

Replacement Local Development Plan 2018-2033
Background Paper

BP9: Conwy local housing market assessment



Deposit Plan

September 2025



Mae'r ddogfen hon ar gael yn Gymraeg hefyd.

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Conwy Local Housing Market Assessment 2022-2037



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Contents

Preface	4
1. Introduction	6
1.1 Purpose of the Local Housing Market Assessment	6
1.2 National Policy Background	6
1.3 Local Policy Background	9
1.4 Governance and Consultation	12
2. Overview of Assessment and Methodology	15
2.1 Methodology, inputs and assumptions	15
2.2 Housing Market Areas	16
3. Overview of housing market and socio-economic and demographic trends	24
3.1 Housing market analysis	24
3.2 Socio-economic and demographic trends	59
3.3 Specific housing needs requirements	110
4 Range of additional housing need estimates	155
4.1 General	155
4.2 Principal projection	155
4.3 Lower projection	162
4.4 Higher projection	168
4.5 Replacement LDP employment growth projection	174
5 LHMA additional housing need estimates	182
5.1 Household projections used in this LHMA	182
5.2 Limitations and risks of simple comparisons of CCBC's previous LHMA (2021-2026) and this LHMA	183
5.3 Analysis of Welsh Government Principal Projection and Replacement LDP Employment Growth Projection	184
6 Quality assurance statement	191
Appendix A – Key Issues Tables	192
Key Issues Table 1 – Key data inputs	192
Key Issues Table 2 – Input Assumptions	197
Key Issues Table 3 – Calculations and outputs	197
Appendix B – Alternative scenarios for planning purposes	199
a) Conwy Replacement LDP employment growth projection – affordable housing for local need.	199

b) Principal projection– affordable housing for local need only	205
c) Eryri National Park area	211
Appendix C – Analysis of change in the additional housing need estimates	217
Appendix D – list of consultees	221

Preface

Local authorities are required to undertake a Local Housing Market Assessment (LHMA). Every five years, local authorities are required to **rewrite** their LHMA and **refresh** their LHMA once during that five year period (between years two and three). Local authorities can refresh their LHMA more frequently if required but these would not be reviewed nor signed off by Welsh Government.

Version 3.2 of the LHMA tool has been used to complete this LHMA.

Whilst the estimate in this LHMA will inform the development plan, it is unlikely to directly equate to a housing requirement or the affordable housing target in a development plan.

Affordable housing has a very specific definition in the context of land use planning and the Replacement Local Development Plan (RLDP). National planning policy documents and [Technical Advice Note 2](#) (TAN2) contain the definition of affordable housing for this purpose.

Planning Policy Wales definition of affordable housing

Affordable housing for the purposes of the land use planning system is housing where there are secure mechanisms in place to ensure that it is accessible to those who cannot afford market housing, both on first occupation and for subsequent occupiers. Affordable housing includes social rented housing owned by local authorities and RSLs, and intermediate housing where prices or rents are above those of social rent but below market housing prices or rents. All other types of housing are referred to as 'market housing', that is private housing for sale or rent where the price is in the open market and occupation is not subject to control by the local authority. It is recognised that some schemes may provide for stair casing to full ownership and where this is the case there must be secure arrangements in place to ensure the recycling of capital receipts to provide replacement affordable housing.

TAN2 definition of affordable housing

The definition of affordable housing for the purpose of the land use planning system is housing where there are secure mechanisms in place to ensure that it is accessible to those who cannot afford market housing both on first occupation and for subsequent occupiers. However, it is recognised that some schemes may provide for stair casing to full ownership and where this is the case there must be secure arrangements in place to ensure the recycling of capital receipts to provide replacement affordable housing. Affordable housing includes social rented housing and intermediate housing.

Social housing and intermediate housing in the Conwy County

Social housing in the Conwy County is allocated via the Common Housing Register. The eligibility criteria can be found on CCBC's website -

<https://www.conwy.gov.uk/en/Resident/Housing/Housing-Options/Social-Housing.aspx>

Intermediate housing in the Conwy County is allocated via Tai Teg (affordable housing register). The eligibility criteria can be found on Tai Teg's website -

<https://taiteg.org.uk/en/am-i-eligible-to-apply>

1. Introduction

1.1 Purpose of the Local Housing Market Assessment

1.1.1 The purpose of the Local Housing Market Assessment (LHMA) is to provide a robust evidence base to inform the Local Housing Strategy (LHS) and the Local Development Plan (LDP) in Conwy County. It also informs strategic housing priorities and local service planning, such as education and transport. The LHMA can also be used as a tool for negotiating affordable housing provision when determining planning applications and allocating Social Housing Grant (SHG) to support the delivery of affordable housing.

1.1.2 The LHMA assesses current and future housing need within Conwy County Borough. The LHMA sets out the need for additional affordable housing in Conwy over the next fifteen years (2022-37), and also informs the provision of market housing in terms of size and type to ensure there is an appropriate mix of housing on offer. The assessment provides detail by geographical 'local housing market areas'.

1.1.3 An affordable housing needs calculation to inform the Conwy Replacement Local Development Plan (LDP) has been carried alongside the standard methodology. This figure excludes those on the common housing register with no local connection. An employment growth led projection was endorsed at Preferred Strategy stage of the Replacement LDP, which covers the timeframe 2018-33. The calculation also reflects these projections and timeframe.

1.2 National Policy Background

1.2.1 The following national legislation, policies and strategies are considered relevant when preparing the LHMA:

- **Section 8 of the Housing Act 1985** - Section 8 of the Housing Act 1985 places a statutory duty on local authorities to periodically assess the level of housing need in their area. It is vital that authorities have a comprehensive understanding of their local housing market(s) and provide a robust evidence base for effective strategic housing and planning services. Production of a Local Housing Market Assessment (LHMA) falls under this duty, building

upon the requirement to review housing needs through a more holistic review of the whole housing market. Local authorities are expected to rewrite LHMA every five years and refresh that LHMA once during that five year period (between years two and three) utilising section 87 of the [Local Government Act 2003](#).

- [**Independent Review of Affordable Housing Supply**](#) - The importance of LHMA, and using the best possible data on housing need and demand to inform housing policy and decisions regarding affordable housing supply, was underlined in the 2019 Independent Review of Affordable Housing Supply. The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. A robust LHMA is the key means of identifying this evidence at the local level.
- [**Renting Homes \(Wales\) Act \(2016\)**](#) - Implemented from 1 December 2022, this changed the way all landlords in Wales rent their properties, affecting all social and private tenants. It has made it simpler to rent a home and protect tenants' rights by replacing various complex pieces of existing legislation with one legal framework and new 'occupation contracts'.
- [**Planning Policy Wales**](#) - Planning Policy Wales also stresses that LHMA form a fundamental part of the evidence base for development plans and when assessing the impact of second and holiday homes in communities, and they are best dealt with through the planning system.
- [**The Development Plans Manual**](#) requires all development plans to be supported by an LHMA. It also advises that the sub-market areas identified in the LHMA should be spatially reflected in the viability testing. It should also clearly show how the LHMA and viability work aligns with the settlement hierarchy and affordable housing targets.

- **Future Wales the National Plan 2040** is a national development plan, which sets a strategy for addressing key national priorities. Policy 7 Delivering Affordable Homes requires planning authorities to develop strong evidence based policy frameworks to deliver affordable housing.
- **Housing (Wales) Act 2014** - In addition, local authorities must develop a homelessness strategy every four years under sections 50, 51 and 52 of the Housing (Wales) Act 2014. The LHMA plays a fundamental role in informing this strategy which must include a review of the resources available to the local authority and other bodies associated with supporting people who are or may become homeless.
- **Ending Homelessness in Wales: A high level action plan (2021-2026)** - Following Welsh Government's Strategy to End Homelessness in 2019, this action plan sets the direction for the work required to end homelessness in Wales. It focuses on early preventative actions across public services and making the transformation shift to a rapid rehousing approach.
- **Equality Act 2010** - It is essential also for local authorities to consider their equality duties under the Equality Act 2010 and the Welsh Public Sector Equality Duties.
- **Wellbeing of Future Generations (Wales) Act 2015** - This Act is about improving the social, economic, environmental and cultural well-being of Wales. Public bodies need to make sure that when making their decisions they take into account the impact they could have on people living their lives in Wales in the future. It expects them to:
 - Work together better
 - Involve people reflecting the diversity of our communities
 - Look to the long term as well as focusing on now
 - Take action to try and stop problems getting worse - or even stop them happening in the first place.

The Act puts in place seven well-being goals. Public Service Boards must also conduct an assessment of local wellbeing.

1.3 Local Policy Background

1.3.1 The LHMA informs local housing policy development, including the Conwy LDP, Eryri LDP and the Local Housing Strategy. It has also been used to inform the first Affordable Housing Delivery Plan for Conwy. The information below summarises how the LHMA links to and supports local plans and strategies.

1.3.2 Relevant priorities from the [Conwy Corporate Plan 2022-27](#) are below:

- Outcome 4) People in Conwy have access to affordable, appropriate, good quality accommodation that enhances the quality of their lives.

1.3.3 The [Conwy and Denbighshire Well-being Plan \(2023-2028\)](#) identifies the availability of housing as a key area to help deliver the overall aim of 'A more equal Wales'. It identifies the following step, which is relevant:

"Review the amount of available housing in our county to ensure that there is quality provision that meets the needs of residents, assisting them to lead independent lives in appropriate accommodation for as long as possible".

1.3.4 The [Local Housing Strategy 2018-2023](#) sets out Conwy's strategic vision and priorities for housing and housing related services. Conwy's vision is that 'people in Conwy have access to affordable, appropriate and good quality accommodation that enhances their quality of life', which is underpinned by 4 key objectives:

1. Increase the supply of affordable housing
2. Ensure that housing support is available to those who need it
3. Improve the quality of the private sector
4. Ensure people understand their housing options to enable them to make an informed decision

1.3.5 A new 5 year Local Housing Strategy will be produced by summer 2024.

1.3.6 The Local Housing Prospectus 2023 identifies the strategic housing priorities for the next 12 months:

- a) General needs 1 bed accommodation and larger accommodation in coastal towns (4, 5, 6, 7 and 8 bed) including innovative solutions such as pods, acquisition and refurbishment of existing dwelling(s), conversions and/or shared housing
- b) 1 and 2 bed bungalow/ ground floor adapted properties in coastal towns, where appropriate (i.e. land is suitable and ensures the property is accessible)
- c) Development that supports rightsizing initiatives and creates mobility within the existing housing stock.
- d) Sustainable developments (i.e. mixed size and tenure), there will be an expectation that consideration is given to ensure a higher percentage of social housing is available
- e) Town centre regeneration
- f) Development of supported housing schemes for specific groups
- g) Accommodation that supports the effective implementation of Conwy's Rapid Rehousing Transition Plan, such as accommodation that can be used as an alternative to bed and breakfast, including temporary family accommodation
- h) Development of an extra care scheme
- i) Development that meets the housing need set out in CCBC's Social Care Housing Prospectus

1.3.7 Conwy's Programme Delivery Plans sets out how grant support for the development of affordable housing in the county will be allocated. All schemes included for financial support must be in line with Conwy's strategic housing priorities and contribute towards maximising the provision of affordable housing.

1.3.8 As of 1st April 2023 there was 1439 dwellings in Conwy that had been empty for six months or longer. [Conwy Empty Homes Strategy 2019](#) sets out how the Council will address this, through returning them to use and increasing the supply of accommodation in the county. Some are returned as affordable units.

1.3.9 The [Rapid Rehousing Transition Plan 2022](#) sets out how the Council will work towards achieving Welsh Government's vision to making homelessness 'rare, brief and unrepeatable'. The high level of 'ineffective properties', which includes second homes and short-term lets is raised as an issue. The need for a sufficient supply of affordable housing is one of the cornerstones of a rapid rehousing approach.

1.3.10 The [Conwy LDP](#) (2007-2022) sets out the framework for the development and use of land in the areas of the County Borough that lie outside of the Eryri National Park. Work has commenced on a Replacement LDP. Consultation on the [Preferred Strategy](#) stage took place August-September 2019. Public consultation on the Deposit stage is due to take place during 2024. This LHMA will form part of the evidence base.

1.3.11 The [Eryri LDP](#) (2016-31) sets out the planning framework for development within the National Park area. The plan notes a requirement for 770 dwellings and makes provision for approximately 885 new dwellings has been allocated within the plan. Just less than half of the required dwellings (375) is affordable housing for local people in need, and who cannot afford open market housing. This stock of dwellings will be retained in perpetuity to establish a range of dwellings providing social and economic benefit for local people and the area. Eryri are currently in the process of reviewing their LDP.

1.3.12 The [Housing Support Programme Strategy](#) (2022-2026) identified Conwy's strategic approach to homelessness prevention and housing related support services, and prioritises Housing Support Grant funded services. The Strategy supports Conwy's commitment to achieving Welsh Government's vision of ending homelessness in Wales and making it 'rare, brief and unrepeatable' when it does occur.

1.4 Governance and Consultation

1.4.1 A collaborative approach with a wide range of stakeholders was applied when preparing this LHMA. It was prepared jointly between CCBC Housing Strategy and Strategic Planning Policy Services.

1.4.2 Close working with Eryri National Park planning policy team took place at all stages to make sure that the needs of the Park were considered fully from the outset.

1.4.3 Data Cymru provided assistance with data input and checking for the Toolkit. Close working and data sharing took place between CCBC Housing Strategy, Cartrefi Conwy Social Housing Register (SARTH) Team, CCBC Homeless Prevention Team, Tai Teg (intermediate housing register team), Registered Social Landlords operating in the Conwy County (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing) to gather the most robust social housing need data, intermediate housing need data, temporary accommodation need data, existing social housing and intermediate housing data, turnover of existing social and intermediate housing stock data and planned supply data.

1.4.4 To gather information on the specific housing need requirements of the full diversity of households living in Conwy CB and to better support people to live well and with dignity, and to live independently for as long as possible, close working took place with:

- CCBC Housing Improvements Team
- CCBC Social Care (including Occupational Therapists),
- CCBC Re-settlement Co-ordinator,
- CCBC Homeless Prevention Team and
- Registered Social Landlords operating in Conwy (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing)

1.4.5 Statistical expertise of CCBC staff in the Strategic Planning Policy Service was used for sourcing and analysing other data required by the template. The justification and methodology for setting the housing market areas now used in

the LHMA links with Replacement LDP background evidence to ensure consistency between the documents.

1.4.6 Public consultation took place between 29th January and 11th March 2024. A copy of the draft LHMA and a survey requesting feedback on the draft LHMA was online and at libraries in the Conwy County. There were 3 drop in sessions for stakeholders and members of the public to provide feedback to officers on the draft LHMA. The drop in sessions were in the following locations:

- Coed Pella Council offices, Conwy Road, Colwyn Bay, LL29 7AZ
- Bodlondeb Council Offices, Bangor Road, Conwy, LL32 8DU
- Glasdir, Plas yn Dre, Llanrwst, LL26 0DF.

1.4.7 Further details about the drop in sessions were available on the Council's website and social media pages. A link to the consultation webpage was included on the Council's team brief and postmaster which was shared with all Council employees and local Councillors.

1.4.8 Rent Smart Wales and the National Residential Landlords Association shared the consultation information with private landlords and letting agents. TPAS Cymru (Tenant Participation Advisory Service) shared details with tenants.

1.4.9 The following were contacted via email and informed of the public consultation and how they could submit comments. A full list can be found in appendix D of this LHMA.

- Registered Social Landlords.
- Betsi Cadwaladr University Health Board
- CCBC Social Care staff
- CCBC Housing Improvements Team, CCBC Homeless Prevention Team and CCBC Housing Support Grant Team
- Rural Housing Enablers.
- Private developers and planning agents operating in Conwy CB.
- Tenant organisations.
- Estate agents and letting agents.

- CCBC local Councillors.
- Neighbouring Local Authorities (Gwynedd and Denbighshire).
- Eryri National Park Authority
- North Wales Regional Collaborative.
- Citizens Advice.
- Advocacy services.
- Groups representing people with protected characteristics.

1.4.10 During the consultation period there were regular posts with information about the consultation on the Council's social media accounts.

1.4.11 After the consultation closed, all feedback was considered and amendments were made where needed. The final LHMA was presented to CCBC Economy and Place Overview and Scrutiny Committee and Cabinet with the recommendation that it was endorsed and submitted to Welsh Government. The LHMA was then submitted to Welsh Government for consideration.

2. Overview of Assessment and Methodology

2.1 Methodology, inputs and assumptions

2.1.1 The additional housing needs estimates are determined using the LHMA Tool.

This Tool uses a formulaic approach to allocate the additional housing need, formed from the existing unmet need and the newly arising need (change in the household projections over the LHMA period), to the different housing tenures. All existing unmet need is allocated to affordable housing and assumed to be covered during the first five years of the LHMA period. The newly arising need is allocated between market and affordable housing using a formulaic approach.

2.1.2 By housing market area (HMA), the LHMA Tool provides default data inputs for rent, house price paid and household projections (used to generate the newly arising need) with local authorities providing the income percentile distributions, existing unmet need and the planned supply and turnover of existing stock. The latter two data inputs are considered over the first five years only of the LHMA period and are fully allocated to affordable housing. This is because it becomes less accurate to predict supply beyond the first five years of the LHMA period. A local authority can have up to 20 HMAs which are defined using wards, middle-layer super output areas (MSOAs) or lower-layer super output areas (LSOAs). Each HMA can have up to 40 wards, MSOAs or LSOAs.

2.1.3 The input data together with a number of assumptions is used to generate an income level above which households would be considered able to meet their needs in the market and a lower income level below which households are considered to be in need of social rent. The intermediate households are those not allocated to market housing or social rent. The LHMA Tool also forecasts how the data inputs may change over the first five years of the LHMA period.

2.1.4 The output tables from the LHMA Tool are used as the starting point for development plans to provide the range of LHMA additional housing need estimates.

2.1.5 There are no higher education facilities in Conwy County Borough and therefore no halls of residence. Replacement LDP [background paper 20: skills](#)

needs assessment recommends that there is no need to set aside land for a new higher education facility. It is therefore considered highly unlikely that there will be a need in future for student accommodation, and so this has not been covered in this LHMA.

2.1.6 To ensure that as many households as possible are aware of their housing options a communication plan has previously been developed to promote the intermediate housing register in Conwy. To ensure that the data inputted in to the tool was accurate and that there was no double counting, households on the social housing register were compared with the intermediate housing register and households in temporary accommodation. Further detail on this can be found in Appendix A. The communication plan is currently being reviewed and will be amended to include the social and intermediate housing registers, rather than only the intermediate housing register.

2.1.7 Due to the current level of housing need in the Conwy County and the number of homeless households in temporary accommodation, there is a need to increase the supply of affordable housing at pace. The local authority is working closely with Registered Social Landlords to purchase existing dwellings using Transitional Accommodation Capital Programme, Recycled Capital Grant and Social Housing Grant funding. The number of acquisitions have not been included in toolkit table 12 Existing Stock and Planned Supply – Committed Supply as at the time of writing the LHMA as they were still being processed.

2.1.8 Further information on data issues can be found in appendix A.

2.1.9 Estimates of population numbers have been revised following the release of results from the 2021 Census, so what we understand about population trends has changed since the Welsh Government and Conwy RLDP projections and background evidence were published. This means that some numbers, rates and percentages will look significantly different from what we have seen before, and some data sources that we have used previously are no longer considered reliable (in particular projections and forecasts based on past trends).

2.2 Housing Market Areas

General

2.2.1 HMAs are areas that have been defined geographically based on the functional areas where people currently live and would be willing to move home without changing jobs, recognising that housing markets are not constrained by administrative boundaries. A number of key factors need to be taken into account when defining these areas, including the broad price of housing (to consider ‘transferability’ within the market) and major transport links by road or rail (to take account of commuting patterns). When planning for new housing provision, land availability, financial viability, vacancy rates and housing need also require consideration.

2.2.2 The Interim LHMA (2021-2026) was based on five HMAs, which were the corporate areas used by some Council services at that time. They were based on service catchment areas, including schools, GPs and community council boundaries. The changes to Electoral Divisions (wards) in 2022 means that these areas no longer follow ward boundaries and need amending.

2.2.3 The new LHMA guidelines state the following:

“LHMAs are the first step in linking the housing and planning process. LHMAs form a critical part of the evidence base for local planning authorities and are a key consideration in determining the location of housing growth in development plans.”; and,

“As the purpose of an LHMA is to provide an evidence-base to inform Development Plans and feed into wider housing strategies, there should be a clear read-across from assessments to plans.”

2.2.4 In addition, a recommendation from an independent review from 2019 stated:

“Further work is required to better integrate the production and reconciliation of the conclusions of LHMA and Development Plans processes. Housing and planning departments should collaborate further on this in order to bring greater clarity and cohesion to the local assessment of housing requirements and to make better use of limited resources. The potential for greater regional collaboration should be explored.”

Conwy Replacement LDP alignment

2.2.5 The Conwy Replacement LDP uses a spatial strategy approach based on various data sources and the following key considerations, which reflect the key factors referred to above:

- National planning policy and Well-being of Future Generations Act
- Other strategies, regional and local, e.g. the North Wales Growth Deal
- Replacement LDP Evidence Base for all subject areas, and not just housing
- Promoting Healthy Lifestyles, including Active Travel
- Welsh Language and Placemaking
- Infrastructure capacity and accessibility to facilities and services
- Constraints – having regard to physical or environmental constraints e.g. flood risk .
- Housing commitments
- Candidate Sites for RLDP
- Local housing market conditions, viability etc.
- Flexibility to be able to adapt to future changes
- Delivering RLDP Vision and Objectives
- Brownfield Land and De-risking approach

2.2.6 The Development Plans Manual, states that: “All Development Plans should be supported by an LHMA”. It also states that:

“The sub-market areas identified in the LHMA should be spatially reflected in subsequent viability testing, thus ensuring clarity for policy formulation, spatial expression and application. The evidence base should also be clear how the sub market areas reflected in the LHMA and viability work aligns with the settlement hierarchy and affordable housing policy targets in the plan.”

2.2.7 The Conwy Replacement LDP splits the planning authority area into five Spatial Strategy areas. Ensuring sustainable areas for growth is key, and it is considered that these areas ensure that growth is directed to sustainable and deliverable locations in line with national planning policy and the growth areas of Llandudno and Colwyn Bay, identified in Future Wales. Viability testing of areas and strategic sites was part of the Preferred Strategy stage of the

Replacement LDP. This is a significant piece of work, which has been updated for the Deposit stage and reflects the Spatial Strategy areas used in the Conwy Replacement LDP.

2.2.8 In addition, the new LHMA guidelines and methodology splits the market and affordable dwelling requirement by HMA. The Spatial Distribution Strategy of the Replacement LDP Preferred Strategy apportions the level of growth to each sub-area. It would be appropriate to apply this split to the need identified in the LHMA.

2.2.9 Extensive consultation and joint working took place when preparing the Replacement LDP and selecting the most appropriate and sound Spatial Strategy areas. Public consultation on the Pre-Deposit Participation stage took place between 14 December 2018 and 25 January 2019, which included the Spatial Strategy areas. Public consultation on the Preferred Strategy stage took place on 29th July 2019 to 20th September 2019. No objections were received regarding the growth areas or the spatial distribution strategy.

2.2.10 The Preferred Strategy stage sets out the Council's Vision, Strategic Objectives, Spatial Strategy and Strategic Policies to guide the chosen level of future development and growth in Conwy up to 2033. The Preferred Strategy also includes Strategic Sites, supported by an Infrastructure Plan, Viability Assessments and Concept Drawings.

2.2.11 For these reasons, it has been considered appropriate for this LHMA to apply the same areas and growth distribution as the Replacement LDP.

Eryri National Park

2.2.12 Eryri National Park has its own planning authority. The LHMA guidance suggests that where there is a National Park boundary crossing the local authority, this area should be included as a separate section. In Conwy County Borough, the Park boundary does not follow any administrative or statistical boundaries. The LHMA toolkit only allows areas to be built from Electoral Wards or Lower Super Output Areas (LSOA), which do not reflect the National Park boundary. It would, therefore, be difficult to find accurate and robust data split in this way and the Toolkit does not allow for the National Park boundary to be used to split the data.

2.2.13 The National Park covers a small geographic area in Conwy County Borough, with low levels of housebuilding due to restrictive land-use policies. Affordable housing need in these small settlements is relatively low. Some of these settlements are split, with part falling under the National Park planning authority, and part falling in Conwy's planning authority. Other planning constraints in some of these settlements also affect where the need can be delivered.

2.2.14 A joint approach to delivering the housing need for these areas is needed and is already in place and working well. Conwy and the Park planning authority have worked pro-actively together to ensure we have a consistent approach for our shared settlements to deliver the rural housing need. Work is already underway alongside this LHMA to prepare a joint background evidence paper for the Conwy Replacement LDP (ahead of Deposit consultation) with the Park. The housing need will be analysed at a small level to ensure it is split appropriately in terms of meeting planning policies and constraints, but also to deliver the housing need sustainably.

2.2.15 The LHMA toolkit allows for HMAs to be built from LSOAs. One LSOA does fall completely within in the National Park boundary. Consideration was given to including this as an individual HMA, separate to other rural areas. It is such a small area, however, it was considered unlikely to be reflective of a HMA on its own and including it with the wider rural area would better reflect the local housing market in that location. Caerhun, Betws y Coed and Trefriw and Uwch Conwy wards are split by the Park boundary. These could be a HMA for Eryri National Park, however, it could imply that all of the housing need in these areas should be met on the Park side of the boundary. It is anticipated that the affordable need in shared settlements will be met by both planning authorities through a co-ordinated approach, subject to land-use planning constraints.

2.2.16 The West HMA is also part in Eryri National Park area. For Llanfairfechan and Penmaenmawr Wards, there are no settlements in the park boundary. For the Capelulo ward, there are two settlements: Dwygyfylchi, where the majority falls outside of the National Park area and Capelulo, where the majority falls inside. It is anticipated that the majority of affordable need for this ward will be met on the Conwy LDP side of the boundary.

2.2.17 For these reasons, Eryri National Park has been included with the remainder of the rural housing market area. Continued close working with CCBC housing and planners at both Conwy and Eryri planning authorities will take place to ensure affordable housing needs are met in the most appropriate way.

2.2.18 To assist the National Park as a planning authority, an indicative figure based on the Electoral Ward boundaries for Betws-y-Coed and Trefriw, Caerhun and Uwch Conwy has been included in appendix B, section C. This area includes parts of the County Borough that fall outside of the National Park boundary, and therefore could be an over-count of need. No figure has been included for Capelulo, as there is currently no household on the registers for that area. This will be reviewed regularly.

Housing Market Areas

2.2.19 The HMAs include the following electoral divisions (wards):

- West HMA:
 - Bryn
 - Pandy
 - Penmaenmawr
- Creuddyn HMA:
 - Conwy
 - Craig y Don
 - Deganwy
 - Glyn y Marl
 - Gogarth Mostyn
 - Llansannfraid
 - Penrhyn
 - Tudno
- Central HMA:
 - Colwyn

- Eirias
- Glyn
- Llandrillo yn Rhos
- Llysfaen
- Mochdre
- Rhiw

- East HMA:

- Gele and Llanddulas
- Kinmel Bay
- Pensarn Pentre Mawr
- Towyn

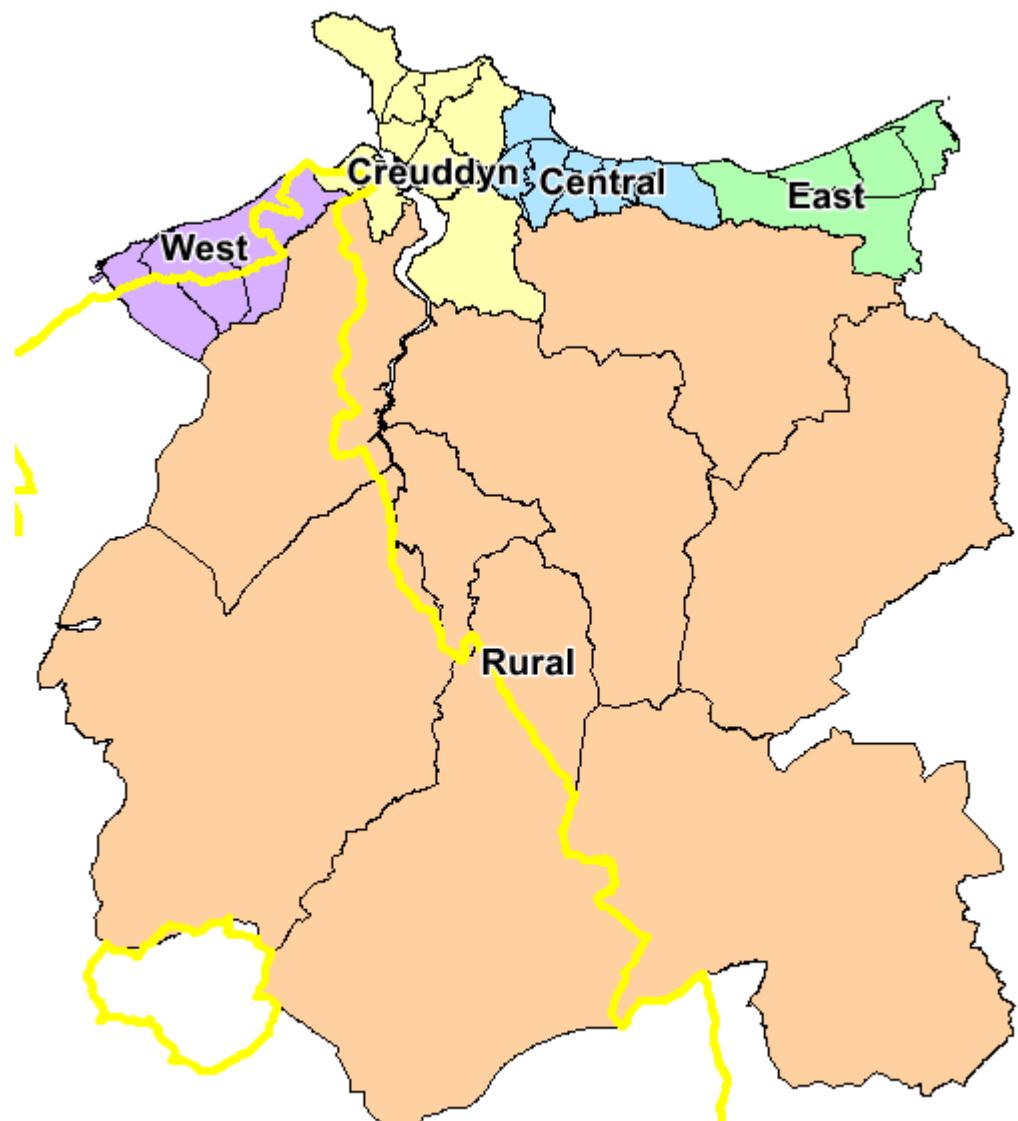
- Rural HMA:

- Betws yn Rhos
- Betws y Coed and Trefriw
- Caerhun
- Eglwys-bach a Llangernyw
- Llanrwst a Llanddoged
- Llansannan
- Uwch Aled
- Uwch Conwy

2.2.20 The map below shows the boundaries of the HMAs and wards.

Map 1: HMAs by electoral divisions

Source: Natural Resources Wales and Ordnance Survey open data, 2023



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3. Overview of housing market and socio-economic and demographic trends

3.1 Housing market analysis

3.1.1 This section provides an overview of the local housing market within the local authority. Please note that we have included a breakdown of protected characteristics in the next section, 3.2 Socio-economic profile.

General

3.1.2 Conwy CB is centrally located within North Wales. The County Borough covers an area of 113,000 hectares and has a population of 114,741 (2021 Census). About 38% of its area and 4% of its population are within the Eryri National Park.

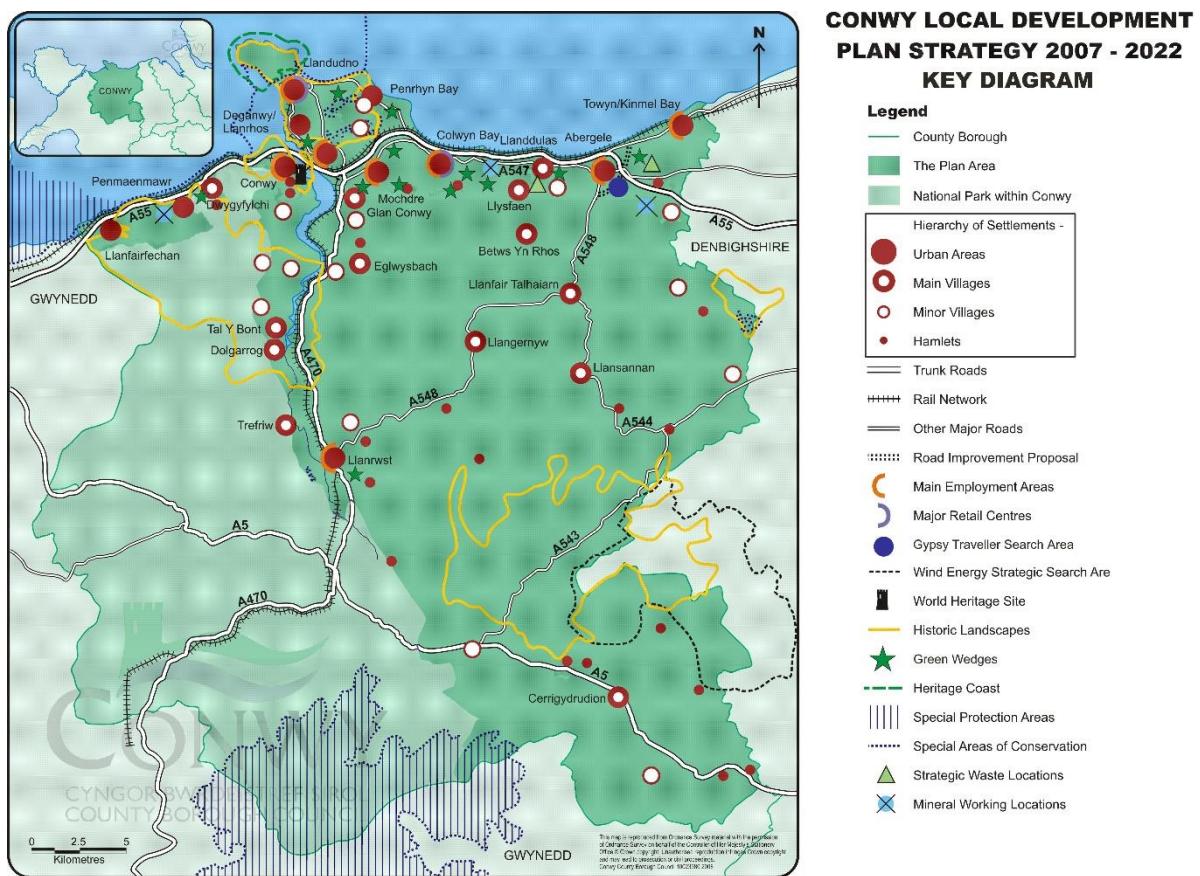
3.1.3 Conwy CB is an area of outstanding landscape ranging from extensive sandy beaches and headlands to sheltered valleys, open moors and rugged mountains. Not surprisingly, its economy relies heavily upon tourism. Rural areas and their communities are dependent on agricultural and forestry activities, even though these sectors do not provide a high level of direct employment.

3.1.4 The narrow coastal belt contains about 90% of the County Borough's population with Llandudno and Colwyn Bay as the two main settlements in terms of population numbers. Rural Conwy is an attractive, mainly agricultural area with limited alternative employment and few development pressures. Its population is widely dispersed and is predominantly Welsh speaking. The main settlement in terms of population numbers is the market town of Llanrwst.

3.1.5 The map below shows the key strategic towns for Conwy CB and main transport routes.

Map 2: Conwy County Borough

Source: Strategic Planning Policy, CCBC



Households

3.1.6 There were an estimated 52,237 households with at least one usual resident on Census Day in Conwy CB. 112,917 usual residents (98.4%) lived in households and 1,824 (1.6%) lived in communal establishments.

3.1.7 Average household size is the average number of persons per household. In 2021, this was 2.16 residents per household in Conwy CB, which is slightly smaller than in 2011 when it was 2.20. This was the smallest average household size in Wales.

Household composition

3.1.8 Overall, in Conwy CB, 61.4% of households (32,089) were single family households, 34.3% (17,909) were one person households and 4.3% (2,239) were multiple family or other household types.

3.1.9 9,318 or 17.8% of all households were pensioners living alone (people aged 66 years and over). This has increased from 5,952 in 2011, even though the pension age was lower in 2011. In addition, there were 6,674 or 12.8% of households containing families made up of only people of pension age or older.

3.1.10 Together, pensioners living alone and pensioner-only families make up 30.6% of all households in the area. This compares to 28.7% in 2011. It is higher than the Wales average of 24.8%.

3.1.11 12,010 households (23.0%) contained dependent children (down from 12,513 or 24.5% in 2011). Households containing dependent children in Wales as a whole is higher at 26.5%.

3.1.12 In 2021 3,504 or 6.7% of all households were lone parent families with dependent children. This has increased from 6.2% in 2011.

Table 1: household composition in Wales, North Wales and Conwy CB (2021)

Source: table TS003, 2021 Census, Office for National Statistics

Household composition	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Total households	52,235	100%	301,374	1,347,114
Single person	17,909	34.3%	32.2%	31.9%
Single pensioner	9,318	17.8%	15.8%	14.6%
All households with dependent children	12,010	23.0%	25.5%	26.5%
Couple (married and cohabiting)	19,500	37.3%	40.1%	40.3%
Single parent	3,504	6.7%	7.2%	7.6%
Other	927	1.8%	1.8%	1.9%
One family with no dependent children	8,660	16.6%	16.7%	16.5%
Others with no dependent children	1,312	2.5%	2.6%	3.1%
All households of only pensioners	16,093	30.8%	27.2%	24.9%
Population in private households	112,917	98.4%	98.3%	98.2%
Average household size	Not applicable	2.16	2.24	2.27

3.1.13 The tables below show household composition by HMA. Creuddyn HMA has the largest number of households at 16,534, followed by Central HMA at 13,914. The West is the smallest with 3,673 households.

