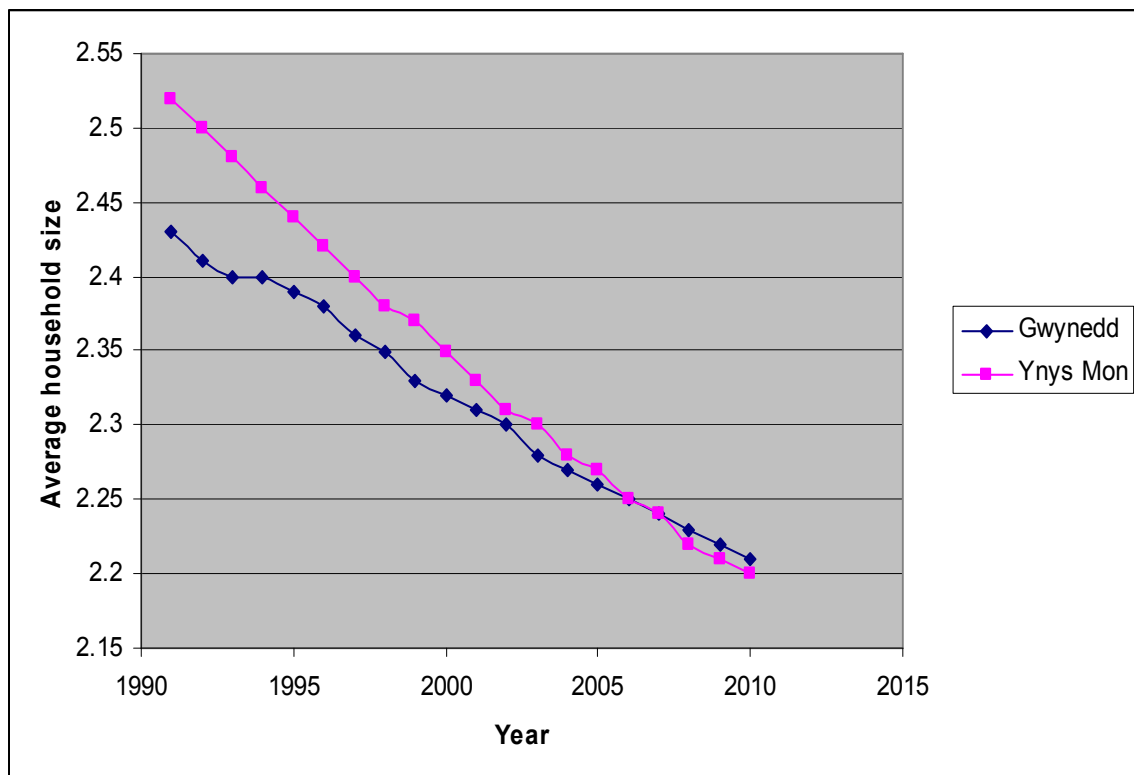
- The number of households in Gwynedd has increased gradually every year between 1991 and 2010.

¹⁷ Definition of 'household' [as noted in 'Household Projections for Wales (2008-based), Welsh Government]: "A household comprises 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. A household is not the same as a house or dwelling".

- Apart from the period 1993-95, there was a gradual and continuous increase in the number of households in Anglesey between 1991 and 2010.
- There were 8,155 more households in Gwynedd in 2010 compared to 1991.
- There were 3,992 more households in Anglesey in 2010 compared to 1991.

5.2 Average household size 1991-2010

	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	2.28	2.27	2.26	2.25	2.24	2.23	2.22	2.21
Anglesey	2.33	2.31	2.30	2.28	2.27	2.25	2.24	2.22	2.21	2.20



Source: Stats Wales

- The average household size in Gwynedd decreased gradually every year between 1991 and 2010 (apart from 1993-94 when the figure remained consistent).

- The average household size in Anglesey decreased gradually every year between 1991 and 2010.
- There was a significant decrease in the average household size between 1991 and 2010 in Gwynedd and Anglesey (Gwynedd: from 2.43 to 2.21 people; Anglesey: from 2.52 to 2.20 people).

5.3 The number of specific types of households 1991-2010

Gwynedd

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	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	15,912	15,035	1,451	2,967	990	4,616	322	3,104
2002	16,183	15,188	1,519	2,956	1,032	4,570	335	3,041
2003	16,486	15,393	1,582	2,947	1,071	4,523	347	2,978
2004	16,763	15,578	1,648	2,949	1,106	4,471	357	2,907
2005	16,947	15,631	1,705	2,934	1,136	4,396	365	2,824
2006	17,191	15,744	1,771	2,929	1,171	4,338	376	2,754
2007	17,421	15,847	1,829	2,929	1,200	4,275	383	2,678
2008	17,649	15,970	1,883	2,926	1,224	4,205	388	2,596
2009	17,851	16,056	1,943	2,932	1,251	4,144	394	2,519
2010	18,021	16,136	1,998	2,938	1,274	4,076	399	2,443
Difference 1991-2010 (number and percentage)	+4,789 +36.2%	+2,431 +17.7%	+1,331 +199.6%	+140 +5.0%	+768 +151.8%	-621 -13.2%	+225 +129.3%	-1,151 -32.0%

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	8,426	9,450	941	1,857	620	2,831	217	1,696
2002	8,599	9,596	979	1,849	643	2,785	225	1,654
2003	8,770	9,745	1,019	1,849	666	2,744	233	1,617
2004	8,942	9,900	1,057	1,850	688	2,704	240	1,579
2005	9,108	10,038	1,097	1,856	709	2,663	248	1,540
2006	9,263	10,157	1,138	1,858	729	2,618	255	1,500
2007	9,433	10,287	1,173	1,857	746	2,570	260	1,457
2008	9,589	10,397	1,211	1,856	760	2,515	265	1,410
2009	9,720	10,474	1,247	1,860	778	2,469	272	1,369
2010	9,830	10,541	1,278	1,855	794	2,417	277	1,327
Difference 1991-2010 (number and percentage)	+2,870 +41.2%	+2,101 +24.9%	+780 +156.6%	-32 -1.7%	+434 +120.6%	-922 -27.6%	+152 +121.6%	-874 -39.7%

Source: Stats Wales

- A significant increase in the number of single person households in Gwynedd and Anglesey between 1991 and 2010.
- 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 2.21 in Gwynedd and 2.20 in Anglesey by 2010.
- A much greater number of single person and one adult with children households in Gwynedd and Anglesey by 2010.

6.0 HOUSEHOLD PROJECTIONS

6.1 Household projections 2008-33 (2008-based) – Welsh Government

(This information relates to the select years noted)

	2008	2013	2018	2023	2028	2033	Percentage change (2008-33)
Gwynedd	51,900	53,800	55,700	57,500	59,000	60,300	+16%
Anglesey	30,600	32,000	33,400	34,500	35,300	35,800	+17%

- A continual increase in the number of households in Gwynedd and Anglesey until 2033.
- Gwynedd: Approximately 7,100 more households in 2028 (i.e. two years following the end of the LDP period) compared to 2008. This equates to an increase of approximately 355 households a year during this period.
- Anglesey: Approximately 4,700 more households in 2028 (i.e. two years following the end of the LDP period) compared to 2008. This equates to an increase of approximately 235 households a year during this period.

