

# **Conwy Deposit Local Development Plan 2007 – 2022 (Revised edition 2011)**



## **BACKGROUND PAPER 7**

### **Local Housing Market Assessment (Phase 1)**

**March 2011**

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# North West Wales Local Housing Market Assessment

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**Baseline report**

**March 2008**

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## **Responding to the consultation**

We are currently consulting on the baseline report for the North West Wales Local Housing Market Assessment. This looks at the local housing market and lays out the process for assessing housing need.

This report and a list of the questions we are especially interested in hearing your responses to are available on our website at [www.conwy.gov.uk/NWWLHMA/consultation](http://www.conwy.gov.uk/NWWLHMA/consultation)

Please return any comments to us by 23rd May 2008. You can send responses by post or by email.

A report on the outcome of the consultation will be published in June 2008.

## **Please submit your responses to the consultation to**

Mari Kells  
NWWLHMA Project Co-ordinator  
Housing Services  
Conwy County Borough Council  
Conwy Road  
Mochdre  
Conwy  
LL28 5AB  
Phone: 01492 574237

Email: [mari.kendall.kells@conwy.gov.uk](mailto:mari.kendall.kells@conwy.gov.uk)

## Preface

This document contains the baseline report on a Local Housing Market Assessment (LHMA) for North West Wales and covers the counties of Anglesey, Conwy, Denbigh and Gwynedd along with the Snowdonia National Park. It has been produced by a partnership of local stakeholders working in conjunction with Bangor University.

This baseline report considers evidence about housing need and demand in North West Wales and will inform the preparation of local strategies including planning and housing policies. Its conclusions also highlight a number of sub regional issues that may be worthy of further consideration. It is noted that Denbighshire County Council has also participated in the Local Housing Market Assessment for North East Wales.

Initial stakeholder participation has taken place during the preparation of this baseline assessment but this will be strengthened as the assessment moves forward and the LHMA work programme evolves over the next three years. The partnership between five authorities and Bangor University provides this assessment with a relatively unique opportunity to “Make the Connections” beyond the functional and geographic boundaries of each constituent authority and ensure the housing markets of North West Wales are more fully understood. The partnership acknowledges the role played by core funding from the Welsh Assembly Government in facilitating this process. It has encouraged collaborative work to meet the joined up approach to policy making encouraged in national guidance.

However the partnership that is evolving the assessment has been formed for a three year period and additions to the evidence base are welcomed at any time. The Assessment will also be monitored so that changes in market conditions can be considered as the assessment is ‘a snapshot of the position at a particular time. The housing market in an area will always be in a state of flux, as will be the precise boundaries of the local housing market area’<sup>1</sup>.

Mari Kendall Kells  
Local Housing Market Assessment Project Co-ordinator

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<sup>1</sup> Welsh Assembly Government, *Local Housing Market Assessment Guidance*, 2006, p.7.

# 1 Introduction

## The partnership

- 1.1 Working in partnership with Bangor University, the Isle of Anglesey County Council, Conwy County Borough Council, Denbighshire County Council, Gwynedd Council and Snowdonia National Park Authority formed a consortium to undertake a North West Wales Local Housing Market Assessment (NWWLHMA) in line with Welsh Assembly Government's guidance. Preliminary participation from local stakeholders has made a valuable contribution to the assessment and the connections made during this initial phase of work will continue to shape the assessment beyond this baseline report.

## The research process as a demonstration of practical partnership working

- 1.2 At the outset of this report the user may find it useful to understand the process undertaken to prepare the baseline LHMA. Members of the partnership have actively contributed to the study process summarised in the following project timeline :

What ?	When ?
Forming of partnership	Summer 2006
Preliminary socio-economic research on characteristics of the study area. Baseline discussion.	Autumn 2006
Development of partnership between Bangor University and other partners	Winter 2006 – Ongoing
Recruitment of LHMA Coordinator	Winter 2006
Preliminary mapping of intuitive housing market areas.	Spring 2007
Collation of housing market data	Spring/Summer 2007
Key drivers workshop	Early Summer 2007
Identification of housing needs information to support Assembly requirement for local housing strategies.	Summer 2007
Stakeholder seminar and workshop at Venue Cymru	Autumn 2007
Preparation of baseline LHMA for publication including ongoing dialogue with Welsh Assembly Government.	Autumn 2007
<b>Consultation on baseline LHMA</b>	April 2008
Review results of consultation	May 2008
Publish baseline LHMA	June 2008

- 1.3 At various points in this report the research process has related data to specific geographical areas e.g. ward or local authority boundaries. These units have been used to enhance our understanding of some of the issues and key drivers affecting local housing markets and should not be taken as any indicator of policy statements at this stage. The partnership recognises that local housing markets do not strictly follow such boundaries but they are a useful tool for organising data and promoting a discussion of the findings of the baseline assessment.