3.1.14 Creuddyn HMA has the highest proportion of single person households (36.4%). West HMA (35.9%) and Central HMA (35.3%) are similar. Rural HMA has the lowest at 28.9%.

3.1.15 Central HMA has the highest proportion of households with dependent children (25.3%), compared to East, which has the lowest at 21.6%. The East HMA has the highest level of pensioner households 34.3% and West HMA the lowest at 27.0%.

3.1.16 Creuddyn HMA has the lowest average household size at 2.10 people per household. West HMA has a similar size at 2.11. Rural HMA has the highest at 2.27 people per household.

Table 2: household composition in HMAs by number (2021)

Source: table TS003, 2021 Census, Office for National Statistics

Household composition	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Total households	3,673	16,534	13,914	9,728	8,399
Single person	1,320	6,014	4,910	3,231	2,427
Single pensioner	620	3,230	2,382	1,817	1,268
All households with dependent children	874	3,600	3,517	2,099	1,923
Couple (married and cohabiting)	1,382	6,244	5,069	3,494	3,309
Single parent	301	1,081	1,083	656	384
Other	60	272	269	173	152
One family with no dependent children	643	2,820	2,110	1,622	1,465
Others with no dependent children	83	475	329	237	185
All households of only pensioners	992	5,404	3,961	3,335	2,407
Population in private households	7,763	34,773	30,457	20,859	19,065
Average household size	2.11	2.10	2.19	2.14	2.27

Table 3: household composition in HMAs by % (2021)

Source: table TS003, 2021 Census, Office for National Statistics

Household composition	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Total households	100%	100%	100%	100%	100%
Single person	35.9%	36.4%	35.3%	33.2%	28.9%
Single pensioner	16.9%	19.5%	17.1%	18.7%	15.1%
All households with dependent children	23.8%	21.8%	25.3%	21.6%	22.9%
Couple (married and cohabiting)	37.6%	35.6%	36.4%	35.9%	44.7%
Single parent	8.2%	6.5%	7.8%	6.7%	4.6%
Other	1.6%	1.6%	1.9%	1.8%	2.1%
One family with no dependent children	17.5%	16.1%	15.2%	16.7%	19.8%
Others with no dependent children	2.3%	2.7%	2.4%	2.4%	2.5%
All households of only pensioners	27.0%	32.7%	28.5%	34.3%	28.7%
Population in private households	99.1%	98.1%	97.6%	99.1%	99.3%

Tenure

3.1.17 Tenure refers to whether a household rents or owns the accommodation that it occupies. The most robust information for this is from the Census. The table below shows this. Owner occupier (with and without a mortgage) is the most common tenure across Conwy CB and Wales as a whole. The proportion of owner occupiers is slightly higher in Conwy CB (68.4%) when compared to both the Wales (66.1%) and North Wales (67.1%) averages. Percentages across all areas have dropped slightly since 2011. The proportion who own outright in Conwy CB is higher than for Wales and North Wales.

3.1.18 When looking at households in affordable housing, the proportion in shared ownership is small overall, but slightly higher in Conwy CB at 0.6%, than for both Wales (0.3%) and North Wales (0.4%). The proportion of households in social rented is lower in Conwy CB (12.0%) compared to 16.5% in Wales and 15.6% in North Wales.

3.1.19 Private rented households is more common in Conwy CB (19.0%), compared to Wales (17.0%) and North Wales (16.6%). This has increased across Wales as a whole since 2011.

Table 4: household tenure in Wales, North Wales and Conwy CB (2021)

Source: table TS054, 2021 Census; Office for National Statistics

Tenure	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All households	52,235		301,377	1,347,117
Owned	35,501	68.4%	67.1%	66.1%
outright	20,409	43.6%	40.3%	38.0%
with mortgage / loan	15,092	24.8%	26.8%	28.0%
Shared ownership	378	0.6%	0.4%	0.3%
Social rented	5,946	12.0%	15.6%	16.5%
Private rented	8,534	19.0%	16.6%	17.0%
Lives rent free	818	0.1%	0.2%	0.2%

3.1.20 The tables below show the variance in household tenure across the County Borough. The number of households who are owner occupiers is the highest household tenure type across all areas. The East and Rural HMAs have the highest proportions at 71.9% and 71.1% respectively and Central the lowest (64.3%).

3.1.21 The HMA the highest proportion of shared ownership household tenure is the East at 1.0% of households, which is 93 households. Social rented is highest in the Central HMA (14.0%) and lowest in the East HMA (9.5%). Private rented is highest in the Central HMA (21.1%) and lowest in the West HMA (17.0%).

Table 5: household tenure in HMAs by number (2021)

Source: table TS054, 2021 Census, Office for National Statistics

Tenure	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All households	3,677	17,524	13,917	9,732	7,386
Owned	2,528	11,998	8,952	6,996	5,253
outright	1,544	7,838	5,363	4,518	3,499
with mortgage / loan	984	4,160	3,589	2,478	1,754
Shared ownership	18	98	63	93	20
Social rented	505	2,083	1,948	921	805
Private rented	626	3,328	2,941	1,718	1,301
Lives rent free	0	17	13	4	7

Table 6: household tenure in HMAs by % (2021)

Source: table TS054, 2021 Census, Office for National Statistics

Tenure	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All households	100%	100%	100%	100%	100%
Owned outright	68.8%	68.5%	64.3%	71.9%	71.1%
with mortgage / loan	42.0%	44.7%	38.5%	46.4%	47.4%
Shared ownership	26.8%	23.7%	25.8%	25.5%	23.7%
Social rented	0.5%	0.6%	0.5%	1.0%	0.3%
Private rented	13.7%	11.9%	14.0%	9.5%	10.9%
Lives rent free	17.0%	19.0%	21.1%	17.7%	17.6%
	0.0%	0.1%	0.1%	0.0%	0.1%

Owner occupier sector

3.1.22 Owner occupier is the most common tenure across Conwy CB at 68.4% of households, compared to 66.1% Wales and 67.1%.North Wales. For more details, see Tenure section above.

3.1.23 Unit level transaction data which is available from the Land Registry, and collects data for the whole year. The median measure of average is more robust than the mean measure, and if we look at this on an annual basis we can also smooth out the fluctuations caused by the low number of monthly transactions and the seasonality of the housing market.

Table 7: number of registered sales by accommodation type (2022)

Source: Land Registry Price Paid data

Area	All house types	Detached	Flats	Semi-detached	Terraced
Conwy CB	1,831	555	341	524	376
West	116	0	9	25	47
Creuddyn	653	166	184	170	133
Central	506	133	134	139	100
East	395	186	12	144	53
Rural	161	70	2	46	43

3.1.24 Only those new build properties which are registered as change of land ownership are included, and so some self-build properties will be excluded. Not all house sales are recorded through the Land Registry and some transactions may see a delay in registration, but it is the most complete register of house prices available in the UK.

3.1.25 The table below shows median house prices for the different house types by HMA. Creuddyn and Rural HMAs have the highest average (median) house prices, at £216,000 and £220,000, compared to West with lowest at £177,000. When looking at specific house types, the East has the lowest average prices for detached, semi-detached and flats. The Rural HMA has the highest average house price for detached (£350,000) and flats (£237,000). Creuddyn HMA has the highest for semi-detached (£225,000) and terraced (£195,000). These figures could easily be skewed by the small number of sales in some areas for the house types and so should be treated with caution.

Table 8: house prices (median) by accommodation type (2022)

Source: Land Registry Price Paid data

Area	All house types	Detached	Flats	Semi-detached	Terraced
Conwy CB	£200,000	£295,000	£138,000	£200,000	£164,000
West	£177,000	£315,000	£144,950	£208,000	£150,500
Creuddyn	£216,000	£330,000	£140,000	£225,500	£195,000
Central	£183,750	£299,950	£135,000	£210,000	£144,000
East	£189,950	£231,750	£119,000	£166,750	£155,000
Rural	£220,000	£350,000	£237,500	£190,000	£159,950

3.1.26 The table below looks at the affordability of properties at median and lower quartile house prices when compared to median income. A house price to household income ratio (or multiplier) gives some indication of how affordable housing is in the area for first time buyers. Typically a ratio of 3 to 4 times income is needed to be able to afford a mortgage. WG has provided data for the LHMA toolkit, which shows that the average house price to income ratio for those who have purchased a home in Conwy County Borough is 4.4.

3.1.27 In 2022 the ratio for average (median) house price to median income was 6.2 for Conwy CB, which is higher than the ratio of 4.4 for recent property purchases. Even if a buyer has managed to save a deposit, the median price is out of the reach of people with average household income. This ratio is slightly higher than for Wales (6.1) and North Wales (6.0). Creuddyn and Rural HMAs have the highest ratio at 6.5. West HMA has the lowest at 5.4.

Table 9: house price to median household income ratio (2022)

Source: CACI Paycheck & Land Registry Price Paid data

Area	Median house price	Lower quartile house price	Median household income	Median house price ratio	Lower quartile house price ratio
Wales	£190,000	£136,000	£31,350	6.1	7.6
North Wales	£190,000	£143,000	£31,450	6.0	7.9
Conwy CB	£200,000	£146,400	£32,100	6.2	7.9
West	£177,000	£146,400	£32,700	5.4	7.7
Creuddyn	£216,000	£155,000	£33,150	6.5	8.1
Central	£183,750	£137,000	£31,400	5.9	7.6
East	£189,950	£151,500	£29,700	6.4	8.7
Rural	£220,000	£161,250	£33,700	6.5	8.3

3.1.28 Though it is seemingly more affordable, housing in the lower quartile range is mostly smaller properties (for example one bedoomed properties and/or converted flats) or those which need a lot of refurbishment. Previous research of properties sold in Conwy CB that are in the lower price range also include a significant number of retirement apartments, which have restrictions about who can buy them. We cannot assume that these cheaper properties provide suitable accommodation for all first time buyers.

3.1.29 This analysis has just looked at the situation for households with median income. Obviously individuals and households who have income that falls below this level find it even harder to buy a home, in terms of both being eligible for a mortgage based on their income, and saving for a deposit. This applies to existing homeowners who may not be able to move to more appropriate accommodation as their circumstances change as well as those who wish to enter the housing market for the first time. Relative to household incomes, Conwy County Borough is a more expensive place to buy a house than across the North Wales region and Wales as a whole.

3.1.30 Data for this indicator is not yet likely to show the full impacts of recent economic changes.

3.1.31 ONS produced an interactive map, which shows how the latest house prices and interest rates translate to monthly bills for home owners. It features house prices from the UK House Price Index and interest rate figures from the Bank of England database to show how mortgage repayments vary and have changed over time. It provides an indicative average mortgage payments on house

purchases at the most up-to-date price averages. It does not represent the costs of re-mortgaging.

3.1.32 The mortgage costs are based on the following assumptions, and apply to the initial fixed rate period of the mortgage:

- you purchase a property at the average (mean) price in a given area.
- you secure the average mortgage rate being offered by mortgage lenders at the time, at the mortgage term length selected in the calculator options.
- you supplied the user-defined deposit amount.

3.1.33 For detached properties in Conwy CB, the:

- Typical mortgage repayment (assuming a 5 year fixed mortgage, £30,000 deposit and a 25 year mortgage) was £1,869.
- Average house price (August 2023) was £312,000.
- Increase since August 2018 is 39%.

3.1.34 For semi-detached properties in Conwy CB, the:

- Typical mortgage repayment (assuming a 5 year fixed mortgage, £30,000 deposit and a 25 year mortgage) was £1,151.
- Average house price (August 2023) was £212,000.
- Increase since August 2018 is 37%.

3.1.35 For terraced properties in Conwy CB, the:

- Typical mortgage repayment (assuming a 5 year fixed mortgage, £30,000 deposit and a 25 year mortgage) was £887.
- Average house price (August 2023) was £170,000.
- Increase since August 2018 is 35%.

3.1.36 For flats in Conwy CB, the:

- Typical mortgage repayment (assuming a 5 year fixed mortgage, £30,000 deposit and a 25 year mortgage) was £620.
- Average house price (August 2023) was £128,000.
- Increase since August 2018 is 23%.

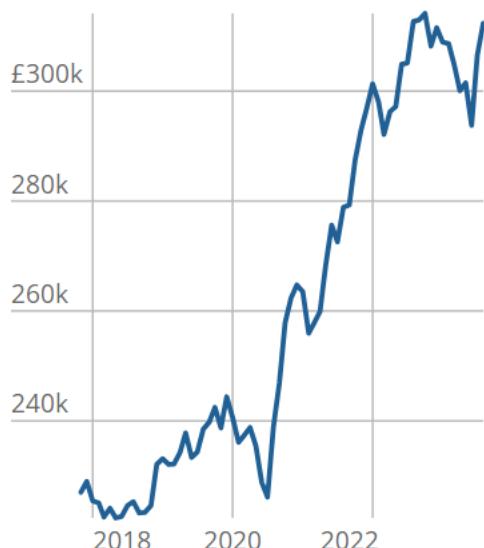
3.1.37 The charts below shows the changes in house price and mortgage repayments over time for each property type in Conwy CB.

Charts 1-4: average mortgage payments by property type in Conwy CB (08/2018-07/2023)

Source: [How are monthly mortgage repayments changing in Great Britain?](#),

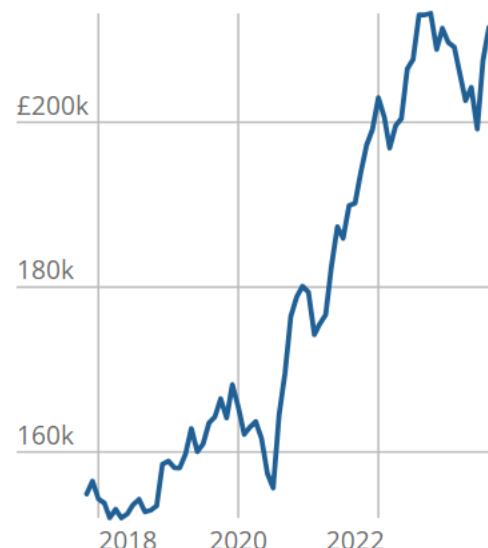
Office for National Statistics

Detached



Average monthly mortgage payments

Semi-detached



Average monthly mortgage payments

Terraced



Average monthly mortgage payments

Flat



Average monthly mortgage payments

Private rented sector

3.1.38 The private rented sector houses a diverse range of households, with a wide range of needs from their housing. It can provide flexibility for people with changing accommodation needs or who need to move house frequently for

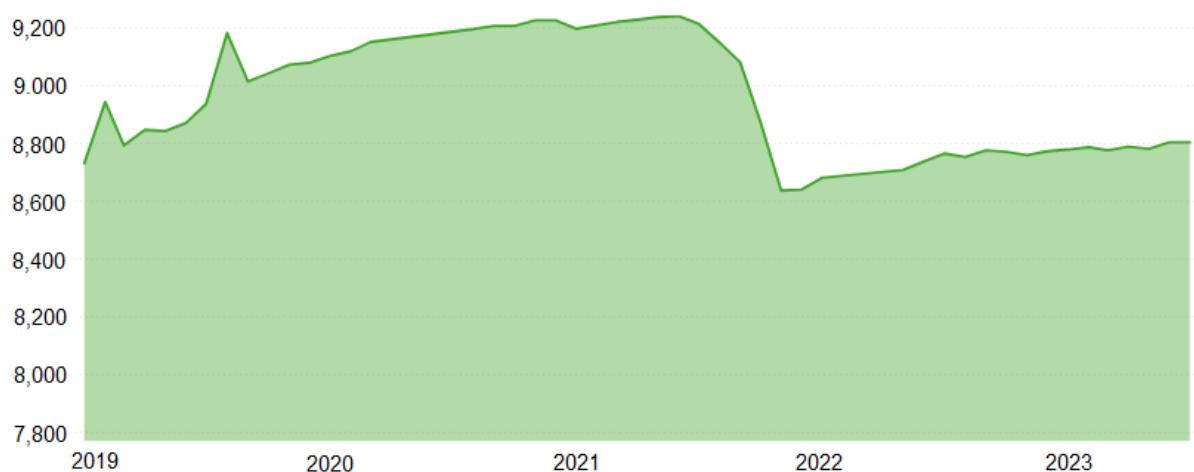
work reasons or such like. However, it can also lead to insecurity of tenure and has additional up-front costs as well as rents, which may be problematic for tenants at the lower end of the market (for example finding money for deposits/bond, providing several weeks' rent in advance to secure a tenancy, or paying agency fees which may need to be paid each time a tenancy is renewed).

3.1.39 There are currently 8,803 properties (4516 landlords) registered with Rent Smart Wales in Conwy County Borough (July 2023). The peak was 9,240 properties in June 2021, a reduction of 437.

3.1.40 Rent Smart Wales advise that: “Registrations with Rent Smart Wales last for five years, at which point Landlords must renew for a further five year period. Landlords can end their registration early, but many just let it expire, so the totals below cannot be interpreted as a reflection of the month-to-month status of the private rented sector. Many Landlords registered their properties in November 2016, so all authorities showed a large drop in registrations around November 2021, as Landlords who ceased trading during the previous five-year period let their registrations expire”.

Chart 5: number of registered properties in Conwy CB

Source: Rent Smart Wales



3.1.41 Information about private rental costs is very difficult to obtain and there are severe limitations with the data that is available. Rent Officers Wales (part of WG Housing Policy Division) produce annual figures at the unitary authority level. These are presented below because they are the only data that are

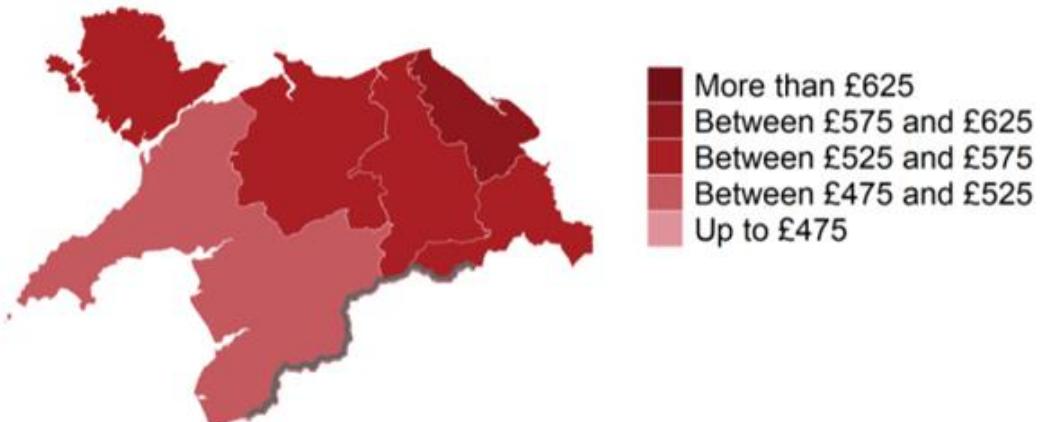
available about private rents in Conwy County Borough, but with a number of caveats. The limitations of the data include:—

- sample size – it covers fewer than 1/5th of the number identified in the 2011 Census as privately rented from a landlord or letting agency. This sample is too small to include UA level data about people renting studio flats/bedsits or rooms in a shared house.
- exclusion of tenants qualifying for housing benefit – the data does not include those people paying rent which includes an element of housing benefit, and so results are skewed away from the lower end of the rental market.
- under-representation of some types of landlord – tends to collect data mainly from larger landlords and letting agencies, and from those who are compliant with official monitoring or regulation. The sample therefore excludes many small landlords, and those who avoid contact with authority.
- modelling error – the way the data is modelled within the sample is also considered faulty, as it holds rental values for the non-responses at last year's level and so tends to underestimate rent levels and particularly change over time.
- measuring more than just rent – the data doesn't differentiate between rents for furnished/unfurnished properties, nor for whether utility bills and council tax are included/not included. This makes comparisons over time or between areas problematic.

3.1.42 Though data should be interpreted with caution due to the caveats listed above, the map below shows that Conwy County Borough falls within the median range for rent in Wales of £525-£575. This is comparable to the authorities of Anglesey, Denbighshire and Wrexham. Flintshire is higher and Gwynedd is lower. In February 2023, the median rent in Wales was £560 per month.

Map 3: median monthly rent in the private rental market (2023)

Source: Rent Officer Wales (2023) in Data mapping and visualisation on the housing rental market in Wales (Alma Economics for WG)

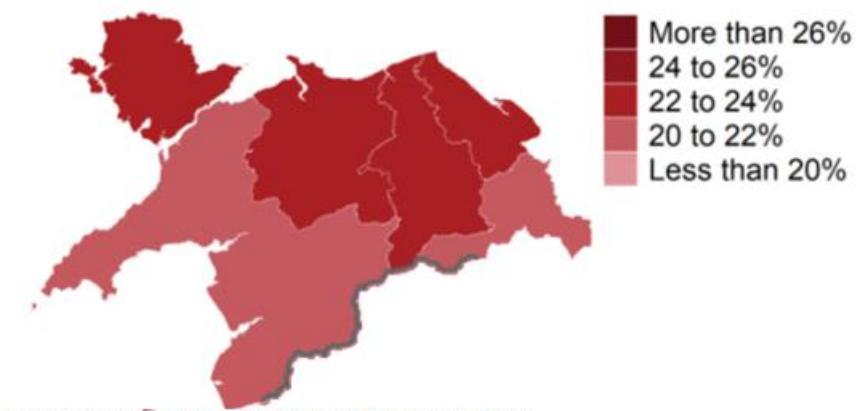


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3.1.43 Based on 2023 rental prices, in North Wales, median rental prices in the private market are equivalent to 22% of the median earnings. WG suggest that for rent to be affordable, a household should spend less than 30% of its income on rent. The map below shows this across North Wales. Conwy CB falls into the same band of affordability (22-24%) as Anglesey, Denbighshire and Flintshire. Gwynedd and Wrexham are lowest at below 20-22%.

Map 4: affordability ratio for the private rental market by local authority (2023)

Source: Rent Officer Wales (2023) in Data mapping and visualisation on the housing rental market in Wales (Alma Economics for WG)

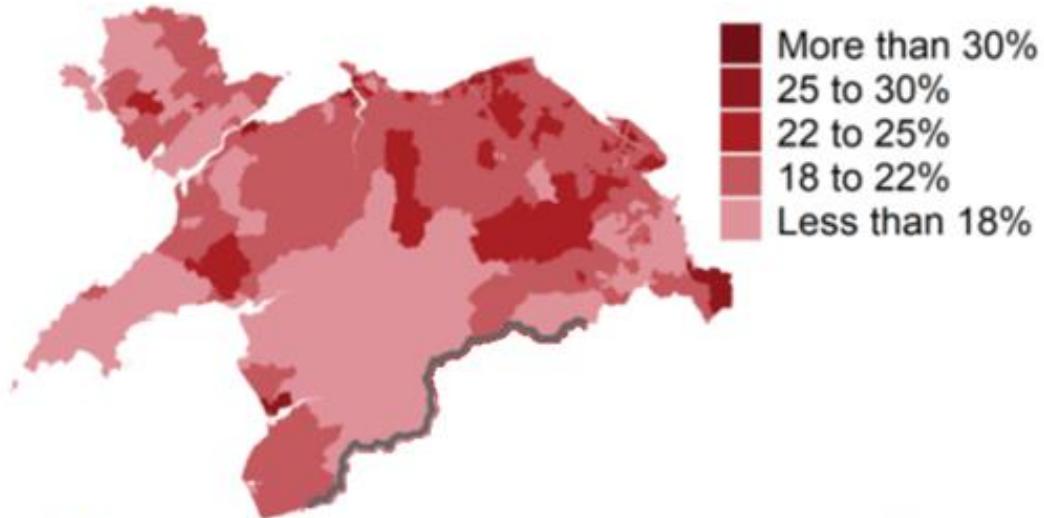


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3.1.44 The map below shows this affordability ratio by Lower Level Super Output Area (LSOA). It shows variances across the County Borough, with small pockets in the coastal areas and a part of the rural area where affordability is higher.

Map 5: affordability ratio for the private rental market by LSOA (2023)

Source: Rent Officer Wales (2023) in Data mapping and visualisation on the housing rental market in Wales (Alma Economics for WG)



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3.1.45 The LHA rates were frozen between 2020 and 2024. As a consequence, LHA did not cover the full housing costs for many households. In November 2023 the Westminster Government announced a reintroduction of LHA at the 30th percentile of rents from April 2023. The 30th percentile is calculated by ranking all rent data points in order from cheapest to most expensive. The rent at the midway point is the 50th Percentile. The rent at the 30th percentile is the rent at 30% of all rents. This does not mean that 30% of advertised properties will be affordable, as it is a sample of the rents of all existing tenancies in a local area that are used to calculate LHA levels. It also only considers rents being charged by landlords of existing tenancies and not what landlords are asking for a vacant flat on the market. The Rent Office does not include rents where there is an applicant in receipt of housing related benefits. The table below shows the new LHA rates for April 2024 – March 2025.

Table 10: LHA rate April 2024 – March 2025

Source: Welsh Government, 2023

Property size	Local Housing Allowance rate April 2024 – March 2025
1 bed monthly rate	£393.90
2 bed monthly rate	£548.51
3 bed monthly rate	£648.22
4+ bed monthly rate	£852.67

3.1.46 The table below shows how the new LHA rate (2024) compares to the latest available private rental costs (2022). The table shows that, although the gap has reduced significantly for all property sizes, the new rates still fall short of average rental prices for the area. The gap is highest for 4+ bed properties at £92.33.

Table 11: affordability gaps for private rentals (2022) and local housing allowance in Conwy CB (2024)

Source: private sector rents, Rent Officers Wales, Local Housing Allowance, Department for Work and Pensions

Affordability indicator	1 bed monthly rent	2 bed monthly rent	3 bed monthly rent	4+ bed monthly rent
Median monthly rent	£450	£595	£695	£945
Local Housing Allowance rate	£393.90	£548.51	£648.22	£852.67
Gap between average rent and LHA received	£56.10	£46.49	£46.78	£92.33

3.1.47 The table below shows the median monthly rent value for Conwy CB. The median 1 bed, 2 bed and 3 bed monthly rent is highest in Creuddyn (£463 for 1 bed, £637 for 2 bed and £775 for 3 bed). The median 4+ bed monthly rent is highest in the East at £1,050.

Table 12: median monthly rent value for Conwy CB and HMAs (2022-23)

Source: private sector rents, Rent Officers Wales

Area	1 bed monthly rent	2 bed monthly rent	3 bed monthly rent	4+ bed monthly rent
Conwy CB	£450	£595	£695	£945
West	£450	£542	£650	£945
Creuddyn	£463	£637	£775	£775
Central	£450	£595	£675	£950

East	£426	£600	£730	£1,050
Rural	£450	£550	£660	£945

3.1.48 The private rented sector has grown significantly – within the County Borough tenure in the sector rose from 11.4% of all households in the 2001 Census to 15.1% in 2011, and to 19.0% in the 2021 Census.

3.1.49 There are a number of reasons for the rapid growth of private renting, and a number of reasons for expecting it to continue: social change as people co-habit later in life and renting and house-sharing become ever more socially acceptable; high house prices and lack of availability of mortgage credit; the promotion and use of the sector by local authorities to house those in housing need or who are homeless; and, restricted access and long waiting lists for social housing. The pressure on the private rented sector as the housing market has slowed and house building rates have dropped has been particularly noticeable.

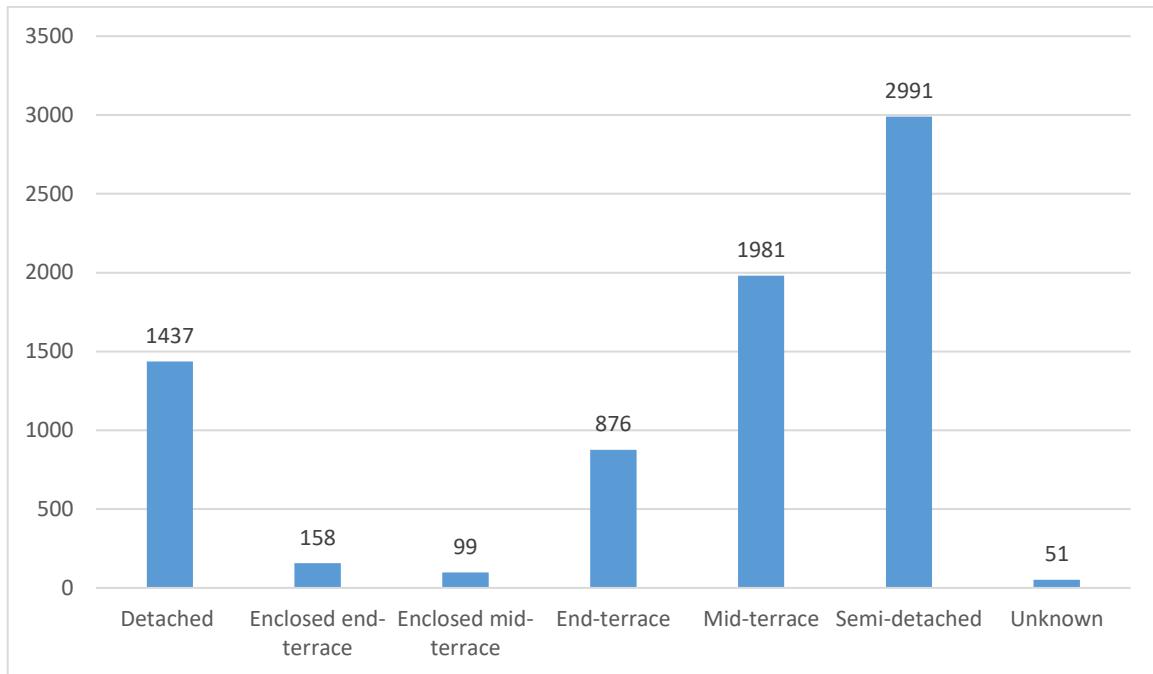
3.1.50 Alongside this the supply of private rented homes has been buoyed by the growth of the small scale buy-to-let landlord, with many using rental properties as an alternative to a pension fund.

3.1.51 The private rented sector houses a diverse range of households, with a wide range of needs from their housing. It can provide flexibility for people with changing accommodation needs or who need to move house frequently for work reasons or such like. However, it can also lead to insecurity of tenure and has additional up-front costs as well as rents, which may be problematic for tenants at the lower end of the market (for example finding money for deposits/bond, providing several weeks' rent in advance to secure a tenancy, or paying agency fees which may need to be paid each time a tenancy is renewed).

3.1.52 The chart below shows the dwelling types of Rent Smart Wales registered properties in the County Borough. The majority were semi-detached (2991 properties). There were 1981 mid-terrace properties, 1437 detached properties, 876 end-terrace properties, 158 enclosed end-terrace properties, and 99 enclosed mid-terrace properties. The dwelling type of 51 properties registered with Rent Smart Wales was unknown.

Chart 6: dwelling types of Rent Smart Wales registered properties in Conwy CB (2023)

Source: Rent Smart Wales, 2023



3.1.53 The table below shows the age of Rent Smart Wales registered properties in the County Borough. The majority of properties registered with Rent Smart Wales were built in 1899 and earlier (22.2%) or 1900-1929 (26.3%). In some cases, there can be more work involved with bringing older properties up to standard. In comparison, a smaller percentage of Rent Smart Wales registered properties were built in 1991-1995 (3.4%), 1996-2002 (4.0%), 2003 – 2006 (2.8%) and 2007 onwards (2.9%)

Table 13: age of Rent Smart Wales registered properties in Conwy CB (2023)

Source: Rent Smart Wales, 2023

Year	Conwy CB No	Conwy CB %
1899 and earlier	1684	22.2%
1900-1929	1997	26.3%
1930-1949	656	8.6%
1950-1966	563	7.4%
1967-1975	671	8.8%
1976-1983	381	5.0%
1983-1990	458	6.0%

Year	Conwy CB No	Conwy CB %
1991-1995	260	3.4%
1996-2002	304	4.0%
2003-2006	210	2.8%
2007 onwards	219	2.9%
Unknown	190	2.5%

3.1.54 The minimum energy efficiency standards have been in place for the private rented sector since 2017. The current minimum energy efficiency standard is E. Plans for the minimum energy efficiency standard in the private rented sector to be C rated are on hold, although the Westminster Government stated that it was still committed to meeting energy efficiency targets in 2030. As housing is such an important source of carbon emissions, we can expect minimum standards to increase, although there is no indication of when this might be.

3.1.55 The table below shows that currently there are 3.8% of properties registered with Rent Smart Wales in Conwy CB which do not meet the current minimum energy efficiency standard. This is slightly lower in comparison to properties registered with Rent Smart Wales across North Wales (4.0%), but higher than across Wales (2.0%).

3.1.56 The table below shows the average energy efficiency of Rent Smart Wales registered properties in Conwy CB, North Wales and Wales. In Conwy there is a slightly higher number of EPC A-C rated properties registered with Rent Smart Wales (31.8%), in comparison to North Wales (31.3%), but slightly lower in comparison to Wales (36.5%).

3.1.57 The table below shows that the majority (64.3%) of Rent Smart Wales registered properties in Conwy CB are EPC D or E rated. This is slightly lower in comparison to properties registered with Rent Smart Wales across North Wales (64.6%), but higher than across Wales (61.4%).

Table 14: average energy efficiency of Rent Smart Wales registered properties in Conwy CB, North Wales and Wales (2023)

Source: Rent Smart Wales, 2023

EPC	Conwy CB Number	Conwy CB %	North Wales %	Wales %
A	11	0.1%	0.1%	0.1%
B	261	3.4%	3.9%	5.0%
C	2,146	28.3%	27.3%	31.4%
D	3,471	45.7%	43.5%	44.4%
E	1,416	18.6%	21.1%	17.0%
F	188	2.5%	2.8%	1.4%
G	100	1.3%	1.2%	0.6%

3.1.58 The table below shows the age profile of private landlords in the County Borough. The majority of landlords are aged between 50-59 (27.0%) or 60-69 (24.9%).

Table 15: age profile of private landlords in Conwy CB by percent (2023)
Source: Rent Smart Wales (2023)

Age	Conwy
18-29	1.7%
30-39	7.8%
40-49	16.4%
50-59	27.0%
60-69	24.9%
80-89	5.2%
90+	0.9%

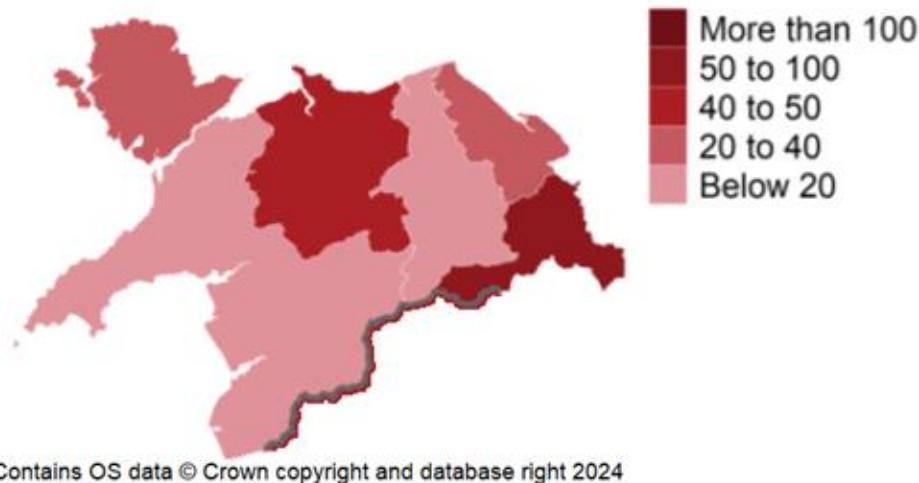
Homelessness

3.1.59 Conwy has been an area with significant housing pressures for some time, exacerbated by the pandemic. Since the Covid pandemic there has been an increase in households requiring temporary accommodation and being owed a Section 75 rehousing duty.

3.1.60 The map below shows households threatened with homelessness as a rate per 10,000 households. The rate for Conwy CB is high at 50-100 households, compared to 67 for Wales as a whole. Wrexham has the highest at over 100 households per 1,000. Gwynedd and Denbighshire the lowest at fewer than 20 households per 10,000.

Map 6: households threatened with homelessness per 10,000 households (2023)

Source: Stats Wales (2022) in Data mapping and visualisation on the housing rental market in Wales (Alma Economics for WG)



3.1.61 The table below shows that in Conwy, the number of service requests to the Homeless Prevention Team in 2019/20 was higher than in 2020/21 and 2021/22. The number of service requests to the Homeless Prevention Team in 2022/23 increased. Although the number of service requests declined in 2020/21 and 2021/22, the number of section 62 assessments completed increased slightly in 2020/21 and then reduced slightly in 2021/22. The number of section 62 assessments completed in 2022/23 increased. The total number of outcomes has been decreasing slightly year on year, however, in 2022/23 this increased slightly. It is important to note that the nature of the duties owed has changed and there has been an increase in the number of households being owed a duty under Section 75.