6.2 Projections for average household size 2008-33 (2008-based) – Welsh Government

(This information relates to the select years noted)

	2008	2013	2018	2023	2028	2033
Gwynedd	2.23	2.17	2.12	2.08	2.05	2.03
Anglesey	2.22	2.16	2.10	2.05	2.02	1.99
Wales	2.27	2.20	2.14	2.10	2.06	2.02

- The average household size in Gwynedd and Anglesey will continue to decrease periodically until 2033. It is anticipated that this will correspond with the tendency across the whole of Wales.

**6.3 Projections for specific types of households 2008-33 (2008-based)
– Welsh Government**

(This information relates to the select years noted)

Gwynedd

Type of household	2008	2013	2018	2023	2028	2033	Percentage change (2008-33)
1 person	17,649	19,013	20,454	21,848	23,094	24,251	+37.4%
2 person (No children)	15,970	16,625	17,162	17,456	17,509	17,412	+9.0%
2 person (1 adult, 1 child)	1,883	2,162	2,441	2,738	3,028	3,297	+75.1%
3 person (No children)	3,371	3,413	3,390	3,246	3,082	2,972	-11.8%
3 person (2 adults, 1 child)	2,926	2,928	2,916	2,873	2,860	2,883	-1.5%
3 person (1 adult, 2 children)	1,224	1,349	1,493	1,685	1,880	2,042	+66.8%
4 person (No children)	1,121	1,162	1,157	1,100	1,060	1,049	-6.4%
4 person (2+ adults, 1+ children)	4,205	3,879	3,661	3,574	3,531	3,425	-18.5%
4 person (1 adult, 3 children)	388	420	463	526	589	641	+65.2%
5+ person (No children)	391	433	448	441	447	459	+17.4%
5+ person (2+ adults, 1+ children)	2,596	2,227	1,965	1,838	1,729	1,584	-39.0%
5+ person (1 adult, 4+ person)	140	156	175	202	227	248	+77.1%

Anglesey

Type of household	2008	2013	2018	2023	2028	2033	Percentage change (2008-33)
1 person	9,589	10,510	11,423	12,265	13,010	13,615	+42.0%
2 person (No children)	10,397	10,986	11,515	11,868	12,000	11,920	+14.6%
2 person (1 adult, 1 child)	1,211	1,405	1,581	1,739	1,885	2,019	+66.7%
3 person (No children)	1,938	1,908	1,833	1,714	1,643	1,634	-15.7%
3 person (2 adults, 1 child)	1,856	1,880	1,863	1,836	1,825	1,833	-1.2%
3 person (1 adult, 2 children)	760	860	976	1,090	1,171	1,231	+62.0%
4 person (No children)	521	494	453	414	394	394	-24.4%
4 person (2+ adults, 1+ child)	2,515	2,323	2,159	2,024	1,914	1,805	-28.2%
4 person (1 adult, 3 children)	265	300	345	388	420	438	+65.3%
5+ person (No children)	89	75	62	52	45	40	-55.1%
5+ person (2+ adults, 1+ children)	1,410	1,235	1,102	1,013	911	807	-42.8%
5+ person (1 adult, 4+ person)	70	73	79	85	90	90	+28.6%

- There will be a continual and significant increase in the number of single person households in Gwynedd and Anglesey.
- There will also be a significant increase in the number of households where children (either 1, 2, 3 or 4+ children) live with one adult.
- It is anticipated that there will be a decrease in the number of more 'traditional' households in Gwynedd and Anglesey by 2033 i.e. 2 adults with children [2 adults and 1 child; 4 person (2+ adults, 1+ children); and 5+ person (2+ adults, 1+ children)].

6.4 Comparison of the 2006 and 2008 based annual housing projections for Gwynedd¹⁸ 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 and 2008-based (the 2008-based projections are the most recent) household projections 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.

Planning Authority	Annual housing provision ¹⁹	Completion rate for new residential units: annual average (2006 – 2011)	Annual housing apportionment (2003-based)	Welsh Government Projections 2006-based ²⁰		Welsh Government Projections 2008-based ²¹		Difference compared with the UDP and LDP
				Increase 2006 – 2021 (number of houses)	Annual (number of houses)	Increase 2008 – 2023 (number of houses)	Annual (number of houses)	
Gwynedd Planning Authority	278	182	270	8,640	576	6,375	425	+ 94 ²² (+%)
Snowdonia National Park Authority	53 ²³	61	50					
Anglesey	120	209	175	3,795	253	4,020	268	+148 (+123%)

Source: Anglesey and Gwynedd Joint Planning Policy Unit

- **Gwynedd:** The figure for the annual housing provision deriving from the Welsh Government's 2008-based household projections is higher than what is provided for in the Gwynedd Unitary Development Plan and the Eryri Local Development Plan.

¹⁸ 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.

¹⁹ 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.

²⁰ 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.

²¹ 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.

²² It is presumed that 96% of Snowdonia National Park's annual provision is located in Gwynedd.

²³ 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.

- If applying the proportion regarding the annual provision of houses that are to be located in the Gwynedd Planning Authority area (i.e. $278 \div 331 = 0.84$) to the figure in the last column of the table, the Welsh Government's household projections (2008-based) suggest that 79 more units are required to be provided annually in the planning authority area than what is provided for in the Gwynedd 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 (2008-based), is significantly higher than the annual completion rate for new residential units.
- Anglesey: The figure for the annual housing provision deriving from the Welsh Government's 2008-based household projections is significantly higher than what is provided for 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 (2008-based), is higher than the annual completion rate for new residential units. (The table in section 8.1 notes, however, that more residential units have been completed in Anglesey during some recent years than the figure of 268 units that derives from the 2008-based projections).

THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- The number of households in Gwynedd and Anglesey will continue to increase gradually until 2033, whilst the size of households will decrease gradually until that year.
- Single person households and households with one adult and children will significantly increase in number until 2033, whilst a decrease in the number of more 'traditional' households is projected i.e. households with two adults and children.
- Information deriving from the Welsh Government's household projections (2008-based) suggests that much more housing need to be provided annually within the Anglesey and Gwynedd Planning Authorities area than what is provided for in the Gwynedd Unitary Development Plan and the Stopped Anglesey Unitary Development Plan.
- Information from the Welsh Government's household projections (2008-based) suggests that the number of houses that need to be provided annually in Gwynedd and Anglesey is higher than the recent house-building rate.

7.0 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


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)

Note: 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 Centre or Local Centre) that are defined in the Gwynedd Unitary Development Plan.


 **Rural ward** – A ward located outside one of the Centres defined in the Gwynedd Unitary 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%)	Maeshyfyrd (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	Maeshyfyrd (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 Main Centres or Secondary Centres as defined in the Stopped Anglesey Unitary Development Plan.

 **Rural ward** – A ward located outside one of the Main Centres or Secondary Centres as defined in the Anglesey Unitary Development Plan (stopped).

- 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:: Total	Unshared dwellings									Shared dwelling
			Whole house or bungalow				Flats, Maisonette or Apartment					
			Total	Detached	Semi-detached	Terrace (including end terrace)	Total	Purpose built block of flats or tenement	Part of a converted or shared house (including bedsits)	In a commercial building	Caravan or other mobile or temporary structure	
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

Gwynedd

- 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.

Anglesey

- 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

Gwynedd and Anglesey

7.4.3 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]

7.4.4 Distribution of category 1²⁴ hazards by area

Areas ²⁵	Percentage of units where a category 1 risk is evident
Anglesey	22.3%
Cybi	11.5%
Alaw	18.2%
Eilian	19.8%
Eleth	41.7%
Cefni	18.1%
Menai	16.2%
Aethwy	33.4%

Source: Isle of Anglesey Private Sector House Condition Survey 2008

7.4.5 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

²⁴ 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.