### **Report structure**

- 1.4 The report therefore explains its purpose (chapter 2), reviews the policy context for LHMA (chapter 3), profiles the study area (chapter 4) and then considers information on the socio-economic context and identifies key drivers in the local housing markets (chapter 5). A housing profile is provided (chapter 6), then issues around affordability are reviewed (chapter 7) leading to information on Housing Need (chapter 8). These set the context for defining 13 local housing market areas (chapter 9). Conclusions are set out (chapter 10) before outlining the next steps of the NWWLHMA (chapter 11). The work is supported by detailed appendices.
- 1.5 The reader should note that this baseline report draws together the first phase of the NWWLHMA. Socio-economic data is constantly changing and the data in this report reflects the position as of mid 2007. The 3 year assessment project will expand upon a number of key points that warrant further investigation and likewise address any gaps in the assessment that also requires further study and analysis that have been initially highlighted in this report. These matters are highlighted in the Next Steps (Chapter 10).



## 2 Purpose

2.1 The purpose of this report is to set out the baseline local housing market assessment for North West Wales report for formal consultation. The consultation process is paramount to achieving full stakeholder involvement in the LHMA processes. As well as sharing our findings to date with stakeholders the purpose of this document is to open up the debate of Housing Market Areas (HMA) in North West Wales. Once the report has gone through the consultation process it will be possible to define the housing market areas which in turn will then enable the LHMA to consider housing demand and need within these areas. The baseline report does not provide a full assessment but a platform upon which further work can take place in future.

2.2 The assessment will provide evidence to inform the preparation of key policies and strategies including:

- community strategies and the work to be carried out by local service boards;
- local development plans;
- local housing strategies

and will be useful to local partnerships working on projects such as health and well-being strategies. This baseline assessment will also be useful in the implementation and review of higher level strategies such as the Wales Spatial Plan and could inform decisions to be made in relation to Convergence Funding.

2.3 However the major advantage of this assessment is that it is not confined by the boundaries of any single unitary authority and this will allow cross boundary and cross cutting issues and their potential solutions to be explored in more depth. The Assembly Guidance<sup>2</sup> states that:

Bramley et al (2000) recognised the need for authorities to consider carefully the choice of geographical area on which to base their housing market assessments. Often, in particular around urban areas, functional housing market areas may operate across local authority boundaries. Elsewhere, including in rural areas, housing demand may differ markedly between different settlements or sub-areas.

The geography underpinning the partnership of this assessment will allow all these issues to be explored.

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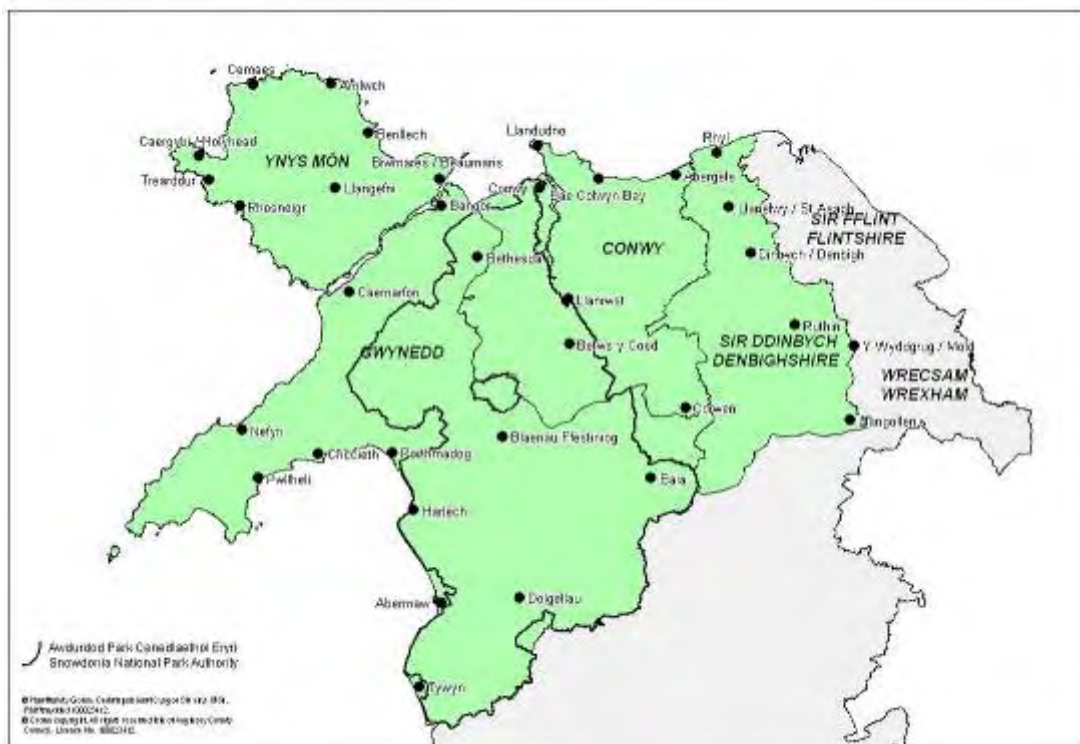
<sup>2</sup> Welsh Assembly Government, 2006, p.10.