Table 16: outcomes of homelessness applications assessed, Conwy CB (2019/20- 2022/23)

Source: Table HOUS0413, Stats Wales 2023, HOUS0413

	2019/20	2020/21	2021/22	2022/23
Number of service requests	1,350	1,272	1,233	1,470
Total Section 62 assessments	997	1,018	931	1,022
Total number of outcomes	1,149	1,002	1,061	1,089
Not homeless or threatened	51	87	114	101
Ineligible	3	0	4	7

	2019/20	2020/21	2021/22	2022/23
Section 66 – threatened with homelessness	327	240	237	224
Section 73 - homeless	549	525	503	497
Section 75 – full housing duty	48	78	131	240

3.1.62 The tables below show the cost of emergency and leased accommodation in Conwy between 2019/20 and 2022/23. Table 15 shows that there has been a significant increase in the amount being spent on emergency accommodation. This is due to households staying in emergency accommodation for longer due to a lack of affordable move on accommodation.

Table 17: cost of emergency accommodation for Conwy CBC (2019/20-2022/23)

Source: CCBC Finance (2023)

	2019/20	2020/21	2021/22	2022/23
Cost of Accommodation	£671,020	£1,945,127	£3,193,636	£4,880,124
Housing Benefit Income	-£91,001	-£377,235	-£370,297	-£542,999
WG Covid Hardship Grant		-£982,318	-£1,470,006	-£1,024,249
Repairs	£730	£7,248	£7,157	£12,464
Net cost	£580,749	£592,823	£1,360,491	£3,326,040

3.1.63 Table 18 shows that there has been an increase in the amount being spent on leased accommodation since 2019/20.

Table 18: cost of leased accommodation for Conwy CBC (2019/20-2022/23)

Source: CCBC Finance (2023)

	2019/20	2020/21	2021/22	2022/23
Cost of Accommodation	£556,878	£570,863	£656,516	£680,533
Housing Benefit Income	-£447,830	-£480,950	-£510,084	-£437,363
Repairs	£90,346	£103,873	£100,023	£215,618
Management Fee (Cartrefi Conwy)	£105,450	£100,504	£117,100	£124,171
Net cost	£304,844	£294,291	£363,555	£582,960

3.1.64 Table 19 shows that there has been an increase in the amount of new households moving in to emergency accommodation since 2019/20.

Table 19: number of new households moved in to emergency accommodation in Conwy CB (2019/20-2022/23)

Source: CCBC Finance (2023)

Households	2019/20	2020/21	2021/22	2022/23
Total number of households	237	518	458	479
of which households with children	69	67	76	127

3.1.65 Table 20 shows that there has been a significant increase in the number of households in all types of temporary accommodation since 2019/20.

Table 20: number of new households in all types of temporary accommodation in Conwy CB (2019/20 - 2022/23)

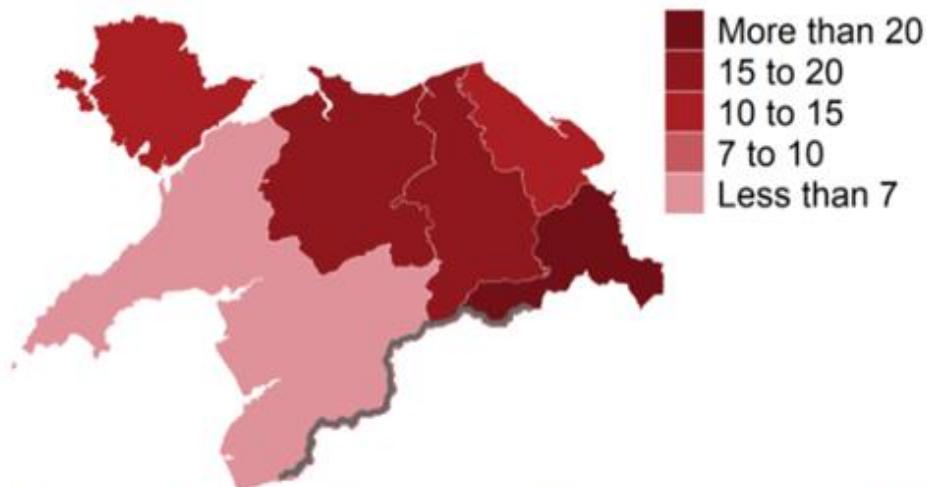
Source: CCBC Finance (2023)

Total	2019/20	2020/21	2021/22	2022/23
Total number of households	435	721	756	774
of which households with children	110	166	160	219

3.1.66 In some cases, households are at risk of homelessness due to loss of private rented accommodation. Landlords can start a claim to court to repossess a property should there be rent arrears, the tenant has not moved out by a certain date, or if there is anti-social behaviour. The map below shows that there were 15-20 possession actions per 10,000 residents for Conwy CB. This compares to 14 per 10,000 for Wales. Denbighshire had similar rates to Conwy CB. Anglesey and Flintshire had lower rates (10-15 per 10,000). Wrexham had the highest rate in North Wales and Gwynedd the lowest.

Map 7: landlord possession actions per 10,000 inhabitants (2023)

Source: ONS (2022) in Data mapping and visualisation on the housing rental market in Wales (Alma Economics for WG)



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Houses in Multiple Occupation

3.1.67 Houses in multiple occupation (HMOs) are shared houses or flats occupied by at least three unrelated individuals who share basic amenities (as defined in Section 254 of the Housing Act 2004). This classification covers a wide range of private housing types from traditional family houses shared by students or a group of friends, to former mansions subdivided to create numerous flatlets.

3.1.68 HMOs offer an important housing option, as smaller units, and shares are more likely to be affordable for low income households. There is a high demand for smaller accommodation in the local area, and HMOs could help to meet this need, where appropriate for the individual household. They could also help to meet the housing need for households who work in the local area, that might not be able to compete in the open market, and that might not be eligible for affordable housing. There have been planning applications recently for small HMOs for new NHS staff moving to the area. Neighbouring local authorities have had applications for HMOs for tourism and care workers.

3.1.69 The table below details the number of mandatory and additional licences issued for HMOs in Conwy CB, North Wales and Wales. Local authorities can introduce "Additional HMO" licensing schemes in areas where they are concerned about problems arising from a significant proportion of HMOs being poorly managed. CCBC has introduced Additional licensing schemes in Abergele Pensarn, Colwyn Bay and Llandudno / Craig y Don.

3.1.70 The table below shows that there is a total of 423 licensed HMOs in Conwy CB, which accounts for 0.7% of Conwy CB housing stock. By comparison, there are 7,229 licensed HMOs which accounts for 0.5% of Wales' housing stock.

Table 21: HMO licences in Conwy CB, North Wales and Wales

Source: Stats Wales Hazards and Licences 2020-2021

HMO licences	Conwy CB	North Wales	Wales
Total licences	423	1,683	7,229
Mandatory licence	39	411	2,443
Additional licence	384	1,272	4,786

Social rented sector

3.1.71 Social rented stock is provided by some local councils and registered, not for profit organisations. It is provided at affordable rates for those who cannot afford to rent or purchase a home that meets their needs on the open market. It is governed by law to ensure its affordability and quality. In Wales rent levels, property standards and management standards are regulated by Welsh Government. Social housing is allocated to those in housing need. Allocations are made strictly in line with policy, prioritising urgency of need and local connection.

3.1.72 The table below gives an overview of the social rented sector in the County Borough. Conwy CBC transferred all its social housing stock to Cartrefi Conwy (registered social landlord) in 2008. The stock detailed below is all owned by registered social landlords. The proportion of one bedroom is comparable between Conwy CB and Wales. The proportion of two bed stock has levels below the Welsh average at 31.18% in Conwy CB, compared to 36.26% in Wales. The levels of three bed stock is higher at 46.82% in Conwy CB and 42.57% in Wales.

Table 22: Social general needs housing in Conwy County Borough (2021-22)

Source: table HOUS0601, StatsWales, Social landlord stock and rents data collection, Welsh Government

Social stock	Conwy CB No	Conwy CB %	Wales %
All stock	4,622	100%	100%
1 bed	849	18.37%	18.48%
2 bed	1,441	31.18%	36.26%
3 bed	2,164	46.82%	42.57%
4 bed	146	3.16%	2.43%
5 bed or more	22	0.48%	0.22%

3.1.73 These are properties that are allocated via Conwy's Common Housing Allocation Policy.

3.1.74 Please note that table 22 uses data from a different timeframe and source to tables 23, 24, 25 and 26, and therefore will not match. 2023 data for Wales was not yet available.

3.1.75 The table below shows that in April 2023, overall the highest number of social housing units is in Creuddyn HMA (1,657), followed by Central HMA (1,390). The lowest number of social housing units is in the West HMA (374). The table below shows that the highest number of 1 bed social housing units is in the Central HMA (269) and the lowest is in the Rural HMA (61). The highest number of 2 bed social housing units is in Creuddyn HMA (480) and the lowest is in West HMA (139). The highest number of 3 bed social housing units is in Creuddyn HMA (790) and the lowest is in West HMA (146). The highest number of 4+ bedroom social housing units is in Creuddyn HMA (95 units) and the lowest is in West HMA (7).

Table 23: Social general needs housing in HMAs by number (2023)

Source: Adra, Cartrefi Conwy, Clwyd Alyn Housing, First Choice Housing Association, Grwp Cynefin, North Wales Housing and Wales & West Housing

Social stock	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All social stock	374	1,657	1,390	639	575
1 bed	82	292	269	95	61
2 bed	139	480	438	222	188
3 bed	146	790	638	300	316
4 bed	7	83	34	22	10
5 bed	0	10	6	0	0
6 bed	0	2	5	0	0

3.1.76 The table below shows that the highest proportion of social housing stock in each HMA is 3 bed accommodation - West HMA (39.0%), Creuddyn HMA (47.7%), Central HMA (45.9%), East HMA (46.9%) and Rural HMA (55.0%). The lowest proportion of social housing stock in each HMA is 4+ bedroom accommodation – 0% in West HMA, 5.7% in Creuddyn HMA, 3.2% in Central HMA, 3.4% in East HMA and 1.7% in Rural HMA.

Table 24: Social general needs housing in HMAs by % (2023)

Source: Adra, Cartrefi Conwy, Clwyd Alyn Housing, First Choice Housing Association, Grwp Cynefin, North Wales Housing and Wales & West Housing

Social stock	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All social stock	100%	100%	100%	100%	100%
1 bed	21.9%	17.6%	19.4%	14.9%	10.6%
2 bed	37.2%	29.0%	31.5%	34.7%	32.7%
3 bed	39.0%	47.7%	45.9%	46.9%	55.0%
4 bed	1.9%	5.0%	2.4%	3.4%	1.7%
5 bed	0.0%	0.6%	0.4%	0.0%	0.0%
6 bed	0.0%	0.1%	0.4%	0.0%	0.0%

3.1.77 The table below shows the social sheltered housing stock, which is allocated via Conwy's Common Housing Allocation Policy. Sheltered housing is available to individuals over the age of 55. Sheltered housing is linked to a 24-hour emergency alarm call system to the warden during officer hours and to the Careline Control Centre at all other times. Sheltered housing has designated wardens, who provide advice, and make sure individuals are managing. Creuddyn and Central HMAs have the largest amount of stock (415 and 536). The majority of stock is 1 bed (1084), with some 2 bed (347) and a very small number of 3 beds (5).

Table 25: Sheltered social housing stock (2023)

Source: Adra, Cartrefi Conwy, Clwyd Alyn Housing, First Choice Housing Association, Grwp Cynefin, North Wales Housing and Wales & West Housing

Area	All stock	1 bed number	1 bed %	2 bed number	2 bed %	3 bed number	3 bed %
Conwy CB	1,436	1,084	75.5%	347	24.2%	5	0.3%
West	101	63	62.4%	37	36.6%	1	1.0%
Creuddyn	415	305	73.5%	107	25.8%	3	0.7%
Central	536	465	86.8%	70	13.1%	1	0.2%

Area	All stock	1 bed number	1 bed %	2 bed number	2 bed %	3 bed number	3 bed %
East	190	163	85.8%	27	14.2%	0	0.0%
Rural	194	88	45.4%	106	54.6%	0	0.0%

3.1.78 The table below shows the social extra care housing stock. Extra care housing gives people over the age of 60 an opportunity to live in their own home and to access support from an on-site dedicated team 24 hours per day. Individuals have to make an application to the housing association to be considered for an extra care scheme.

3.1.79 The table below shows that there is a higher proportion of two bed extra care social housing (64%) in Conwy CB, in comparison to one bed extra care social housing stock (36%). The table below shows that the majority of one bed extra care social housing stock is in the West HMA (67.4%). The majority of two bed extra care social housing stock is in the East HMA (87.8%) and Rural HMA (71.1%). There is no extra care social housing stock in the Central HMA.

Table 26: extra care social housing stock (2023)

Source: Adra, Cartrefi Conwy, Clwyd Alyn Housing, First Choice Housing Association, Grwp Cynefin, North Wales Housing and Wales & West Housing

Area	All stock	1 bed number	1 bed %	2 bed number	2 bed %
Conwy CB	186	67	36%	119	64%
West	46	31	67.4%	15	32.6%
Creuddyn	46	17	37%	29	63%
Central	0	0	0%	0	0%
East	49	6	12.2%	43	87.8%
Rural	45	13	28.9%	32	71.1%

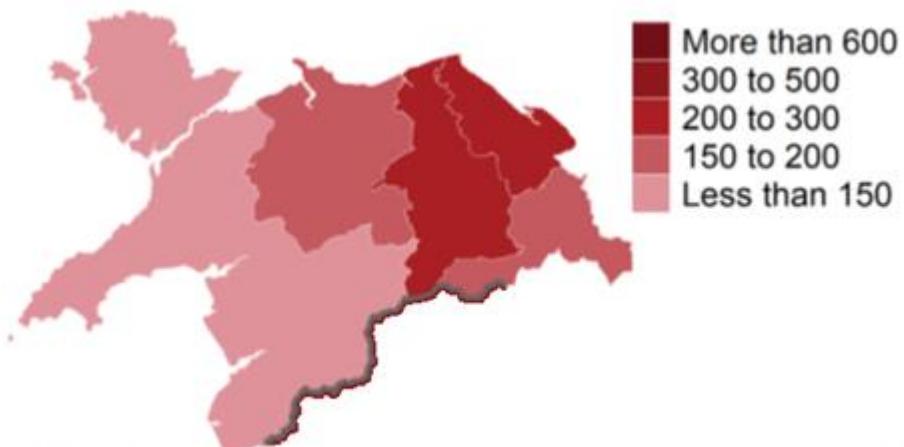
3.1.80 The section above on tenure shows how the level of social rented stock compares to other tenures in the area and compares to North Wales and Wales.

3.1.81 Annual data on social housing rent arrears is also collected by WG on an annual basis. The map below shows the number of tenancies where rent has not been paid. The rate for Conwy CB is 150-200 per 1,000 inhabitants. This compares to 380 per 1,000 across Wales. Conwy CB has a similar rate to

Wrexham, Denbighshire and Flintshire have higher rates. Anglesey and Gwynedd have lower rates than Conwy CB.

Map 8: Social housing rent arrears per 1,000 inhabitants

Source: Alma Economics calculations using data from StatsWales (2021) and Office for National Statistics (Census 2021) in Data mapping and visualisation on the housing rental market in Wales (Alma Economics for WG)



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Intermediate sector

3.1.82 Intermediate affordable housing is an option for households unable to afford to buy or rent their own home on the open market. Intermediate housing schemes offer homes for sale or rent at prices discounted from the prevailing markets to buy or rent and equivalent property.

3.1.83 There are a number of different intermediate products available in Conwy, including intermediate rent, shared equity, shared ownership, rent to own and homebuy.

3.1.84 Intermediate properties are allocated through the Intermediate Affordable Housing Register. Households must meet the eligibility criteria based on household income and local connection.

3.1.85 The Intermediate Affordable Housing Register is administered on behalf of the six North Wales Authorities and the North of Powys by Grwp Cynefin under the brand Tai Teg.

3.1.86 The table below shows the levels of intermediate housing stock in the County Borough. Please note that these figures do not include Homebuy or rent to own

properties. The majority of stock intermediate rent stock is in the East (83) and Central HMAs (78). Creuddyn has the majority of the low cost home ownership properties (117 out of 168 units).

Table 27: intermediate housing stock in Conwy CB and HMAs (2023)

Source: Adra, Cartrefi Conwy, Clwyd Alyn Housing, First Choice Housing Association, Grwp Cynefin, North Wales Housing and Wales & West Housing

Area	All stock	Intermediate rent Number	Intermediate rent %	Low cost home ownership Number	Low cost home ownership %
Conwy CB	397	229	57.7%	168	42.3%
West	12	7	58.3%	5	41.7%
Creuddyn	178	61	34.3%	117	65.7%
Central	112	78	69.6%	34	30.4%
East	88	83	94.3%	5	5.7%
Rural	7	0	0.0%	7	100.0%

Occupancy rating

3.1.87 Occupancy rating provides a measure of whether a household's accommodation is overcrowded or under-occupied. Households who live in overcrowded accommodation may require re-housing or help with adaptations to their homes. The ages of the household members and their relationships to each other are used to derive the number of rooms/bedrooms they require, based on a standard formula. The number of rooms/bedrooms required is subtracted from the number of rooms/bedrooms in the household's accommodation to obtain the occupancy rating. An occupancy rating of negative 1 or less implies that a household has fewer rooms/bedrooms than the standard requirement (i.e. is overcrowded), positive 1 implies that they have more rooms/bedrooms than required (under-occupied), and 0 implies that they met the standard required.

3.1.88 Across Wales, in 2021, 2.2% of households had fewer bedrooms than required, down from 2.9% in 2011. This compares to 2.0% for North Wales in 2021 and 2.8% in 2011; 2.0% of households in Conwy CB in 2021 and 2.6% in 2011. For Conwy CB, this is around 1,050 people.

3.1.89 21.4% of households in Wales had the required number of bedrooms. This compares with 20.8% across North Wales and 22.2% in Conwy CB, which is around 11,600 households. The remaining 76.4% in Wales had more bedrooms than required, compared to 77.2% across North Wales and 75.7% in Conwy CB.

Table 28: Occupancy rating for bedrooms in Wales, North Wales and Conwy CB (2021)

Source: table TS052, 2021 Census; Office for National Statistics

Occupancy rating	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All households	52,233		301,372	1,347,114
+2 or more	19,803	37.9%	40.7%	41.7%
+1	19,755	37.8%	36.5%	34.7%
0	11,611	22.2%	20.8%	21.4%
-1	964	1.8%	1.8%	1.9%
-2 or less	100	0.2%	0.2%	0.3%

3.1.90 When looking at smaller area, the Rural HMA had the highest proportion of households with more than the required number of bedrooms at 81.2%, which is well above the county Borough average of 75.7%. This compares to the Central HMA with the lowest proportion at 71.8%.

3.1.91 The Central HMA had the highest proportion of households with fewer bedrooms than acquired at 2.4%, compared to the Rural HMA with the lowest at 1.6% and the County Borough at 2.0%.

Table 29: Occupancy rating for bedrooms in HMAs by number (2021)

Source: table TS052, 2021 Census, Office for National Statistics

Occupancy rating	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All households	3,675	17,521	13,923	9,726	7,390
+2 or more	1,415	6,572	5,023	3,433	3,360
+1	1,419	6,627	4,966	4,103	2,638
0	773	3,987	3,596	1,983	1,271
-1	60	308	308	184	107
-2 or less	8	27	30	23	14

Table 30: Occupancy rating for bedrooms in HMAs by % (2021)

Source: table TS052, 2021 Census, Office for National Statistics

Occupancy rating	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All households	100%	100%	100%	100%	100%
+2 or more	38.5%	37.5%	36.1%	35.3%	45.5%
+1	38.6%	37.8%	35.7%	42.2%	35.7%
0	21.0%	22.8%	25.8%	20.4%	17.2%
-1	1.6%	1.8%	2.2%	1.9%	1.4%
-2 or less	0.2%	0.2%	0.2%	0.2%	0.2%

Empty homes

3.1.92 There needs to be some level of vacant accommodation within the housing stock, to allow for churn within the housing market. There is no optimum level of vacancy, as the housing market in each area is different and changes over time.

3.1.93 Empty dwellings in the private sector housing stock are an issue in Conwy CB, as in many other counties in Wales. In recent years, there has been a slight reduction in the number of empty homes in the county of Conwy, but with approximately 1440 properties vacant for 6 months or longer, success in returning these to occupation could play a vital role in addressing the current shortage of accommodation in the area.

3.1.94 Not all empty properties are in poor condition, but those that are can act as magnets for crime, vandalism and antisocial behaviour, or at best, create a nuisance to the occupants of neighbouring properties. Research has also shown that an empty property in poor condition can impact negatively on the value of adjoining properties.

3.1.95 The table below shows those properties classed as long-term empty by HMA. The Rural HMA is the area with the highest proportions (2.04%). Capel Curig Community Council has the highest proportion at 4.43%. In the urban areas, the Bay of Colwyn has the highest at 2.23%.

Table 31: number and percent of long term empty dwellings by Conwy CB and HMAs (2023)

Source: Council tax, CCBC

Area	All stock	Long-term empty Number	Long-term empty %
Conwy CB	58,077	723	1.24%
West	4,054	45	1.11%
Creuddyn	19,704	232	1.18%
Central	15,337	214	1.40%
East	10,532	60	0.57%
Rural	8,450	172	2.04%

Second homes and short-term holiday lets

3.1.96 It is hard to monitor the number or proportion of second homes and holiday lets in the housing stock as there is no single data source available, and definitions vary. Council tax and the non-domestic rates register provide a picture at a local level. For Council tax, a second home is a dwelling that is not a sole or main home, is substantially furnished and is used periodically. They may not all be in use for holiday purposes. Properties in use as a commercial holiday let can move onto the non-domestic rate register. This is not a requirement, and some do not meet the criteria in terms of number of let-able days, and days let to be included on this register.

3.1.97 The table below shows the number and proportion of properties paying the second home premium for their Council tax and the number and proportion registered as short term holiday let business properties. The highest proportion of second homes and holiday lets is in the Rural HMA. Some small areas have high percentages. Bro Machno is the community council area with the highest level of second homes at 17.8%.

Table 32: number and percent of second homes and holiday lets by Conwy CB and HMAs (2023)

Source: Council tax and Non-Domestic Rates register, CCBC

Area	All stock	Second home premium Number	Second home premium %	Holiday let Number	Holiday let %
Conwy CB	58,077	1,644	2.8%	862	1.5%
West	4,054	148	3.6%	52	1.3%
Creuddyn	19,704	720	3.6%	350	1.7%
Central	15,337	250	1.6%	62	0.4%

Area	All stock	Second home premium Number	Second home premium %	Holiday let Number	Holiday let %
East	10,532	109	1.0%	22	0.2%
Rural	8,450	417	4.6%	376	4.2%

Dwellings by Council tax band

3.1.98 Conwy County Borough has a lower proportion of properties in the A and B council tax bands than is the national average. This implies there are proportionally fewer of the lowest value properties within the dwelling stock than is found across Wales as a whole.

Table 33: dwellings by Council tax band for Wales and Conwy CB (2023/4)

Source: Council tax dwellings (CT1) data collection, StatsWales table

LGFS0001, Welsh Government

Council tax band	Conwy CB Number	Conwy CB %	Wales %
All bands	55,841		1,411,082
Band A	5,077	9.1%	14.3%
Band B	7,915	14.2%	20.7%
Band C	15,001	26.9%	21.8%
Band D	11,488	20.6%	16.3%
Band E	8,982	16.1%	13.4%
Band F	4,922	8.8%	8.3%
Band G	1,881	3.4%	3.8%
Band H	415	0.7%	0.9%
Band I	160	0.3%	0.4%

3.1.99 When looking at HMA level, there are variances in the proportions of Bands A and B. All HMAs are below the Wales average for Band A; East (7.3%) and Rural (5.8%) in particular. There is more variance with Band B, ranging from 24.4% in the West, which is higher than the Welsh average of 20.7%, to 10.6% in Creuddyn and 10.7% in the East HMA. See the two tables below for more details.

Table 34: number of dwellings by Council tax band in HMAs (2023/4)

Source: Valuation Office Agency: Council Tax statistics

Council tax band	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All bands	4,060	19,700	14,650	10,550	8,450
Band A	420	1,850	1,930	770	490
Band B	990	2,090	2,810	1,130	1,270
Band C	1,140	4,790	3,430	4,070	2,090
Band D	800	4,470	2,560	2,470	1,430
Band E	410	3,400	1,990	1,480	1,670
Band F	250	2,100	1,210	510	1,030
Band G	40	790	560	140	360
Band H	0	180	140	20	50
Band I	0	70	40	0	20

NB The source of this data is different to the table above and so will not match.

Totals are calculated from rounded data as that is all that is available at small area level.

Table 35: percent of dwellings by Council tax band in HMAs (2023/4)

Source: Valuation Office Agency: Council Tax statistics

Council tax band	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All bands	100%	100%	100%	100%	100%
Band A	10.3%	9.4%	13.2%	7.3%	5.8%
Band B	24.4%	10.6%	19.2%	10.7%	15.0%
Band C	28.1%	24.3%	23.4%	38.6%	24.7%
Band D	19.7%	22.7%	17.5%	23.4%	16.9%
Band E	10.1%	17.3%	13.6%	14.0%	19.8%
Band F	6.2%	10.7%	8.3%	4.8%	12.2%
Band G	1.0%	4.0%	3.8%	1.3%	4.3%
Band H	0.0%	0.9%	1.0%	0.2%	0.6%
Band I	0.0%	0.4%	0.3%	0.0%	0.2%

NB The source of this data is different to the table above and so will not match.

Totals are calculated from rounded data as that is all that is available at small area level.

3.2 Socio-economic and demographic trends

3.2.1 This section provides an overview of the socio-economic and demographic trends within the local authority.

Age and gender

3.2.2 In 2021, the size of the resident population in Conwy County Borough was 114,750. The population density in Conwy CB is lower at 1.02 persons/ha compared to North Wales at 1.12 persons/ha and Wales at 1.5 persons/ha.

3.2.3 The average (median) age in Conwy County Borough was 49 years. This is higher than the median age of 46 years in 2011. The median age in Wales in 2021 was 42 years, and 40 in England and Wales.

3.2.4 Males:females ratio for Conwy CB is 100:106. The Wales ratio is 100:104. This means we have a greater proportion of women in our population than the national averages.

3.2.5 22.1% of our population in Conwy CB, are those aged 66-84. This is a much higher rate than the Wales average, which is 17.5%. The high proportion of elderly within our population also leads to the proportions of residents of working age (aged 16-65) being significantly below the Wales average. The percentage of those aged between 16-65 is 58.0% in Conwy CB, compared to 60.5% in North Wales and 62.2% across Wales.

3.2.6 Children aged below 16 make up 16% of the Conwy CB population, compared to 17.3 % in North Wales and 17.6% in Wales as a whole

Table 36: population characteristics Wales, North Wales and Conwy CB

Source: tables TS006, TS007 and TS008, 2021 Census, ONS

Population characteristics	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Males	55,600	48.4%	48.9%	48.9%
Females	59,150	51.6%	51.1%	51.1%
Aged 0-15	18,400	16.0%	17.3%	17.6%
Aged 16-29	14,900	13.0%	14.8%	16.6%
Aged 30-44	17,700	15.4%	16.8%	18.0%

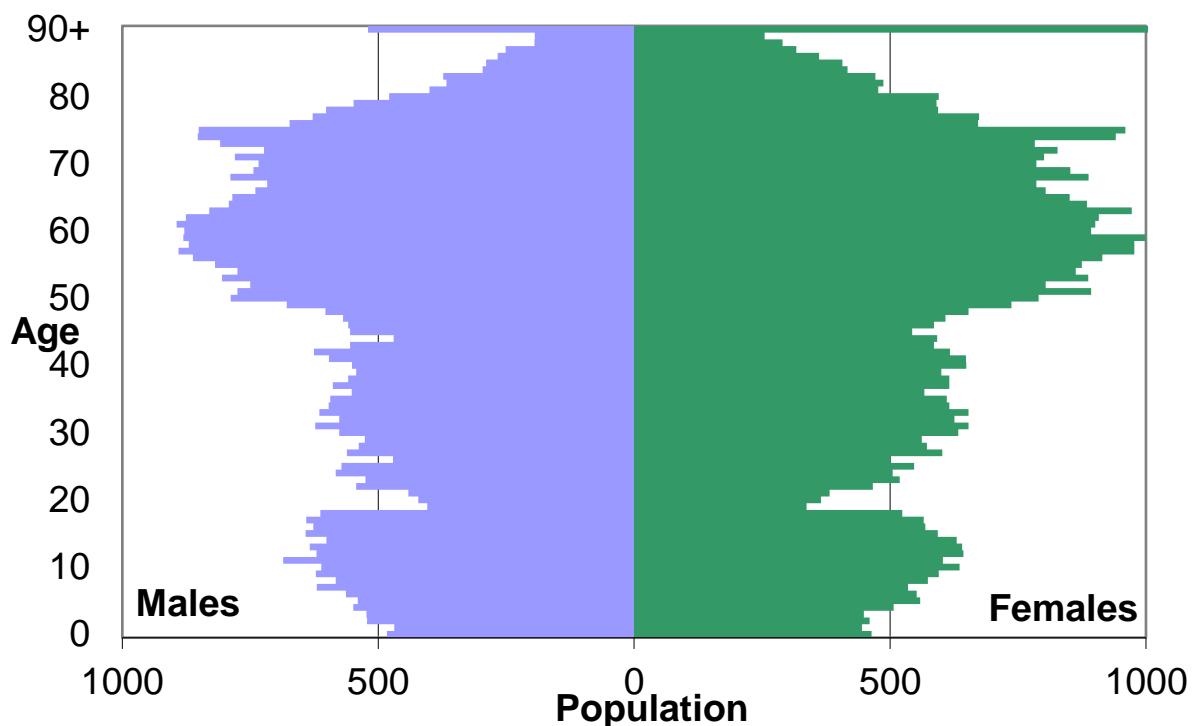
Population characteristics	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Aged 45-65	33,950	29.6%	28.9%	27.7%
Aged 66-84	25,350	22.1%	19.3%	17.5%
Aged 85+	4,500	3.9%	3.0%	2.7%
Population density (persons/ha)	1.02		1.12	1.5

3.2.7 Another way of looking at population structures is to use population pyramids. For Conwy CB, the chart below shows the latest population estimates by age. It is more of a mushroom shape, where it is very top heavy, with a significant proportion of elderly residents. It shows a clear fall in numbers from the age of 18, where young people leave the area, for higher education or other economic and social reasons. This gap continues to include those up until the age of 50, suggesting that those who leave in late teens/early 20s are not returning even later in life cycle.

3.2.8 There is a bulge around the mid 50s age group, who are the early 1960s baby boom. There is a second bulge for those in their late 60s to mid 70s, who are the post World War 2 baby boomers. There are more people in each single year age band from 47-77 than in any of the single year age band 0-46. Women start to outnumber men in late 40s age group.

Chart 7: population pyramid for Conwy CB (2022)

Source: mid-year population estimates, ONS



3.2.9 For local area analysis for HMAs in Conwy CB, West HMA has the highest proportion who are of working age (16-65) at 60.9% compared to 55.1% in the East HMA.

3.2.10 Central HMA has the highest proportion of Children below the age of 16 at 17.5% while the Creuddyn HMA has the lowest at 15.2%, this is reflected in the percentage of those aged over 66, as the East HMA has the highest percentage at 29.5% compared with 22.9% for West HMA

3.2.11 Creuddyn HMA has the highest females:males ratio at 108 to 100 in the County Borough. The lowest is the Rural HMA at 102 to 100.

3.2.12 Central HMA has the highest population density in the area at 13.35 persons per hectare, compared to the lowest in the Rural HMA at 0.19 persons. The West HMA also has a low density at 2.36 people per hectare.

Table 37: population characteristics in HMAs by number (2021)

Source: tables TS006, TS007 and TS008, 2021 Census, ONS

Population, characteristics	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Males	3,800	17,000	15,150	10,100	9,500
Females	4,000	18,450	16,050	10,950	9,700
Aged 0-15	1,250	5,400	5,450	3,250	3,000
Aged 16-29	1,050	4,550	4,250	2,650	2,400
Aged 30-44	1,250	5,550	5,150	2,950	2,800
Aged 45-65	2,500	10,250	8,900	6,000	6,250
Aged 66-84	1,600	8,050	6,200	5,350	4,200
Aged 85+	200	1,600	1,250	850	600
Population density (persons/ha)	2.36	10.63	13.35	6.53	0.19

Table 38: population characteristics in HMAs by % (2021)

Source: tables TS006, TS007 and TS008, 2021 Census, ONS

Population, characteristics	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Males	48.7%	47.9%	48.5%	48.0%	49.6%
Females	51.3%	52.1%	51.5%	52.0%	50.4%
Aged 0-15	16.2%	15.2%	17.5%	15.4%	15.6%
Aged 16-29	13.2%	12.9%	13.7%	12.6%	12.5%
Aged 30-44	16.1%	15.7%	16.4%	14.1%	14.6%
Aged 45-65	31.6%	28.9%	28.5%	28.5%	32.6%
Aged 66-84	20.1%	22.8%	19.9%	25.5%	21.8%
Aged 85+	2.8%	4.5%	4.0%	4.0%	3.0%

Disability

3.2.13 There is no comprehensive source of data about disability. The Census provides information on limiting long term illness, whether they considered themselves disabled, and the extent that people considered themselves

affected day-to-day. There are limitations when using this data set: it is self-defining and so some people may be missing from the count. The approach used in the Census aligns with the medical model of disability, which defines people as disabled by their impairment.

3.2.14 The table below shows that the proportion of Conwy CB residents who consider themselves disabled under the Equality Act at 22.6% is slightly higher than the Wales (21.6%) and North Wales (20.7%) averages. The proportion who are limited a lot in their daily activities are similar in Conwy CB and Wales as a whole, but slightly higher than North Wales. Daily activities limited a little is slightly higher in Conwy CB than both Wales and North Wales. Those with a long term condition that does not limit daily activities is similar across Conwy CB (6.7%), North Wales (6.6%) and Wales (6.6%).

Table 39: disability and health in Wales, North Wales and Conwy CB (2021)

Source: table TS038, 2021 Census, Office for National Statistics

Disability	Conwy CB No	Conwy CB %	North Wales %	Wales %
All people	114,741	100%	686,906	3,107,494
Disabled under the Equality Act	25,944	22.6%	20.7%	21.6%
Day-to-day activities limited a lot	11,920	10.4%	9.4%	10.3%
Day-to-day activities limited a little	14,024	12.2%	11.3%	11.3%
Not disabled under the Equality Act	88,797	77.4%	79.3%	78.4%
Long term physical / mental health condition, day-to-day activities not limited	7,673	6.7%	6.6%	6.6%
No long term physical / mental health conditions	81,124	70.7%	72.7%	71.8%

3.2.15 When looking at the variance across the County Borough, the East HMA has the area with highest proportion consider themselves disabled under the Equality Act, at 26.7%, compared to Rural HMA with 18.2%. Creuddyn HMA has the highest number of people who consider themselves disabled (8,130). Central HMA also has a high number at 7,324 people. The West HMA has the highest proportion of people with a long term condition that does not limit daily activities at 7.6%, compared to the lowest in Rural HMA at 6.1%.

Table 40: disability and health in HMAs by number (2021)

Source: table TS038, 2021 Census, Office for National Statistics

Disability	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All people	7,842	37,563	31,216	21,060	17,059
Disabled under the Equality Act	1,753	8,130	7,324	5,633	3,103
Day-to-day activities limited a lot	754	3,625	3,417	2,744	1,380
Day-to-day activities limited a little	999	4,505	3,907	2,889	1,723
Not disabled under the Equality Act	6,089	29,433	23,892	15,427	13,956
Long term physical / mental health condition, day-to-day activities not limited	595	2,555	2,177	1,302	1,044
No long term physical / mental health conditions	5,494	26,878	21,715	14,125	12,912

Table 41: disability and health in HMAs by % (2021)

Source: table TS038, 2021 Census, Office for National Statistics

Disability	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All people	100%	100%	100%	100%	100%

Disability	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Disabled under the Equality Act	22.4%	21.6%	23.5%	26.7%	18.2%
Day-to-day activities limited a lot	9.6%	9.7%	10.9%	13.0%	8.1%
Day-to-day activities limited a little	12.7%	12.0%	12.5%	13.7%	10.1%
Not disabled under the Equality Act	77.6%	78.4%	76.5%	73.3%	81.8%
Long term physical / mental health condition, day-to-day activities not limited	7.6%	6.8%	7.0%	6.2%	6.1%
No long term physical / mental health conditions	70.1%	71.6%	69.6%	67.1%	75.7%

3.2.16 Some disabled people are eligible to claim disability related benefits. This is covered in the benefits section below.

Gender identity

3.2.17 There were responses from 89,798 people (93.2% of the population aged 16 years and over) to the voluntary gender identity question in Conwy County Borough. 6.8% did not answer the question.

- 92.9% of usual residents aged 16 years and over answered “Yes”, indicating that their gender identity was the same as their sex registered at birth.
- 253 people (0.3%) answered “No”, indicating that their gender identity was different to their sex registered at birth. (North Wales = 0.3%; Wales = 0.4%)
- 58 people identified as a trans man, 40 people identified as a trans woman, and 34 people identified as non-binary. 94 people answered “No” but did not provide a write-in response.

3.2.18 Data about gender identity is not available at small area (HMA) level.

Marriage and civil partnership

3.2.19 The proportion of adults in Wales who have never married or been in a civil partnership has increased every decade from 26.3% in 1991 to 37.2% in 2021, whereas the proportion of adults who are married or in a civil partnership (including separated) has fallen from 58.4% in 1991 to 43.8% in 2021. Proportionately, more of Conwy CBs population (aged 16+) at 45.6% are married in comparison to North Wales (44.8%) and Wales (43.8%).

3.2.20 The proportion who are in a civil partnership in Conwy CB is consistent with North Wales and Wales averages, at 0.2% for all areas.

3.2.21 Rates of divorced or civil partnership dissolved are slightly higher in the County Borough (11.1%) compared with the Wales average (9.9%). This is also true for levels of those widowed or surviving civil partnership partner.