²⁵ 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, Llanelilian 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

7.4.6 Unfit dwellings²⁶ 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

7.4.7 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 than 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).

²⁶ 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).

- 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

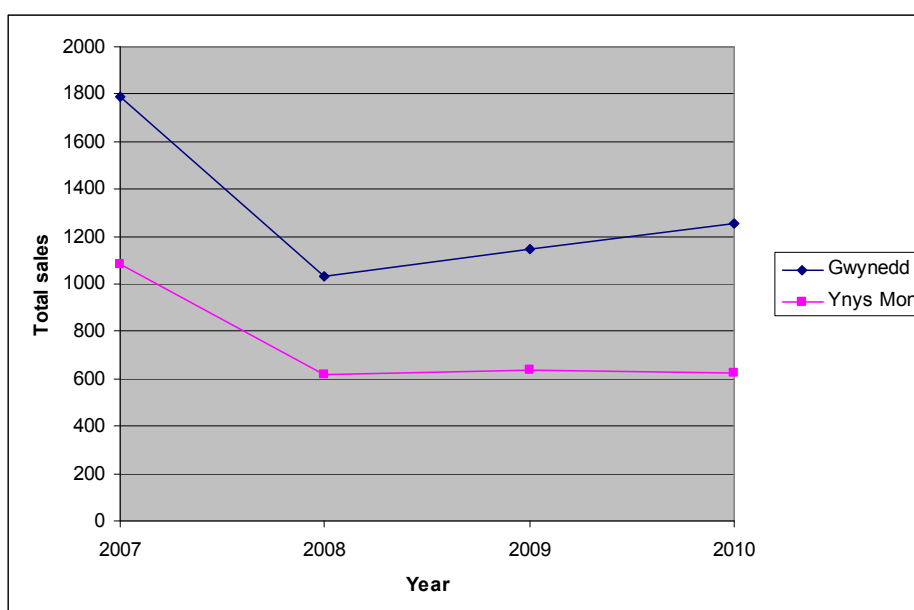
Gwynedd

Year	2 nd hand house sales	2 nd 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

Anglesey

Year	2 nd hand house sales	2 nd 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

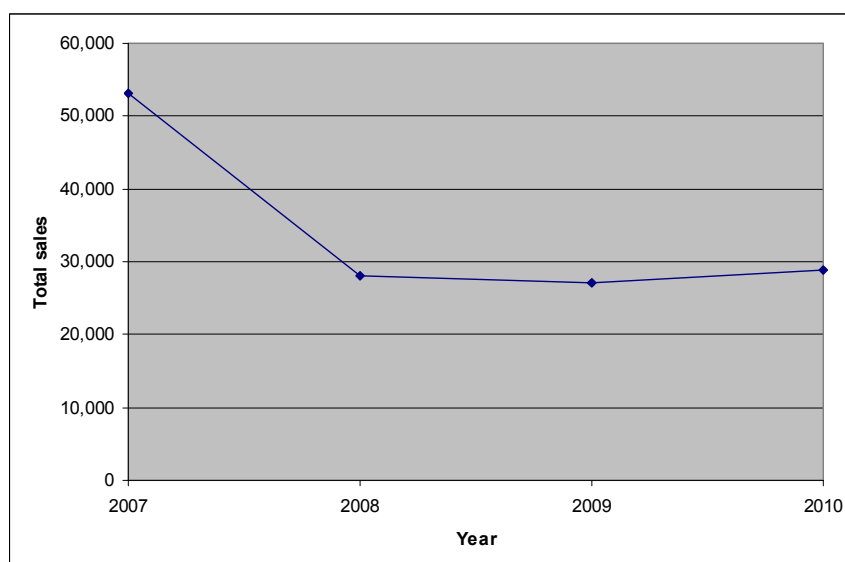
Source: Hometrack



Wales

Year	2 nd hand house sales	2 nd hand flat sales	New build house sales	New build flat sales	Total sales
2007	45,666 (86.0%)	3,860 (7.3%)	2,344 (4.4%)	1,222 (2.3%)	53,092
2008	23,149 (82.4%)	1,951 (6.9%)	1,883 (6.7%)	1,101 (3.9%)	28,084
2009	22,273 (82.1%)	1,367 (5.0%)	2,081 (7.8%)	1,400 (5.2%)	27,121
2010	24,742 (85.6%)	1,595 (5.5%)	1,847 (6.4%)	721 (2.5%)	28,905

Source: Hometrack



- 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 93.5% of all sales during the select years) compared to Anglesey (between 85.7% and 93.0% of all sales during the select years). In general, these percentage figures are higher than the corresponding figures for Wales as a whole (82.1% to 86%).
- New build house sales (i.e. as a percentage of the total number of sales) have been more prevalent in Anglesey than in Gwynedd. The figures for Anglesey correlate more closely with the figures for the whole of Wales.
- 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 Britain in 2008. This corresponds to the pattern for all of Wales (a reduction of 47.1% in the total sales during this period).
- Contrary to the tendency for the whole of Wales, it is seen that there has been a consistent increase in the number of residential sales in Gwynedd

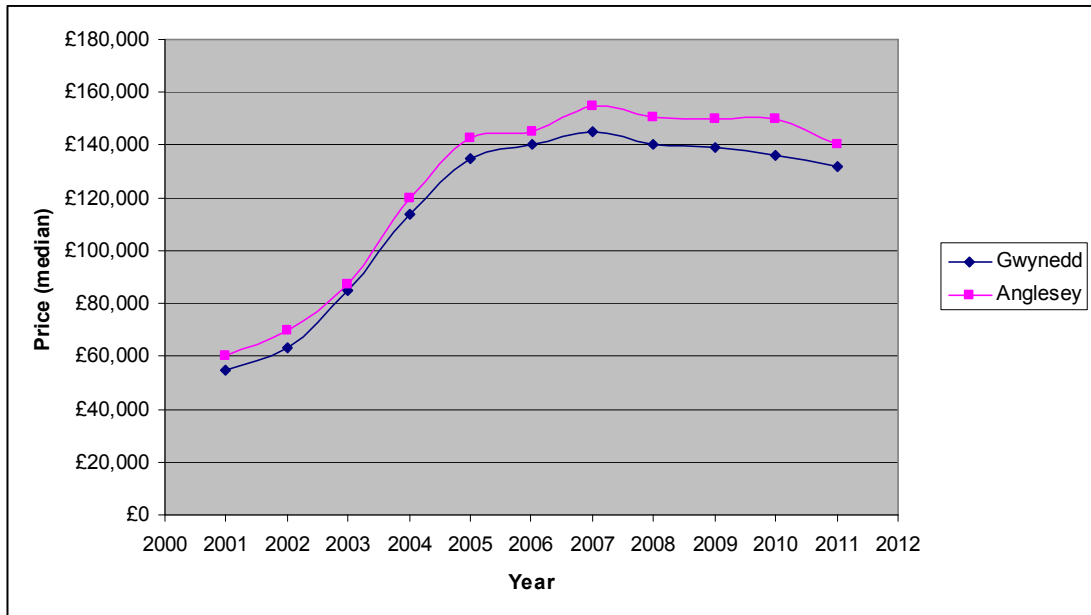
since 2008. There has also been an increase in Anglesey, but on a much smaller scale.