### 3 The study area

#### Description of the study area

- 3.1 Maps 1-2 show the study area, stretching from Prestatyn in the east to Pen Llyn and Holyhead in the west, Tywyn (Gwynedd) to the south and Llangollen in the east. It is a diverse area consisting of relatively peripheral areas (Llyn and northern Anglesey), nationally protected landscapes (Snowdonia National Park and Llyn, Anglesey Clwydian AONBs) and more significant urban settlements on the coast (Bangor, Llandudno, Colwyn Bay Rhyl, Abergele). It is an area of unique linguistic and cultural characteristics where the Welsh language is spoken by a large number of residents. There is a lengthy coastline and at the western end the sea connections to Ireland via the port of Holyhead.

Map 1: Study area

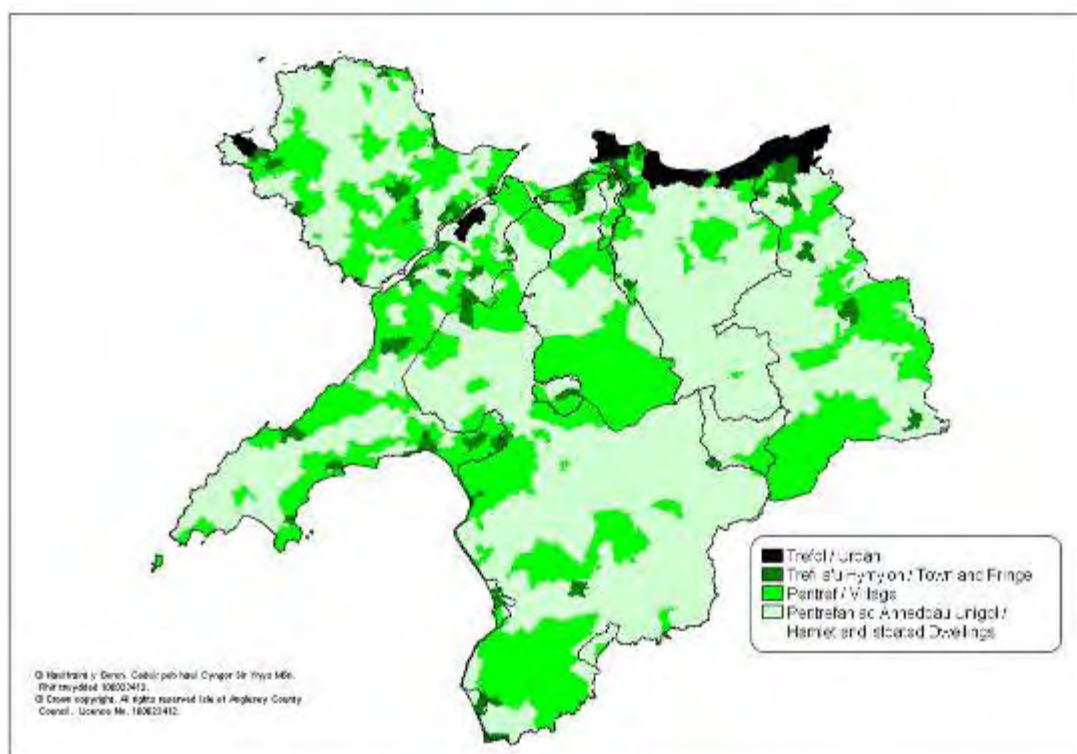


- 3.2 The study area excludes the counties of Flintshire and Wrexham in North East Wales. These areas have a more urban/industrial character and stronger relationship with Cheshire and the North West of England as highlighted in the North East Local Housing Market Assessment.<sup>3</sup>

<sup>3</sup> GVA Grimley, 2007.