Table 42: legal partnership status in Wales, North Wales and Conwy CB (2021)

Source: Table TS002 2021 Census, Office for National Statistics

Legal partnership status	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All residents aged (16+)	96,366	100%	100%	100%
Never married or in a civil partnership	31,279	32.5%	35.2%	37.2%
Married or in a registered civil partnership	43,990	45.6%	44.8%	43.8%
Married	43,791	45.4%	44.6%	43.6%
In a registered civil partnership	199	0.2%	0.2%	0.2%
Separated, but still legally married or in a civil partnership	2,061	2.1%	2%	2%

Legal partnership status	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Divorced or civil partnership dissolved	10,732	11.1%	10.4%	9.9%
Widowed or surviving civil partnership partner	8,304	8.6%	7.6%	7.1%

Note: In order to protect against disclosure of personal information, records have been swapped between different geographic areas and counts perturbed by small amounts. Small counts at the lowest geographies will be most affected.

3.2.22 For local area analysis for HMAs in Conwy CB, the proportion of those that are married or in a registered civil partnership varies across the County Borough with the highest proportion in the Rural HMA at 50.5%, to 42.9% in West HMA.

3.2.23 Proportions of divorced or civil partnerships dissolved is low in Rural HMA (9.4%) when compared to the West HMA (12.0%). Widowed or surviving civil partnership partner proportions are high in both Creuddyn and East HMAs at 9.3%, when compared with the Wales average. Both these areas have a higher proportion of elderly population.

Table 43: legal partnership status in HMAs by number (2021)

Source: Table TS002 2021 Census, Office for National Statistics

Legal partnership status	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents aged (16+)	6,567	30,031	25,750	17,809	16,199
Never married or in a civil partnership	2,276	9,742	8,821	5,384	5,059
Married or in a registered civil partnership	2,816	13,446	11,143	8,391	8,184
Married	2,798	13,390	11,102	8,347	8,152

Legal partnership status	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
In a registered civil partnership	18	56	41	44	32
Separated, but still legally married or in a civil partnership	166	607	615	417	254
Divorced or civil partnership dissolved	791	3,429	3,040	1,954	1,519
Widowed or surviving civil partnership partner	518	2,807	2,131	1,663	1,183

Note: In order to protect against disclosure of personal information, records have been swapped between different geographic areas and counts perturbed by small amounts. Small counts at the lowest geographies will be most affected.

Table 44: legal partnership status in HMAs by % (2022)

Source: Table TS002 2021 Census, Office for National Statistics

Legal partnership status	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents aged (16+)	100%	100%	100%	100%	100%
Never married or in a civil partnership	34.7%	32.4%	34.3%	30.2%	31.2%
Married or in a registered civil partnership	42.9%	44.8%	43.3%	47.1%	50.5%
Married	42.6%	44.6%	43.1%	46.9%	50.3%
In a registered civil partnership	0.3%	0.2%	0.2%	0.2%	0.2%
Separated, but still legally married or in a civil partnership	2.5%	2%	2.4%	2.3%	1.6%
Divorced or civil partnership dissolved	12.0%	11.4%	11.8%	11%	9.4%

Legal partnership status	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Widowed or surviving civil partnership partner	7.9%	9.3%	8.3%	9.3%	7.3%

Note: In order to protect against disclosure of personal information, records have been swapped between different geographic areas and counts perturbed by small amounts. Small counts at the lowest geographies will be most affected.

Ethnicity

3.2.24 The proportion of people in Conwy CB who identified within the ethnic category “White” was 96.8% of the population. This was slightly smaller than in 2011 (97.7%), and is much higher than the proportion of people identifying as White in Wales at 93.8% and North Wales at 96.7%. Within the “White” category 94.1% of the total population identified as “Welsh, English, Scottish, Northern Irish or British”. This was a decrease from 95.4% in 2011. This compared with 90.6% in Wales and 93.3% in North Wales in 2021. The proportion who identify as “Gypsy or Irish traveller” is 0.1% across Conwy CB, North Wales and Wales for both 2021 and 2011.

3.2.25 1.4% of the population in Conwy CB is “Asian, Asian Welsh or Asian British”, compared to 1.1% in 2011. This was 2.9% in Wales and 1.4% in North Wales.

3.2.26 1.1% of the population identified within the high-level category “Mixed or multiple ethnic groups”, compared to 0.8% in 2011. The Wales proportion is 1.6% and 1.1% in North Wales. 0.2% identified within the high-level category “Black, Black Welsh, Black British, Caribbean or African” in Conwy CB, compared to 0.2% in 2011. This is lower than in Wales at 0.9%, but similar to 0.3% in North Wales for 2021.

3.2.27 0.3% of the population identified within the high-level category “Other ethnic group”, which did not change from 2011. This compares to 0.9% in Wales and 0.4% in North Wales.

Table 45: ethnic groups in Wales, North Wales and Conwy CB (2021)

Source: table TS021, 2021 Census; Office for National Statistics

Ethnicity	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All people	114,743	100%	686,916	3,107,494
White British	107,926	94.1%	93.3%	90.6%
Gypsy or Irish traveller	104	0.1%	0.1%	0.1%
Other white	3,146	2.7%	3.4%	3.2%
Mixed or Multiple ethnic groups	1,254	1.1%	1.1%	1.6%
Asian, Asian British or Asian Welsh	1,651	1.4%	1.4%	2.9%
Black, Black British, Black Welsh, Caribbean or African	271	0.2%	0.3%	0.9%
Other ethnic group	391	0.3%	0.4%	0.9%

3.2.28 For local area analysis for HMAs in Conwy CB, Rural HMA has the highest proportion who identify as “White” at 98.8%, compared to 95.8% in the Central HMA.

3.2.29 The Rural HMA has the lowest proportion of “Mixed or multiple ethnic groups” at 0.6%. The other four HMAs have similar proportions to the County Borough average ranging from 1.0% to 1.3%. The West and Rural HMAs have the lowest proportion of the population who identify as “Asian, Asian Welsh or Asian British” at 0.4%, compared to 2.1% in Central, which is the highest. There are similar proportions who identify as “Black, Black Welsh, Black British, Caribbean or African” across the County Borough, ranging from 0.1% in the East HMA, to 0.3% in Creuddyn, Central and the Rural HMAs. “Other ethnic group” is highest in Central at 0.5%, compared to 0.1% in Rural and West HMAs.

Table 46: ethnic groups in HMAs by number (2021)

Source: table TS021, 2021 Census; Office for National Statistics

Ethnicity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All people	7,834	37,569	31,206	21,052	17,062
White British	7,663	36,349	29,903	20,401	16,856
Gypsy or Irish traveller	47	327	240	143	80
Other white	7,517	34,832	29,121	20,043	16,539
Mixed or Multiple ethnic groups	10	18	9	8	2
Asian, Asian British or Asian Welsh	7,834	37,569	31,206	21,052	17,062
Black, Black British, Black Welsh, Caribbean or African	11	148	197	81	31
Other ethnic group	147	1,528	783	362	320

Table 47: ethnic groups in HMAs by % (2021)

Source: table TS021, 2021 Census; Office for National Statistics

Ethnicity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All people	100%	100%	100%	100%	100%
White British	95.9%	92.6%	93.3%	94.9%	96.9%
Gypsy or Irish traveller	0.0%	0.1%	0.0%	0.3%	0.1%
Other white	1.9%	4.1%	2.5%	1.7%	1.9%
Mixed or Multiple ethnic groups	1.3%	1.1%	1.3%	1.0%	0.6%
Asian, Asian British or Asian Welsh	0.4%	1.4%	2.1%	1.6%	0.4%
Black, Black British, Black Welsh, Caribbean or African	0.2%	0.3%	0.3%	0.1%	0.3%

Ethnicity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Other ethnic group	0.1%	0.4%	0.5%	0.2%	0.1%

Religion

3.2.30 The most common response to the religion question in the 2021 Census in Conwy CB was "Christian" at 50.8% of the overall population. This was also the most common religious group in Wales (43.8%) and in North Wales (49.8%).

3.2.31 "No religion" was the second most common response, 40.9% of Conwy CB population of 114,741. This is less than Wales 46.5% and North Wales 41.7%.

3.2.32 1.8% of the population in Conwy CB describe their religious affiliation as either Buddhist, Hindu, Jewish, Muslim, Sikh or Other Religion. This is low compared to 3.6% in Wales but the same 1.8% in North Wales.

Table 48: religion in Wales, North Wales and Conwy CB (2021)

Source: table TS030, 2021 Census, ONS [from Nomis on 23 November 2023]

Religion	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Total: All usual residents	114,741	100.0%	100.0%	100.0%
No religion	46,946	40.9%	41.7%	46.5%
Christian	58,283	50.8%	49.8%	43.6%
Buddhist	375	0.3%	0.3%	0.3%
Hindu	254	0.2%	0.2%	0.4%
Jewish	63	0.1%	0.0%	0.1%
Muslim	842	0.7%	0.8%	2.2%
Sikh	33	0.0%	0.0%	0.1%
Other religion	621	0.5%	0.5%	0.5%
Not answered	7,324	6.4%	6.7%	6.3%

3.2.33 For local area analysis for HMAs in Conwy CB, Rural HMA has the highest proportion who identify as “Christian” at 54.5% compared to 47.4% in the Central HMA with the lowest.

3.2.34 “No religion” was the second most common response across all the HMA’s, West HMA had the highest at 48.3%. East and Rural HMAs had the lowest at 38.6 % and 38.1%.

3.2.35 As well as being the HMA with the highest percentage of people reporting as “Christian”, Rural MHA has the lowest percentage reporting as “no religion” 38.1%. It is also the least religiously diverse region of Conwy CB, with 1.1% selecting a religion other than “Christian”. Conversely, West HMA has the lowest percentage reporting as “Christian” also has the highest percentage figure reporting as “no religion” (48.3%) and is the most religiously diverse region of Conwy CB with 2.3% selecting a religion other than “Christian”.

Table 49: religion in HMAs by number (2021)

Source: table TS030, 2021 Census, ONS [from Nomis on 23 November 2023]

Religion	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents	7,841	37,559	31,214	21,059	17,061
No religion	3,788	14,883	13,641	8,138	6,494
Christian	3,515	19,553	14,810	11,113	9,293
Buddhist	32	108	103	80	47
Hindu	5	83	97	63	8
Jewish	1	20	13	19	9
Muslim	15	298	356	128	47
Sikh	0	4	9	18	2
Other religion	46	202	179	114	76
Not answered	439	2,408	2,006	1,386	1,085

Table 50: religion in in HMAs by % (2021)

Source: table TS030, 2021 Census, ONS [from Nomis on 23 November 2023]

Religion	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents	100.0%	100.0%	100.0%	100.0%	100.0%
No religion	48.3%	39.6%	43.7%	38.6%	38.1%
Christian	44.8%	52.1%	47.4%	52.8%	54.5%
Buddhist	0.4%	0.3%	0.3%	0.4%	0.3%
Hindu	0.1%	0.2%	0.3%	0.3%	0.0%
Jewish	0.0%	0.1%	0.0%	0.1%	0.1%
Muslim	0.2%	0.8%	1.1%	0.6%	0.3%
Sikh	0.0%	0.0%	0.0%	0.1%	0.0%
Other religion	0.6%	0.5%	0.6%	0.5%	0.4%
Not answered	5.6%	6.4%	6.4%	6.6%	6.4%

Sexual orientation

3.2.36 On Census Day, 21 March 2021, responses to the voluntary sexual orientation question were provided for 88,376 usual residents in Conwy County Borough (91.7% of the population aged 16 years and over). The remaining 7,986 people aged 16 years and over (8.3%) did not answer the question on sexual orientation.

- 85,973 people (89.2% of the population aged 16 years and over) described themselves as “Straight/Heterosexual”. (Wales, and England and Wales = 89.4%)
- 1,330 (1.4%) described themselves as “Gay or Lesbian”.
- 872 (0.9%) described themselves as “Bisexual”.
- A further 201 (0.2%) wrote in a different sexual orientation, among whom the most common responses included “Pansexual”, “Asexual” and “Queer”.
- In total, 2,403 usual residents (2.5% of the population aged 16 or over) selected an LGB+ sexual orientation (“Gay or Lesbian”, “Bisexual” or

another minority sexual orientation). Wales = 3.0% and England and Wales = 3.2%.

3.2.37 Data about sexual orientation is not available at small area (HMA) level.

Welsh language

3.2.38 In Conwy CB, there are 29,000 people aged 3 or over who are able to speak Welsh. This 25.9% of the population. This compares to Wales as a whole at 17.9% and 29.1% in North Wales.

3.2.39 Of those who are able to speak Welsh:

- 20.2% Can speak, read and write Welsh,
- 3.6% Can speak but cannot read or write Welsh,
- 1.8% Can speak and read but cannot write Welsh,
- 0.3% Can speak and other combinations of skills in Welsh.

3.2.40 Conwy CB, 29,000 Welsh speakers make up 6.7% of the Welsh speaking population of Wales. (Our population as a whole makes up 3.8% of the total Welsh population).

3.2.41 61.9% of Conwy CB have no skills in Welsh at all, this is similar to that of North Wales (61.3%), however is significantly lower than the whole of Wales at 74.8%.

Table 51: Welsh language skills in Wales, North Wales and Conwy CB

Source: Table TS032, 2021 Census, ONS [from Nomis on 23 November 2023]

Welsh language skills	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Total: All usual residents aged 3 years and over	111,805	100%	100%	100%
Can understand spoken Welsh only	10,707	9.6%	7.2%	5.2%
Can speak, read and write Welsh	22,605	20.2%	23.6%	14.2%

Welsh language skills	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Can speak but cannot read or write Welsh	4,022	3.6%	3.4%	2.3%
Can speak and read but cannot write Welsh	2,058	1.8%	1.7%	1.1%
Can read but cannot speak or write Welsh	1,849	1.7%	1.4%	1.4%
Can write but cannot speak or read Welsh	248	0.2%	0.2%	0.2%
Can read and write but cannot speak Welsh	842	0.8%	0.7%	0.6%
Can speak and other combinations of skills in Welsh	315	0.3%	0.4%	0.2%
No skills in Welsh	69,159	61.9%	61.3%	74.8%

3.2.42 For local area analysis for HMAs in Conwy CB, Rural HMA has the highest proportion who are able to speak Welsh at 53.1% compared to 16.1% in the East HMA.

3.2.43 In general, the incidence of Welsh speakers increases towards the west, and as one travels inland from the more highly populated coastal strip. As a comparison to high number of Welsh speakers in Rural HMA; East HMA has a significantly lower percentage of Welsh Speakers with 16.1% and Central HMA with a similarly low percentage figure of 19.2%

3.2.44 In opposition with the high number of Welsh speakers increasing towards the west and inland, Those that have no Welsh skills dominate East HMA with 75.2% and Central HMA 68.7% compared with 35.7% in Rural MHA

Table 52: Welsh language skills in HMAs by number

Source: Table TS032, 2021 Census, ONS

Welsh language skills	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents (age 3+)	7,614	36,651	30,357	20,536	16,649
Can understand spoken Welsh only	1,012	4,046	2,770	1,360	1,521
Can speak, read and write Welsh	2,138	6,061	4,313	2,561	7,530
Can speak but cannot read or write Welsh	460	1,337	921	420	882
Can speak and read but cannot write Welsh	224	666	524	261	385
Can read but cannot speak or write Welsh	128	714	550	250	207
Can write but cannot speak or read Welsh	13	71	81	52	29
Can read and write but cannot speak Welsh	51	319	249	132	96
Can speak and other combinations of skills in Welsh	23	100	83	60	47
No skills in Welsh	3,565	23,337	20,866	15,440	5,952

Table 53: Welsh language skills in HMAs by %

Source: Table TS032, 2021 Census, ONS

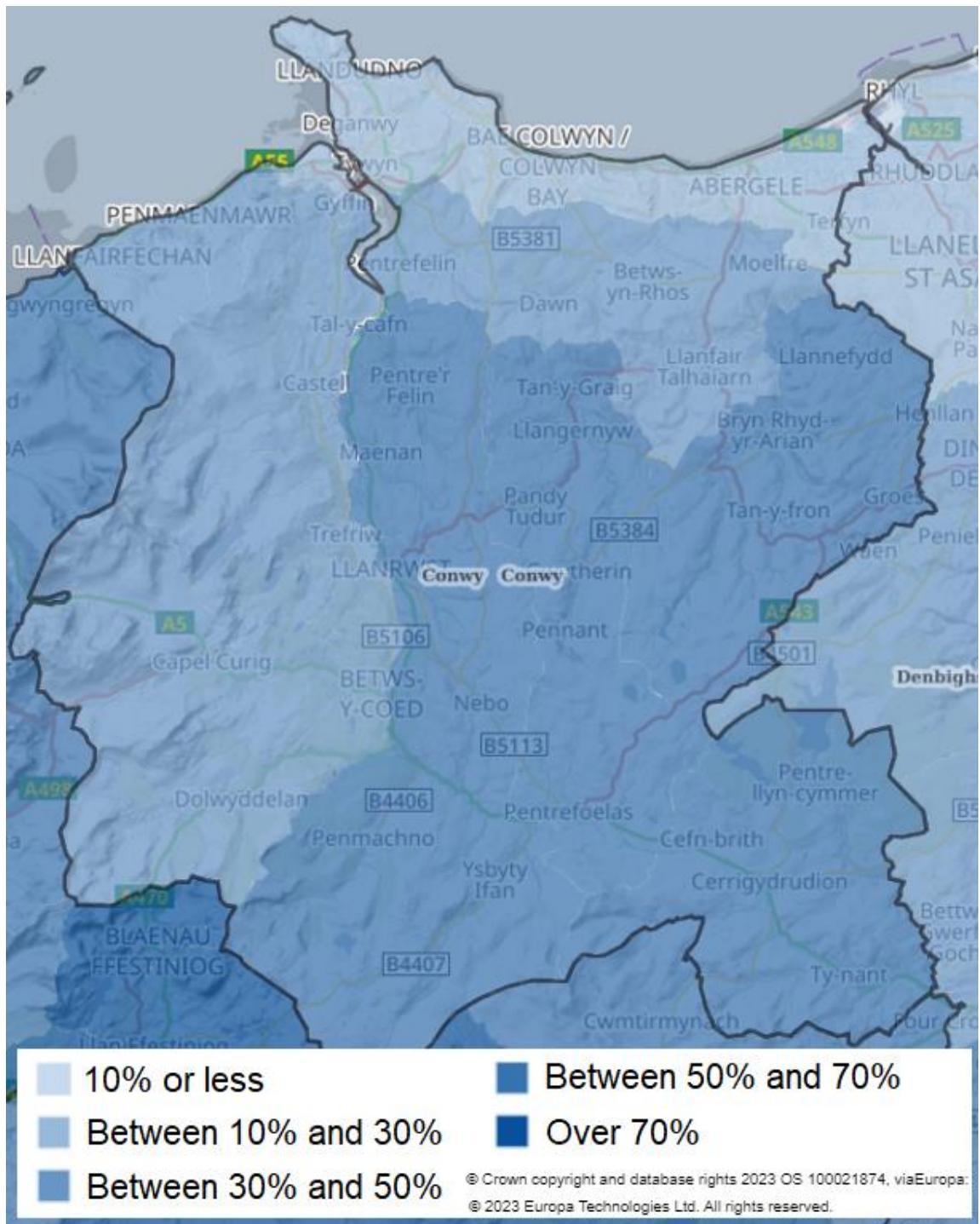
Welsh language skills	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents (age 3+)	100%	100%	100%	100%	100%
Can understand spoken Welsh only	13.3%	11%	9.1%	6.6%	9.1%

Welsh language skills	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Can speak, read and write Welsh	28.1%	16.5%	14.2%	12.5%	45.2%
Can speak but cannot read or write Welsh	6%	3.6%	3%	2%	5.3%
Can speak and read but cannot write Welsh	2.9%	1.8%	1.7%	1.3%	2.3%
Can read but cannot speak or write Welsh	1.7%	1.9%	1.8%	1.2%	1.2%
Can write but cannot speak or read Welsh	0.2%	0.2%	0.3%	0.3%	0.2%
Can read and write but cannot speak Welsh	0.7%	0.9%	0.8%	0.6%	0.6%
Can speak and other combinations of skills in Welsh	0.3%	0.3%	0.3%	0.3%	0.3%
No skills in Welsh	46.8%	63.7%	68.7%	75.2%	35.7%

3.2.45 The map below shows the proportion of Welsh speakers for the County Borough. It shows the variance within HMAs. The south east part of the County Borough has the highest proportions who have Welsh language skills.

Map 9: % of people (age 3+) who can speak Welsh (2021)

Source: Table TS032, 2021 Census, ONS



Nationality

3.2.46 In 2021, 98.7% (113,172 people) of Conwy CB residents identified with at least one UK national identity, this is marginally higher than North Wales (97.6%) and Wales with 97.3%.

3.2.47 "Welsh" was the first response option for the national identity question. More than half the population of Wales at 55% chose this option although this was lower in Conwy CB with 42% and North Wales 46.7%.

3.2.48 People who identified with at least one UK and one non-UK identity accounted for 1% of the overall population of Conwy CB (1,205 people) in 2021, both Wales and North Wales have similar percentage rates to this.

3.2.49 Those selecting a non-UK identity only accounted for 2.9% of the overall population of Conwy CB (3,365 people). This is lower than the percentage figures for Wales with 4.2% and North Wales 3.9%.

Chart 8: national identity in Conwy CB (2021)

Source: Table TS032, Census 2021, ONS

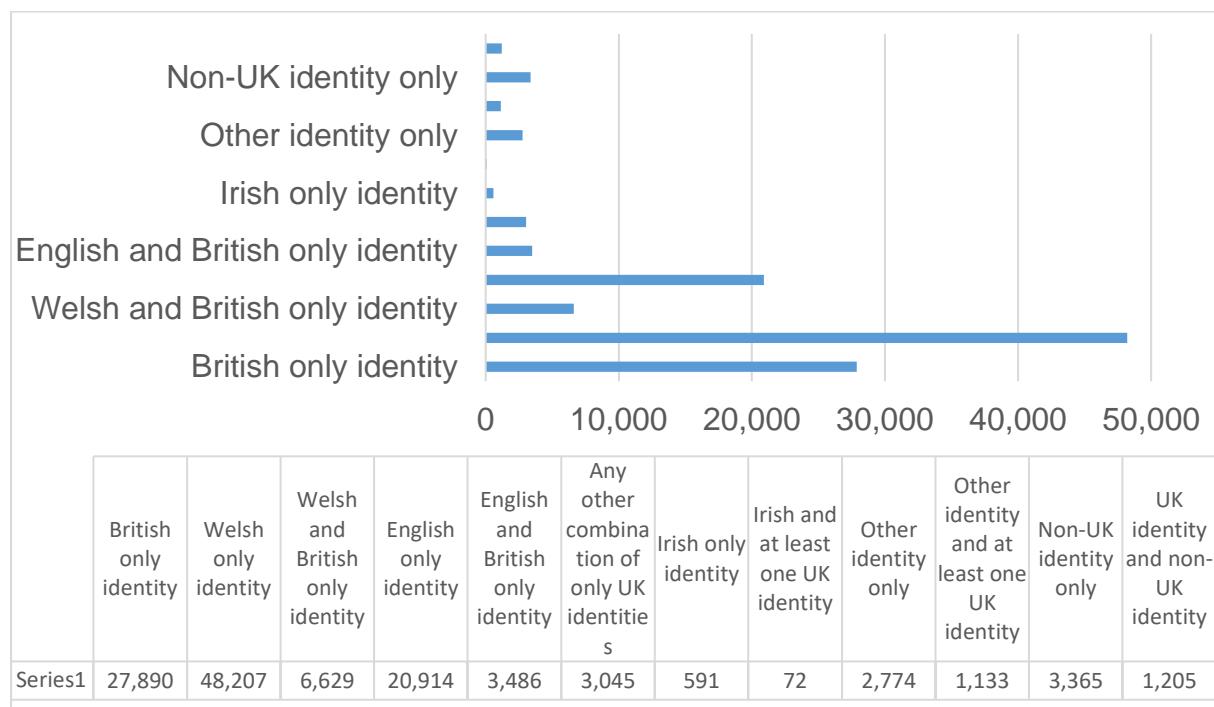


Table 54: national identity in Wales, North Wales and Conwy CB (2021)

Source: table TS027 2021 Census, Office for National Statistics

National identity	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All residents	114,741	100.0%	100.0%	100.0%
British only identity	27,890	24.3%	21.1%	18.5%

National identity	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Welsh only identity	48,207	42.0%	46.7%	55.2%
Welsh and British only identity	6,629	5.8%	6.1%	8.1%
English only identity	20,914	18.2%	15.9%	9.1%
English and British only identity	3,486	3.0%	2.8%	1.8%
Any other combination of only UK identities	3,045	2.7%	2.6%	1.9%
Irish only identity	591	0.5%	0.3%	0.3%
Irish and at least one UK identity	72	0.1%	0.1%	0.1%
Other identity only	2,774	2.4%	3.5%	4.0%
Other identity and at least one UK identity	1,133	1.0%	1.0%	1.1%
Non-UK identity only	3,365	2.9%	3.9%	4.2%
UK identity and non-UK identity	1,205	1.1%	1.0%	1.2%

3.2.50 For local area analysis for HMAs in Conwy CB, Rural HMA has the highest proportion who identify as “Welsh only” at 56.6%. This is significantly higher than those in the East HMA with 33.7%.

3.2.51 Central HMA has the highest percentage of those identifying at “British only” with 26.4%. This is in contrast with Rural HMA which has 19.3%.

3.2.52 Those selecting a non-UK identity was low across all HMA areas, ranging from 1.7% in the Rural HMA to 3.9% in the Creuddyn HMA.

Table 55: national identity in HMAs by number (2021)

Source: table TS027, 2021 Census, Office for National Statistics

National identity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents	7,841	37,562	31,219	21,067	17,061
British only identity	1,814	9,440	8,246	5,099	3,291
Welsh only identity	3,901	15,175	12,370	7,106	9,657
Welsh and British only identity	425	2,350	1,934	1,120	800
English only identity	1,064	6,547	5,536	5,705	2,061
English and British only identity	161	1,159	962	863	343
Any other combination of only UK identities	209	970	839	607	424
Irish only identity	34	224	182	98	49
Irish and at least one UK identity	5	31	15	8	14
Other identity only	138	1,251	801	350	238
Other identity and at least one UK identity	90	415	334	111	184
Non-UK identity only	172	1,475	983	448	287
UK identity and non-UK identity	95	446	349	119	198

Table 56: national identity in HMAs by % (2021)

Source: table TS027, 2021 Census, Office for National Statistics

National identity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All residents	100.0%	100.0%	100.0%	100.0%	100.0%
British only identity	23.1%	25.1%	26.4%	24.2%	19.3%
Welsh only identity	49.8%	40.4%	39.6%	33.7%	56.6%

National identity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Welsh and British only identity	5.4%	6.3%	6.2%	5.3%	4.7%
English only identity	13.6%	17.4%	17.7%	27.1%	12.1%
English and British only identity	2.1%	3.1%	3.1%	4.1%	2.0%
Any other combination of only UK identities	2.7%	2.6%	2.7%	2.9%	2.5%
Irish only identity	0.4%	0.6%	0.6%	0.5%	0.3%
Irish and at least one UK identity	0.1%	0.1%	0.0%	0.0%	0.1%
Other identity only	1.8%	3.3%	2.6%	1.7%	1.4%
Other identity and at least one UK identity	1.1%	1.1%	1.1%	0.5%	1.1%
Non-UK identity only	2.2%	3.9%	3.1%	2.1%	1.7%
UK identity and non-UK identity	1.2%	1.2%	1.1%	0.6%	1.2%

In order to protect against disclosure of personal information, records have been swapped between different geographic areas and counts perturbed by small amounts. Small counts at the lowest geographies will be most affected.

Household incomes and housing costs

3.2.53 Please see Section 3.1 for this data.

Household composition

3.2.54 Please see Section 3.1 for this data.

Commuting patterns

3.2.55 The Census asks people who were in employment or temporarily away in the week before the Census are asked how they travel to work and the distance.

25.6% of people in Wales (aged 16 and over in employment) work mainly from home. This compares with 21.7% North Wales and 23.4% in Conwy CB. This has grown significantly since 2011, when the figure for Wales was 10.4% and 13.5% for Conwy CB.

3.2.56 The majority of people who travelled to their workplace, travelled up to 20 km. In 2021, in Conwy CB, 12.4% travelled less than 2 km, which is the largest category. This compares to 11.9% in North Wales and 11.6% in Wales. The largest category in Wales and North Wales is 5 to less than 10 km at 12.8% and 13.9%.

Table 57: distance travelled to work in Wales, North Wales and Conwy CB (2011 and 2021)

Source: table TS058, 2021 Census; Office for National Statistics

Distance travelled	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All age 16+	48,723		306,217	1,368,449
Less than 2km	6,033	12.4%	11.9%	11.6%
2km to less than 5km	5,733	11.8%	11.6%	11.9%
5km to less than 10km	5,864	12.0%	13.9%	12.8%
10km to less than 20km	5,588	11.5%	13.4%	12.7%
20km to less than 30km	2,875	5.9%	6.2%	5.5%
30km to less than 40km	1,138	2.3%	2.8%	2.3%
40km to less than 60km	1,284	2.6%	2.1%	1.6%
60km and over	1,270	2.6%	2.4%	2.0%
Works mainly from home	11,381	23.4%	21.7%	25.6%
Works mainly at an offshore installation, in no fixed place, or outside the UK*	7,557	15.5%	14.2%	13.9%

3.2.57 When looking at this data at smaller HMA level, it shows differences across the County Borough. The Rural and West HMAs have the highest proportions who work mainly from home, at 31.2% and 27.8%, compared to the East HMA, with the lowest proportion at 17.5%. The distances travelled also varies by HMA. 10 km to less than 20 km is the most common distance travelled in the West and Rural HMAs. 5 km to less than 10 km is the most common in the Central and East HMAs. Less than 2 kilometres to the most common in the Creuddyn HMA.

Table 58: distance travelled to work in HMAs by number of people (2021)

Source: table TS058, 2021 Census, Office for National Statistics

Distance travelled	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All age 16+	3,473	15,894	12,969	8,069	8,317
Less than 2km	261	2,830	1,584	814	541
2km to less than 5km	134	2,703	1,578	976	341
5km to less than 10km	433	1,367	1,969	1,430	666
10km to less than 20km	669	752	1,699	1,191	1,273
20km to less than 30km	200	1,315	360	272	725
30km to less than 40km	97	235	258	253	297
40km to less than 60km	40	365	418	292	172
60km and over	99	489	278	234	170
Works mainly from home	964	3,532	2,877	1,415	2,592
Works mainly at an offshore installation, in no fixed place, or outside the UK	576	2,306	1,948	1,192	1,540

NB Census 2021 took place during a period of rapid change (Covid-19 lockdown). The Office for National Statistics gave extra guidance to help people on furlough answer the census questions about work. However, we are unable to determine how furloughed people followed the guidance. Caution is advised when using this data for planning purposes.

Table 59: distance travelled to work in HMAs by % (2021)

Source: table TS058, 2021 Census, Office for National Statistics

Distance travelled	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All age 16+	100%	100%	100%	100%	100%
Less than 2km	7.5%	17.8%	12.2%	10.1%	6.5%
2km to less than 5km	3.9%	17.0%	12.2%	12.1%	4.1%
5km to less than 10km	12.5%	8.6%	15.2%	17.7%	8.0%
10km to less than 20km	19.3%	4.7%	13.1%	14.8%	15.3%
20km to less than 30km	5.8%	8.3%	2.8%	3.4%	8.7%
30km to less than 40km	2.8%	1.5%	2.0%	3.1%	3.6%
40km to less than 60km	1.2%	2.3%	3.2%	3.6%	2.1%
60km and over	2.9%	3.1%	2.1%	2.9%	2.0%
Works mainly from home	27.8%	22.2%	22.2%	17.5%	31.2%
Works mainly at an offshore installation, in no fixed place, or outside the UK	16.6%	14.5%	15.0%	14.8%	18.5%

NB Census 2021 took place during a period of rapid change (Covid-19 lockdown). The Office for National Statistics gave extra guidance to help people on furlough answer the census questions about work. However, we are unable to determine how furloughed people followed the guidance. Caution is advised when using this data for planning purposes.

Social class

3.2.58 Census 2021 data showed that people in Conwy CB (aged 16-65) at 31% were more likely to be classed as having managerial and professional occupations compared with the whole of Wales and North Wales, both with 29%.

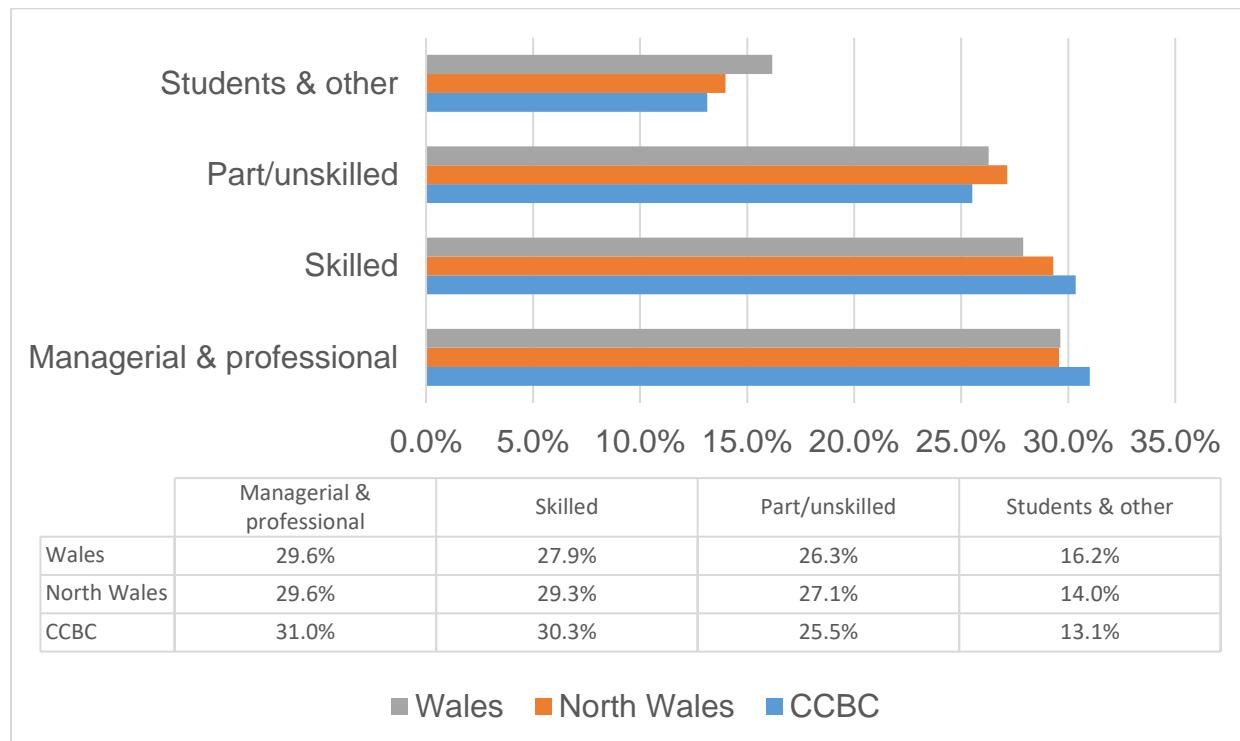
3.2.59 Conwy CB has higher proportion of people classed as Skilled (30.3%) than in Wales (27.9%) and North Wales (29.3%).

3.2.60 Although Conwy CB has higher proportions of managerial, professional and skilled professional amongst the population, the workforce that consider themselves as being part / unskilled has the lowest proportion (25.5%). North Wales is 27.1% and Wales 26.3%

3.2.61 In Conwy CB, 13.1% of the population were classed as the lowest social class, Students and other, the proportions in Wales were (16.2%) and North Wales (14%).

Chart 9: social class in Wales, North Wales and Conwy CB (age 16-64) (2021)

Source: table TS062, 2021 Census, ONS



3.2.62 For local area analysis of HMAs in Conwy CB, West HMA has the highest proportion who identify as being managerial and professional at 33.7%. This compares to the East HMA with the lowest proportion at 27.0%.

3.2.63 There is a greater regional variance with people in the skilled category, Rural HMA (36.3%) is significantly higher than those along the coastal areas, West (27.4%), Central (28.7%), Creuddyn (29.6%) and East (29.7%)

3.2.64 Students and other make up the smallest proportion of the social class classification, East has the highest proportion with 14.9% and Rural HMA has the least at 10.4%

Table 60: social class in HMAs by % (age 16-64) (2021)

Source: Table TS062, 2021 Census, ONS

Social class	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All age 16+	100%	100%	100%	100%	100%
Managerial & professional	33.7%	31.6%	31.7%	27.0%	32.2%
Skilled	27.4%	29.6%	28.7%	29.7%	36.3%
Part/unskilled	25.8%	26.3%	25.4%	28.4%	21.0%
Students & other	13.1%	12.6%	14.2%	14.9%	10.4%

Table 61: Social Class in HMAs by number (2021)

Source: Table TS062, 2021 Census, ONS

Social class	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All age 16+	6,567	30,032	25,748	17,812	16,201
Managerial & professional	2,213	9,480	8,150	4,813	5,221
Skilled	1,799	8,884	7,401	5,283	5,885
Part/unskilled	1,694	7,886	6,539	5,060	3,405
Students & other	861	3,782	3,658	2,656	1,690

Occupation

3.2.65 In Census 2021, respondents aged 16 years and over were asked for their full job titles (for their main job, or if not working their last main job) and the main activity of their employer. The answers they gave were coded using the Standard Occupational Classification 2020. The data was combined into the following categories:

- Managers, directors and senior officials (minor groups including production managers and directors; managers and directors in retail and wholesale; chief executives and senior officials).
- Professional occupations (minor groups including teaching and other educational professionals; information technology professionals; nursing and midwifery professionals).