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

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. 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 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 less houses are available to be sold.

7.6.2 Lower quartile house prices²⁷

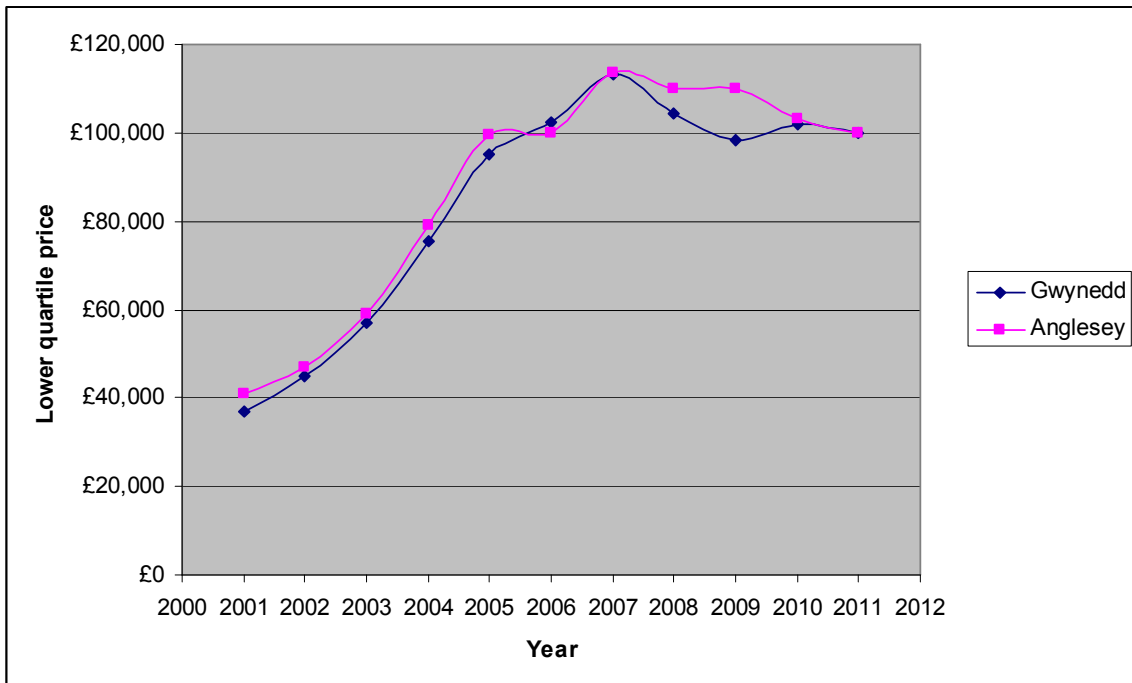
Year	Gwynedd		Anglesey	
	Price (£)	Number of sales	Price (£)	Number of sales
2001	£37,000	2,429	£41,000	1,261
2002	£44,963	2,480	£47,000	1,490
2003	£57,000	2,268	£59,000	1,359

²⁷ 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.

- These figures apply to the six month period prior to the date noted based on valuation and sales.

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

Source: Land Registry



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

7.7 Number of residential units sold according to price (2011)

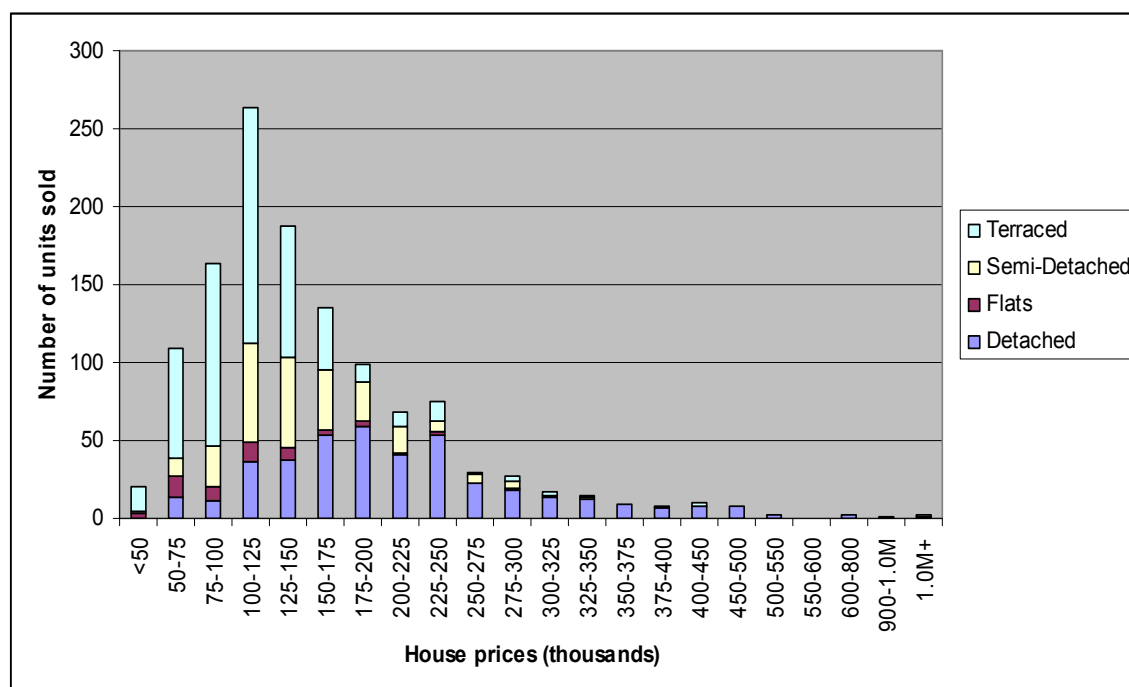
Gwynedd

Type of unit	Price (£ thousands)										
	<50	50-75	75-100	100-125	125-150	150-175	175-200	200-225	225-250	250-275	275-300
Terrace	16	70	117	152	84	39	11	9	13	2	3
Semi-detached	1	12	26	63	57	39	26	17	6	5	5
Detached	0	14	11	36	38	53	59	41	53	23	18
Flats	3	13	10	13	8	4	3	1	3	0	1
Total	20	109	164	264	187	135	99	68	75	30	27