- 3.3 Denbighshire and Conwy sit in the central section of North Wales and in some ways can be seen as a zone with some transitional character between North West and North East Wales. Both counties have a more urbanised coastal zone contrasting with a pleasant rural hinterland. The A55 Expressway is an approximate boundary to those differing characters. However given its 'central' location with influence to the east and west then Denbighshire CC is also participating in the North East Local Housing Market Assessment and, within that Assessment, Denbighshire particularly seemed to have stronger links with Conwy than its other neighbour Flintshire.
- 3.4 The A55 Expressway and main north coast rail-line are largely shared resources across the north of the study area, although perhaps not as relevant for the more peripheral parts. The Cambrian rail coastline provides services in Dwyfor and Meirionydd areas of Gwynedd, Powys and Ceredigion. Southern Gwynedd and Conwy fall within the study area but also are in the Central Wales spatial plan zone.
- 3.5 The most populated areas are situated along the northern coast in North West Wales – this is clearly illustrated in Map 2.
- 3.6 Housing pressures are particularly intense within protected landscape areas (Snowdonia National Park and the Llyn Peninsula and Ynys Mon Areas of Outstanding Natural Beauty) due to the attractiveness of the areas and the quality of life and landscape offered. The Snowdonia National Park is an area of outstanding landscape quality with a network of towns and villages of predominantly rural character, with some coastal settlements along the Arduwy Coast. The National Park consists of a variety of housing situations including the pressures of tourism 'honey pots' and resulting in seasonal variations in the demand for accommodation. In some communities, migration pressures and the demand for second homes and or retirement homes are significant issues contributing to affordability problems, which can have a considerable effect on the sustainability of local communities.
- 3.7 Gwynedd and Anglesey contain a mixture of both urban and deep rural settlements. The cluster of settlements along the Menai Strait (Bangor, Caernarfon and Llangefni) contain the larger centres of population and contrast with smaller settlements in the foothills of Snowdonia and on the Llyn Peninsula. Both counties have extensive coastlines which provide attractive living environments and a good quality of life.

Map 2: Urban-Rural analysis



Source: ONS

## 4 The policy context

### National policy context

- 4.1 The joint working arrangement which has underpinned this assessment is promoted by national policy such as the Ministerial Interim Planning Policy statement on Housing<sup>4</sup> which recommends building partnerships between local authorities and local stakeholders. This is also in-line with the Welsh Assembly Government's Making the Connections vision for Wales, by 'sharing common goals and working across functional and organisational boundaries';<sup>5</sup> and with the principles outlined in Beecham's 'Beyond the Boundaries' report.<sup>6</sup>
- 4.2 More recently the Living Communities section of the Welsh Assembly Government document 'One Wales, A progressive agenda for the government of Wales' states that 'everyone has the right to an affordable home as owner, as part-owner or as tenant'<sup>7</sup>. The baseline housing market assessment is a contribution to informing actions that can respond to this agenda.
- 4.3 By identifying housing needs and providing a complete housing market assessment the findings of the report will enable a greater understanding of the housing markets within North West Wales. This will enable local authorities and stakeholders to meet the vision set out in the Wales Spatial Plan (WSP) November 2004:

We will sustain our communities by tackling the challenges presented by population and economic change; we will grow in ways which will increase our competitiveness while spreading prosperity to less well-off areas and reducing negative environmental impacts; we will enhance our natural and built environment for its own sake and for what it contributes to our well-being, and we will sustain our distinct identity.<sup>8</sup>

Wales Spatial Plan is being updated (January 2008) and any revisions to WSP will be addressed in updating this assessment.