- Associate professional and technical occupations (minor groups including sales, marketing and related associate professionals; artistic, literary and media occupations; welfare and housing associate professionals).
- Administrative and secretarial occupations (minor groups including secretarial and related occupations; administrative occupations in finance).
- Skilled trades occupations (minor groups including construction and building trades; food preparation and hospitality trades; agricultural and related trades).
- Caring, leisure and other service occupations (minor groups including caring personal services; teaching and childcare support occupations; hairdressers and related services).
- Sales and customer service occupations (minor groups including sales assistants and retail cashiers; customer service occupations).
- Process, plant and machine operatives (minor groups including road transport drivers; process operatives).
- Elementary occupations (minor groups including elementary cleaning occupations; elementary storage occupations).

3.2.66 The week before, census day 21 March 2021, Just over half of the usual residents aged 16 years and over in Conwy CB (96,360) were in employment (48,722, 50.5%).

3.2.67 In Conwy CB, 17.1% were employed in professional occupations (8,308 people), making it the largest broad occupation category. In addition, over 5,596 people were employed in associate professional and technical occupations (11.5%) and as managers, directors and senior officials (5,936, 12.2%) respectively.

3.2.68 A larger percentage in Wales were employed in professional occupations (18.2% of usual residents aged 16 years and over in employment) compared with Conwy CB (17.1%).

Table 62: Occupation in Wales, North Wales and Conwy CB (2021)

Source: table TS063, 2021 Census, Office for National Statistics

Occupation (current)	Conwy CB No	Conwy CB %	North Wales %	Wales %
All usual residents aged 16+ years in employment the week before the census	48,722	100.0%	100.0%	100.0%
Managers, directors and senior officials	5,936	12.2%	10.8%	10.5%
Professional occupations	8,308	17.1%	16.7%	18.2%
Associate professional and technical occupations	5,596	11.5%	11.0%	11.8%
Administrative and secretarial occupations	4,093	8.4%	8.7%	9.4%
Skilled trades occupations	6,521	13.4%	13.5%	12.2%
Caring, leisure and other service occupations	6,327	13.0%	11.9%	11.2%
Sales and customer service occupations	4,194	8.6%	8.1%	8.4%
Process, plant and machine operatives	2,984	6.1%	8.7%	7.9%
Elementary occupations	4,763	9.8%	10.7%	10.5%

3.2.69 Nearly a fifth who were in employment were working in professional occupations in West MHA (19.4%) which has the largest percentages of the Conwy CB HMAs, compared with 14.8% in the East HMA.

3.2.70 In Rural HMA, a large proportion were employed in skilled trades occupations (21.9%) when compared with 11.2% in Central HMA with the lowest.

Table 63: Occupation in HMAs by number (2021)

Source: table TS063, 2021 Census, Office for National Statistics

Occupation (current)	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All usual residents aged 16+ years in employment the week before the census	3,473	15,892	12,974	8,059	8,321
Managers, directors and senior officials	412	1,988	1,511	895	1,125
Professional occupations	674	2,686	2,369	1,189	1,387
Associate professional and technical occupations	437	1,807	1,606	906	839
Administrative and secretarial occupations	255	1,356	1,145	788	551
Skilled trades occupations	391	1,883	1,457	970	1,821
Caring, leisure and other service occupations	493	2,121	1,773	1,073	863
Sales and customer service occupations	287	1,492	1,143	756	515
Process, plant and machine operatives	227	846	773	650	491
Elementary occupations	297	1,713	1,197	832	729

Table 64: Occupation in HMAs by % (2021)

Source: table TS063, 2021 Census, Office for National Statistics

Occupation (current)	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All usual residents aged 16+ years in employment the week before the census	100.0%	100.0%	100.0%	100.0%	100.0%
Managers, directors and senior officials	11.9%	12.5%	11.6%	11.1%	13.5%
Professional occupations	19.4%	16.9%	18.3%	14.8%	16.7%

Occupation (current)	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Associate professional and technical occupations	12.6%	11.4%	12.4%	11.2%	10.1%
Administrative and secretarial occupations	7.3%	8.5%	8.8%	9.8%	6.6%
Skilled trades occupations	11.3%	11.8%	11.2%	12.0%	21.9%
Caring, leisure and other service occupations	14.2%	13.3%	13.7%	13.3%	10.4%
Sales and customer service occupations	8.3%	9.4%	8.8%	9.4%	6.2%
Process, plant and machine operatives	6.5%	5.3%	6.0%	8.1%	5.9%
Elementary occupations	8.6%	10.8%	9.2%	10.3%	8.8%

Qualifications and education attainment

3.2.71 Census 2021 helps us to understand education in Conwy CB through usual residents' highest level of qualification.

3.2.72 Residents aged 16 years and over (96,364) were asked to record any qualifications (including academic, vocational, and professional qualifications) they had achieved in England, Wales or worldwide. This is used to calculate the highest level of qualification (so, the highest level of qualification that an individual reported irrespective of previous qualifications listed) using the following categories:

- no qualifications: no formal qualifications
- Level 1: one to four GCSE passes (grade A* to C or grade 4 and above) and any other GCSEs at other grades, or equivalent qualifications
- Level 2: five or more GCSE passes (grade A* to C or grade 4 and above) or equivalent qualifications
- apprenticeships

- Level 3: two or more A Levels or equivalent qualifications
- Level 4 or above: Higher National Certificate, Higher National Diploma, Bachelor's degree, or post-graduate qualifications
- other qualifications, of unknown level

3.2.73 Across Conwy CB, 32.4% of usual residents aged 16 years and older (31,232) indicated that their highest level of qualification was a Level 4 or above, this is marginally higher than Wales as a whole (31.5%) and North Wales (31.1%).

3.2.74 The second most common category in Conwy CB was no qualifications (18.7%, 17,998 residents). This is the same as North Wales but is slightly lower than Wales (19.9%)

3.2.75 Apprenticeships were the highest qualification for 6.3% of the people in Conwy CB and North Wales, which was slightly higher than 5.6% for Wales as a whole.

Table 65: Highest level of qualification in Wales, North Wales and Conwy CB (2021)

Source: table TS067, 2021 Census, Office for National Statistics

Qualifications	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All usual residents aged 16+	96,364	100.0%	100.0%	100.0%
No qualifications	17,998	18.7%	18.7%	19.9%
Level 1 and entry level qualifications	8,317	8.6%	9.0%	8.7%
Level 2 qualifications	13,890	14.4%	15.0%	14.4%
Apprenticeships	6,111	6.3%	6.3%	5.6%
Level 3 qualifications	15,948	16.5%	17.2%	17.2%
Level 4 qualifications or above	31,232	32.4%	31.1%	31.5%
Other qualifications	2,868	3.0%	2.8%	2.7%

3.2.76 For local area analysis for HMAs in Conwy CB, the West HMA has the highest percentage of people who indicated their highest level of qualification was level 4 or above (35.1%) compared with East HMA with the lowest (26.3%).

3.2.77 Conversely, East HMA (23.9%) had the highest proportion of people indicating no qualifications, compared to the West HMA with the lowest (17.2%).

3.2.78 Apprenticeships in Rural HMA (5.8%) was on the low side when compared with the coastal HMA's; East (7.2%), West (6.5%), Creuddyn (6.2%) and Central (6.1%).

Table 66: highest level of qualification in HMAs by number (2021)

Source: table TS067, 2021 Census, Office for National Statistics

Qualifications	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All usual residents aged 16+	6,569	31,856	25,754	17,808	14,364
No qualifications	1,131	5,612	4,488	4,263	2,500
Level 1 and entry level qualifications	516	2,769	2,189	1,711	1,133
Level 2 qualifications	887	4,673	3,773	2,524	2,032
Apprenticeships	427	1,988	1,573	1,279	839
Level 3 qualifications	1,118	5,173	4,427	2,750	2,483
Level 4 qualifications or above	2,309	10,615	8,602	4,691	5,015
Other qualifications	181	1,026	702	590	362

Table 67: highest level of qualification by HMAs by % (2021)

Source: table TS067, 2021 Census, Office for National Statistics

Qualifications	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Total: All usual residents aged 16 and over	100.0%	100.0%	100.0%	100.0%	100.0%
No qualifications	17.2%	17.6%	17.4%	23.9%	17.4%

Qualifications	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Level 1 and entry level qualifications	7.9%	8.7%	8.5%	9.6%	7.9%
Level 2 qualifications	13.5%	14.7%	14.7%	14.2%	14.1%
Apprenticeships	6.5%	6.2%	6.1%	7.2%	5.8%
Level 3 qualifications	17.0%	16.2%	17.2%	15.4%	17.3%
Level 4 qualifications or above	35.1%	33.3%	33.4%	26.3%	34.9%
Other qualifications	2.8%	3.2%	2.7%	3.3%	2.5%

Economic activity

3.2.79 The economically active population is defined by the ONS as people aged 16 and over who are either in employment or unemployed. On Census Day, 21 March 2021, more than half of the usual residents aged 16 years and over in Conwy CB (96,360) were economically active (50,107, 52.0%), while 44,773 (46.5%) were economically inactive.

3.2.80 52% of people aged 16-64 in Conwy CB are economically active (In work or in and a full-time student) – slightly lower than the Wales and North Wales figure of 54.9%.

3.2.81 The County Borough has a high proportion of the population that are retired (30.8%) compared with the whole of Wales (24.7%), however these figures are proportionate to those ages above 65 across the region.

3.2.82 The percentage of the economically active population that are unemployed is consistent throughout Wales, with Conwy CB only being 0.1% above the national average.

Table 68: Economic activity status in Wales, North Wales and Conwy CB (2021)

Source: table TS066, 2021 Census, Office for National Statistics

Economic activity	Conwy CB Number	Conwy CB %	North Wales %	Wales %
All usual residents aged 16 and over	96,360	100.0%	100.0%	100.0%
Economically active (excluding full-time students)	50,107	52.0%	54.9%	54.9%
in employment	47,561	49.4%	52.5%	51.9%
Unemployed	2,546	2.6%	2.5%	2.5%
Economically active and a full-time student	1,480	1.5%	1.9%	2.2%
In employment	1,158	1.2%	1.4%	1.6%
Unemployed	322	0.3%	0.5%	0.6%
Economically inactive	44,773	46.5%	43.2%	43.5%
Retired	29,697	30.8%	27.1%	24.7%
Student	3,623	3.8%	4.6%	5.7%
Looking after home or family	3,678	3.8%	3.8%	4.3%
Long-term sick or disabled	5,201	5.4%	4.9%	5.9%
Other	2,574	2.7%	2.8%	2.9%

3.2.83 There are wide regional variances when comparing those who are economically active with 58.3% in the Rural HMA, compared with 44.2% in East HMA, which is 10.7% below the national average for Wales.

3.2.84 The economic inactivity of the residents in the HMA's correlates to those that are economically active. 51.7% of East HMA as opposed to 40.4% in Rural HMA. This is a difference of 11.3% between the regions and 8.2% of the Wales average.

3.2.85 Of those that are economically inactive in East HMA, 35.1% are retired, 3.3% are students, 4.1% are looking after home or family, 6.6% are long term sick or disabled and 2.6% is other

Table 69: Economic activity status in HMAs by number (2021)

Source: table TS066, 2021 Census, Office for National Statistics

Economic activity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All usual residents aged 16 and over	6,576	31,853	25,762	17,810	14,378
Economically active (excluding full-time students)	3,549	16,356	13,468	8,347	8,378
in employment	3,381	15,483	12,665	7,869	8,156
Unemployed	168	873	803	478	222
Economically active and a full-time student	115	513	416	253	196
In employment	95	399	314	199	161
Unemployed	20	114	102	54	35
Economically inactive	2,912	14,984	11,878	9,210	5,804
Retired	1,844	10,285	7,372	6,247	3,954
Student	272	1,170	1,090	586	508
Looking after home or family	249	1,093	1,123	739	477
Long-term sick or disabled	363	1,528	1,596	1,169	548
Other	184	908	697	469	317

Table 70: Economic activity status in HMAs by % (2021)

Source: table TS066, 2021 Census, Office for National Statistics

Economic activity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
All usual residents aged 16 and over	100.0%	100.0%	100.0%	100.0%	100.0%

Economic activity	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Economically active (excluding full-time students)	54.0%	51.3%	52.3%	46.9%	58.3%
in employment	51.4%	48.6%	49.2%	44.2%	56.7%
Unemployed	2.6%	2.7%	3.1%	2.7%	1.5%
Economically active and a full-time student	1.7%	1.6%	1.6%	1.4%	1.4%
In employment	1.4%	1.3%	1.2%	1.1%	1.1%
Unemployed	0.3%	0.4%	0.4%	0.3%	0.2%
Economically inactive	44.3%	47.0%	46.1%	51.7%	40.4%
Retired	28.0%	32.3%	28.6%	35.1%	27.5%
Student	4.1%	3.7%	4.2%	3.3%	3.5%
Looking after home or family	3.8%	3.4%	.4%	4.1%	3.3%
Long-term sick or disabled	5.5%	4.8%	6.2%	6.6%	3.8%
Other	2.8%	2.9%	2.7%	2.6%	2.2%

Housing related benefits

3.2.86 Data about housing related benefits claimants helps us understand the impacts housing costs may have on residents. Information about other types of welfare benefits is available in the section below.

3.2.87 The number of people receiving housing related benefits had been on a gradual downward trend between spring 2013 and autumn 2018, but had then started to rise slowly. The Covid-19 pandemic and the change it caused in people's household income and housing situation resulted in a large upturn in numbers of recipients in April 2020.

3.2.88 In August 2023 there were 9,760 households who were recipients of housing related benefits. Universal Credit, housing element has the highest proportion of claimants, in Conwy CB with equates to 51.6% of those claiming a housing related benefit 54.7% of the properties are social rented and 44.4% are private

rented. The proportion in socially rented properties in Conwy CB is lower than the 67.7% for Wales as a whole.

3.2.89 The proportion of those receiving housing benefits who are housed within the private rented sector is much higher in Conwy County Borough than across the country as a whole, which is a reflection of the lack of social housing within our housing stock and of the increasing reliance on the private rented sector to provide for those in social and intermediate need.

3.2.90 36.3% of claimants are single and of working age (16-65), which is comparable to Wales (36.4%), but lower than the North Wales average (34.0%). The proportion of claimants who are of retirement age (66+) is higher in Conwy CB (19.7%) than the Wales average (17.3%).

Table 71: housing related benefits in Wales, North Wales and Conwy CB (August 2023)

Source: Stat-Xplore data, Department for Work and Pensions

Housing related benefits	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Total claimants	9,760	100%	100%	100%
Housing benefit	4,725	48.4%	44.3%	44.7%
Universal Credit housing element	5,035	51.6%	55.7%	55.3%
Social rented	5,385	54.7%	65.5%	67.7%
Private rented	4,375	44.4%	33.6%	31.4%
Households with children	3,475	35.6%	38.6%	38.3%
Single person aged 16-65	3,545	36.3%	34.0%	36.4%
Single person aged 66+	1,925	19.7%	19.3%	17.3%

3.2.91 There are differences across the County Borough when comparing those who are claiming Universal Credit housing element. The East HMA (54.5%) and West HMA (54.2%) having comparatively high proportions when compared to Rural HMA (48.2%) and Central HMA (49.8%). Although all regions remain below the Wales (55.3%) and North Wales average (55.7%)

Table 72: housing related benefits in HMAs by number (August 2023)

Source: Stat-Xplore data, Department for Work and Pensions

Housing related benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Total claimants	660	3,080	3,160	1,840	980
Housing benefit	305	1,500	1,585	835	505
Universal Credit housing element	360	1,580	1,575	1,005	470
Social rented	410	1,825	1,765	790	585
Private rented	250	1,255	1,395	1,050	395
Households with children	245	1,060	1,060	695	320
Single person aged 16-65	250	1,160	1,265	585	275
Single person aged 66+	115	640	605	335	225

3.2.92 The East HMA has the highest proportion of claimants who are living in households with children (37.7%), compared with 32.8% in the Rural HMA. The proportion of housing related benefits claimants who are single pensioners (age 66+) is highest in the Rural HMA (23.2%), compared to 17.2% in the West HMA, which is the lowest.

Table 73: housing related benefits in HMAs by % (2023)

Source: Stat-Xplore data, Department for Work and Pensions (August 2023)

Housing related benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Total claimants	100%	100%	100%	100%	100%
Housing benefit	45.8%	48.7%	50.2%	45.5%	51.8%
Universal Credit housing element	54.2%	51.3%	49.8%	54.5%	48.2%
Social rented	62.0%	58.9%	55.6%	41.8%	58.9%
Private rented	37.4%	40.4%	43.8%	55.8%	40.0%

Housing related benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Households with children	36.9%	34.5%	33.6%	37.7%	32.8%
Single person aged 16-65	37.7%	37.7%	40.1%	31.8%	28.1%
Single person aged 66+	17.2%	20.7%	19.2%	18.2%	23.2%

Unemployment

3.2.93 Unemployment figures represented in this section come from monthly claimant count statistics produced by the Department of Works and Pensions (those claiming Job Seekers Allowance benefits plus those who claim Universal Credit and are required to seek work and be available for work). This is not the headline unemployment figure that tends to be report in the media, which comes from the quarterly Annual Population Survey (APS) and uses a different definition of unemployment. The APS, which is a sample survey, sees significant fluctuations in results at unitary authority level, and is therefore not robust enough to provide a reliable measure for monitoring unemployment at the local level. Under Universal Credit, a broader span of claimants are required to look for work than under Jobseeker's Allowance. This has the effect of increasing the Claimant Count which means there is some discontinuity in this data series.

3.2.94 Unemployment across the county at October 2023 was at 3.4%, this is an increase of 0.1% from the same period last year and is now back to similar levels to that of pre-pandemic. The peak rate during the pandemic was seen in July 2020, when rates were 7.1%, or 4,740 claimants.

3.2.95 The unemployment rate for October 2023 in Conwy CB is 0.2% higher than that of Wales (3.2%) and 0.3% higher than North Wales (3.1%). Unemployment in Conwy CB is generally seasonal – at its highest in the winter months, usually peaking around February.

3.2.96 Those claimants ages 50+ make up the highest proportion of those unemployed at 26.9% this is higher than that of Wales as a whole at 21.6%.

3.2.97 The total number of unemployed claimants aged under 25 was 425 in October 2023. In general, young people under the age of 25 are overrepresented in the claimant count. They make up around 19% of all unemployed claimants, though they are a smaller proportion of the working age population (aged 16-66) and a much smaller proportion of the economically active population, given most 16-17 year olds and many 18-24 year olds will be in full-time education and thus not economically active.

Table 74: unemployment in Wales, North Wales and Conwy CB (2023)

Source: ONS claimant count, NOMIS

Unemployment	Conwy CB Number	Conwy CB %	North Wales %	Wales %
October 2023	2,230	3.4%	3.0%	3.2%
July 2023 (previous quarter)	2,220	3.4%	3.1%	3.2%
October 2022 (previous year)	2,180	3.3%	3.0%	3.2%
October 2018 (5 years ago)	1,500	2.3%	2.3%	2.3%
Claimants aged 16-24 (Oct-23)*	425	19.1%	19.4%	20.8%
Claimants aged 50+ (Oct-23)*	600	26.9%	24.3%	21.6%

Rounded to nearest 5. * % is of all claimants.

3.2.98 At a smaller area level, unemployment in the Central HMA (4.3%) and East HMA (4.0%) is high compared to the Wales average of 3.2%, whereas Rural HMA is significantly lower with 1.8%.

3.2.99 On average unemployment has increased across the region by 0.2% since the previous year.

3.2.100 The West HMA has the highest proportion of claimants who are over the age of 50 with 32.3%, compared to 25% in East HMA. There are significant variants in the proportions of claimants who are age 16-24, ranging from 12.9% in the West to 21.8% in Central HMA.

Table 75: unemployment in HMAs by number (2023)

Source: claimant count, NOMIS

Unemployment	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
October 2023	155	685	735	440	210
July 2023 (previous quarter)	160	655	760	445	195
October 2022 (previous year)	140	650	755	450	185
October 2018 (5 years ago)	105	450	530	305	110
Claimants aged 16-24 (Oct-23)	20	125	160	85	30
Claimants aged 50+ (Oct-23)	50	185	190	110	60

Rounded to nearest 5.

Table 76: unemployment in HMAs % (2023)

Source: claimant count, NOMIS

Unemployment	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
October 2023	3.3%	3.2%	4.3%	4.0%	1.8%
July 2023 (previous quarter)	3.4%	3.0%	4.4%	4.0%	1.7%
October 2022 (previous year)	2.9%	3.0%	4.4%	4.1%	1.6%
October 2018 (5 years ago)	2.3%	2.1%	3.1%	2.8%	0.9%

Unemployment	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Claimants aged 16-24 (Oct-23)*	12.9%	18.2%	21.8%	19.3%	14.3%
Claimants aged 50+ (Oct-23)*	32.3%	27.0%	25.9%	25.0%	28.6%

Rounded to nearest 5. * % is of all claimants.

Benefits

3.2.101 The introduction of the Universal Credit benefit system was rolled out to Conwy CB in mid-2015, and most new claimants are registered with this system. Existing claimants are still counted under the old Department of Works and Pensions system.

3.2.102 There was a significant and sudden increase in the number of Universal Credit claimants after the onset of the pandemic, with the peak count in June 2020 being almost double that seen in February 2020. The number of claimants has since fallen considerably, and in May 2023 was at 15.2%, which is comparable to Wales.

3.2.103 Conwy CB has a high incidence of claimants for most benefits related to disability and/or ill-health, when compared to the GB average (PIP/DLA, attendance allowance, carers allowance and the out-of-work incapacity benefits such as ESA). Levels are comparable to the Welsh averages.

3.2.104 People claiming Disability Living Allowance (DLA) benefits are affected by the replacement of this benefit with the Personal Independence Payment (PIP) benefit. This will primarily affect people of working age as there is a programme to reassess and shift all clients in this age group to the replacement benefit.

Table 77: benefits claimed by working age people (aged 16-65) in Wales, North Wales and Conwy CB (May 2023)

Source: Stat-Xplore data, Department for Work and Pensions

Benefits	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Universal Credit	10,140	15.2%	14.8%	15.2%
Job Seekers Allowance	175	0.3%	0.2%	0.2%
Employment & Support Allowance	3,655	5.5%	4.9%	5.8%
Disability Living Allowance	175	0.3%	0.2%	0.2%
Personal Independence Payments	6,330	9.5%	9.0%	10.0%
Carer's Allowance	2,160	3.3%	3.1%	3.3%

Note: There is a discontinuity in the benefits data, as Universal Credit is rolled out and starts to replace older awards systems. % is of all in that age group.

3.2.105 For HMAs within the County Borough, there are variances across the levels who claim benefits. For Universal Credit, Central has the highest number of claimants (3,145 people of working age). The East HMA has the highest proportion at 18.6%, compared to 9.5% in the Rural HMA. The East HMA has the highest proportion claiming Personal Independence Payments at 12.6%, compared to 6.5% in the Rural HMA. Claimants of Carers Allowance have the same pattern, with the highest proportion in the East HMA, and lowest in the Rural HMA.

Table 78: number of benefit claimants for working age people (aged 16-65) in HMAs (May 2023)

Source: Stat-Xplore data, Department for Work and Pensions

Benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Universal Credit	690	3,085	3,145	2,155	1,085
Job Seekers Allowance	0	45	45	30	5

Benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Employment & Support Allowance	250	1,055	1,145	780	425
Disability Living Allowance	5	40	35	30	20
Personal Independence Payments	420	1,820	1,860	1,465	745
Carer's Allowance	120	535	615	595	265

Note: There is a discontinuity in the benefits data, as Universal Credit is rolled out and starts to replace older awards systems.

Table 79: number of benefit claimants for working age people (aged 16-65) in HMAs (2023)

Source: Stat-Xplore data, Department for Work and Pensions (May 2023)

Benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Universal Credit	14.5%	15.1%	17.2%	18.6%	9.5%
Job Seekers Allowance (JSA)	0%	0.2%	0.2%	0.3%	0.1%
Employment & Support Allowance (ESA)	5.2%	5.2%	6.3%	6.7%	3.7%
Disability Living Allowance (DLA)	0.1%	0.2%	0.2%	0.3%	0.2%
Personal Independence Payments (PIP)	8.8%	8.9%	10.2%	12.6%	6.5%
Carer's Allowance	2.6%	2.6%	3.4%	5.1%	2.3%

Note: There is a discontinuity in the benefits data, as Universal Credit is rolled out and starts to replace older awards systems. % is of all in that age group.

3.2.106 Conwy CB has a higher proportion of children who claim Disability Living Allowance (6.9%) when compared to North Wales (6.1%) and Wales (5.8%). There is a significant variance within the County Borough, with highest rates in the East HMA at 9.2% and lowest in the West HMA at 5.9%. Central

HMA has the highest number of claimants at 415, compared to 300 in the East HMA and 75 in the West.

Table 80: benefits claimed by children (aged 0-15) in Wales, North Wales, Conwy CB and HMAs (2023)

Source: Stat-Xplore data, Department for Work and Pensions (May 2023)

Area	Number	%
Wales	N/A	5.8%
North Wales	N/A	6.1%
Conwy CB	1,260	6.9%
West HMA	75	5.9%
Creuddyn HMA	375	6.9%
Central HMA	415	7.6%
East HMA	300	9.2%
Rural HMA	150	5.0%

3.2.107 In May 2023, 29,805 people claimed a state pension in Conwy CB. 3,705 pensioners, or 12.4% claim Pension Credit in the County Borough, comparable with North Wales at 12.5% and lower than the Wales average of 13.1%. The proportion claiming DLA and PIP is lower in Conwy CB for this age group, when compared to both North Wales and Wales.

Table 81: benefits claimed by pensioners (aged 66+) in Wales, North Wales and Conwy CB (May 2023)

Source: Stat-Xplore data, Department for Work and Pensions

Benefits	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Pension Credit	3,705	12.4%	12.5%	13.1%
Attendance Allowance	5,215	17.5%	16.6%	17.0%
Disability Living Allowance (DLA)	1,330	4.5%	5.2%	6.8%

Benefits	Conwy CB Number	Conwy CB %	North Wales %	Wales %
Personal Independence Payments (PIP)	1,530	5.1%	5.3%	6.9%

Note: % is of all in that age group.

3.2.108 Creuddyn HMA has the highest number of State Pension claimants (9,610) of all HMAs. It also has the highest number claiming Pension Credits (1,120), but Central HMA has the highest proportion claiming this at 19.3%. The lowest is in the West HMA at 14.5%. The East HMA has the highest proportion claiming Attendance Allowance (6.5%) and Disability Living Allowance (7.3%), compared to the lowest in Rural HMA at 3.4% and 3.6%. Central HMA has the highest proportion of this age group claiming Personal Independence Payments (14.1%), compared to the lowest in Rural HMA at 9.8%.

Table 82: benefits claimed by pensioners (aged 66+) HMAs by number (May 2023)

Source: Stat-Xplore data, Department for Work and Pensions

Benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
State Pension	1,790	9,610	7,375	6,260	4,780
Pension Credit	215	1,120	1,050	840	465
Attendance Allowance	260	1,690	1,440	1,150	695
Disability Living Allowance (DLA)	85	345	330	405	160
Personal Independence Payments (PIP)	105	430	380	450	170

Table 83: benefits claimed by pensioners (aged 66+) HMAs by % (May 2023)

Source: Stat-Xplore data, Department for Work and Pensions

Benefits	West HMA	Creuddyn HMA	Central HMA	East HMA	Rural HMA
Pension Credit	11.9%	11.6%	14.1%	13.5%	9.8%
Attendance Allowance	14.5%	17.5%	19.3%	18.5%	14.7%
Disability Living Allowance (DLA)	4.8%	3.6%	4.4%	6.5%	3.4%
Personal Independence Payments (PIP)	5.8%	4.4%	5.1%	7.3%	3.6%

3.3 Specific housing needs requirements

Please note, details of the specific housing need requirements for Gypsy and Traveller communities are considered through the Gypsy and Traveller Accommodation Assessment (GTAA). Conwy County Borough Council has prepared a GTAA and this is currently with Welsh Government for consideration.

There are no higher education facilities in Conwy County Borough and therefore no halls of residence. Replacement LDP [background paper 20: skills needs assessment](#) recommends that there is no need to set aside land for a new higher education facility. It is therefore considered highly unlikely that there will be a need in future for student accommodation, and so this has not been covered in this LHMA. This will be reviewed during the next LHMA process.

a) Accessible and adapted housing provision

Local policies / strategies

- Draft CCBC Adaptations policy
- Replacement LDP: emerging Deposit stage policies and background papers.
- Conwy Local Programme Development Plan Local Housing Prospectus April 2023 (<https://www.conwy.gov.uk/en/Resident/Housing/Information-for-Developers/Conwy-Local-Housing-Prospectus.aspx>)
- Conwy Local Housing Strategy 2018-2023 (<https://www.conwy.gov.uk/en/Resident/Housing/Local-Housing-Strategy/Local-Housing-Strategy-18-23.aspx>). A new Local Housing Strategy (2024 – 2029) is currently being prepared.
- The Social Housing Allocation Policy – June 2018 (<https://www.conwy.gov.uk/en/Resident/Housing/Housing-Options/The-Social-Housing-Allocation-Policy.aspx>)

Property needs - the current type and level of needs and provision

Households with physical disability / mobility issues who make an application for social housing (SARTH) in Conwy CB are assessed by an Occupational Therapist. Occupational Therapists will make a recommendation on whether the household is in an urgent housing need and therefore placed in band 1 or whether they are in a housing need and placed in band 2. Households may be placed in band 3 if they are in an urgent housing need and do not have a local connection to Conwy CB. Households will be placed in band 4 if they are in a housing need and do not have a local connection to the Conwy CB or if they have had their priority reduced due to their behaviour affecting their suitability to be tenants, having sufficient financial resources to meet their own housing need, households being found to have deliberately worsened their own housing circumstances, homeless households found intentionally homeless.

Households in an urgent housing need and who require an accessible or adapted property (band 1) are also placed on the Specialist Housing Panel. The Specialist Housing Panel meets quarterly (officers from CCBC Housing Strategy Team, CCBC Occupational Therapist, and Registered Social Landlords operating in the Conwy County). The role of the panel is to explore options to increase the supply of accessible or adapted properties to meet the needs of applicants on the social housing register (SARTH). The Specialist Housing Panel takes into account households needs and area choices and works with Registered Social Landlord Development Teams to ensure that the right properties are developed in the right places to meet identified needs. In some cases households can be rehoused in existing stock, however, existing stock may not meet every households needs. The needs of households on the Specialist Housing Panel can vary significantly.

As of 1st April 2023 there were 95 households on the Specialist Housing Panel list in need of a 1 bed adapted property;

- 74 households required a ground floor property with an adapted bathroom (level access shower, low level shower or wet room), some of which also needed level access entry into the property (23 households).

- 8 households required a ground floor property or access with a lift and an adapted bathroom (level access shower, low level shower or wet room), some of which also needed level access entry into the property (2 households).
- 13 households required a wheelchair accessible ground floor property with level access entry and an adapted bathroom.

67 households in need of a 1 bed adapted property on the Specialist Housing Panel list were over the age of 55 and therefore may be offered over 55s accommodation. Households under the age of 55 will not be offered over 55s accommodation and this will greatly reduce the number of properties that are suitable for them.

As of 1st April 2023, there were 50 households on the Specialist Housing Panel list in need of a 2 bed property;

- 6 households required a ground floor property or access with a lift and an adapted bathroom (level access shower, low level shower or wet room), some of which also needed level access entry into the property (1 households).
- 23 households required a ground floor property with an adapted bathroom (level access shower, low level shower or wet room), some of which also needed level access entry into the property (12 households).
- 1 household needed a ground floor property with level access entry.
- 1 household needed a ground floor property or house with a stair lift.
- 1 household needed a wheelchair accessible property with level access entry.
- 1 household needed a wheelchair accessible property with an adapted bathroom (level access shower/wet room) and a hoist.
- 17 households needed a wheelchair accessible property with level access entry and an adapted bathroom (level access shower).

As of 1st April 2023, there were 20 households on the Specialist Housing Panel list in need of a 3 bed property;

- 1 household needed a ground floor property with level access entry.
- 5 households needed a ground floor property with level access entry and an adapted bathroom (level access shower or wet room).
- 4 households needed a wheelchair accessible ground floor property with level access entry and an adapted bathroom (level access shower or wet room), 2 of which needed a hoist.
- 3 households needed a wheelchair accessible ground floor property or house with level access entry, adapted bathroom (level access shower or wet room) and stair lift.
- 7 household needed a wheelchair accessible ground floor property or house with level access entry, an adapted bathroom (level access shower or wet room) and through floor lift, 3 of which needed a hoist.

As of 1st April 2023, there were 6 households on the Specialist Housing Panel list in need of 4+ bed property;

- 2 households needed a ground floor property or house with level access entry and an adapted bathroom (level access shower or wet room).
- 1 households needed a ground floor property or house with level access entry, an adapted bathroom (level access shower or wet room) and stair lift.
- 3 households needed a wheelchair accessible ground floor property or house with level access entry and an adapted bathroom (level access shower or wet room).

The area choices of households on the Specialist Housing Panel vary. A higher proportion of households areas of choice are in the Creuddyn HMA, Central HMA and East HMA, however, there is still a need in Rural HMA and West HMA.

Table 84: Households on the Specialist Housing Panel by property size and HMA (April 2023)

Source: Cartrefi Conwy Social Housing Register (SARTH), 2023

	1 bed	2 bed	3 bed	4+ bed
Conwy CB	92	50	20	5
West	6	2	3	0
Creuddyn	38	17	17	0
Central	23	13	5	3
East	17	15	5	2
Rural	8	3	1	0

The table below shows that there is a high number of households in band 2, 3 and 4 who have reduced mobility and are in need of an adapted property.

Table 85: Households on the social housing register with reduced mobility by band and number of bedrooms (April 2023)

Source: Cartrefi Conwy Social Housing Register (SARTH), 2023

	Band 2	Band 3	Band 4
1 bed	133	4	22
2 bed	39	2	4
3 bed	14	0	0
4+ bed	1	0	0

It is considered that there is currently a high need for accessible and adapted properties across the Conwy County. There is a need to increase the supply to ensure that households are able to access properties that meet their needs and to ensure that they are able to live independently for as long as possible.

Where possible Registered Social Landlords will adapt properties to meet the needs of households. Registered Social Landlords have noted that when properties have been adapted previously, the properties may not suit another household's needs. For example, a property may have a through floor lift, however, there is not enough space for turning circles in the property, which would mean that the property would not be suitable for a wheelchair user.

In some cases where Registered Social Landlords have made a property accessible for a household (by fitting stair lifts), the property may not be suitable for another household when the property becomes available for re-let. Registered Social Landlords have noted that in some cases they have to remove the stair lift, as there are no households on the housing register with a need for that type/size of property with that adaptation. Similarly, Registered Social Landlords have also noted that if a wet room bathroom has been fitted in a family size property (i.e. 3-bedroom property) and the family now wants to move, it can be difficult to find a family who need or want a property with a wet room bathroom. Feedback from RSLs highlights that adaptations are specific to individuals' needs, it is important to note that there is a need for accessible family accommodation. Therefore there is still a need to develop accessible properties and adapt existing stock when needed.

Future type and level of needs and provision required.

Over the last 3 years, the number of households in need of an accessible property has increased. On the Specialist Housing Panel list there has been an increase in the need of all types of properties, especially the need for 1 bed and 2 bed accessible properties. It is apparent that many households on the Specialist Housing Panel need a ground floor property and therefore there will be a need to ensure that ground floor adapted properties are included on future developments.

It is likely that this increase will continue. Population projections for Conwy CB show an increase in the number and proportions of the elderly (see section 3.2 above). Daffodil population projections for people aged 65 and over predict that the number of people who struggle with activities associated with

daily living will increase in Conwy CB. Whilst not all of these will be eligible for social housing, and those who are may not all need an adapted property, it does suggest that the number in need could increase.

Table 86: Predicted number of people aged 65 and over who struggle with activities of daily living

Source: Daffodil, Mid-year population estimates, Office for National Statistics and 2018-based population projections, Welsh Government

Year	Conwy CB No	Conwy CB %	North Wales No	North Wales %	Wales No	Wales %
2020	9,450	29%	45,700	28%	185,300	28%
2040	13,050	30%	60,900	29%	248,900	29%
Change	3,600	27%	15,150	25%	63,600	26%

Numbers have been rounded so may not sum.

As the needs of households vary, there will be a need to ensure that accessible properties are purchased or built in the right areas to ensure that households can access the services required. There will be a need to ensure that properties have parking that is suitable for a wheelchair user, and the topography will need to be taken into account to ensure that the right properties are built or purchased in suitable locations. Further work will need to take place with Occupational Therapists to ensure that properties have the correct internal and external door widths to suit a wheelchair user, that there is room for ceiling track hoists if required, and there is sufficient storage space for equipment and space to accommodate a through-floor lift. It is therefore vital that Occupational Therapists have input early on in the development process.

Any gaps or shortfall in provision.

There is a shortfall in all types of suitable adapted and accessible properties across the Conwy County, especially 2 bedroom accessible properties. A number of households in need of a 2 bed accessible property have been on the social housing register (SARTH) for longer than the average waiting time

for a general needs property. Registered Social Landlords in Conwy are working closely with the Local Authority to develop 2 bedroom accessible properties, however, the topography of sites can be an issue.