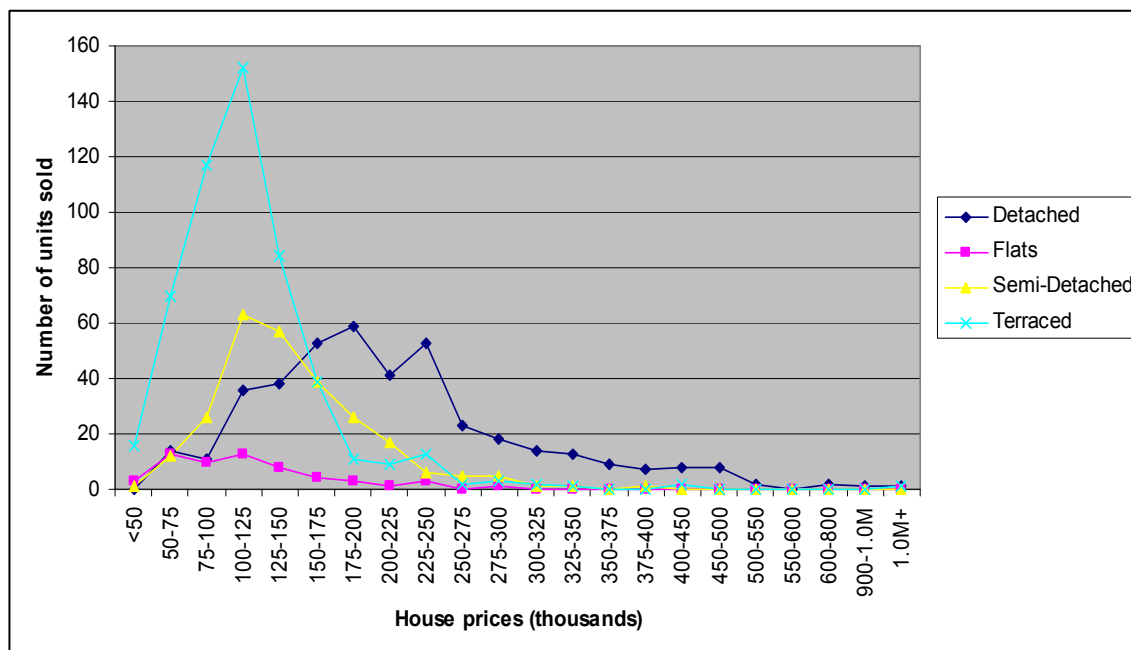
Type of unit	300-325	325-350	350-375	375-400	400-450	450-500	500-550	550-600	600-800	800-1.0M	1.0M+	Total
Terrace	2	1	0	0	2	0	0	0	0	0	1	522
Semi-detached	1	1	0	1	0	0	0	0	0	0	0	260
Detached	14	13	9	7	8	8	2	0	2	1	1	411
Flats	0	0	0	0	0	0	0	0	0	0	0	59
Total	17	15	9	8	10	8	2	0	2	1	2	1252

Source: Land Registry, 2011

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



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

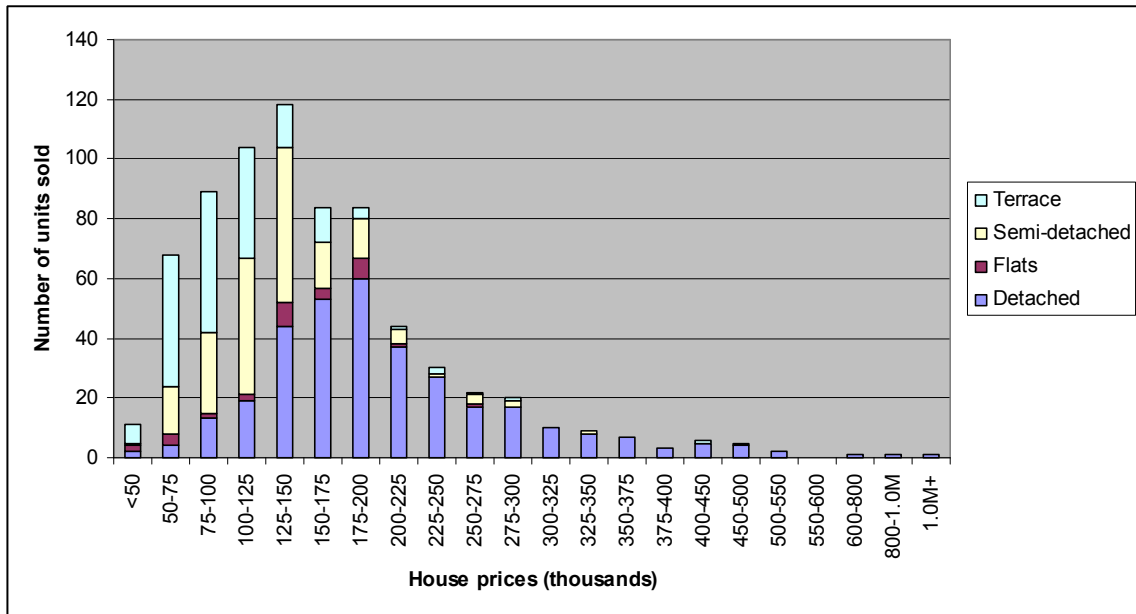


Anglesey

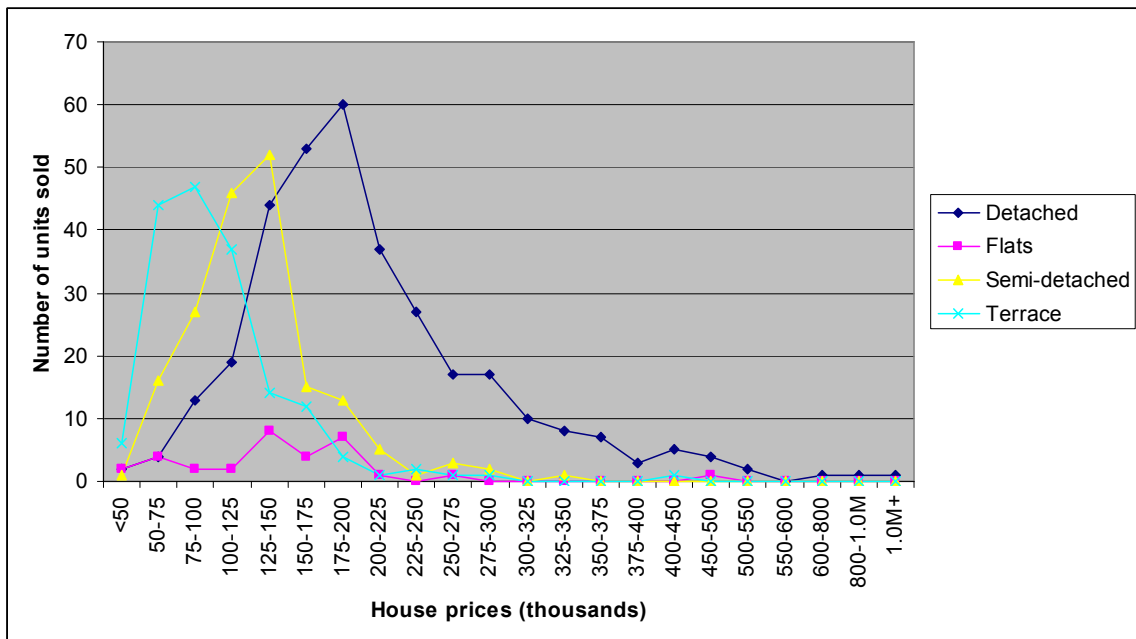
Type of unit	Price (£ thousands)											Total
	<50	50-75	75-100	100-125	125-150	150-175	175-200	200-225	225-250	250-275	275-300	
Terrace	6	44	47	37	14	12	4	1	2	1	1	170
Semi-detached	1	16	27	46	52	15	13	5	1	3	2	182
Detached	2	4	13	19	44	53	60	37	27	17	17	335
Flats	2	4	2	2	8	4	7	1	0	1	0	32
Total	11	68	89	104	118	84	84	44	30	22	20	
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	0	0	0	0	1	0	0	0	0	0	0	170
Semi-detached	0	1	0	0	0	0	0	0	0	0	0	182
Detached	10	8	7	3	5	4	2	0	1	1	1	335
Flats	0	0	0	0	0	1	0	0	0	0	0	32
Total	10	9	7	3	6	5	2	0	1	1	1	719

Source: Land Registry, 2011

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 2011 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 2011 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 £100,000-£125,000.
- £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 2011 than any other type of residential unit.
- More residential units (i.e. all types of residential units) were sold within the price category £125,000-150,000 in Anglesey in 2010 than in any other price category. The most common price categories after that were £100,000-125,000 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 £125,000-150,000, with a substantial number also being sold for between £100,000 and £125,000.
- £175,000-£200,000 was the most prevalent price category for detached house sales in Anglesey.