- 4.4 Better Homes for People in Wales: A National Housing Strategy for Wales<sup>9</sup> contains a vision for the future of housing in Wales. Elements of this vision include sustainable home ownership, increased quality and quantity in the private rental sector, social rented sector allocations meeting aspirations, eliminating roofless homelessness,

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<sup>4</sup> Welsh Assembly Government, June 2006

<sup>5</sup> Welsh Assembly Government, *Making the Connections: Delivering Better Services for Wales*, 2004, p.6.

<sup>6</sup> Welsh Assembly Government, *Beyond Boundaries - Review of Local Service Delivery (Beecham Review)*, July 2006

<sup>7</sup> WAG, *One Wales, A progressive agenda for the government of Wales*, (2007), p.16.

<sup>8</sup> *People, Places, Futures*, p. 7,

<sup>9</sup> National Assembly for Wales, 2002

increased 'Supporting People' initiatives and highlighting Black Minority and Ethnic community and individual housing issues thus promoting equality.

4.5 How these type of visions can be met in Wales is outlined in a number of reports including the Welsh Assembly Government's Planning Policy Wales<sup>10</sup> document in which it states that planning policies and proposals should 'promote sustainable patterns of development' by

- promoting the re-use of brown-field land
- assessing the home and work relationship with a view to reducing commuting distances
- locating higher density developments situated close to transport links
- encouraging mixed uses in town centres integrating both commercial and residential
- providing affordable housing in both urban and rural communities

4.6 Elements of national planning policy were changed by Ministerial Interim Planning Policy Statement on Housing<sup>4</sup> which emphasised that local planning authorities 'must ensure that sufficient land is available or will become available to provide a 5 year supply of land for housing judged against targets set in the development plan.' Additionally, they should provide a mix of affordable and market housing and promote mixed tenure communities and also 'address the scope and potential for rehabilitation, conversion, clearance and redevelopment.'

## **Regional policy context**

4.7 Before the introduction of the Wales Spatial Plan, the North Wales Economic Forum adopted a North Wales Development Strategy<sup>11</sup>. This set a vision for North Wales including the area covered by the NWWLHMA consortium, that 'North Wales is a region where people, business and a unique environment create the conditions for success' stating 'productivity, competitiveness, regeneration and inclusion are at the heart of this agenda'.

4.8 It is of note to the NWWLHMA that the North Wales strategy was framed by five themes including 'The North Wales offer'. Amongst the issues identified in this theme was improving North Wales as a place to live. This included the need for research on the efficiency of operation of the North Wales housing market, highlighting:

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<sup>10</sup> Welsh Assembly Government, 2002, p.12-p.13, p.17-p.18.

<sup>11</sup> North Wales Economic Forum, 2004, p.9.

- improving the residential offer (providing a better selection of housing choices),
- improving properties in declining areas,
- determining the need for affordable housing.

- 4.9 It would seem the preparation of two LHMA's in North Wales, this and the North East Local Housing Market Assessment, may help address these points and reflect the fact that the North Wales strategy found spatial diversity as North Wales is not a homogeneous area although it has some issues common across the region and others which are specific to locations.
- 4.10 The Regional Planning guidance for North Wales<sup>12</sup> was published by a consortium of seven local planning authorities in October 2002. The guidance included the regional planning principles including thriving communities where there is a need 'to ensure that the scale of the housing allocations is appropriate to their needs and is consistent with the provision of services and jobs'. This was reflected in the strategy that stated the 'provision of houses at a scale and in locations which support existing communities and economic development'.
- 4.11 The Regional Planning Guidance was not binding on authorities but was a material consideration in the preparation of Development Plans and the housing figures recommended in that report will be considered later in this Assessment.
- 4.12 The Wales Spatial Plan identifies a series of spatial planning areas within Wales that do not adhere to administrative boundaries.<sup>13</sup> The spatial planning areas identified in the WSP include North West Wales (Eryri and Mon), North East Wales (Border and Coast) and Central Wales that all fall within sections of the NWWLHMA study area.

The vision for Eryri a Mon is:

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

The vision for **Border and Coast** is:

An area harnessing the economic drivers on both sides of the border, reducing inequalities and improving the quality of its natural and physical assets.

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<sup>12</sup> North Wales Regional Planning Group, p.21.

<sup>13</sup> *People, Places, Futures* 2004, p.38, p.41, p.45.