There is a need to increase the number of general needs accessible properties as there is a shortfall in provision. There has been an increase in households approaching the Homeless Prevention Team with mobility issues and there is a lack of suitable accommodation available. There is a significant shortfall of both permanent and temporary adapted and accessible accommodation, which means that households can be living in unsuitable housing. This has a significant impact on their health and wellbeing and this can lead to households approaching CCBC Social Care for assistance.

Registered Social Landlords will work with tenants where possible to adapt existing properties; however, the suitability of existing properties is a key issue. There can be an issue with staircases in existing stock, as a straight staircase is needed in some cases for stair lifts, however, a number of existing properties do not have straight staircases. Existing stock consists of older properties and therefore cannot always be adapted due to narrow doorways, lack of space, steps into the property. A number of existing stock units are first floor or second floor flats, often without lifts, and they are not always suitable for households with mobility issues. Whilst it may be possible to adapt a property, the topography surrounding the property can be an issue for the tenant and therefore the property remains unsuitable. Similarly, it can be difficult to let properties if there is no parking available. To overcome these issues the Local Authority works closely with Registered Social Landlords on their new developments to ensure that where possible (topography constraints etc.), adapted units are included on site. However, there are limitations due to the timescales associated with new developments and in some cases this leads to households waiting a number of years for a suitable property.

Data sources

- Cartrefi Conwy – Social Housing Register (SARTH).

- Conwy County Borough Council – Housing Strategy Team.
- Conwy County Borough Council Housing Improvements Team
- Conwy County Borough Council Social Care (including Occupational Therapists)
- Conwy County Borough Council Homeless Prevention Team
- Registered Social Landlords operating in the Conwy County (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).
- North Wales Population Needs Assessment

External stakeholder consultation and engagement (who was consulted and how the consultation was undertaken. What were the findings?)

The following stakeholders were asked to identify the current type and level of needs and provision, any shortfall in provision, the future level and type of provision required via email survey, followed by focus group meetings:

- CCBC Housing Improvements Team
- CCBC Social Care (including Occupational Therapists)
- CCBC Resettlement Co-ordinator
- CCBC Homeless Prevention Team
- Registered Social Landlords in Conwy (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).

Public consultation took place between 29th January and 11th March 2024. Further details about the consultation is available in section 1.4 of this document.

Close working took place with Strategic Planning Policy Service in preparing this section.

Key data issues identified (note any limitations or gaps in data).

- The property need only considers households on the social housing register. It is likely that households on the Tai Teg intermediate register will also have needs for adapted properties.
- Details of the needs of households in band 2, 3 and 4 are noted on their social housing register application (i.e. area choices, occupational therapist report, etc.). The allocations team will take into account the households needs when allocating a property. It is not possible to share their exact needs in this section as their needs are not saved in a central location.

b) Multi-generational and/or larger families requiring larger properties

Local policies / strategies

- Conwy Local Programme Development Plan Local Housing Prospectus April 2023 (<https://www.conwy.gov.uk/en/Resident/Housing/Information-for-Developers/Conwy-Local-Housing-Prospectus.aspx>)
- Conwy Local Housing Strategy 2018-2023 (<https://www.conwy.gov.uk/en/Resident/Housing/Local-Housing-Strategy/Local-Housing-Strategy-18-23.aspx>). A new Local Housing Strategy (2024 – 2029) is currently being prepared.
- The Social Housing Allocation Policy – June 2018 (<https://www.conwy.gov.uk/en/Resident/Housing/Housing-Options/The-Social-Housing-Allocation-Policy.aspx>)
- North Wales Population Needs Assessment, April 2022 (<https://www.northwalescollaborative.wales/north-wales-population-assessment/>)

Property needs - the current type and level of needs and provision

As of 1st April 2023, there were 153 households on the social housing register in need of a 4 bedroom property in the Conwy County. The turnover of a 4+ bedroom social rented property is low and the current social rented stock levels do not meet the need.

The majority of households were 2 generations (143 households). Some 2 generation households consist of parents with adult children or parents with both adult children and children under the age of 18. There were 10 households with 3 generations. During the application process for the social housing register (SARTH), the Homefinder Team will provide housing options advice. Therefore, all multi-generational households will have considered their housing options and will have made the decision to remain living together. It is important to note that although there is a need for larger social rented properties to meet the need, it is not as acute as the need for 1 bed accommodation.

As of 1st April 2023 there were 156 social general needs 4 bedroom properties. The number of 4 bedroom social general needs properties is low in comparison to the number of 1 bedroom, 2 bedroom and 3 bedroom social properties. The turnover of 4 bedroom properties is also very low. Over the last 3 years only nine 4 bedroom social general needs properties were re-let. This suggests that the current social rented stock levels are unable to meet the level of need.

The table below shows that the highest proportion of need is in the East (40%) and Creuddyn (31%) HMAs. Just over half of the stock (53%) is in the Creuddyn HMA, however only 14% of the stock is in the East. The data suggests that there is a need to increase the number of 4 bedroom social rented properties in all areas, especially in the East HMA.

Table 87: Area choices of households on the social housing register in need of 4 bedrooms and the location of current 4 bedroom stock (April 2023)

Source: Cartrefi Conwy Social Housing Register (SARTH), Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, Grwp Cynefin, First Choice Housing Association, North Wales Housing, Wales & West Housing.

	Households on the social housing register (number)	Current social housing stock (number)
Conwy CB	153	156
West	6	7
Creuddyn	47	83
Central	31	34
East	61	22
Rural	7	10

Please note that 1 household had not selected an area choice, therefore they have not been included in the table above.

As of 1st April 2023, there were 44 households on the social housing register in need of a 5 bedroom property in the Conwy County. The majority of households were 2 generations (42 households). Some 2 generation households consist of parents with adult children or parents with both adult children and children under the age of 18. There were 2 households with 3 generations. As of 1st April 2023 there were 16 social general needs 5 bedroom properties. The turnover of 5 bedroom properties has been very low. Over the last 3 years only two 5 bedroom properties were re-let. This highlights that there is a need to increase the supply of 5 bed social general needs properties to meet the level of need.

The table below shows that the highest proportion of need is in the East (41%) and Creuddyn (38%) HMAs. 63% of the stock is in the Creuddyn HMA, and there is no stock is in the East. The data suggests that there is a need to increase the number of 5 bedroom social rented properties in all areas, especially in the East HMA.

Table 88: Area choices of households on the social housing register in need of 5 bedrooms and the location of current 5 bedroom stock (April 2023)

Source: Cartrefi Conwy Social Housing Register (SARTH), Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, Grwp Cynefin, First Choice Housing Association, North Wales Housing, Wales & West Housing.

	Households on the social housing register (number)	Current social housing stock (number)
Conwy CB	44	16
West	0	0
Creuddyn	17	10
Central	9	6
East	18	0
Rural	0	0

As of 1st April 2023, there were 12 households on the social housing register (SARTH) in need of a 6 bedroom property in the Conwy County. The majority of households were 2 generations (9 households). Some 2 generation households consist of parents with adult children or parents with both adult children and children under the age of 18. There were 3 households with 3 generations. As of 1st April 2023 there were 7 social general needs 6 bedroom properties. The turnover of 6 bedroom properties is very low. Over the last 3 years only one 6 bedroom property was re-let. This highlights that there is a need to increase the supply of 6 bed social units to meet the level of need.

The table below shows that the highest proportion of need is in the Central (42%) and East (33%) HMAs. 71% of the stock is in the Central HMA, and there is no stock in the East. The data suggests that there is a need for 6 bedroom social rented properties in the East HMA.

Table 89: Area choices of households on the social housing register in need of 6 bedrooms and the location of current 6 bedroom stock (April 2023)

Source: Cartrefi Conwy Social Housing Register (SARTH), Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, Grwp Cynefin, First Choice Housing Association, North Wales Housing, Wales & West Housing.

	Households on the social housing register (number)	Current social housing stock (number)
Conwy CB	12	7
West	1	0
Creuddyn	2	2
Central	5	5
East	4	0
Rural	0	0

As of 1st April 2023, there were 3 households on the social housing register in need of a 7 bedroom property in the Conwy County. All households were 2 generations. Some 2 generation households consist of parents with adult children or parents with both adult children and children under the age of 18. As of 1st April 2023 there were no 7 bedroom social general needs properties. There is a need to increase the supply of 7 bedroom properties in the Central and East HMA as there is a need for this type of property in the Central and East HMAs.

The table below shows that the highest proportion of need is in the Central (67%) and East (33%) HMAs. There are no 7 bed social rent properties in the Conwy County. The data suggests that there is a need to increase the number of 7 bedroom social rented properties in all areas, especially in the Central HMA.

Table 90: Area choices of households on the social housing register in need of 7 bedrooms and the location of current 7 bedroom stock (April 2023)

Source: Cartrefi Conwy Social Housing Register (SARTH), Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, Grwp Cynefin, First Choice Housing Association, North Wales Housing, Wales & West Housing.

	Households on the social housing register (number)	Current social housing stock (number)
Conwy CB	3	0
West	0	0
Creuddyn	0	0
Central	2	0
East	1	0
Rural	0	0

As of 1st April 2023, there were 2 households on the social housing register in need of an 8 bedroom property in the Conwy County. The table below shows that the highest proportion of need is in the Central (50%) and Creuddyn (50%). Both households were 2 generations. Some 2 generation households consist of parents with adult children or parents with both adult children and children under the age of 18. The table below shows that as of 1st April 2023 there were no 8 bedroom social general needs properties. There is a need to increase the supply of 8 bedroom social rented properties in the Central HMA and Creuddyn HMA as there is a need for this type of property in the Central and Creuddyn HMAs.

Table 91: Area choices of households on the social housing register in need of 8 bedrooms and the location of current 8 bedroom stock (April 2023)

Source: Cartrefi Conwy Social Housing Register (SARTH), Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, Grwp Cynefin, First Choice Housing Association, North Wales Housing, Wales & West Housing.

	Households on the social housing register (number)	Current social housing stock (number)
Conwy CB	2	0
West	0	0
Creuddyn	1	0
Central	1	0
East	0	0
Rural	0	0

There is currently a high level of need for larger social rented properties (4+ bedrooms), especially in Creuddyn HMA, Central HMA and East HMA. There is also a low level need for 4 bedroom properties in Rural HMA and West HMA. There is a need to increase the supply of 4+ bedroom social rented properties as the turnover of stock is low and therefore the existing stock is not meeting the current need. The Local Authority has identified this as a key issue and has been working closely with Registered Social Landlords to ensure that 4+ bedroom units are included on new developments and that they acquire 4+ bedroom properties where possible.

There are currently 34 households on the Tai Teg intermediate housing register only in need of a 4+ bedroom property. The area choices of households are:

- West HMA – 0 households
- Creuddyn HMA – 12 households
- Central HMA – 9 households
- East HMA – 12 households
- Rural HMA – 1 household

Future type and level of needs and provision required.

A number of households in temporary accommodation in need of 4+ bedroom property have lived in temporary accommodation for a number of years due to the lack of 4+ bedroom social rented properties. In some cases family members are living with one another for longer due to them providing care to other household members. Some households in temporary accommodation entered temporary accommodation in need of a smaller property (i.e. 3 bedroom property), however, their family has grown since being in temporary accommodation and they now need a 4+ bedroom property.

The need for 4+ bedroom properties has increased in recent years. The area choices of households in need of 4+ bedroom properties vary and there will be a need to ensure that 4+ bedroom properties are purchased or built in the right area to ensure that families can live in their areas of choice.

Any gaps or shortfall in provision.

There is generally a lack of larger properties (4+ bedroom) across all areas. In some cases households in temporary accommodation who need a larger property (6 bedrooms, 7 bedrooms and 8 bedrooms) have been living in temporary accommodation for a number of years due to the lack of stock available to meet their needs. Temporary accommodation very much feels like permanent accommodation to these households. In some cases households in temporary accommodation in need of 4+ bedroom properties are multi-generational. In some cases the households want to remain living together as a household member is providing care to another household member. There are some households with children with complex needs which means that children cannot share bedrooms, and so a larger property is required. In some cases adult children continue to live with their parents due to a lack of affordable accommodation for them to live independently. Therefore a shortfall in affordable 1 bedroom accommodation is having an impact on the need for 4+ bedroom properties.

There are a number of households presenting to the Homeless Prevention Team in need of 4+ bedroom properties. In some cases households can only afford rents at local housing allowance rate. In some cases the private sector is not affordable for households as there is a shortfall between the rental cost and local housing allowance rate. Therefore there is a need for more affordable 4+ bedroom properties to meet the current level of need.

Data sources

- Cartrefi Conwy – Social Housing Register (SARTH).
- Conwy County Borough Council – Housing Strategy Team.
- Conwy County Borough Council Homeless Prevention Team
- Registered Social Landlords operating in the Conwy County (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).

External stakeholder consultation and engagement (who was consulted and how the consultation was undertaken. What were the findings?)

The following stakeholders were asked to identify the current type and level of needs and provision, any shortfall in provision, the future level and type of provision required via email survey, followed by focus group meetings:

- Conwy County Borough Council Housing Improvements Team
- Conwy County Borough Council Social Care (including Occupational Therapists)
- Conwy County Borough Council's Resettlement Co-ordinator
- Conwy County Borough Council Homeless Prevention Team
- Registered Social Landlords in Conwy (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).

-

Public consultation took place between 29th January and 11th March 2024. Further details about the consultation is available in section 1.4 of this document.

Close working took place with Strategic Planning Policy Service in preparing this section.

Key data issues identified (note any limitations or gaps in data).

- The Tai Tag intermediate register does not record whether a household is multi-generational.
- Households who are in need of a 4+ bedroom property and are on both the Tai Teg intermediate housing register and social housing register are only included in the social housing register need above to ensure that there is no double counting.
- Intermediate stock data provided by Registered Social Landlords did not include a breakdown of the number of bedrooms in each property, therefore the intermediate stock level has not been included in this section.
- It is not possible to gather accurate data on concealed households from our social housing register and intermediate housing register – toolkit table 8 – Existing Unmet Need. Some households on the housing register may be concealed, however, they may want to remain as one household. For future LHMA's CCBC will ask the team who manage to social housing register if it is possible to start recording this information.

c) Non-permanent housing

Local policies / strategies

- Rapid Rehousing Transition Plan 2022 ([Conwy's Rapid Rehousing Transition Plan - Conwy County Borough Council](#))

- Conwy Local Programme Development Plan Local Housing Prospectus April 2023
(<https://www.conwy.gov.uk/en/Resident/Housing/Information-for-Developers/Conwy-Local-Housing-Prospectus.aspx>)
- Conwy Local Housing Strategy 2018-2023
(<https://www.conwy.gov.uk/en/Resident/Housing/Local-Housing-Strategy/Local-Housing-Strategy-18-23.aspx>). A new Local Housing Strategy (2024 – 2029) is currently being prepared.
- Conwy Housing Support Programme Strategy March 2022 ([Housing Support Programme Strategy, April 2022 to March 2026 - Conwy County Borough Council](https://www.conwy.gov.uk/en/Resident/Housing/Housing-Support-Programme-Strategy-April-2022-to-March-2026-Conwy-County-Borough-Council))
- The Social Housing Allocation Policy – June 2018
(<https://www.conwy.gov.uk/en/Resident/Housing/Housing-Options/The-Social-Housing-Allocation-Policy.aspx>)

Property needs – the current type and level of needs and provision

Temporary accommodation in Conwy provided in either bed and breakfast accommodation, most of which is ensuite, or self-contained accommodation in properties that are leased by the Council.

The table below shows that the number of households in temporary accommodation in need of a 1 bedroom property is highest. The Creuddyn and Central HMAs have the most households. There is also a need for 2 bedroom and 3 bedroom properties.

Although the number of households in temporary accommodation in need of 4+ bedroom units is lower than the need for 1 bedroom, 2 bedroom and 3 bedroom units, due to the low stock levels and turnover of 4+ bedroom units, there is a need to increase the supply of this type of accommodation, as in many cases households in need of 4+ bedroom units are in temporary accommodation for a number of years before they are rehoused.

Table 92: Housing need by number of households in temporary accommodation (31st March 2023)

Source: CCBC Homeless Prevention Team

	1 bed	2 bed	3 bed	4+ bed	All beds
Conwy CB	172	65	24	18	279
West HMA	8	2	2	1	13
Creuddyn HMA	77	34	10	3	124
Central HMA	61	13	9	6	89
East HMA	21	13	2	8	44
Rural HMA	5	3	1	0	9

Please note: 5 households in temporary accommodation on 31st March 2023 were not tenancy ready and therefore have not been included in the table above. These households would be in need of supported accommodation.

As of 1st April 2023 there were 122 properties in the lease portfolio (self-contained properties used as temporary accommodation). The number of properties in the lease portfolio has been declining slowly since the start of January 2023 for various reasons, such as the landlord deciding to withdraw the property from the scheme. There is an increasing reliance on bed and breakfast accommodation in Conwy to accommodate households as there is a lack of self-contained temporary accommodation, and homelessness applications continue to be at an increased level. In Conwy CB, there is a need to increase the supply of good quality self-contained temporary accommodation units by increasing the number of units on the existing leasing scheme by working with private landlords and property owners.

Future type and level of needs and provision required.

The number of households in need of temporary accommodation has been increasing since 2020. Based on the level of current presentation and this recent trend, officers predict that this will continue in the shorter term. Longer term trends are unknown, and will be impacted on by the planned changes to the homelessness legislation. There is a need to increase the supply of permanent affordable accommodation to enable households in temporary accommodation to move into permanent accommodation more quickly and to reduce the use of temporary accommodation. This is consistent with the plan to move to a Rapid Rehousing approach outlined in CCBC Rapid Rehousing Transition Plan 2022. There is also a need to increase the supply of self-contained temporary accommodation for all types of households, especially households in need of a 1 bedroom and 4+ bedroom units.

Any gaps or shortfall in provision.

There is a general shortfall in self-contained temporary accommodation across the Conwy County. The main operational model is bed and breakfast accommodation. Households in temporary accommodation mostly want to be placed in Central, Creuddyn and East HMAs. In some cases households need to remain in certain areas due to the schools that their children attend or if they are receiving support in a particular area.

There is a shortfall of temporary accommodation for young people. There is a need for more specific temporary accommodation for young people.

There is a shortfall in temporary accommodation for households with a history of some types of offending, which means that they cannot be placed in bed and breakfast accommodation. This can cause pressures on the homelessness service as there is a shortfall in self-contained temporary accommodation and therefore suitable options are limited.

A high number of households in bed and breakfast accommodation are single person households and there is a lack of move on accommodation for them. Affordability can be an issue for single households, especially those under the

age of 35. The Local Housing Allowance rate (2023/24) for single households under the age of 35 was capped at £58.95 per week. The LHA rate (April 2024 – March 2025) has increased to £78.80 per week. Tables 11 and 12 in section 3.1 of this LHMA provides further information on the gaps between LHA rate and the private rented sector. In many cases single households in temporary accommodation staying in temporary accommodation for longer as there is a lack of affordable suitable accommodation available.

There has been an increase in the number of households facing homelessness in need of ground floor accessible properties. There is a shortfall in accessible self-contained temporary accommodation and therefore there is a reliance on accessible rooms in bed and breakfast accommodation. There is also a shortfall in suitable permanent accessible accommodation.

There has been a decrease in the turnover of one bedroom, two bedroom and three bedroom social housing units since 2020/21.

Table 93: Average number of social housing units re-let between 2017/18 and 2022/23

Source: Cartrefi Conwy Social Housing Register (SARTH) 2023

	1 bed	2 bed	3 bed
April 2017 – March 2020	159	118	66
April 2020 – March 2023	123	72	42

The turnover of four bedroom social housing units has been low since 2017/18. The low turnover of social housing units is having an impact on households in temporary accommodation as they are staying in temporary accommodation for longer. The Homeless Prevention Team have noted that social sheltered units are re-let more frequently than social general needs units. The Homeless Prevention Team have noted that there is a higher need for social general needs units than sheltered social units and therefore there

is not always a nomination for the social sheltered unit from the Homeless Prevention Team. It was suggested that consideration should be given as to whether the age restriction on certain social housing units should be removed.

There is a need for houses in multiple occupation (HMO) type accommodation for hotel staff. This type of accommodation needs to be near to tourism areas. Other tourism related employers need temporary staff for the summer months and short terms accommodation may be needed.

Data sources

- Cartrefi Conwy – Social Housing Register (SARTH).
- Conwy County Borough Council – Housing Strategy Team.
- Conwy County Borough Council Homeless Prevention Team
- Conwy County Borough Council Social Care
- Registered Social Landlords operating in the Conwy County (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).
- Stats Wales – Welsh Government
- Rent Officers Wales

External stakeholder consultation and engagement

The following stakeholders were asked to identify the current type and level of needs and provision, any shortfall in provision, the future level and type of provision required via email survey, followed by focus group meetings:

- CCBC Resettlement Co-ordinator
- CCBC Homeless Prevention Team
- Registered Social Landlords in Conwy (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).

Public consultation took place between 29th January and 11th March 2024. Further details about the consultation is available in section 1.4 of this document.

Close working took place with Strategic Planning Policy Service in preparing this section.

Key data issues identified (note any limitations or gaps in data)

A list of households on the social housing register as of 1st April 2023 was compared with a list of households in all forms of temporary accommodation as of 31st March 2023. 33 households in all forms of temporary accommodation did not have a live social housing register application and therefore have not been included in the LHMA:–

- 5 households were not tenancy ready,
- 23 households were no longer in need of accommodation, however, there was a delay in removing them from the housing register,
- 2 households were not eligible,
- 4 households did not want to live in the Conwy CB, and
- 1 household did not want social housing.

d) Housing, care and support needs

Local policies / strategies

- A Placement Commissioning Strategy (2022-27) for children and young people has been agreed.
- A Placement Commissioning Strategy for older people is currently being prepared.
- The Conwy Replacement LDP Deposit policies are currently being prepared. These will include an amended care home policy to address concerns highlighted and policies meeting extra care housing needs.
- Draft CCBC Adaptations Policy 2023
- Conwy Local Programme Development Plan Local Housing Prospectus April 2023

(<https://www.conwy.gov.uk/en/Resident/Housing/Information-for-Developers/Conwy-Local-Housing-Prospectus.aspx>)

- Conwy Local Housing Strategy 2018-2023
(<https://www.conwy.gov.uk/en/Resident/Housing/Local-Housing-Strategy/Local-Housing-Strategy-18-23.aspx>). A new Local Housing Strategy (2024 – 2029) is currently being prepared.
- Conwy Housing Support Programme Strategy 2022 – 2026
(<https://www.conwy.gov.uk/en/Resident/Housing/Housing-Support-Programme-Strategy-April-2022-to-March-2026.aspx>)
- The Social Housing Allocation Policy – June 2018
(<https://www.conwy.gov.uk/en/Resident/Housing/Housing-Options/The-Social-Housing-Allocation-Policy.aspx>)
- North Wales Market Stability Report – November 2022
(<https://www.northwalescollaborative.wales/commissioning/msr2022/>)
- North Wales Population Needs Assessment, April 2022
(<https://www.northwalescollaborative.wales/north-wales-population-assessment/>)

Property needs – the current type and level of needs and provision

Regional integration fund (previously the Integrated Care Fund)

The regional integration fund is a large grant which has a programme of activity. The priorities of the programme in Conwy are:

- to support individuals in their own homes (elderly people, people discharged from hospital, etc.)
- minor aids or adaptations in properties to ensure that individuals can live independently
- supporting individuals in the community
- extra care housing for individuals who need additional support
- to provide a space for children with complex needs and their families where they can access support (residential team and therapeutic team)
- a disability respite centre which meets the needs of people with disabilities and their carers for planned respite breaks

Older people

In 2020 there were 32,950 people aged over 65 living in the Conwy County. This was higher than other North Wales local authorities. The projected number of people aged over 65 in Conwy in 2040 is 43,500. Some individuals will be able to live independently (in some cases with low level support or a higher level of support) and some individuals will not be able to live independently.

In 2018/19 there were 5,750 people aged 65 or over receiving services in Conwy. In 2020 there were 9,450 people aged 65 and over who struggled with activities of daily living in Conwy (this includes personal care, mobility around the home that are basic to daily living such as taking medication, eating, bathing, dressing and toileting).

In the Conwy County, Registered Social Landlords have accommodation specifically for people over the age of 55. Some accommodation has a warden who can offer support if needed, and some are extra care housing schemes. There are 1,084 x 1 bed sheltered and over 55s properties, 347 x 2 bed over 55s properties and 5 x 3 bed over 55s properties which are allocated via the social housing register (SARTH) to people who can live independently and are in a housing need.

Extra care housing is not allocated via the social housing register (SARTH). There are 185 extra care flats in Conwy provided by Registered Social Landlords. They are Hafan Gwydir in Llanrwst, Hafod Y Parc in Abergele, Llys Y Coed in Llanfairfechan and Tan Y Fron in Llandudno. In April 2022, there were 62 people on the waiting list of which 10 were from out of county (two from Denbighshire and eight from elsewhere in the UK but with family links to the area). There is currently a shortfall of extra care social housing in the Colwyn Bay area.

There is a need to ensure that individuals are living in suitable accommodation that meets their needs and that they are receiving the right level of support.

Disabilities

Taking the data from the 2021 Census for working aged people, the average % of the population disabled a lot by their disability is 9.4% for Wales (9.2 % in Conwy). Disability prevalence increases with age, rising considerably after the age of 70-74 years, on average 11.8% in this age group identifies as limited a lot by their disability ([Disability by age, sex and deprivation, England and Wales - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk)). The population in Conwy in 2021 was around 114,800, therefore from the Census we can assume that approximately 10,791 people will have a disability that has a significant impact on their day to day living.

The Social Care Disability Service in Conwy provides assessment for those who may be eligible for support under the Social Services & Wellbeing (Wales) Act. The average number of people open to the Disability Service is around 900 people. The Service works with people who have a substantial, long term physical or mental impairment that affects an individual's ability to carry out normal day to day activities. This includes people who have hearing or sight loss, learning disability, physical disability, acquired brain injury and chronic health conditions. The Service works with approximately 9% of the population in Conwy who would identify as having a disability that impacts a lot on their day to day living.

The criteria for accessing accommodation and support provided by the Disability Service is that the individual requires a significant amount of support, this is usually 24/7. The Disability Service has access to different types of accommodation including residential care homes both in Conwy and out of County. The Service currently has 50 supported living settings accommodating 133 people in Conwy in their own tenancies. A small number of these are peoples' own properties (3).

The Disability Service would not provide accommodation for people who have a Disability who although requiring some support, are able to manage their own accommodation and day to day living. The route to Housing for these individuals is the social housing register (SARTH). Suitability of location may need to be a consideration for some of these individuals who have additional vulnerabilities.

The Disability Service Occupational Therapists work closely with Conwy Housing Adaptations and registered social landlords to enable appropriate adaptations to properties. This can include minor and major adaptations. These are vital to enabling people to remain as independent as possible and in many cases independent of the need for additional support provided by Social Care.

As part of the Welsh Government Improving Lives Programme, a comprehensive review of specialist inpatient care for people with a learning disability was commissioned. The report was published in 2020 and an implementation plan led by Public Health Wales has been developed which includes the need to provide appropriate accommodation for individuals in their local communities. There are a small number of people from Conwy currently accommodated in hospital. Their accommodation needs are bespoke and the Disability Service have been working with partners to identify potential build sites. This is challenging in Conwy.

Due to a shortage of local provision the Disability Service from time to time will need to place individuals out of county in specialist residential care homes. The Disability Service considers that most people with disabilities should be able to live in their local communities as tenants in their own homes. In addition there are children with disabilities who are looked after by the Local Authority and who, at the age of 18 require supported living. We work closely with RSL partners to develop local supported living provision. In 2023/24 we have worked with an RSL to acquire an additional 2 x 4 bed properties to accommodate 3 people with disabilities in each.

Given that 9.2% of people in Conwy identify as disabled and impacted a lot by their disability there is a need to ensure that Housing is able to meet the accommodation needs of this group. Accessible, ground floor accommodation or accessible by lift is a priority. Furthermore any Housing developed should be future proofed so that where adaptations are needed, these are more easily achieved.

Housing Support Grant (HSG)

The Housing Support Grant aims to prevent homelessness and support people to access and/or maintain a stable and suitable home. Welsh Government provide funding to local authorities to allocate to projects aimed at preventing homelessness and helping people to live in their own supported housing. HSG projects are temporary and during their time living in the projects people develop skills to live independently. In the Conwy County, HSG is used to fund shared supported accommodation, self-contained accommodation with floating support, and floating support, which can be for young people, older people, individuals with substance misuse/alcohol issues, individuals fleeing domestic abuse, individuals with mental health issues, and other individuals who need support to live independently.

Young people

There are currently 26 young people who are looked after by the authority and residing in costly placements due to a lack of suitable accommodation and care provision in the Conwy County. Out-of-county placements are used to meet the needs of some people due to the lack of suitable accommodation within the county. This comes at a cost to the authority, and can negatively impact the wellbeing of the person.

The total occurrences in bed and breakfasts between April 2022 and March 2023:

- 11 single 16-17 year olds in temporary accommodation (accommodated under the current Homelessness legislation).

- 5 single 16-17 year olds in temporary accommodation (accommodated by Children's Services).
- 7 care leavers aged between 18 and 21 in temporary accommodation.

Some young people will not be ready to live independently and will need support. There are a number of Housing Support Grant funded projects to help support young people in the Conwy County. Currently there is:

- Shared accommodation – 20 bed spaces for young people (1 of which is an emergency bed space).
- Self-contained accommodation – 6 units.
- Floating Support – 10 units.

There are currently 6 self-contained units in development for young people.

There is also semi-independent provision for 4 young people in the County.

Substance/alcohol misuse

There are a number of Housing Support Grant funded projects to help support individuals with substance misuse issues in the Conwy County.

Currently there are:

- 31 bed spaces for individuals with substance misuse issues
- 6 units of supported accommodation
- 6 units of floating support

Individuals placed in Housing Support Grant funded accommodation must not be alcohol dependent or using substances at the time of their placement.

Future type and level of needs and provision required

Overall there is a need for flexibility to ensure that accommodation meets the changing needs of individuals as they can change at any time. There is also a need to ensure that as the housing supply increases, consideration is given to the impact of services in that particular area.

Older people

Older home owners are often asset rich but cash poor, which can make it difficult for the individual to fund any renovations to the property that are required. This can mean that some individuals are living in accommodation which does not meet their current needs. Actively encouraging households to downsize if they are under occupying in both the private sector and social housing sector could assist with the shortfall in accommodation.

Encouraging more inter-generational households could also assist with the shortfall in accommodation and encourage churn in the existing stock. More visible support systems in place to assist households to downsize would be needed. However, it is important to note that this may not be a suitable option for all households.

Disabilities

Changing expectations of carers and increased aspirations of young adults with disabilities to live lives independently of their families has resulted in an increase in requests for accommodation and support at an earlier stage than has been the case in the past. This has been reinforced by the Social Services & Wellbeing (Wales) Act, Part 3, S24 (4)(a) – where the Local Authority is required to assess the extent to which the carer, is able, and will continue to be able, to provide care for the person for whom the carer provides or intends to provide care. The Code of Practice for Section 3 of the Act states that the assessment should clarify and record that the carer is willing and able to contribute to the care and support of the individual.

The Disability Service will therefore have a duty to assess the accommodation and support needs of people with disabilities open to the service. Where the individual meets the criteria for the provision of accommodation with support the Disability Service will consider the

appropriate options available through its own resources and commissioned services e.g. residential care home, nursing home, supported living, shared lives (where a person will live with a shared lives carer as a tenant in the shared lives carer's own home). The Disability Service may also work with individual RSLs to source accommodation specific to the needs of individuals and will tender for the support provider.

The Disability Service requires accommodation that is flexible and able to meet the changing needs of people with disabilities and properties need to be able to accommodate any future requirement for adaptions.

We require accommodation where individuals can share; usually 3 people. The property would need to be 4 bed to enable staff sleep-in if necessary. Properties can be houses or bungalows but a property which provides 1st floor and ground floor accommodation enables the service to support people with different needs within the accommodation.

We have a need for accommodation that enables floating support, where individuals have their own front doors but there is space within the property for staff and / or a communal area. We have some successful examples of this type of accommodation, one of which provides 10 flats within an old school building. This type of accommodation can meet varied support needs.

There is a need to provide accommodation that is robust where tenants may engage in behaviours that are challenging to support and where fixtures and fittings may need to be more durable. There may be a need to consider adaptations to the environment where tenants may have autism with sensory processing disorder, which results in hypersensitivity to a range of stimuli such as light, sound, smells and textures, which can be overwhelming.

There are a small number of people from Conwy living in hospital who require step-down accommodation to enable them to return to live in their

local community. The accommodation needed for these individuals would be bespoke and include 3 to 4 self-contained ground floor flats with staff and communal area and include good outside space.

Young people

A Placement Commissioning Strategy (2022-27) for children and young people has been agreed. The aspirational aim of Conwy's Placement and Commissioning strategy is to provide sufficient placements to meet the individual and diverse needs of children who are looked after. Over the next five years we aim to reduce our dependency on commissioning independent placements, and instead invest a percentage of the money saved in increasing the number of in-house and local resources. This will not only reduce our expenditure on both fostering and residential placements with the independent sector, but will also benefit the children by keeping them within their local area.

Substance/alcohol misuse

Housing First is a recovery-orientated approach that moves people experiencing homelessness into permanent housing as quickly as possible. As of June 2023 there were 16 individuals receiving support from Housing First in the Conwy County. Some individuals had tenancies and other individuals are living in temporary accommodation and receiving support from Housing First, whilst waiting for suitable stable accommodation. There is a lack of suitable properties for the Housing First co-hort in Conwy. Finding the right property is paramount to support the individual as well as protecting the community.

There is a need for individuals who have substance/alcohol misuse issues to have their own accommodation with wrap around support from the appropriate services, and care if required. There is a need for flexibility in the support provided and for it to be bespoke and person centred.

Any gaps or shortfall in provision

Older people

There is a shortfall of extra care housing in the Colwyn Bay area. To address this, there is a need to increase extra care housing in this area. There is a need for 2 bedroom extra care units as some individuals may have a carer that needs to stay occasionally.

Disabilities

Whilst the Disability Service has been able to work successfully with RSL partners to deliver shared tenancies and small developments of flats in recent years. The Service has struggled to source accommodation for individuals with more complex needs.

There is specifically a shortfall in the availability of bespoke accommodation in Conwy for those currently in hospital or in specialist residential placements, out of county. We would estimate that at this time there is a need to develop 2 properties which include 3-4 self-contained ground floor flats, with staff area and semi-rural or on the outskirts of towns with ample outside space for each flat.

Although we are able to source properties that are ground floor / or accessible via lift for people with physical disabilities, this can be challenging due to the footprint required, and therefore would be considered a gap. Small scale extra care model for working age adults with physical disabilities is a model that may meet this need.

Please also note information in the previous section.

Young people

There is a need to increase affordable housing for single care leavers in the Conwy County. A need for 18 units has been identified. 7 units have already been procured and will be occupied shortly, leaving 11 units to be delivered. A mix of 1 bedroom, 2 bedroom and 3 bedroom units are required.

There is a gap in respite accommodation for young people in the Conwy County. In some cases young people are presenting as homeless and are placed in bed and breakfast. If respite accommodation was available it would prevent some young people from being placed in bed and breakfast accommodation. By placing young people in respite accommodation there would be an opportunity for mediation to take place between the young person and their family.

There is a gap in provision for young people with arson convictions. There are limited accommodation options for people with arson convictions which leads to pressures on services to find accommodation. There is also a shortfall in accommodation for female prison leavers. This shortfall has been identified and there is currently work ongoing to try and meet this need.

There is a gap in provision for young people with behavioural issues or mental health issues. Some young people have previously been given a property with a bespoke care package, or they have been living in supported accommodation and it has failed. There is a need for 1 bed permanent accommodation with wrap around support for young people. Young people may be placed in unsuitable accommodation and if it breaks down they can be labelled as difficult to accommodate, with limited options available for them.

Some young people who are homeless will be accommodated by the Homeless Prevention Team. There is a shortfall of suitable temporary accommodation for young people. Increasing the number of Housing Support Grant funded projects for young people at local housing allowance rate would enable young people in employment to access affordable supported accommodation. There is also a need to increase the supply of supported accommodation for 16 and 17 year olds, especially 16 and 17 year old couples. This can only be achieved through partnership working. In many cases 16 and 17 year old couples stay in temporary accommodation until permanent accommodation can be found, which can

take some time due to the lack of availability of this type of accommodation. Young couples with a baby may have to live separately if they are in need of supported accommodation, as current supported accommodation does not accommodate couples. This means that the housing options for young couples with a child is either the private rented sector or social housing. However, this type of accommodation can be difficult to access due to affordability issues and limited availability due to the current demand, and does not have the benefit of on-site support. The current Housing Support Grant funded supported accommodation can accommodate single people or a single parent with a child. Although there is Housing Support Grant funded supported accommodation for single parents with children in the Conwy County, in some cases single young parents are being placed in bed and breakfast accommodation if supported accommodation is at full capacity, often due to a lack of move-on accommodation. There is a need for a mother and baby unit in the Conwy County. Further work needs to be done to identify if the type of accommodation needed is self-contained or shared accommodation.

There is a high demand for affordable 1 bed properties for care leavers and other young people, and there is very limited supply. In some cases there is an affordability issue for young people moving into social housing, as the rent together with utility costs can be unaffordable. In some cases the only affordable housing option is shared accommodation, however, there is a lack of shared accommodation in the County, and it is often not what people want. Some people may not be suitable to share accommodation. This has already been identified as a shortfall and the Local Authority are working with a housing association on this. Current LDP policies are very restrictive for changes of use to shared accommodation. Several appeals have been overturned by Planning Inspections. This policy and approach has been fully reviewed as part of the work on the Replacement LDP and a new policy will be included, which will allow shared accommodation to come forward in a managed way.