7.8 Affordability²⁸

Local Authority		Affordability ratio	Local Authority	Affordability ratio
Gwynedd		5.67	Anglesey	5.66
Selection of specific wards		Affordability ratio	Selection of specific wards	Affordability ratio
Wards with the highest affordability ratio	Abersoch	11.03	Rhosneigr	8.79
	Llanengan	10.58	Beaumaris	8.19
	Llanbedrog	9.83	Moelfre	7.61
	Aberdaron	9.69	Llanfaethlu	7.35
	Pwllheli South	8.71	Llanbadrig	7.03
/				
Wards with the lowest affordability ratio	Teigl (Blaenau Ffestiniog)	3.44	London Road, Holyhead	3.75
	Bowydd and Rhiw (Blaenau Ffestiniog)	3.54	Llanfair-yn-Neubwll	3.96

²⁸ The affordability ratio is based on the median house price to median income ratio in the period between August 2010 and July 2011 (house prices are based on sales and valuations).

	Cwm y Glo	3.54	Amlwch Port	4.10
	Diffwys and Maenofferen (Blaenau Ffestiniog)	3.56	Bodffordd	4.19
	Penisarwaun	3.96	Maeshyfyd, Holyhead	4.31

Source: Hometrack

- In 2011, median house prices in Gwynedd were 5.67 times greater than the median income. In Anglesey, this figure was 5.66. 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 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 conclusions of the North West Wales Local Housing Market Assessment notes an annual affordable housing need of between 664 units (based on the Welsh Government’s household projections, 2003-based) and 828 units (based on the Welsh Government’s household projections, 2006-based) in Gwynedd. It is noted that these figures are based on a snapshot of the situation in December 2009 (agreed upon by the North West Wales Local Housing Market assessment Project Board).
- With respect to Anglesey, the conclusions of the North West Wales Local Housing Market Assessment note an annual affordable housing need of between 249 units (based on the Welsh Government’s household projections, 2003-based) and 304 units (based on the Welsh Government’s household projections, 2006-based). Again, it is noted that these figures are based on a snapshot of the situation in December 2009 (agreed upon by the North West Wales Local Housing Market assessment Project Board).
- These figures have been based on distributing the affordable housing need over a period of 5 years.
- More recent research work has distributed the need for affordable housing over a period of 15 years in order to be consistent with the period of the Local Development Plans.
- Further work therefore needs to be undertaken in order to establish what is the annual need for affordable housing. This topic paper will have to be updated after this work has been undertaken and agreed upon.
- 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 Authority²⁹

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

Anglesey³⁰

Community Council Area	Number of empty properties
Holyhead	151
Amlwch	76
Llangefni	47
Menai Bridge	28

Source: Isle of Anglesey County Council Housing Service , 1st April, 2013

- 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 2012, there were 699 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).

²⁹ Gwynedd Local Planning Authority area only

³⁰ Empty homes that are unfurnished and exempt from having to pay Council Tax (February 2010)

7.11 Unoccupied homes and second residences/holiday accommodation

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 wards³¹ - 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

³¹ Only wards situated within the Gwynedd Planning Authority area were considered in this table.

- 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.
- 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 Unoccupied household spaces – 2001 Census³²

	Percentage of unoccupied household spaces	Percentage of household spaces that are second residences / holiday accommodation	Percentage of household spaces that are vacant (excluding second residences and holiday accommodation)
Gwynedd	13.3	7.8	5.5
Anglesey	8.7	3.7	4.9
Wales	5.2	1.2	4.0

Source: Table UV53, 2001 Census

7.11.4 Selection of specific wards³³ - 2001 Census

Gwynedd

	Unoccupied household spaces		Household spaces that are second residences/ holiday accommodation		Household spaces that are vacant (excluding second residences and holiday accommodation)	
	Ward	Percentage	Ward	Percentage	Ward	Percentage
Wards with the highest percentages	Abersoch	48.8	Abersoch	44.9	Bowydd a Rhiw	14.3
	Llanengan	34.6	Llanengan	28.3	Clynnog	11.1
	Llanbedrog	30.4	Llanbedrog	26.1	Talysarn	11.0
					Tudweiliog	11.0
Wards with the lowest percentages	Glyder	1.1	Bethel	0.0	Glyder	1.1
	Hendre	1.6	Garth	0.0	Pebblig	1.4

³² The figures in these tables indicate the percentage of unoccupied household spaces at the time of the 2001 Census. The figures therefore apply to household spaces that are second residences or holiday accommodation, along with other vacant household spaces.

³³ Only wards situated within the Gwynedd Planning Authority area were considered in this table.

	Peblig	1.7	Glyder	0.0	Pentir	1.4
			Hendre	0.0		
			Marchog	0.0		

Source: Table UV53, 2001 Census

Anglesey

	Unoccupied household spaces		Household spaces that are second residences/ holiday accommodation		Household spaces that are vacant (excluding second residences and holiday accommodation)	
	Ward	Percentage	Ward	Percentage	Ward	Percentage
Wards with the highest percentages	Rhosneigr	36.8	Rhosneigr	32.5	Trearddur	9.0
	Trearddur	22.6	Trearddur	13.6	Llanerch-y-Medd	8.6
	Moelfre	19.3	Moelfre	13.2	Aberffraw	8.1
Wards with the lowest percentages	Gwyngyll	2.4	Gwyngyll	0.0	Tysilio	2.2
	Tysilio	2.6	Holyhead Town	0.0	Cyngar	2.4
	Cyngar	2.9	London Road	0.0	Gwyngyll	2.4
			Maeshyfyrd	0.0		
			Morawelon	0.0		
			Parc a'r Mynydd	0.0		
			Tudur	0.0		

Source: Table UV53, 2001 Census

- The percentage of household spaces that are unoccupied in Gwynedd is over twice the corresponding percentage for the whole of Wales.
- The percentage of household spaces that are unoccupied in Anglesey is also higher than the corresponding percentage for the whole of Wales.
- There is a substantial percentage of unoccupied household spaces in the Abersoch, Rhosneigr, Llanengan and Llanbedrog wards.
- A substantial percentage of household spaces in Gwynedd are either second residences or holiday accommodation. This percentage is much higher than the corresponding percentage for the whole of Wales. Gwynedd is the local authority that has the highest number and percentage of second residences/holiday accommodation in Wales.
- The percentage of second residences/holiday accommodation in Anglesey is also higher than the percentage for the whole of Wales.
- A substantial percentage of household spaces in the Abersoch, Rhosneigr, Llanengan and Llanbedrog wards are second residences/holiday accommodation. It is apparent that most of the empty household spaces within these wards belong to this category. On the other hand, it is seen that there are a number of wards within the

Gwynedd and Anglesey planning authority areas that do not contain second residences/holiday accommodation at all.

- The wards with the highest percentages of second residences/holiday accommodation in Gwynedd and Anglesey, are located in coastal locations. Overall, the wards with the lowest percentages of second residences/holiday accommodation are more urbanised locations.
- The percentage of household spaces that are vacant (that excludes second residences and holiday accommodation) is higher in Gwynedd and Anglesey than the percentage for the whole of all Wales.
- The percentage of household spaces that are vacant (that excludes second residences and holiday accommodation) in Gwynedd is higher than the figure for any other local authority in Wales.
- There are many reasons for the difference between wards in terms of the percentage of household spaces that are vacant (excluding second homes and holiday homes) e.g. age and standard of the houses.