The vision for **Central Wales** is:

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

### **Local policy context**

4.13 The Welsh Assembly Government stresses the importance of basing housing and planning policy in the evidence of a local housing market assessment which ‘develops an understanding of the nature and level of housing demand and need in their local housing markets’.<sup>14</sup> A LHMA will therefore provide local authorities and other stakeholders with the evidence required for sound policies in Local Development Plans, informed Housing Strategies and assist with work on corporate, community strategies including:

- Improving Anglesey Life,
- Gwynedd Together,
- Turning ideas in to reality - Conwy,
- Vision for Denbighshire 2025,
- Shaping the Future (Eryri Management Plan and LDP consultation report)

4.14 The ‘Shaping the Future’ report is the over-arching strategic document for the management of all aspects of the Snowdonia National Park. It co-ordinates and integrates other plans, strategies and actions in the National Park, where they affect National Park purposes and duty. The Management Plan also sets the vision and objectives for the National Park that will guide its future over the next 20 – 30 years and should consider the need for affordable housing within national park communities and how this is to be addressed under the Authority’s socio economic duty<sup>15</sup>.

4.15 Each Local Authority Local Housing Strategy sets out the housing priorities for the area and helps decide the priorities for allocation of social housing grant. It deals with maintenance, management and investment issues.

4.16 Development plans provide an overall vision and framework for future land use decisions. The position with development plans differs across the consortium; summarised below:

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<sup>14</sup> Welsh Assembly Government, *Local Housing Market Assessment Guidance*, 2006, p.7.

<sup>15</sup> Section 62(1) of the Environment Act 1995



Authority	Position
Anglesey	Work on LDP started. Preferred strategy due to be published May/June 2008.
Conwy	LDP preferred strategy published and being reviewed after consultation.
Denbighshire	LDP preferred strategy published and being reviewed after consultation.
Gwynedd	UDP continuing and inquiry completed. Inspector's report published in December 2007.
Snowdonia	LDP work started and preferred strategy published in February 2008.

4.17 Key housing issues to be addressed in Local Development Plans include:

- The establishment of a settlement strategy, often involving identifying sub areas,
- a hierarchy of settlements (main centres to rural hamlets),
- housing land allocations to meet planned requirements,
- maintaining a land supply,
- a mix of type of dwellings,
- provision for affordable housing.

The publication of the baseline LHMA is an important contribution to the preparation of sound development plans.

## Summary

4.18 The preparation of a Local Housing Market Assessment will inform the partnership and other stakeholders about housing demand and need in the study area. The assessment will inform local and regional strategies and improve the soundness of policy interventions. It can play a critical role in informing the housing policies to be included within Local Development Plans