Substance/alcohol misuse

There is a shortfall in provision of accommodation for individuals with alcohol and/or substance misuse issues. In some cases it is dangerous for individuals to abstain. The current Housing Support Grant funded supported accommodation available is for individuals who are not currently alcohol dependent or using substances. It is important to note that this is the current position and this could change in the future. Some individuals are referred to the Housing Support Grant Team for accommodation, however, they do not need support. Individuals may be placed in accommodation with support where they have to adhere to the support package, however, this may not work for the individual. There is a need for individuals to have their own accommodation with wrap around support from the appropriate services, and care if required. There is a need for flexibility in the multi-agency support provided, with the support being bespoke and person centred.

Housing Support Grant

There is a shortfall of Housing Support Grant funded supported accommodation for households in employment. If households are in employment, Housing Support Grant funded supported accommodation is often unaffordable for them. The Housing Support Grant Team are currently working on a project in the Conwy County where the rent will be at the local housing allowance rate which will mean that it is affordable for households in need of supported accommodation and who are in employment. There is a need to increase this type of accommodation as it will incentivise individuals to start working or enable them to retain their employment.

Housing Support Grant funded supported accommodation is temporary for up to 2 years. Once households are ready to live independently they will be supported to find permanent accommodation. However, currently there is a shortfall of affordable move-on accommodation. This is leading to some individuals staying in Housing Support Grant funded supported accommodation for longer than required, leading to longer waiting times

for people who require access to Housing Support Grant supported accommodation.

Larger properties

There is a shortfall of larger properties (4+ bedrooms). A number of households are overcrowded and in some cases this is having an impact on the Social Care budget as support is needed for families. Some families are on the child protection register due to the overcrowding and if the overcrowding issue was resolved they would be removed from the child protection register. Therefore there is a need to increase the supply of affordable 4+ bedroom properties in the Conwy County.

Data Sources

- North Wales Market Stability Report November 2022
- North Wales Population Needs Assessment April 2022
- CCBC – Social Care, including 10 year plan
- CCBC – Housing Support Grant Team
- CCBC – Strategic Planning Policy Service

External stakeholder consultation and engagement

The following stakeholders were asked to identify the current type and level of needs and provision, any shortfall in provision, the future level and type of provision required via email survey, followed by focus group meetings:

- CCBC Housing Improvements Team
- CCBC Social Care (including Occupational Therapists)
- CCBC Resettlement Co-ordinator
- CCBC Homeless Prevention Team
- Registered Social Landlords operating in Conwy (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).

Public consultation took place between 29th January and 11th March 2024. Further details about the consultation is available in section 1.4 of this document.

Close working took place with Strategic Planning Policy Service in preparing this section.

Key data issues identified

- The figures quoted above do not include open market supported living premises.

e) Locational needs for people with physical or cultural needs

Local policies / strategies

- Conwy Local Programme Development Plan Local Housing Prospectus April 2023
(<https://www.conwy.gov.uk/en/Resident/Housing/Information-for-Developers/Conwy-Local-Housing-Prospectus.aspx>)
- Conwy Local Housing Strategy 2018-2023
(<https://www.conwy.gov.uk/en/Resident/Housing/Local-Housing-Strategy/Local-Housing-Strategy-18-23.aspx>). A new Local Housing Strategy (2024 – 2029) is currently being prepared.
- North Wales Population Needs Assessment, April 2022
(<https://www.northwalescollaborative.wales/north-wales-population-assessment/>)

Property needs – the current type and level of needs and provision

Conwy County Borough Council (CCBC) is an asylum dispersal area. CCBC have a target of 97 bed spaces for individuals seeking asylum. Clearsprings are responsible for finding suitable accommodation and they consult with the Local Authority regarding suitability of the accommodation identified. A part of their role is to consult with various organisations regarding the suitability of the accommodation and then local members for the area. Currently there are only 9 bed spaces for individuals seeking asylum in the Conwy County. Individuals

placed in this type of accommodation are awaiting the outcome of their asylum application.

CCBC are committed to supporting the Home Officer Afghan Relocation and Assistance Policy (ARAP) Scheme, currently there is 1 family under this scheme living in the Conwy County. CCBC also took part in the Home Office Syrian Vulnerable Persons Resettlement Scheme. Currently there are 3 households that are a part of this scheme. Households are placed either in temporary self-contained accommodation, private rented accommodation or social rented accommodation.

CCBC are also working with households affected by the Ukraine crisis. To date CCBC have supported the arrival and resettlement of 365 individual Ukrainian refugees. Currently there are 32 households have been placed in hosted accommodation, 5 households have been placed in temporary, initial hotel accommodation. The Resettlement Team have supported 49 households to secure private rented accommodation. CCBC's Resettlement support team continue to work closely with families and individuals to secure alternative accommodation. The Resettlement Team have also supported families and individuals to repatriate to Ukraine or to reunite with extended family in other areas in the UK.

Individuals seeking asylum in the United Kingdom who are granted indefinite leave to remain have the option to live in any area of their choice. Therefore it is unknown how many households would want to live in the Conwy County once they have been granted indefinite leave to remain. Demand could come from people who have lived elsewhere in the UK whilst waiting for the decision on their asylum application as well as from those who lived in the county whilst their application was being processed.

Generally, individuals prefer to be located close to employment opportunities and education services. In many cases individuals have built up community support in the areas they have been accommodated in. The Resettlement Team work closely with organisations such as North Wales Police to identify

suitable locations as certain areas within the Conwy County have been deemed unsuitable.

There is a reliance on private rented sector accommodation for individuals seeking asylum. There is a shortfall as the rent is much higher than the local housing allowance rate. In the majority of cases the Local Housing Allowance rate covers less than 50% of the rent. This means that other sources of funding have to be used to pay the shortfall in rent.

In some cases there will be multi-generational households due to the households' culture. This means that there is a need for larger units (4+ bedroom). There is also a need to consider cultural needs when determining the suitability of the property for households. For example, in some cases Syrian and Afghan households require 2 bathrooms in their property due to cultural needs. An example was given of a household who advised that a property was not suitable as the toilet was in a separate room to the wash hand basin and therefore this did not meet their cultural needs. Consideration needs to be given to the size of the property as Syrian households would need two living areas – one living area for the male household member and another living area for the other household members. The property size and layout is a higher priority than the location of the property, however, the location of the property is still important. Households with cultural needs need to be near a place of worship or in an area where with good transport links which would enable households to access religious buildings or places of worship.

Evidence including data sources (key section)

Future type and level of needs and provision required

The needs of individuals and households vary significantly. It is difficult to highlight the future type and level of needs and provision required as it will depend on the locational needs of the households granted indefinite leave to remain. It is important to note that each individuals needs are specific, however, generally individuals will need to be in a location with good transport links to enable individuals to access education, employment, places of

worship and other support services. It is also important to note that the property layout needs to meet the individuals' cultural needs and this needs to be taken into account, and not just the locational needs.

Any gaps or shortfall in provision

In some cases households with 7 individuals would be willing to live in a 1 bedroom property as they lived in a 1 bedroom property in their home country. The re-settlement team have worked with the families to explain that there would be an overcrowding issue if they were placed in a 1 bedroom property. In some cases it has been challenging to share this information with households as they would not want to meet the higher rent costs for a larger property. In most cases the rent is significantly higher than the local housing allowance rate and other sources of funding have been used to help top up to pay the rent. The local housing allowance rate and shortfall in the rental costs is an issue and causes some challenges. An affordability assessment is completed to ensure that households can repay the rental costs covered by the Local Authority to secure the tenancy and in the majority of cases households have kept up with the repayments. If households cannot afford to repay the full amount a lower repayment amount which is affordable to the household can be agreed. Financial affordability assessments are undertaken by the Resettlement Team on an ongoing basis for these families due to the current cost of living crisis.

Transport links has an impact on the areas that individuals will consider. In many cases individuals want to be near a place of work or education. Individuals want to be within 10 or 15 minutes of the services they want to access. This can be an issue due to the availability of transport in certain areas and this can limit the areas that individuals will consider.

Affordability issues and less affordable housing supply in rural areas could impact farms and local communities. The [Farmers' Union of Wales \(FUW\) submitted comments](#) in support to the Welsh Government consultation on the introduction of the new planning powers to separate the C3 dwelling use class and the use of Article 4 areas to manage them. They are concerned about the

impact the levels of second homes and short-term lets are having on younger people, farming families and farm workers being able to afford to buy or rent in their local community in rural areas. A large proportion of agriculture, forest and fishing workers are Welsh speakers, particularly in rural areas. Any negative impact on this sector, is therefore likely to negatively impact the Welsh language. The [Commission for Welsh-speaking Communities: position paper \[HTML\] | GOV.WALES](#) notes the importance of tackling the housing needs of Welsh-speaking communities.

Data sources

- Cartrefi Conwy – Social Housing Register (SARTH).
- Conwy County Borough Council Social Care
- Conwy County Borough Council – Housing Strategy Team.
- Conwy County Borough Council Homeless Prevention Team
- Registered Social Landlords operating in the Conwy County (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).
- North Wales Population Needs Assessment, April 2022
- [Commission for Welsh-speaking Communities: position paper \[HTML\] | GOV.WALES](#)
- [Farmers' Union of Wales \(FUW\)](#)

External stakeholder consultation and engagement

The following stakeholders were asked to identify the current type and level of needs and provision, any shortfall in provision, the future level and type of provision required via email survey, followed by focus group meetings:

- CCBC Social Care (including Occupational Therapists)
- CCBC Resettlement Co-ordinator
- CCBC Homeless Prevention Team
- Registered Social Landlords operating in Conwy (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West Housing).

Public consultation took place between 29th January and 11th March 2024.

Further details about the consultation is available in section 1.4 of this document.

Close working took place with Strategic Planning Policy Service in preparing this section.

Key data issues identified

- The HMA of current individuals and future need cannot be shared as it would be disclosive.
- The needs of families/individuals are specific and vary. As individuals seeking asylum in the United Kingdom granted indefinite leave to remain have the option to remain in a location of their choice it is difficult to identify the future need of provision.

4 Range of additional housing need estimates

4.1 General

- 4.1.1 This chapter details the summary tables from the LHMA toolkit for each of the WG household projections (principal, higher and lower variants), and the Council's own employment growth projection that is being progressed through the Conwy Replacement LDP. The scenarios below include all households on the housing registers.
- 4.1.2 Alternative scenarios for planning purposes have been included in Appendix B, where households on bands 1 and 2 only have been included to match with national planning policy definition of affordable housing for local need.
- 4.1.3 Please note that the outputs are not a dwelling target, but give an estimated number of households in need of affordable and market housing. This could be met through the existing stock and so does not necessarily mean a new build dwelling is needed for all of these households.

4.2 Principal projection

- 4.2.1 This scenario includes WGs principal projection with all households on the housing register included in toolkit table 8 – existing unmet need.
- 4.2.2 The table below shows that the estimated average annual additional household need (gross affordable housing need before planned supply and turnover of existing stock) is 694, 627 of which is existing unmet need and 67 is newly arising need. The estimated average annual additional market household need is 116.
- 4.2.3 The table below shows that the estimated average annual net additional affordable need is 358. This is made up of 213 intermediate rent and low cost home ownership, and 145 social rent.

Table 94: annual additional need estimates for the first 5 years of the LHMA

Source: LHMA toolkit

Estimated average annual additional housing need	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
Gross need before planned supply and turnover of existing stock	67	627	694	116	810
Net need, of planned supply and turnover of existing stock	NA	NA	358	NA	NA

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

4.2.4 Table 95 below shows the detailed breakdown of the additional household need estimates over the first five years of the LHMA period. It provides an annual estimate for the first five years of the LHMA period, which are higher due to including the existing unmet need. The estimates have been reduced to allow for turnover of existing affordable housing stock and planned supply.

4.2.5 The table below shows that there is an estimated annual additional social rent household need of 145. The estimated annual additional intermediate rent and low cost homeownership household need is lower – 135 for intermediate rent and 78 for low cost home ownership.

Table 95: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent	All social rent (e = a + b + c + d)	Intermediate rent	LCHO	All affordable housing (h = e + f +g)
Conwy CB	60	30	20	35	145	135	78	358
West	4	0	3	3	10	7	2	18
Creuddyn	40	12	10	12	75	49	32	156
Central	5	7	3	11	25	41	17	83
East	4	11	3	8	27	32	18	77
Rural	7	0	0	2	9	6	9	24

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable housing and does not equate to a new build target.

4.2.6 Table 96 below shows the additional total household need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

4.2.7 The table below shows that the estimated annual additional social rent need for the first 5 years of the LHMA period is highest in Creuddyn HMA (178), followed by Central HMA (135). Similarly the intermediate rent and LCHO estimated annual additional need for the first 5 years of the LHMA period is highest in Creuddyn HMA (92), followed by Central HMA (66) and East HMA (58). The owner occupier and private rented sector estimates annual additional need is also higher in Central HMA (16 for owner occupier and 25 for private rented sector) and Creuddyn HMA (12 for owner occupier and 22 for private rented sector).

Table 96: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register

(SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	452	242	694	43	73	116	810
West	23	9	32	5	8	12	45
Creuddyn	178	92	270	12	22	34	305
Central	135	66	201	16	25	41	242
East	87	58	145	6	10	16	161
Rural	29	17	45	4	8	12	58

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

4.2.8 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the remaining 10 year period of the LHMA (20227-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5 years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year 5.

4.2.9 The table below shows that the estimated annual additional social rent need for the remaining 10 years of the LHMA period is highest in Central HMA (16) and Creuddyn HMA (15). Similarly the intermediate rent and LCHO estimated annual additional need for the remaining 10 years of the LHMA period is highest in Central HMA (7) and Creuddyn HMA (6). The owner occupier and private rented sector estimates annual additional need is also higher in

Central HMA (16 for owner occupier and 25 for private rented sector) and Creuddyn HMA (12 for owner occupier and 22 for private rented sector).

Table 97: Estimated annual additional affordable housing need by HMA for the remaining 10 years of the LHMA period

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	47	20	67	43	73	116	183
West	4	2	6	5	8	12	18
Creuddyn	15	6	21	12	22	34	55
Central	16	7	23	16	25	41	64
East	8	3	11	6	10	16	27
Rural	4	2	6	4	8	12	18

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

4.2.10 The table below shows the additional affordable housing need estimates for each tenure at HMA level. It shows both an annual estimate, and the total estimate over the 15 year LHMA period (2022-37). The affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3. No further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year five.

4.2.11 The table below shows that the affordable housing need (average annual estimate) is higher in Creuddyn HMA (66) and Central HMA (43).

Table 98: estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need)

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)
HMA	Social rent (average annual estimate)	Intermediate rent and LCHO (average annual estimate)	Affordable housing (average annual estimate) c = a + b	Social rent (total 15 year estimate)	Intermediate rent and LCHO (total 15 year estimate)	Affordable housing (total 15 year estimate) f = d + e
Total	79	85	164	1,190	1,271	2,461
West	6	4	10	88	59	147
Creuddyn	35	31	66	519	470	989
Central	19	24	43	284	361	645
East	14	19	33	217	281	498
Rural	6	7	12	83	99	182

Totals may not sum due to rounding

4.2.12 The table below shows the change in income growth, house prices, private rent prices and income distribution growth over the first 5 years of the LHMA period.

Table 99: key assumptions

Source: LHMA toolkit

Type of change	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Totals may not sum due to rounding

4.2.13 The table below shows the market housing and social rent affordability criteria.

Table 100: affordability criteria

Source: LHMA toolkit

Affordability criteria	%
Market housing	30%
Social rent	35%

Totals may not sum due to rounding

4.2.14 It has been assumed that it will take 5 years to clear the existing unmet need.

Table 101: data items and sources

Source: LHMA toolkit

Data item	Data sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	Principal	

4.2.15 It has been assumed that 50% of households considered for owner occupier tenure will go on to buy.

Table 102: HMA assumptions

Source: LHMA toolkit

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
West	£158,213	4.4	£18,364	£23,520
Creuddyn	£180,956	4.4	£20,726	£26,873
Central	£158,164	4.4	£18,810	£24,483
East	£157,026	4.4	£20,306	£26,208
Rural	£177,990	4.4	£18,172	£24,665

Totals may not sum due to rounding

4.3 Lower projection

4.3.1 This scenario includes WGs lower projection with all households on the housing register included in toolkit table 8 – existing unmet need.

4.3.2 The table below shows that the estimated average annual additional household need (gross affordable housing need before planned supply and turnover of existing stock) is 659, 627 of which is existing unmet need and 32 is newly arising need. The estimated average annual additional market household need is 56.

4.3.3 The net need is made up of 203 intermediate rent and low cost home ownership and 123 social rent.

Table 103: annual additional need estimates for the first 5 years of the LHMA

Source: LHMA toolkit

Estimated average annual additional housing need	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
Gross need before planned supply and turnover of existing stock	32	627	659	56	716
Net need, of planned supply and turnover of existing stock	NA	NA	325	NA	NA

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new build target.

4.3.4 Table 104 below shows the detailed breakdown of the additional housing need estimates over the first five years of the LHMA period. It provides an annual estimate for the first five years of the LHMA period, which are higher due to including the existing unmet need. The estimates have been reduced to allow for turnover of existing affordable housing stock and planned supply.

4.3.5 The table below shows that there is an estimated annual additional social rent household need of 123. The estimated annual additional intermediate rent household need is higher (125), but lower for low cost home ownership (78).

Table 104: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a)	(b)	(c)	(d)	(e) All social rent (e = a + b + c + d)	(f)	(g)	(h) All affordable housing (h = e + f +g)
	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent		Inter- mediate rent	LCHO	
Conwy CB	49	22	16	35	123	125	78	325
West	3	0	3	3	8	6	2	16
Creuddyn	37	9	9	11	67	46	32	146
Central	1	4	1	10	16	38	17	71
East	2	9	3	8	23	30	18	71
Rural	6	0	0	2	8	5	9	22

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to a new build target.

4.3.6 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

4.3.7 The table below shows that the estimated annual additional social rent need for the first 5 years of the LHMA period is highest in Creuddyn HMA (171), followed by Central HMA (127). Similarly the intermediate rent and LCHO estimated annual additional need for the first 5 years of the LHMA period is highest in Creuddyn HMA (89), followed by Central HMA (62) and East HMA (56). The owner occupier and private rented sector estimates

annual additional need is also higher in Central HMA (8 for owner occupier and 12 for private rented sector) and Creuddyn HMA (6 for owner occupier and 11 for private rented sector).

Table 105: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	428	231	659	21	35	56	716
West	21	8	29	2	4	6	35
Creuddyn	171	89	260	6	11	17	276
Central	127	62	189	8	12	20	209
East	83	56	139	3	5	8	147
Rural	27	15	42	2	4	6	48

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new build target.

4.3.8 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the remaining 10 year period of the LHMA (2022-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5 years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year 5.

4.3.9 The table below shows that the estimated annual additional social rent need for the remaining 10 years of the LHMA period is highest in Central HMA (8) and Creuddyn HMA (7). Similarly the intermediate rent and LCHO estimated

annual additional need for the remaining 10 years of the LHMA period is highest in Creuddyn HMA (3) and Central HMA (3). The owner occupier and private rented sector estimates annual additional need is also higher in Central HMA (8 for owner occupier and 12 for private rented sector) and Creuddyn HMA (6 for owner occupier and 11 for private rented sector).

Table 106: Estimated annual additional affordable housing need by HMA for the remaining 10 years of the LHMA period

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c = a + b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f = d + e)	(g) Additional housing need (g = c + f)
Conwy CB	23	10	32	21	35	56	89
West	2	1	3	2	4	6	9
Creuddyn	7	3	10	6	11	17	27
Central	8	3	11	8	12	20	31
East	4	2	6	3	5	8	13
Rural	2	1	3	2	4	6	9

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new build target.

4.3.10 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA over the 15 year period of the LHMA (2022-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5 years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year five.

4.3.11 The table below shows that the affordable housing need (average annual estimate) is higher in Creuddyn HMA (55) and Central HMA (31).

Table 107: estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need)

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)
HMA	Social rent (average annual estimate)	Intermediate rent and LCHO (average annual estimate)	Affordable housing (average annual estimate) c = a + b	Social rent (total 15 year estimate)	Intermediate rent and LCHO (total 15 year estimate)	Affordable housing (total 15 year estimate) f = d + e
Total	56	74	130	839	1,113	1,952
West	4	3	7	61	45	106
Creuddyn	27	28	55	407	423	829
Central	11	20	31	160	306	466
East	10	17	27	153	256	410
Rural	4	5	9	59	82	141

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to a new build target.

4.3.12 The table below shows the change in income growth, house prices, private rent prices and income distribution growth over the first 5 years of the LHMA period.

Table 108: key assumptions

Source: LHMA toolkit

Type of change	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Totals may not sum due to rounding

4.3.13 The table below shows the market housing and social rent affordability criteria.

Table 109: affordability criteria

Source: LHMA toolkit

Affordability criteria	%
Market housing	30%
Social rent	35%

4.3.14 It has been assumed that it will take 5 years to clear the existing unmet need.

Table 110: data items and sources

Source: LHMA toolkit

Data item	Data sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	Lower Variant	

4.3.15 It has been assumed that 50% of households considered for owner occupier tenure will go on to buy.

Table 111: HMA assumptions

Source: LHMA toolkit

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
West	£158,213	4.4	£18,364	£23,520
Creuddyn	£180,956	4.4	£20,726	£26,873
Central	£158,164	4.4	£18,810	£24,483

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
East	£157,026	4.4	£20,306	£26,208
Rural	£177,990	4.4	£18,172	£24,665

4.4 Higher projection

4.4.1 This scenario includes WGs higher projection with all households on the housing register included in toolkit table 8 – existing unmet need.

4.4.2 The table below shows that the estimated average annual additional household need (gross affordable housing need before planned supply and turnover of existing stock) is 721, 627 of which is existing unmet need and 94 is newly arising need. The estimated average annual additional market household need is 164.

4.4.3 The net need is made up of 222 intermediate rent and low cost home ownership and 163 social rent.

Table 112: annual additional need estimates for the first 5 years of the LHMA

Source: LHMA toolkit

Estimated average annual additional housing need	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
Gross need before planned supply and turnover of existing stock	94	627	721	164	885
Net need, of planned supply and turnover of existing stock	NA	NA	384	NA	NA

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new built target.

4.4.4 Table 113 below shows the detailed breakdown of the additional housing need estimates over the first five years of the LHMA period. It provides an annual estimate for the first five years of the LHMA period, which are higher due to including the existing unmet need. The estimates have been reduced to allow for turnover of existing affordable housing stock and planned supply.

4.4.5 The table below shows that there is an estimated annual additional social rent household need of 163. The estimated annual additional intermediate rent and low cost homeownership household need is lower - 143 for intermediate rent and 78 for low cost home ownership.

Table 113: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a)	(b)	(c)	(d)	(e) All social rent (e = a + b + c + d)	(f) Intermediate rent	(g) LCHO	(h) All affordable housing (h = e + f + g)
	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent				
Conwy CB	69	36	22	35	163	143	78	384
West	4	0	3	3	11	7	2	20
Creuddyn	43	14	11	12	81	52	32	165
Central	8	9	4	11	31	44	17	92
East	6	12	4	8	30	33	18	81
Rural	8	0	0	2	10	7	9	26

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable housing and does not equate to a new built target.

4.4.6 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

4.4.7 The table below shows that the estimated annual additional social rent need for the first 5 years of the LHMA period is highest in Creuddyn HMA (184), followed by Central HMA (142). Similarly the intermediate rent and LCHO estimated annual additional need for the first 5 years of the LHMA period is highest in Creuddyn HMA (95), followed by Central HMA (69) and East HMA (59). The owner occupier and private rented sector estimates annual additional need is higher in Central HMA (22 for owner occupier and 36 for private rented sector) and Creuddyn HMA (17 for owner occupier and 31 for private rented sector).

Table 114: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

(a)	(b)	(c)	(d)	(e)	(f)	(g)	
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	471	250	721	61	103	164	885
West	25	10	35	7	11	18	52
Creuddyn	184	95	279	17	31	48	327
Central	142	69	210	22	36	58	268
East	91	59	150	9	14	23	172
Rural	30	18	48	6	11	17	65

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new built target.

4.4.8 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the remaining 10 year period of the LHMA (2022-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5

years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year 5.

4.4.9 The table below shows that the estimated annual additional social rent need for the remaining 10 years of the LHMA period is highest in Central HMA (23) and Creuddyn HMA (20). Similarly the intermediate rent and LCHO estimated annual additional need for the remaining 10 years of the LHMA period is highest in Central HMA (10) and Creuddyn HMA (9). The owner occupier and private rented sector estimates annual additional need is also higher in Central HMA (22 for owner occupier and 36 for private rented sector) and Creuddyn HMA (17 for owner occupier and 31 for private rented sector).

Table 115: Estimated annual additional affordable housing need by HMA for the remaining 10 years of the LHMA period

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c = a + b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f = d + e)	(g) Additional housing need (g = c + f)
Conwy CB	66	29	94	61	103	164	258
West	6	3	8	7	11	18	26
Creuddyn	20	9	29	17	31	48	77
Central	23	10	33	22	36	58	90
East	12	5	16	9	14	23	39
Rural	5	3	8	6	11	17	26

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new built target.

4.4.10 The table below shows the additional affordable housing need estimates for each tenure at HMA level. It shows both an annual estimate, and the total estimate over the 15 year LHMA period (2022-37). The affordable housing

need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3. No further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year five.

4.4.11 The table below shows that the affordable housing need (average annual estimate) is higher in Creuddyn HMA (74) and Central HMA (52).

Table 116: estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need)

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

HMA	(a) Social rent (average annual estimate)	(b) Intermediate rent and LCHO (average annual estimate)	(c) Affordable housing (average annual estimate) c = a + b	(d) Social rent (total 15 year estimate)	(e) Intermediate rent and LCHO (total 15 year estimate)	(f) Affordable housing (total 15 year estimate) f = d + e
Total	98	93	191	1,469	1,397	2,866
West	7	5	12	110	71	180
Creuddyn	41	34	74	608	508	1,116
Central	26	27	52	383	404	787
East	18	20	38	267	301	568
Rural	7	8	14	102	113	215

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to a new built target.

4.4.12 The table below shows the change in income growth, house prices, private rent prices and income distribution growth over the first 5 years of the LHMA period.

Table 117: key assumptions

Source: LHMA toolkit

Type of change	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

4.4.13 The table below shows the market housing and social rent affordability criteria.

Table 118: affordability criteria

Source: LHMA toolkit

Affordability criteria	%
Market housing	30%
Social rent	35%

4.4.14 It has been assumed that it will take 5 years to clear the existing unmet need.

Table 119: data items and sources

Source: LHMA toolkit

Data item	Data sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	Higher Variant	

4.4.15 It has been assumed that 50% of households considered for owner occupier tenure will go on to buy.

Table 120: HMA assumptions

Source: LHMA toolkit

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
West	£158,213	4.4	£18,364	£23,520
Creuddyn	£180,956	4.4	£20,726	£26,873
Central	£158,164	4.4	£18,810	£24,483
East	£157,026	4.4	£20,306	£26,208
Rural	£177,990	4.4	£18,172	£24,665

Totals may not sum due to rounding.

4.5 Replacement LDP employment growth projection

4.5.1 This scenario includes the Replacement LDP employment growth projections with all households on the housing register included in toolkit table 8 – existing unmet need.

4.5.2 The table below shows that the estimated average annual additional household need (gross affordable housing need before planned supply and turnover of existing stock) is 701, 627 of which is existing unmet need and 74 is newly arising need. The estimated average annual additional market household need is 129.

4.5.3 The net need is made up of 215 intermediate rent and low cost home ownership and 150 social rent.

Table 121: annual additional need estimates for the first 5 years of the LHMA

Source: LHMA toolkit

Estimated average annual additional housing need	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
Gross need before planned supply and turnover of existing stock	74	627	701	129	830
Net need, of planned supply and	NA	NA	365	NA	NA

Estimated average annual additional housing need	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
turnover of existing stock					

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new build target.

4.5.4 Table 122 below shows the detailed breakdown of the additional housing need estimates over the first five years of the LHMA period. It provides an annual estimate for the first five years of the LHMA period, which are higher due to including the existing unmet need. The estimates have been reduced to allow for turnover of existing affordable housing stock and planned supply.

4.5.5 The table below shows that there is an estimated annual additional social rent household need of 150. The estimated annual additional intermediate rent and low cost homeownership household need is lower – 137 for intermediate rent and 78 for low cost home ownership.

Table 122: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
HMA	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent	All social rent (e = a + b + c + d)	Intermediate rent	LCHO	All affordable housing (h = e + f +g)
Conwy CB	63	31	20	35	150	137	78	365
West	4	0	3	3	10	7	2	18
Creuddyn	41	13	11	12	76	50	32	159
Central	6	7	3	11	26	42	17	85
East	5	11	4	8	28	32	18	78

	(a)	(b)	(c)	(d)	(e) All social rent (e = a + b + c + d)	(f)	(g)	(h) All affordable housing (h = e + f +g)
HMA	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent		Inter- mediate rent	LCHO	
Rural	7	0	0	2	9	6	9	25

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to a new build target.

4.5.6 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

4.5.7 The table below shows that the estimated annual additional social rent need for the first 5 years of the LHMA period is highest in Creuddyn HMA (180), followed by Central HMA (137). Similarly the intermediate rent and LCHO estimated annual additional need for the first 5 years of the LHMA period is highest in Creuddyn HMA (93), followed by Central HMA (66) and East HMA (58). The owner occupier and private rented sector estimates annual additional need is higher in Central HMA (17 for owner occupier and 28 for private rented sector) and Creuddyn HMA (14 for owner occupier and 24 for private rented sector).

Table 123: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	457	244	701	48	81	129	830

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)
	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
West	23	10	33	5	9	14	47
Creuddyn	180	93	273	14	24	38	311
Central	137	66	203	17	28	45	249
East	88	58	146	7	11	18	164
Rural	29	17	46	5	9	14	60

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new build target.

4.5.8 The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the remaining 10 year period of the LHMA (2022-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5 years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year 5.

4.5.9 The table below shows that the estimated annual additional social rent need for the remaining 10 years of the LHMA period is highest in Central HMA (18) and Creuddyn HMA (16). Similarly the intermediate rent and LCHO estimated annual additional need for the remaining 10 years of the LHMA period is highest in Central HMA (8) and Creuddyn HMA (7). The owner occupier and private rented sector estimates annual additional need is also higher in Central HMA (17 for owner occupier and 28 for private rented sector) and Creuddyn HMA (14 for owner occupier and 24 for private rented sector).

Table 124: Estimated annual additional affordable housing need by HMA for the remaining 10 years of the LHMA period

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c = a + b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f = d + e)	(g) Additional housing need (g = c + f)
Conwy CB	52	23	74	48	91	129	203
West	4	2	6	5	9	14	20
Creuddyn	16	7	23	14	24	38	61
Central	18	8	26	17	28	45	71
East	9	4	13	7	11	18	30
Rural	4	2	7	5	9	14	20

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new build target.

4.5.10 The table below shows the additional affordable housing need estimates for each tenure at HMA level. It shows both an annual estimate, and the total estimate over the 15 year LHMA period (2022-37). The affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3. No further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year five.

4.5.11 The table below shows that the affordable housing need (average annual estimate) is higher in Creuddyn HMA (68) and Central HMA (45).

Table 125: estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need)

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)
HMA	Social rent (average annual estimate)	Intermediate rent and LCHO (average annual estimate)	Affordable housing (average annual estimate) c = a + b	Social rent (total 15 year estimate)	Intermediate rent and LCHO (total 15 year estimate)	Affordable housing (total 15 year estimate) f = d + e
Total	84	87	171	1,264	1,304	2,567
West	6	4	10	94	62	156
Creuddyn	36	32	68	542	480	1,022
Central	21	25	45	310	372	682
East	15	19	34	230	286	516
Rural	6	7	13	88	103	191

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to a new build target.

4.5.12 The table below shows the change in income growth, house prices, private rent prices and income distribution growth over the first 5 years of the LHMA period.

Table 126: key assumptions

Source: LHMA toolkit

Type of change	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

4.5.13 The table below shows the market housing and social rent affordability criteria.

Table 127: affordability criteria

Source: LHMA toolkit

Affordability criteria	%
Market housing	30%
Social rent	35%

4.5.14 It has been assumed that it will take 5 years to clear the existing unmet need.

Table 128: data items and sources

Source: LHMA toolkit

Data item	Data sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	User Projections 1 (CCBC Replacement LDP projection)	

4.5.15 It has been assumed that 50% of households considered for owner occupier tenure will go on to buy.

Table 129: HMA assumptions

Source: LHMA toolkit

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
West	£158,213	4.4	£18,364	£23,520
Creuddyn	£180,956	4.4	£20,726	£26,873
Central	£158,164	4.4	£18,810	£24,483
East	£157,026	4.4	£20,306	£26,208
Rural	£177,990	4.4	£18,172	£24,665

Totals may not sum due to rounding

4.5.16 It should be noted that the figures used to inform the CCBC Replacement LDP and Eryri National Park Authority LDP must meet the planning definition

of affordable housing for local need. Alternative scenarios with this definition have been prepared and can be found in Appendix B.

5 LHMA additional housing need estimates

5.1 Household projections used in this LHMA

- 5.1.1 The LHMA need figure is informed using the WG principal projection. This scenario includes all households registered on the social housing register in the Conwy County (toolkit table 8 – existing unmet need) as at 1st April 2023. This will become the evidence base for the Council to inform future housing need. It is important to note that whilst this estimate will inform the development plan and Housing Strategy, it is unlikely to directly equate to a new build housing requirement or the affordable housing target in a development plan.
- 5.1.2 The Replacement LDP projection has also been included for information only at this stage. This is an employment led projection that has been endorsed as part of the Replacement LDP process and evidence base. The LDP has not yet progressed to the Examination in Public stage, where all evidence is assessed by an Independent Planning Inspector to ensure it meets the tests of soundness. Should this growth projection be considered sound through the Examination in Public process, this scenario will replace the WG principal one as the endorsed scenario for the LHMA. The LHMA will be updated to reflect this.
- 5.1.3 The evidence base for development plans must meet the planning definition of affordable housing for local need. Therefore, alternative scenarios including households registered on the social housing register with a local connection to the Conwy County (toolkit table 8 – existing unmet need) has been prepared for both the Conwy Replacement LDP projection and WG principal projection for Eryri National Park LDP. Further work will be needed by CCBC Housing Services and both planning authorities to use this data for each LDP period and to progress a shared approach for meeting the need in shared settlements. CCBC Housing Services will continue to work closely with the Eryri National Park Authority to meet the affordable housing needs for the areas wholly within the Park authority area.

5.1.4 The methodology of this LHMA assumes that the existing unmet need will be met over the first five years in line with the rewrite of the LHMA. All of the existing unmet need is allocated to affordable housing. It is noted this may overstate the affordable housing estimate and understate the market housing estimate. This is a current limitation of the LHMA Tool and if local authorities are able to identify the market housing element of the existing unmet need then the Welsh Government would consider a future amendment to the LHMA Tool to minimise the impact of this limitation. The existing unmet need includes concealed and overcrowded households; those in temporary accommodation; and other social households. It also includes those on the housing registers for intermediate rent and LCHO.

5.1.5 Stakeholder engagements and action taken as a result of discussions will be noted in this section following public consultation.

5.2 Limitations and risks of simple comparisons of CCBC's previous LHMA (2021-2026) and this LHMA

5.2.1 It is inappropriate to compare CCBC's previous LHMA (2021-2026) with this LHMA as a different methodology has been used, as required by the new WG guidelines.

5.2.2 CCBC's previous LHMA (2021-2026) did not include an estimate for additional market housing.

5.2.3 The lending ratio in CCBC's previous LHMA (2021-2026) was 3.5. The lending ratio in this LHMA is 4.4 as the average amount lent by banks has increased, resulting in an average of 4.4. Lending periods have also increased, it is more common for mortgages to last 30 years or longer rather than the average 25 years. The increase ratio may increase the proportion of newly forming households able to buy property on the market if longer mortgages result in more affordable monthly payments

5.2.4 CCBC's previous LHMA (2021-2026) methodology did not cover a 10 and 15 year period, reflecting the WG methodology at the time.

5.3 Analysis of Welsh Government Principal Projection and Replacement LDP Employment Growth Projection

5.3.1 The tables below provides an analysis of the WG principal projection and Replacement LDP employment growth projection by Conwy CB. Both scenarios in the table below include all households registered on the social housing register in the Conwy County (toolkit table 8 – existing unmet need) as at 1st April 2023. A detailed breakdown of the WG principal and Replacement LDP employment growth projection by HMA can be found in chapter 4. Appendix B provides this for the planning definition of affordable housing for local need.

5.3.2 The table below shows that over the first five years of the LHMA period the total additional housing need estimate (gross need before turnover and supply) is 810 for the principal WG Projection, 116 of which is market housing and 694 is affordable housing. In comparison the Replacement LDP employment growth projection total housing need estimate of the first five years of the LHMA period is slightly higher at 830, 129 of which is market housing and 701 is affordable housing.

5.3.3 The table below shows that 627 of all affordable housing need is existing unmet need for the principal WG projection and the Replacement LDP employment growth projection.

5.3.4 The table below shows that 67 of all affordable housing need is newly arising need (Principal WG Projection). In comparison, the Replacement LDP employment growth projections shows that 74 of all affordable housing need is newly arising need.

5.3.5 The newly arising need in CCBC's previous LHMA (2021-2026) was 339. It is important to note that a different methodology was used in CCBC's previous (LHMA 2021-2026), therefore a direct comparison cannot be made with this LHMA.