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 is 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 after this.
- Lower quartile house prices in Gwynedd and Anglesey increased gradually until 2007 before decreasing after this.
- More terraced houses were sold in Gwynedd in 2011 than any other type of residential unit. In Anglesey, more detached houses were sold in 2011 than any other type of residential unit.
- The most prominent price category in terms of house sales (all types of housing) in Gwynedd in 2011 was £100,000-125,000. In Anglesey, the most prominent price category in terms of house sales (all types of housing) in 2011 was £125,000-150,000.
- 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 higher percentage of unoccupied household spaces in Gwynedd (at the time of the 2001 Census) than in any other local authority in Wales. The percentage of unoccupied household spaces in Anglesey is also higher than the corresponding percentage for the whole of Wales. Second residences/holiday accommodation is responsible for the high percentage of unoccupied units in some coastal wards.

8.0 BUILDING TRENDS

8.1 Completed residential units: 2001-2012³⁴

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
Bangor	73	41	72	75	60	33	41	37	27	38	24
Caernarfon	60	52	54	48	39	40	72	72	38	51	31
Llŷn	28	33	48	95	30	34	49	39	40	53	44
Porthmadog	26	12	12	27	25	37	42	18	13	12	10
Ffestiniog	1	0	3	1	6	8	4	5	4	1	1
Dolgellau/Abermaw	1	1	9	25	6	7	23	4	6	4	8
Bala	1	2	0	2	8	1	1	5	1	1	0
Tywyn/Machynlleth	14	10	12	19	22	4	18	7	20	2	3
Total	203	151	210	292	196	164	250	187	149	162	121

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

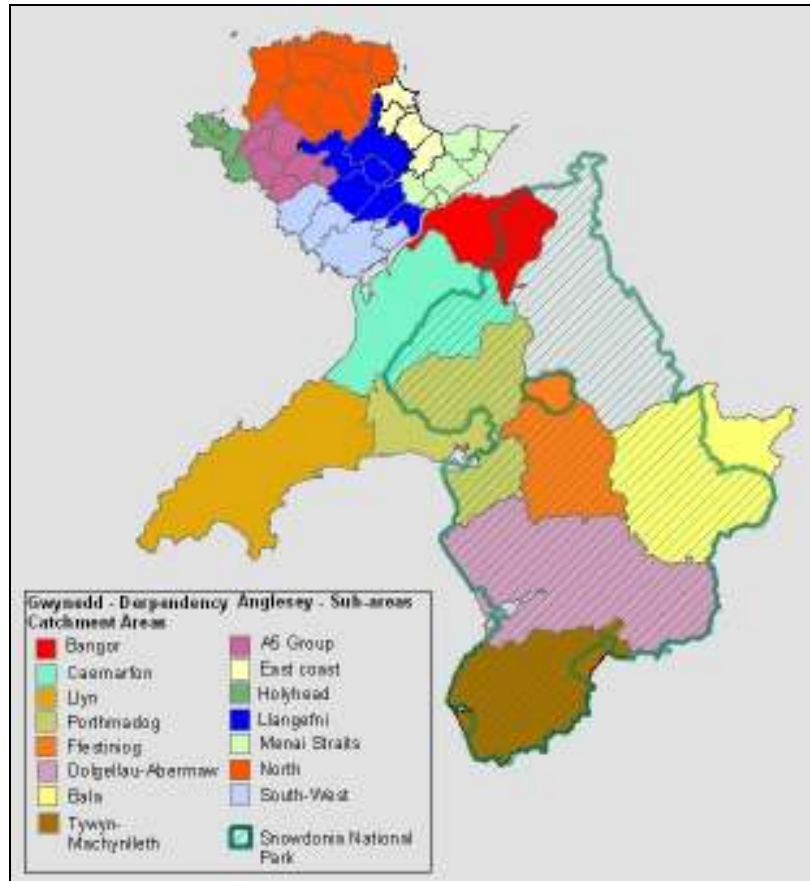
Anglesey

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
	11	12	12	18	40	38	54	51	48	18	17
A5 Group	10	33	19	12	32	6	5	9	18	7	17
East Coast	37	39	5	12	55	51	33	71	62	15	15
Holyhead	56	39	64	20	46	50	46	81	49	54	22
Llangefni	19	37	9	24	16	59	67	25	24	14	14
Menai Straits	32	30	41	23	30	47	49	57	19	30	28
North	6	14	10	2	0	15	24	13	6	5	5
Total	171	204	160	111	219	266	278	307	226	143	118

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

³⁴ 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.
- 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 2011-12, 190 new residential units were completed annually in the Gwynedd Planning Authority area.
- On average, in the period between 2001-02 and 2011-12, 200 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 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 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%
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 2012 compared with the previous years.
- Anglesey – A higher percentage of residential units that had not started in April 2010 than in any of the other periods. The highest percentages in terms of this aspect can all be seen in the most recent periods.

8.3 Analysis of the new residential units completed in the period between April 2011 and April 2012³⁵

	Gwynedd Planning Authority	Anglesey
Number of new residential units completed in the Planning Authority area in the period April 2011 – April 2012	121	118
Number of single-storey houses completed	24	26
Number of two or more storey houses completed	65	73
Number of flats completed	32	19
Number of units completed that were developed on previously developed land (as defined in Planning Policy Wales – Edition 4)	101	71

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

- Gwynedd Planning Authority: The vast majority of residential units completed in the period between April 2011 and April 2012 were two-storey (or more) houses.
- A substantial percentage (83.5%) of the new residential units that were completed during this period were developed on previously developed land.
- Anglesey: The vast majority of residential units completed in the period between April 2011 and April 2012 were two-storey (or more) houses.
- A significant percentage (60.2%) of the new residential units that were completed during this period were developed on previously developed land.

³⁵ This information is based on a housing land availability study held in April 2012. 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.

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

Year	Land supply in years	
	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

Source: Joint Housing Land Availability Study (Welsh Government)

- The Gwynedd Planning Authority area (base date: 1st April, 2011) have exactly the required five year supply of land for housing (see paragraph 9.2.3 of Planning Policy Wales, Edition 5).
- Anglesey (base date: 1st April, 2011) has more than 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 (2011 based) – Relevant for sites that can cope with five or more residential units

Gwynedd Planning Authority

	Proposed units	Area (ha)	Category ³⁶						Units completed
			U/C	1	2	2*	3(i)	3(ii)	
Private sector	2494	75.46	82	6	1489	0	916	1	56
Public sector	127	7.48	0	0	90	0	27	10	0
Housing Associations	67	2.48	13	4	50	0	0	0	40
TOTAL	2688	85.42	95	10	1629	0	943	11	96

Source: Joint Housing Land Availability Study (Gwynedd Council), 1 April, 2011 – Co-ordinated and published by the Department for Economy and Transport, Welsh Government

Anglesey

	Proposed units	Area (ha)	Category						Units completed
			U/C	1	2	2*	3(i)	3(ii)	
Private sector	1068	43.24	39	34	460	0	421	114	37
Public sector	111	3.13	0	0	47	0	64	0	0
Housing Associations	115	2.78	9	44	62	0	0	0	43
TOTAL	1294	49.15	48	78	569	0	485	114	80

³⁶ 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.