## **5 The socio-economic context and key drivers of the housing market**

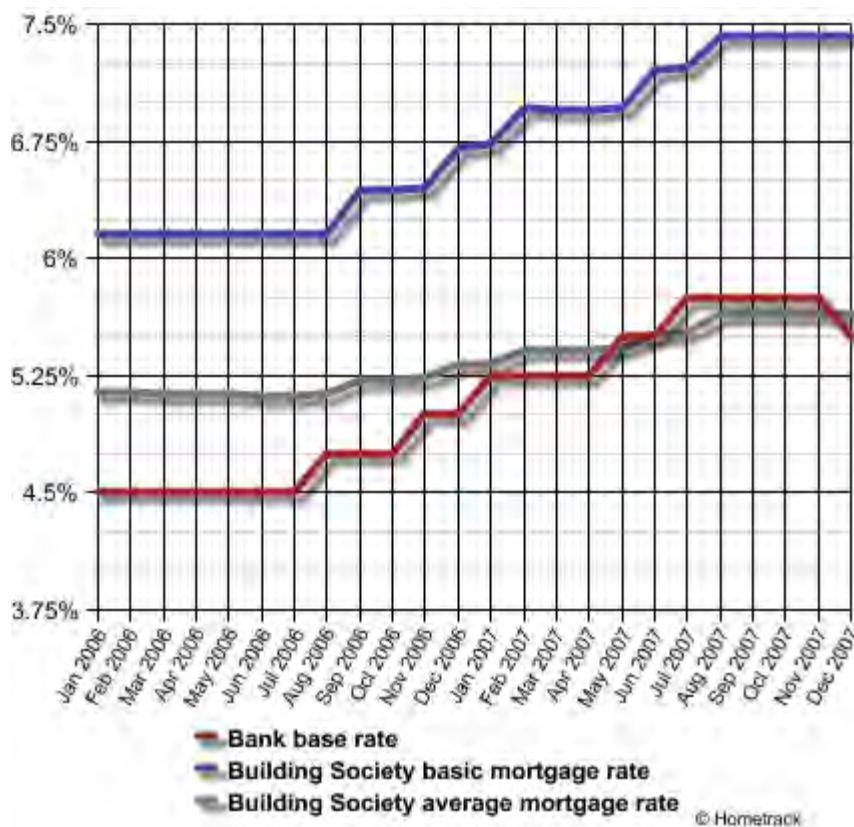
### **Introduction**

- 5.1 What happens in the housing markets of North West Wales is not just determined by local issues and the make up of the study area. The wider (macro) context has to be considered too, and these factors are often outside of the control of local policy makers. This assessment can only reflect the current understanding of these issues. However it is notable that during the preparation of this study major macro economic change did occur, showing that the factors affecting housing markets can change considerably, and rapidly, over a relatively short period of time. This section of the assessment gives a brief overview of some of these macro factors as well as looking at the socio-economic drivers of the study area. Further socio-economic findings are detailed in appendix 1.

### **Macro economics**

- 5.2 Setting the macro economic tone of this housing market assessment we find the current housing market to be uncertain. Interest rates are increasing. Between June and October 2006 interest rates increased from 4.5% to 4.95%, this trend continued as the assessment was compiled and by 5<sup>th</sup> July 2007 it had increased to 5.75%. Whether the UK should anticipate further increases is still debateable however the Bank of England's Monetary Commission voted on the 4<sup>th</sup> October to keep the rate as it is for the time being. Increases in interest rates make mortgages more expensive and may deter people from home ownership. On the other hand low interest rate levels, as experienced over the past decade or so, make it easier for mortgagees to borrow larger amounts and therefore keep up with elevated house prices. As the baseline LHMA is published media coverage of housing re possessions has increased, although levels remain low compared to previous periods of such problems.
- 5.3 This single macro economic factor illustrates why the LHMA can only consider the housing market issues as they are currently understood and economic commentators seem unclear on what trends will occur in the wider economy over the coming years. Many however anticipate a less buoyant economy than in the recent past. This was reflected in the Chancellors Comprehensive Public Spending Review and Pre Budget Statement in October 2007.

Graph 1 illustrates recent changes in interest rates



Source: Bank of England, 2007

## Socio – economic drivers of the study area

- 5.4 An extensive study of the principal socio-economic characteristics of the area was undertaken at an early stage of the assessment. The key findings were:-

Table 1: Population Levels 2006

Authority	Numbers
Anglesey	68,884
Conwy	111,273
Denbighshire	96,089
Gwynedd	118,250
Total	394,496
Snowdonia (estimate of population within the total figure of 394,496)	25,482*

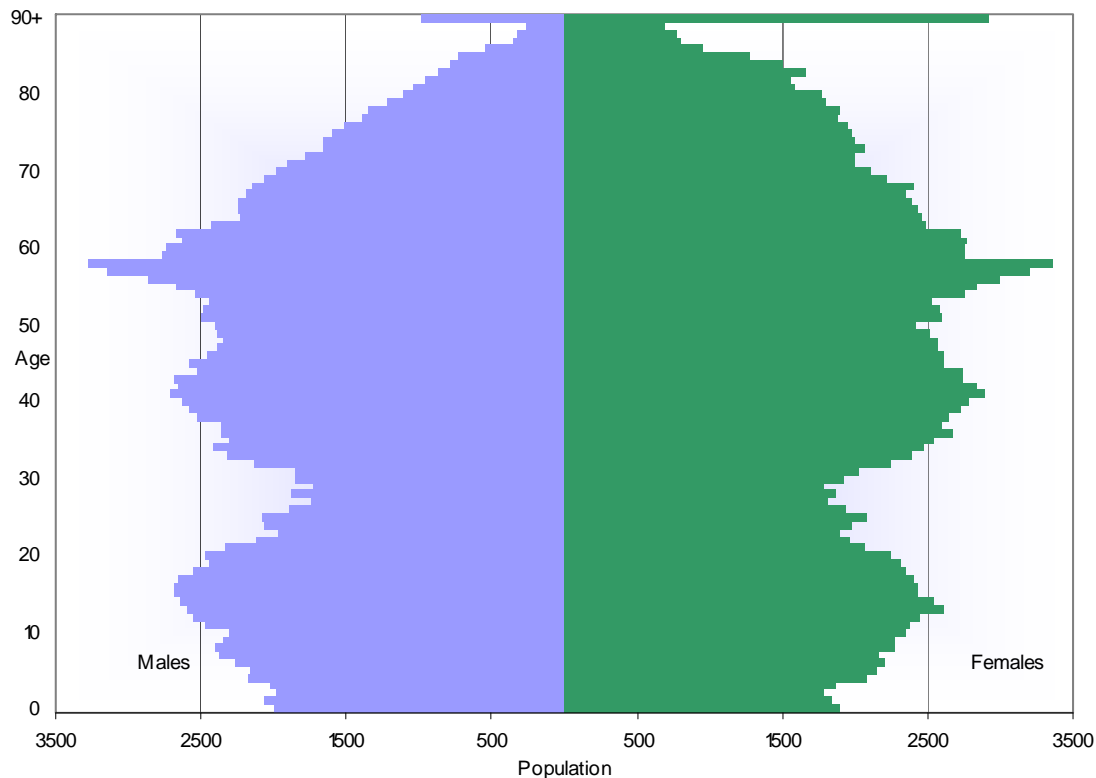
Source: ONS Mid Year estimate 2006 \* 2001 Census