Table 130: annual additional need estimates for the first 5 years of the LHMA (gross need, before turnover and supply) – WG Principal Projection and Replacement LDP employment growth projection

Source: LHMA toolkit, CCBC version 2023

Projection	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
WG Principal Projection	67	627	694	116	810
Replacement LDP employment growth projection	74	627	701	129	830

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

5.3.6 The table below shows that the annual additional affordable household need estimate for the first 5 years of the LHMA (net need of planned supply and turnover of existing stock) is 358 for the WG principal projection, which is made up of 145 social rent, 135 intermediate rent and 78 LCHO. In comparison, the Replacement LDP employment growth projection shows an annual additional affordable housing need of 365, 150 of which is social rent, 137 is intermediate rent and 78 is LCHO.

5.3.7 The net shortfall for social rent in CCBC's previous LHMA (2021-2026) was 102 under the Strategic Housing projection and 66 Strategic land use planning projection. The existing need plus newly arising need for intermediate housing in CCBC's previous LHMA (2021-2026) was 127 for both strategic housing and strategic land use planning. CCBC's previous LHMA (2021-2026) did not include a breakdown of net need by bedroom size for social rent need.

Table 131: Conwy CB estimated annual additional affordable housing need by tenure (net need, net of turnover of existing stock and planned supply) – WG Principal projection and Replacement LDP employment growth projection (2023 LHMA toolkit)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

	Tenure	WG Principal projection	Replacement LDP employment growth projection
(a)	All affordable housing (a = b + g + f)	358	365
(b)	All social rent (b = c + d + e + f)	145	150
(c)	One bed social rent	60	63
(d)	Two bed social rent	30	31
(e)	Three bed social rent	20	20
(f)	Four+ bed social rent	35	35
(g)	Intermediate rent	135	137
(f)	LCHO (h)	78	78

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

5.3.8 The Strategic Housing annual social housing need in CCBC's previous LHMA (2021-2026) was 101, in comparison to 66 for Strategic Land Use Planning. The annual additional social rent household need has increased since the previous LHMA (2021-2026). This is due to the number of households in affordable housing need increasing since the last LHMA (2021-2026).

5.3.9 The Strategic Housing annual intermediate housing need in CCBC's previous LHMA (2021-2026) was 127. This was the same for Strategic Land Use Planning. The table above shows that the annual additional intermediate household need has increased since the previous LHMA (2021-2026).

5.3.10 The table below shows that the estimated annual additional social rent need for the first 5 years of the LHMA period (gross need, before turnover and supply) is 452 for the WG principal projection. This is slightly lower than the Replacement LDP employment growth projection, which is 457.

5.3.11 The intermediate rent and LCHO figure for the WG principal projection (242) is slightly lower than for the Replacement LDP employment growth projection (244).

5.3.12 The owner occupier and private rented sector figures are fairly similar for both the WG principal projection (43 and 73) and Replacement LDP employment growth projection (48 and 81).

5.3.13 Overall the additional household need is higher for the Replacement LDP employment growth projection (830) than the WG principal projection (810).

5.3.14 CCBC's previous LHMA (2021-2026) did not include an estimate for additional market housing, as the WG methodology did not detail this at the time.

Table 132: Conwy CB estimated annual additional total housing need estimates by tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period – WG Principal projection and Replacement LDP employment growth projection (2023 LHMA toolkit)

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

		WG Principal projection	Replacement LDP employment growth projection
(a)	Social rent	452	457
(b)	Intermediate rent and LCHO	242	244
(c)	Affordable Housing (c = a + b)	694	701
(d)	Owner occupier	43	48
(e)	Private rented sector	73	81
(f)	Market Housing (f = d + e)	116	129

		WG Principal projection	Replacement LDP employment growth projection
(g)	Additional housing need (g = f + c)	810	830

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

5.3.15 The table below shows that that the estimated annual additional social rent need for the remaining 10 years of the LHMA period is 47 for the WG principal projection. This is lower than the Replacement LDP employment growth projection, which is 52.

5.3.16 The intermediate rent and LCHO figure for the WG principal projection (20) is slightly lower than for the Replacement LDP employment growth projection (23).

5.3.17 The owner occupier and private rented sector figures are slightly lower for the WG principal projection (43 and 73) than the Replacement LDP employment growth projection (48 and 81).

5.3.18 Overall the additional household need is higher for the Replacement LDP employment growth projection (203) than the WG principal projection (183).

Table 133: Conwy CB estimated annual additional affordable housing need for the remaining 10 years of the LHMA period – WG Principal Projection and Replacement LDP employment growth projection (2023 toolkit)

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	Tenure	WG Principal projection	Replacement LDP employment growth projection
(a)	Additional housing need (a = b + e)	183	203
(b)	Affordable Housing (b = c + d)	67	74
(c)	Social rent	47	52
(d)	Intermediate rent and LCHO	20	23
(e)	Market Housing (e = f + g)	116	129
(f)	Owner occupier	43	48
(g)	Private rented sector	73	81

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

5.3.19 The previous LHMA methodology from WG did not cover a 10 and 15 year period, neither did it provide a market housing figure. CCBC's previous LHMA (2021-2026), therefore only included a 5 year figure and did not include an estimate for additional market housing.

5.3.20 The table below shows that the estimated annual overall additional social rent need over the 15 years of the LHMA is 79 for the WG principal projection. This is lower than the Replacement LDP employment growth projection is 84

5.3.21 The estimated annual overall additional intermediate rent and LCHO figure for the WG principal projection (85) is slightly lower than for the Replacement LDP employment growth projection (87).

5.3.22 Overall the additional annual household need is lower for the WG principal projection (164) than the Replacement LDP employment growth projection (171).

Table 134: Conwy CB estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need) – WG principal projection and Replacement LDP employment growth projection

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	Tenure	WG principal projection	Replacement LDP employment growth projection
(a)	Social rent (average annual estimate)	79	84
(b)	Intermediate rent and LCHO (average annual estimate)	85	87
(c)	Affordable housing (average annual estimate) – c = a + b	164	171
(d)	Social rent (total 15 year estimate)	1,190	1,264
(e)	Intermediate rent and LCHO (total 15 year estimate)	1,271	1,304
(f)	Affordable housing (total 15 year estimate) – f = d + e	2,461	2,567

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

6 Quality assurance statement

- 6.1.1 This LHMA was prepared jointly between CCBC Housing Strategy and Strategic Planning Policy Services, with an input from a wide range of stakeholders.
- 6.1.2 Various quality checks have been completed for each section of the LHMA and the data included by officers from CCBC Housing Strategy and the Strategic Planning Policy Service.
- 6.1.3 Following data quality checks, CCBC Housing Strategy shared the data needed with Data Cymru who then inputted the data into the WG LHMA toolkit. Data Cymru also conducted their own quality assurance process to check the toolkit and data for accuracy. CCBC has also worked closely with WG to ensure that the summary tables produced by the LHMA toolkit were producing the correct figures.
- 6.1.4 Where applicable, the details on the robustness of the data has been included.
- 6.1.5 Where relevant, statistical rounding has taken place. This has been noted under the relevant tables in the LHMA.
- 6.1.6 Further information on data checks completed can be found in Appendix A.

Appendix A – Key Issues Tables

Key Issues Table 1 – Key data inputs

Below are the key issues identified for each data input.

1. Housing Market Areas (HMAs)

- a) As there have been ward boundary changes we are using new areas in the LHMA compared to previous LHMA. The new LHMA guidelines and Welsh Government planning documents strongly advise alignment with Local Development Plans. The new HMAs used are in-line with the Conwy RLDP Preferred Strategy.
- b) Eryri National Park has been included in the rural HMA. Ward and statistical boundaries do not match up with the Park boundary, which runs through the middle of some villages, and so it was not possible to accurately separate this area.

2. Household data

- a) No issues identified.

3. Rent data

- a) Rural and West 4+ bedroom data was not available due to the small sample size. Local authority average was used.

4. Income data

- a) CACI PayCheck data used. No issues found.

5. House price paid data

- a) No issues identified.

6. Existing unmet need

- a) A list of households with a live application on the intermediate housing register (Tai Teg) was received (as of 1st April 2023). The list included all area choices for households. 378 households had another Local Authority area as their first area choice, therefore these households have not been included in Conwy's LHMA as they will be counted in other Local Authority's LHMA. If the households had been included in Conwy's LHMA there would be double counting across the region. Officers from Conwy Council have made Officers in other Local Authorities aware of this.
- b) A list of households with a live application on the intermediate housing register (Tai Teg) (as of 1st April 2023) was compared with households on the social housing register (as of 1st April 2023). 154 households on the intermediate housing register (Tai Teg) had a live application on the social housing register. As proof of income is not provided when the application is made live on the intermediate housing register (Tai Teg), Conwy have included households that appear on both the intermediate housing register and social housing register in the social rent section only in toolkit table 8 - existing unmet need to ensure that there is no double counting.
- c) A list of households on the social housing register as of 1st April 2023 was compared with a list of households in all forms of temporary accommodation as of 31st March 2023. Some households in all forms of temporary accommodation did not have a live social housing register application for various reasons. To ensure that toolkit table 8 - existing unmet need is accurate, households in temporary accommodation who did not have a live social housing application and could manage their own tenancy only were included in toolkit table 8 – existing unmet need. 35 households in all forms of temporary accommodation were not included in the toolkit table 8 – existing unmet need for various reasons –
 - 5 households were not tenancy ready
 - 23 households were no longer in need of accommodation however there was a delay in removing them from the housing register

- 3 households were assessed by the Homeless Prevention Team and not eligible
- 3 households did not want to live in the Conwy County
- 1 household did not want social housing

d) When making an application on the intermediate housing register households have the option to select Low Cost Home Ownership only, Intermediate Rent only, or both Low Cost Home Ownership and Intermediate Rent. There is no option in toolkit table 8 - existing unmet need for households who have selected both Low Cost Home Ownership and Intermediate Rent. As 210 households had selected both Low Cost Home Ownership and Intermediate Rent, we have attributed 50% of these households as wanting Intermediate Rent (toolkit table 8 – existing unmet need) and 50% of households as wanting Low Cost Home Ownership (toolkit table 8 – existing unmet need) as the LHMA tool does not allow a household to select both options to prevent double counting. HMA area and number of bedrooms were considered when determining whether households would be included in intermediate rent or low cost home ownership. This decision was made as households are eligible for both intermediate rent and low cost home ownership on the intermediate housing register.

e) It is not possible to gather accurate data on concealed households from our social housing register and intermediate housing register – toolkit table 8 – existing unmet need. Some households on the housing register may be concealed, however, they may want to remain as one household. For future LHMA's CCBC will ask the team who manage the social housing register if it is possible to start recording this information.

f) There may be double counting regionally without Local Authorities knowing. For example, a household could have a local connection to the Conwy County and be in a housing need, which would mean they would be eligible for the social housing register. The household may also have a local connection to Denbighshire County and therefore would be eligible for the social housing register in Denbighshire.

- g) Some households with a live social housing register application had no bedroom requirement recorded on their application. Some households had no area choices. To ensure that the data submitted is accurate, the social housing register team reviewed applications that had no bedrooms as their requirement and had no area choices. As a result of the review, some households circumstances had changed and they were no longer in a housing need and therefore their applications were cancelled. If the households applications were cancelled they were not included in toolkit table 8 – existing unmet need.
- h) LDP projections include households in band 1 & 2 on the social housing register only as only households with a local connection to the Conwy County should be included in this projection. Some households in band 4 will have a local connection to the Conwy County and will have been placed in band 4 as a decision had been made to reduce the priority of their application. Households in band 4 with a local connection to the Conwy County have not been included in the LDP projection.

7. Existing stock and planned supply

- a) Toolkit table 12 - existing stock and planned supply of affordable housing over the next 5 years. The expected turnover of intermediate rent and low cost home ownership was based on the turnover of intermediate rent units and low cost home ownership units over the last three financial years. Data from the last three financial years was used as the expected re-lets data for social rent units was based on an average over the last three years. Homebuy and rent to own units were not included in this section.
- b) There has been a decrease in the turnover of social housing stock since 2020/21. This could be due to the Covid pandemic and market changes. This needs further monitoring as it could change during the LHMA period.
- c) Toolkit table 12 existing stock and planned supply of affordable housing over the next 5 years - committed supply. Units on a site in Creuddyn HMA are in the main programme development plan as tenure neutral units. The intention is for the units to be Low Cost Home Ownership units, however, if this is not

viable the units will be intermediate rent units. As a viability assessment has not yet been completed, the units have been included as low cost home ownership in toolkit table 12 committed supply. A site in Rural HMA is in the main programme development plan and is currently only viable for social rent units, however, the need is higher for low cost home ownership and intermediate rent. Further discussions are taking place regarding this site, however, for the LHMA the units have been included as social rent units.

- d) Toolkit table 12 existing stock and planned supply of affordable housing over the next 5 years (committed supply) – 3 sites within the National Park area have not been included in the LHMA for the following reasons:
 - 6 units – RSL owned site which is not currently in the main programme development plan or the RSLs own development programme funded without capital grant.
 - 1 unit – private developer and tenure is not currently available.
 - 4 units – private developer and information on size of units and tenure is not currently available.
- e) Some Registered Social Landlords in Conwy submitted an application for Transitional Accommodation Capital Programme funding to purchase existing dwellings. Other Registered Social Landlords would be purchasing a number of empty properties using Recycled Capital Grant (RCG), or Social Housing Grant (SHG) however, the units had not yet been included in the main programme. As a claim for funding had not been submitted at the time of writing the LHMA the units were not included in the toolkit table 12 existing stock and planned supply – committed supply.
- f) Toolkit table 12 existing stock and planned supply of affordable housing over the next 5 years (committed supply) – planning permission has been implemented on one site in Central HMA, however, the site is unlikely to be developed during the next 5 year period, therefore this has not been included in toolkit table 12. One site in West HMA has received planning permission, however, the developer has submitted revised plans which have not yet been determined. It is unlikely that the revised plans will change the number of

affordable housing units, therefore the affordable units agreed under the current planning permission have been included in toolkit table 12.

Key Issues Table 2 – Input Assumptions

1. Affordability criteria
 - a) Default affordability criteria has been used as there is no local data.
2. First time buyer (FTB) assumptions
 - a) Default FTB assumptions have been used.
 - b) The First Time Buyer income to lending ratio in this LHMA is now 4.4. This lending ratio is higher than the last LHMA (3.5) as the average amount lent by banks has increased, resulting in an average of 4.4. Lending periods have also increased, it is more common for mortgages to last 30 years or longer rather than the average 25 years. The increase ratio may increase the proportion of newly forming households able to buy property on the market if longer mortgages result in more affordable monthly payments.
3. Percentage of households eligible for owner occupier tenure that decide to go on and buy
 - a) There is no evidence to make an assumption. The middle value of 50% has been used in line with working group assumption.
4. Five-year financial forecast for key variables – income rent and house prices
 - a) Default has been used when appropriate. No change in income selected.
5. Calculation of intermediate housing (IR and LCHO)
 - a) Level of savings and credit ratings to be considered outside of the tool.

Key Issues Table 3 – Calculations and outputs

1. Market housing need covering owner occupier and private rented sector

- a) It is not clear that this relates to households in need of market housing and that their housing need can be met through other housing options and not necessarily a new build unit.
- b) It is not clear how this relates to the dwelling requirement linked to the population and household projections. Further work will be undertaken.

2. Affordable housing need covering social rent and intermediate housing

- a) Social housing need is assumed to be met should the backlog and newly arising need over the first five year period be met through existing churn. Housing registers for Conwy CB have increased significantly over the last few years. It is uncertain whether this trend will continue in the longer term, and so it cannot be guaranteed that there will be no future arising need.
- b) It is not clear that this relates to households in need of affordable housing and that their housing need can be met through other housing options and not necessarily a new built unit.
- c) It is not clear how this relates to the dwelling requirement linked to the population and household projections. Further work will be undertaken.

3. Scenario testing tables

- a) No issues identified.

4. Five year outputs / 10 year outputs

- a) Different five and ten year periods will be needed in the Conwy Replacement LDP background evidence papers and affordable housing strategy/policies to match the plan period.

Appendix B – Alternative scenarios for planning purposes

The LHMA is used to inform the affordable housing target in development plans. Planning Policy Wales states: “A community’s need for affordable housing is a material planning consideration which must be taken into account in formulating development plan policies”. Therefore this section only includes households who have a local connection to the Conwy County (band 1 and band 2 on the social housing register). Further work will be needed by CCBC Housing Services and both planning authorities to use this data for each LDP period and to progress a shared approach for meeting the need in shared settlements. CCBC Housing Services will continue to work closely with the Eryri National Park Authority to meet the affordable housing needs for the areas wholly within the Park authority area.

a) Conwy Replacement LDP employment growth projection – affordable housing for local need.

This scenario includes the Replacement LDP employment growth projection with households in band 1 and 2 on the housing register included in toolkit table 8 – existing unmet need.

The table below shows that the estimated average annual additional household need (gross affordable housing need before planned supply and turnover of existing stock) is 651, 577 of which is existing unmet need and 74 is newly arising need. The estimated average annual additional market household need is 129.

The net need is made up of 215 intermediate rent and low cost home ownership and 103 social rent.

Table 135: annual additional need estimates for the first 5 years of the LHMA

Source: LHMA toolkit

Estimated average annual additional housing need	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
Gross need before planned supply and turnover of existing stock	74	577	651	129	779
Net need, of planned supply and turnover of existing stock	NA	NA	318	NA	NA

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

Table 136 below shows the detailed breakdown of the additional housing need estimates over the first five years of the LHMA period. It provides an annual estimate for the first five years of the LHMA period, which are higher due to including the existing unmet need. The estimates have been reduced to allow for turnover of existing affordable housing stock and planned supply.

The table below shows that there is an estimated annual additional social rent household need of 103. The estimated annual additional intermediate rent household need is higher (137) but lower for low cost home ownership (78).

Table 136: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
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HMA	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent	All social rent (e = a + b + c + d)	Intermediate rent	LCHO	All affordable housing (h = e + f +g)
Conwy CB	39	20	13	30	103	137	78	318
West	3	0	2	2	8	7	2	16
Creuddyn	29	9	9	11	58	50	32	140
Central	0	3	0	10	13	42	17	72
East	2	8	1	5	16	32	18	66
Rural	6	0	0	2	8	6	9	23

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to new build target.

The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

The table below shows that the estimated annual additional social rent need for the first 5 years of the LHMA period is highest in Creuddyn HMA (162), followed by Central HMA (120). Similarly the intermediate rent and LCHO estimated annual additional need for the first 5 years of the LHMA period is highest in Creuddyn HMA (93), followed by Central HMA (66) and East HMA (58). The owner occupier and private rented sector estimates annual additional need is higher in Central HMA (17 for owner occupier and 28 for private rented sector) and Creuddyn HMA (14 for owner occupier and 24 for private rented sector).

Table 137: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
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HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	407	244	651	48	81	129	779
West	21	10	31	5	9	14	45
Creuddyn	162	93	254	14	24	38	292
Central	120	66	186	17	28	45	232
East	76	58	135	7	11	18	152
Rural	28	17	44	5	9	14	58

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the remaining 10 year period of the LHMA (2022-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5 years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year 5.

The table below shows that the estimated annual additional social rent need for the remaining 10 years of the LHMA period is highest in Central HMA (18) and Creuddyn HMA (16). Similarly the intermediate rent and LCHO estimated annual additional need for the remaining 10 years of the LHMA period is highest in Central HMA (8) and Creuddyn HMA (7). The owner occupier and private rented sector estimates annual additional need is also higher in Central HMA (17 for owner occupier and 28 for private rented sector) and Creuddyn HMA (14 for owner occupier and 24 for private rented sector).

Table 138: Estimated annual additional affordable housing need by HMA for the remaining 10 years of the LHMA period

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c = a + b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f = d + e)	(g) Additional housing need (g = c + f)
Conwy CB	52	23	74	48	81	129	203
West	4	2	6	5	9	14	20
Creuddyn	16	7	23	14	24	38	61
Central	18	8	26	17	28	45	71
East	9	4	13	7	11	18	30
Rural	4	2	7	5	9	14	20

Totals may not sum due to rounding.

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

The table below shows the additional affordable housing need estimates for each tenure at HMA level. It shows both an annual estimate, and the total estimate over the 15 year LHMA period (2022-37). The affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3. No further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year five.

The table below shows that the affordable housing need (average annual estimate) is higher in Creuddyn HMA (62) and Central HMA (41).

Table 139: estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need)

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable housing	(d) Social rent (total 15)	(e) Intermediate rent and LCHO	(f) Affordable housing

	(average annual estimate)	(average annual estimate)	(average annual estimate) c = a + b	year estimate)	(total 15 year estimate)	(total 15 year estimate) f = d + e
Total	69	87	155	1,029	1,304	2,332
West	6	4	10	84	62	146
Creuddyn	30	32	62	451	480	931
Central	16	25	41	242	372	614
East	11	19	31	172	286	458
Rural	5	7	12	80	103	183

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to new build target.

The table below shows the change in income growth, house prices, private rent prices and income distribution growth over the first 5 years of the LHMA period.

Table 140: key assumptions

Source: LHMA toolkit

Type of change	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Totals may not sum due to rounding

The table below shows the market housing and social rent affordability criteria.

Table 141: affordability criteria

Source: LHMA toolkit

Affordability criteria	%
Market housing	30%

Social rent	35%
Totals may not sum due to rounding	

It has been assumed that it will take 5 years to clear the existing unmet need.

Table 142: data items and sources

Source: LHMA toolkit

Data item	Data sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	User projection 1 (Replacement LDP projection)	

It has been assumed that 50% of households considered for owner occupier tenure will go on to buy.

Table 143: HMA assumptions

Source: LHMA toolkit

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
West	£158,213	4.4	£18,364	£23,520
Creuddyn	£180,956	4.4	£20,726	£26,873
Central	£158,164	4.4	£18,810	£24,483
East	£157,026	4.4	£20,306	£26,208
Rural	£177,990	4.4	£18,172	£24,665

b) Principal projection– affordable housing for local need only

This scenario includes WGs principal projection with households in band 1 and 2 on the housing register included in toolkit table 8 – existing unmet need.

The table below shows that the estimated average annual additional household need (gross affordable housing need before planned supply and turnover of existing stock) is 644, 577 of which is existing unmet need and 67 is newly arising need. The estimated average annual additional market household need is 116.

The net need is made up of 213 intermediate rent and low cost home ownership and 99 social rent.

Table 144: annual additional need estimates for the first 5 years of the LHMA

Source: LHMA toolkit

Estimated average annual additional housing need	Newly arising affordable need	Existing unmet affordable need	All affordable housing need	Market housing	Total housing
Gross need before planned supply and turnover of existing stock	67	577	644	116	760
Net need, of planned supply and turnover of existing stock	NA	NA	312	NA	NA

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

Table 145 below shows the detailed breakdown of the additional housing need estimates over the first five years of the LHMA period. It provides an annual estimate for the first five years of the LHMA period, which are higher due to including the existing unmet need. The estimates have been reduced to allow for turnover of existing affordable housing stock and planned supply.

The table below shows that there is an estimated annual additional social rent household need of 99. The estimated annual additional household need is higher for intermediate rent (135) but lower for low cost home ownership (78).

Table 145: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent	All social rent (e = a + b + c + d)	Intermediate rent	LCHO	All affordable housing (h = e + f +g)
Conwy CB	37	19	13	30	99	135	78	312
West	3	0	2	2	8	7	2	16
Creuddyn	28	9	9	11	57	49	32	138
Central	0	2	0	10	12	41	17	70
East	1	8	1	5	15	32	18	65
Rural	6	0	0	2	7	6	9	23

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to new build target.

The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

The table below shows that the estimated annual additional social rent need for the first 5 years of the LHMA period is highest in Creuddyn HMA (160), followed by Central HMA (118). Similarly the intermediate rent and LCHO estimated annual additional need for the first 5 years of the LHMA period is highest in Creuddyn HMA (92), followed by Central HMA (66) and East HMA (58). The owner occupier and private rented sector estimates annual additional need is higher in Central HMA (16 for owner occupier and 25 for private rented sector) and Creuddyn HMA (12 for owner occupier and 22 for private rented sector).

Table 146: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register

(SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	402	242	644	43	73	116	760
West	21	9	30	5	8	12	43
Creuddyn	160	92	252	12	22	34	287
Central	118	66	184	16	25	41	225
East	76	58	133	6	10	16	149
Rural	27	17	44	4	8	12	56

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the remaining 10 year period of the LHMA (2022-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5 years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year 5.

The table below shows that the estimated annual additional social rent need for the remaining 10 years of the LHMA period is highest in Central HMA (16) and Creuddyn HMA (15). Similarly the intermediate rent and LCHO estimated annual additional need for the remaining 10 years of the LHMA period is highest in Central HMA (7) and Creuddyn HMA (6). The owner occupier and private rented sector estimates annual additional need is also higher in

Central HMA (16 for owner occupier and 25 for private rented sector) and Creuddyn HMA (12 for owner occupier and 22 for private rented sector).

Table 147: Estimated annual additional affordable housing need by HMA for the remaining 10 years of the LHMA period

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Conwy CB	47	20	67	43	73	116	183
West	4	2	6	5	8	12	18
Creuddyn	15	6	21	12	22	34	55
Central	16	7	23	16	25	41	64
East	8	3	11	6	10	16	27
Rural	4	2	6	4	8	12	18

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

The table below shows the additional affordable housing need estimates for each tenure at HMA level. It shows both an annual estimate, and the total estimate over the 15 year LHMA period (2022-37). The affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3. No further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year five.

The table below shows that the affordable housing need (average annual estimate) is higher in Creuddyn HMA (60) and Central HMA (39).

Table 148: estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need)

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)
HMA	Social rent (average annual estimate)	Intermediate rent and LCHO (average annual estimate)	Affordable housing (average annual estimate) c = a + b	Social rent (total 15 year estimate)	Intermediate rent and LCHO (total 15 year estimate)	Affordable housing (total 15 year estimate) f = d + e
Total	64	85	149	961	1,271	2,232
West	5	4	9	78	59	137
Creuddyn	29	31	60	428	470	898
Central	15	24	39	222	361	582
East	11	19	29	159	281	440
Rural	5	7	12	75	99	174

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to new build target.

The table below shows the change in income growth, house prices, private rent prices and income distribution growth over the first 5 years of the LHMA period.

Table 149: key assumptions

Source: LHMA toolkit

Type of change	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	No change	0.00%	0.00%	0.00%	0.00%	0.00%

Totals may not sum due to rounding

The table below shows the market housing and social rent affordability criteria.

Table 150: affordability criteria

Source: LHMA toolkit

Affordability criteria	%
Market housing	30%
Social rent	35%

Totals may not sum due to rounding

It has been assumed that it will take 5 years to clear the existing unmet need.

Table 151: data items and sources

Source: LHMA toolkit

Data item	Data sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry	Calendar year
Rent prices	Rent Officers Wales	Calendar year
Household projection basis	Principal	

It has been assumed that 50% of households considered for owner occupier tenure will go on to buy.

Table 152: HMA assumptions

Source: LHMA toolkit

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
West	£158,213	4.4	£18,364	£23,520
Creuddyn	£180,956	4.4	£20,726	£26,873
Central	£158,164	4.4	£18,810	£24,483
East	£157,026	4.4	£20,306	£26,208
Rural	£177,990	4.4	£18,172	£24,665

c) Eryri National Park area

As per requirements in paras 1.35-7 of chapter 1 of the WG LHMA guidance, the section below gives an indication of the number of households in need of

affordable housing in the Eryri National Park. The Rural HMA was split for indicative purposes only. It is not a full reflection of need in the National Park, as it is based on the Electoral Ward boundaries for Betws-y-Coed and Trefriw, Caerhun and Uwch Conwy, which are all split by the National Park boundary. The Electoral Wards include parts of the County Borough which fall outside of the National Park boundary, and so it is likely that this need figure is higher than the true need for the Park.

There are currently no households on the affordable housing registers with Capelulo in the West HMA, as their first area choice, and so the need for this area has not been split. Close monitoring of the need will continue to make sure that any future need is considered.

The LHMA guidance states that the National Park can utilise the estimates of the additional housing need and demand set out within the local authority's LHMA to develop a concise analytical report.

For future need, the 10% growth apportioned to the Rural HMA was split so that 2% applied to these three Electoral Wards and 8% for the remainder of the rural area. This is based on the level of need on the current registers and not a policy or strategy decision on where is the most appropriate location to meet future growth.

The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

Table 153: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

Source: LHMA toolkit table 1, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
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HMA	One bed social rent	Two bed social rent	Three bed social rent	Four+ bed social rent	All social rent (e = a + b + c + d)	Intermediate rent	LCHO	All affordable housing (h = e + f +g)
Rural HMA	6	0	0	2	7	6	9	23
Rural – outside Eryri	3	0	0	1	4	5	6	15
Rural – inside Eryri	3	0	0	0	3	2	4	8

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to new build target.

The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the first 5 year period of the LHMA (2022-27).

Table 154: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply) for the first 5 years of the LHMA period

Source: LHMA toolkit table 2, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Rural	27	17	44	4	8	12	56
Rural outside Eryri	20	12	31	3	6	9	41
Rural inside Eryri	7	5	12	1	2	3	15

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

The table below shows the additional total housing need estimates by tenure for market and affordable housing by HMA for the remaining 10 year period of the LHMA (2022-37). The figures below are based on newly arising need only. It has been assumed that the existing unmet need has been met in the first 5 years of the LHMA period. No further allowance for supply has been included at this stage as it becomes less accurate to predict committed supply and turnover beyond year 5.

Table 155: Estimated annual additional affordable housing need by HMA for the remaining 10 years of the LHMA period

Source: LHMA toolkit table 3, Cartrefi Conwy Social Housing Register (SARTH) register, Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing (c = a + b)	Owner occupier	Private rented sector	Market Housing (f = d + e)	Additional housing need (g = c + f)
Rural	4	2	6	4	8	12	18
Rural outside Eryri	3	2	5	3	6	9	15
Rural inside Eryri	1	0	1	1	2	3	4

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable and market housing and does not equate to new build target.

The table below shows the additional affordable housing need estimates for each tenure at HMA level. It shows both an annual estimate, and the total estimate over the 15 year LHMA period (2022-37). The affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3. No further allowance has been made for supply and

turnover of existing stock as it becomes less accurate to predict beyond year five.

Table 156: estimated annual overall additional affordable housing need by HMA and tenure over the 15 years of the LHMA (net need)

Source: LHMA toolkit table 4, Cartrefi Conwy Social Housing Register (SARTH), Tai Teg register April 2023

	(a)	(b)	(c)	(d)	(e)	(f)
HMA	Social rent (average annual estimate)	Intermediate rent and LCHO (average annual estimate)	Affordable housing (average annual estimate) c = a + b	Social rent (total 15 year estimate)	Intermediate rent and LCHO (total 15 year estimate)	Affordable housing (total 15 year estimate) f = d + e
Rural	5	7	12	75	99	174
Rural outside Eryri	4	5	8	56	71	127
Rural inside Eryri	1	2	3	22	30	52

Totals may not sum due to rounding

Note: this table gives an estimate of households in need of affordable housing and does not equate to new build target.

Key assumptions for income growth, house prices, private rent prices and income distribution growth over the first 5 years of the LHMA period are as outlined in table 149 above.

The market housing and social rent affordability criteria are as table 150 above.

It has been assumed that it will take 5 years to clear the existing unmet need.

Data items and sources are as for table 151 in the Principal Projection above.

Table 157: HMA assumptions

Source: LHMA toolkit

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Rural HMA	£177,990	4.4	£18,172	£24,665
Rural outside Eryri	£179,967	4.4	£18,798	£25,808
Rural inside Eryri	£173,540	4.4	£18,397	£24,563

Appendix C – Analysis of change in the additional housing need estimates

Please note that the previous LHMA used a different methodology and so results are not strictly comparable.

Table 158: Annual additional housing need estimates over the first five years of the LHMA

Source: LHMA toolkit, Interim LHMA (2021-2026)

Annual additional housing need estimates over the first five years of the LHMA period	Column index	Current LHMA (Principal Projection)	Previous LHMA (Strategic Housing)
Total housing need estimate	(a)	810	229
Market housing	(b)	116	N/A
Affordable housing	(c)	694	229
Percentage split of additional housing need by market housing	(b)/(c)	16.7%	N/A
Percentage split of additional housing need by affordable housing	(c)/(a)	85.7%	N/A
Annual planned supply and turnover of existing stock for affordable housing	(e)	346	513
Affordable housing need – net of planned supply and turnover of existing stock	(f)	358	N/A
Annual additional housing need split by tenure – owner occupier	(g)	80	N/A
Annual additional housing need split by	(h)	36	N/A

tenure – private rented sector				
Annual additional housing need split by tenure – LCHO (net basis)	(i)	87	127	
Annual additional housing need split by tenure – intermediate rent (net basis)	(j)	155	127	
Annual additional housing need split by tenure – social rent (net basis)	(k)	150	102	
Annual additional housing need split by tenure – one bedroom social rent	(l)	63	N/A	
Annual additional housing need split by tenure – two bedroom social rent	(m)	31	N/A	
Annual additional housing need split by tenure – three bedroom social rent	(n)	20	N/A	
Annual additional housing need split by tenure – four+ bedroom social rent	(o)	35	N/A	
Market housing percentage split: owner occupier estimate	(g)/(b)	69%	N/A	
Market housing percentage split: private rented sector estimate	(h)/(b)	31%	N/A	
Affordable housing need percentage split: LCHO	(i)/(f)	24%	N/A	
Affordable housing need percentage split: intermediate rent	(j)/(f)	43%	N/A	
Affordable housing need percentage split: social rent	(k)/(f)	42%	N/A	
Social housing need percentage split - 1 bed	(l)/(k)	42%	N/A	

Social housing need percentage split - 2 bed	(m)/(k)	21%	N/A
Social housing need percentage split - 3 bed	(n)/(k)	13%	N/A
Social housing need percentage split - 4+ beds	(o)/(k)	23%	N/A

Table 159: Data Input and Key Assumptions (over the first five years of the LHMA period)

Source: LHMA toolkit, Interim LHMA (2021-2026)

Data Input and Key assumptions (over the first five years of the LHMA period)	Current LHMA	Previous LHMA
Number of HMAs and basis of defining HMAs (ward, MSOA, LSOA)	5 Ward	5 Community Council
Selected household projection basis	Welsh Government Principal Projection	2018 based sub national population projections, Welsh Government
Annual newly arising need	183	Social:302 Intermediate:37
Rent data – state default or source used	Default	Rent Officer data 2019
House price paid data – state default or source used	Land Registry 2022	Land Registry 2020
Income data – state source used	CACI PayCheck 2022	CACI PayCheck 2020
Annual existing unmet housing need	627	Social: 123 Intermediate: 90
Market housing affordability criteria	30%	All households who are able to afford a property outside the social housing system are excluded from the register – so this stage of the calculation is not undertaken.
Social rent affordability criteria	35%	Percentage of households with income below 60% of the GB median (CACI PayCheck)

Percentage of those considered appropriate for owner occupier that go onto buy	50%	N/A
Average FTB property price for the LA	£166,470	N/A
FTB property value to income ratio for the LA	4.4	3.5
Five-year financial forecast – OBR or alternative source	Default – OBR	N/A
Split of intermediate housing need – method 1, 2 or 3	Option 1	N/A

Appendix D – list of consultees

The following were contacted via email and informed of the public consultation and how they could submit comments:

- Registered Social Landlords development teams and housing officers (Adra, Cartrefi Conwy, Clwyd Alyn Housing Association, First Choice Housing Association, Grwp Cynefin, North Wales Housing, Wales & West)
- Betsi Cadwaladr University Health Board
- Colleagues in CCBC Social Care and planning
- CCBC local Councillors
- Denbighshire County Council Planning Policy and Housing Strategy Teams
- Gwynedd County Council Planning Policy and Housing Strategy Teams
- Eryri National Park Planning Policy Team
- Menter Iaith,
- Age Connects,
- Age Cymru Gwynedd & Mon
- Agoriad Cyf (training and employment support)
- Bawso,
- Bernardos Cymru
- Body Positive
- Caia Park Partnership Ltd
- Canolfan Abbey Road – Mental Health Centre
- Carers Outreach Service
- Centre for Sign Sight Sound
- Chwarae Teg
- Citizens Advice

- Young Farmers Club
- Conwy Mind
- Cyfun (Churches Together in Wales)
- Cymorth Cymru
- Digartref
- Disability Wales
- Diverse Cymru
- Equality and Human Rights Commission
- Fair Treatment for the Women of Wales
- Gwynedd Centre for Independent Living
- Gypsies and Travellers Wales
- Headway Conwy and Denbighshire
- Hourglass Cymru, Humanists UK
- Housing LIN
- Itaca (Abergele Community Action)
- Kalpa Bhadra Kadampa Buddist Centre
- Learning Disability Wales
- Llamau
- Mantell Gwynedd
- Medrwn Mon
- Mental Health Advocacy Scheme
- Môn Communities First
- Muslim Council of Wales
- National Autistic Society Cymru
- NEWCIS (supporting unpaid carers in NE Wales)

- North Wales African Society (NWAS)
- North Wales Society for the Blind
- North Wales Women's Centre
- North Wales Young Carers
- North Wales Advice and Advocacy Association
- Conwy and Denbighshire Mental Health Advocacy Service (CADMHAS)
- Dewis Centre for Independent Living
- Advocacy Support Cymru (ASC)
- Tros Gynnal – North Wales Advocacy Service
- North Wales Regional Equality Network
- Penrallt Baptist Church, Race Council Cymru
- Stonewall Cymru, Terrence Higgins Trust
- Shelter Cymru
- Snowdonia Society
- The FDF Centre for Independent Living
- Travelling Ahead (advice and Advocacy for GR&T Communities)
- Urdd Gobaith Cymru
- Victim Support Cymru
- Viva LGBT+
- Wales Council for Voluntary Action
- Youth Parliament Wales
- Farmers Union of Wales
- Projects funded by the Housing Support Grant.
- Rural Housing Enablers