Source: Joint Housing Land Availability Study (Isle of Anglesey County Council), 1 April, 2011
 – Co-ordinated and published by the Department for Economy and Transport, Welsh Government

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	1577	71.1%
	Public	90	4.1%
	Housing Associations	67	3.0%
	Number of units on large sites that can be developed within 5 years	1734	78.1%
Number of units on small sites (i.e. less than 5 units) that can be developed within 5 years		485	21.9%
TOTAL (i.e. the number of units that can be developed within 5 years)		2219	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	533	43.7%
	Public	57	3.9%
	Housing Associations	115	9.4%
	Number of units on large sites that can be developed within 5 years	695	57.0%
Number of units on small sites (i.e. less than 5 units) that can be developed within 5 years		523.5	43.0%
TOTAL (i.e. number of units that can be developed within 5 years)		1218.5	100%

- It can be 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 2011).

- The permissions granted to Housing Associations is more significant in Anglesey.
- 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 Annual supply of affordable housing (as noted in the Affordable Housing Delivery Statements for Gwynedd Council and Isle of Anglesey County Council)³⁷

	Gwynedd Planning Authority		Anglesey	
	2009/10	2010/11	2009/10	2010/11
Affordable units funded by Social Housing Grant	40	75	68	87
Affordable units not funded by Social Housing Grant	10	17	27	8
Affordable units deriving from reusing empty homes	8	14	12	9
TOTAL	58	106	107	104

Source: Evaluation of Gwynedd Council's Affordable Housing Delivery Statement 2007-11 and Isle of Anglesey County Council's Affordable Housing Delivery Statement – Progress Review 1/4/2009 to 31/3/2010.

- A significant number of affordable units were supplied in the Plan area during the years in question.
- A high percentage of the affordable units that have been supplied were funded with Social Housing Grant.

³⁷ The number of affordable residential units completed during the years noted.

THE MAIN MESSAGES IN RELATION TO LAND USE PLANNING

- On average, in the period between 2001-02 and 2011-12, 190 new residential units were completed annually in the Gwynedd Planning Authority area and 200 new residential units annually in the Anglesey Planning Authority area.
- A clear decrease in the number of units completed in 2011-12 and 2010-11 compared to the previous 5 years.
- 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 2011 and April 2012 were developed on previously developed land.
- The majority of the new residential units that were completed between April 2011 and April 2012 were two-storey (or more) houses.
- The Gwynedd planning authority and the Anglesey planning authority each have a five year supply of land for housing (base date: 1st April, 2011).
- 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 2010/11. A high percentage of these units were funded with Social Housing Grant.

9.0 CONCLUSIONS

9.1 The main issues/messages arising from the topic paper

- In essence, the Joint Local Development Plan area is a rural area.
- Generally, the population of the Plan area is increasing and is also ageing.
- 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 2010.
- 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, with this trend continuing.
- On average, in the period between 2001-02 and 2011-12, 190 new residential units were completed annually in the Gwynedd Planning Authority area and 200 new residential units annually in Anglesey.
- Should recent construction trends continue in the future, based on the 2006 household projections (Welsh Government), there will be a clear deficit between the demand for housing and the supply.
- 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.
- There is a higher percentage of unoccupied household spaces in Gwynedd (2001 Census) than in any other local authority in Wales. The figure for Anglesey is also higher than the all Wales average.
- Second residences/ holiday accommodation is responsible for the high percentage of unoccupied household spaces in some of the coastal wards.
- 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.
- There is a 5.00 year supply of land for housing in the Gwynedd Planning Authority area and 5.1 years in Anglesey (April 2011 basis).

9.2 The main differences between Gwynedd and Anglesey

- Based upon migration, a net reduction in the population that are in their twenties in Gwynedd in the period 2008-11, 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, with the figures remaining relatively neutral for the other age groups. It is possible that the differences in these migration trends are related to the impact of the University in Bangor.
- 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 2011 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.

9.3 Housing objectives

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

- to facilitate a provision of various affordable residential 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;
- to consider whether or not there is a need to develop specific policies to meet the challenges and circumstances that are evident in specific areas within the Plan area;
- a challenge in relation to housing workers that would be responsible for developing a possible new nuclear power station on the Wylfa site.

9.4 Further Steps

The information presented in this topic paper, along with other sources of information, will form the evidence base, in terms of the housing field, for what is proposed and encouraged within the various steps of the process of preparing the Joint Local Development Plan.

REFERENCES

¹ The figure for 2011 is based on 2011 census estimates, updated to be consistent with the annual series of mid-year population estimates. The mid-year figures for the previous years will be revised in due course to take into account the 2011 Census.

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.

³ As defined in the Gwynedd Unitary Development Plan (GUDP) and the Stopped Anglesey Unitary Development Plan (UDP).

⁴ **Sub-regional Centre** – It provides a range of services and facilities e.g. transport, health and retail, for the whole of North West Wales.

⁵ **Urban Centres** – Strategic role and importance within their catchment areas and within the County. They are easily reached from the rest of the area and provide a wide range of community services and facilities and a high standard of public transport links. They serve areas outside their neighbouring communities.]

⁶ The Gwynedd Unitary Development Plan and the Stopped Anglesey Unitary Development Plan.

⁷ **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.

⁸ 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 2001 Census).

⁹ **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.

¹⁰ **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 on 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.

¹¹ 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 2001 Census).

¹² For the year 2011, the figures are relevant for the 0-14 and 15-24 age groups rather than 0-15 and 16-24.

¹³ For the year 2011, the figures are relevant for the 0-14 and 15-24 age groups rather than 0-15 and 16-24.

¹⁴ 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.

¹⁵ 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.

¹⁶ Mid-2010 population estimate, Stats Wales

¹⁷ Definition of 'household' [as noted in 'Household Projections for Wales (2008-based), Welsh Government]: "A household comprises 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. A household is not the same as a house or dwelling".

¹⁸ 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.

¹⁹ 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.

²⁰ 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.

²¹ 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.

²² It is presumed that 96% of Snowdonia National Park's annual provision is located in Gwynedd.

²³ 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.

²⁴ 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.

²⁵ The sub-areas are divided as follows:

Cybi: Holyhead Town, Kingsland, London Road, Maeshyfyrd, Morawelon, Parc a'r Mynydd and Porthyfelin wards

Alaw: Llanfaethlu, Llanfair yn Neubwll, Trearddur, Trewalchmai and Valley wards

Eilian: Amlwch Port, Amlwch Rural, Llanbadrig, Llanelian 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

²⁶ 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).

²⁷ 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.

- These figures apply to the six month period prior to the date noted based on valuation and sales.

²⁸ The affordability ratio is based on the median house price to median income ratio in the period between August 2010 and July 2011 (house prices are based on sales and valuations).

²⁹ Gwynedd Local Planning Authority area only

³⁰ Empty homes that are unfurnished and exempt from having to pay Council Tax (February 2010)

³¹ Only wards situated within the Gwynedd Planning Authority area were considered in this table.

³² The figures in these tables indicate the percentage of unoccupied household spaces at the time of the 2001 Census. The figures therefore apply to household spaces that are second residences or holiday accommodation, along with other vacant household spaces.

³³ Only wards situated within the Gwynedd Planning Authority area were considered in this table.

³⁴ New build and conversion of buildings

³⁵ This information is based on a housing land availability study held in April 2012. 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.

³⁶ *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.

³⁷ The number of affordable residential units completed during the years noted.