## Age profile

- 5.5 The population pyramid below illustrates that there is a particular peak of those in the late 50s, this represents the post war “baby boomers” and in 10 years time this increase will have moved up the pyramid. The population pyramid also illustrates a

decline of those in their 20s, highlighting out-migration of young people leaving for further education and employment opportunities.

Figure 1 Population pyramid 2005 by age and gender for North West Wales

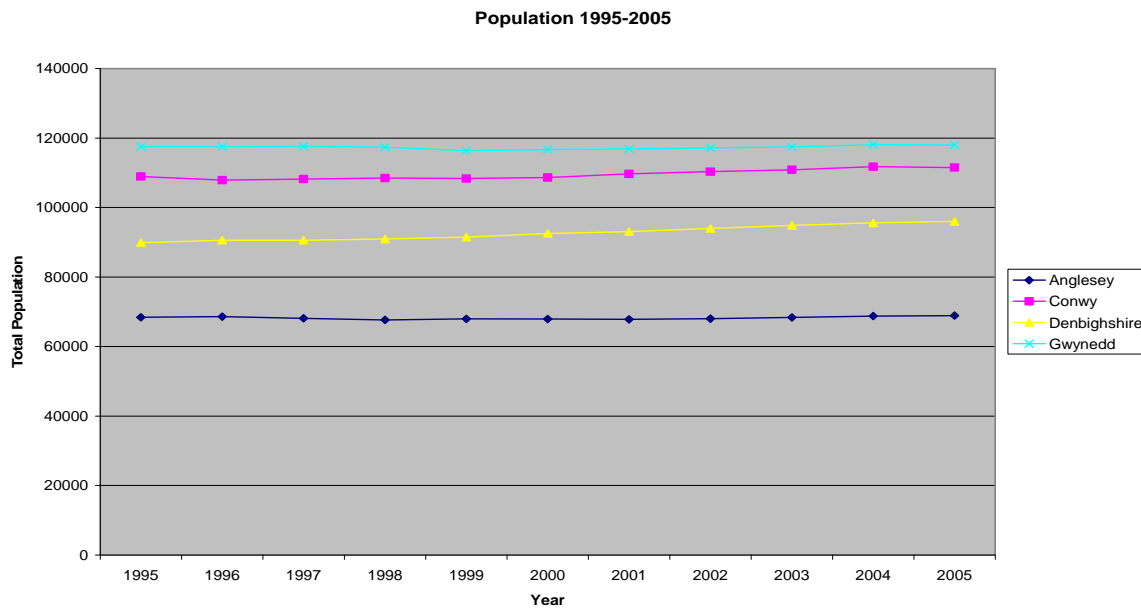


Source: 2005 Mid-Year Estimates

### Population changes

- 5.6 North West Wales population numbers have remained relatively stable in the 10 year period 1995-2005. For example Gwynedd increased from 117,526 in 1995 to 117,985 in 2005 and this local authority area remained the area with highest overall number of population in North West Wales. Denbighshire witnessed the largest population increase during the same period from 89,911 in 1995 to 95,991 in 2005. Graph 2 illustrates changes in the population for each authority over the period.

Graph 2:



Source: Derived from Mid Year population estimates 1995-2005

## Migration

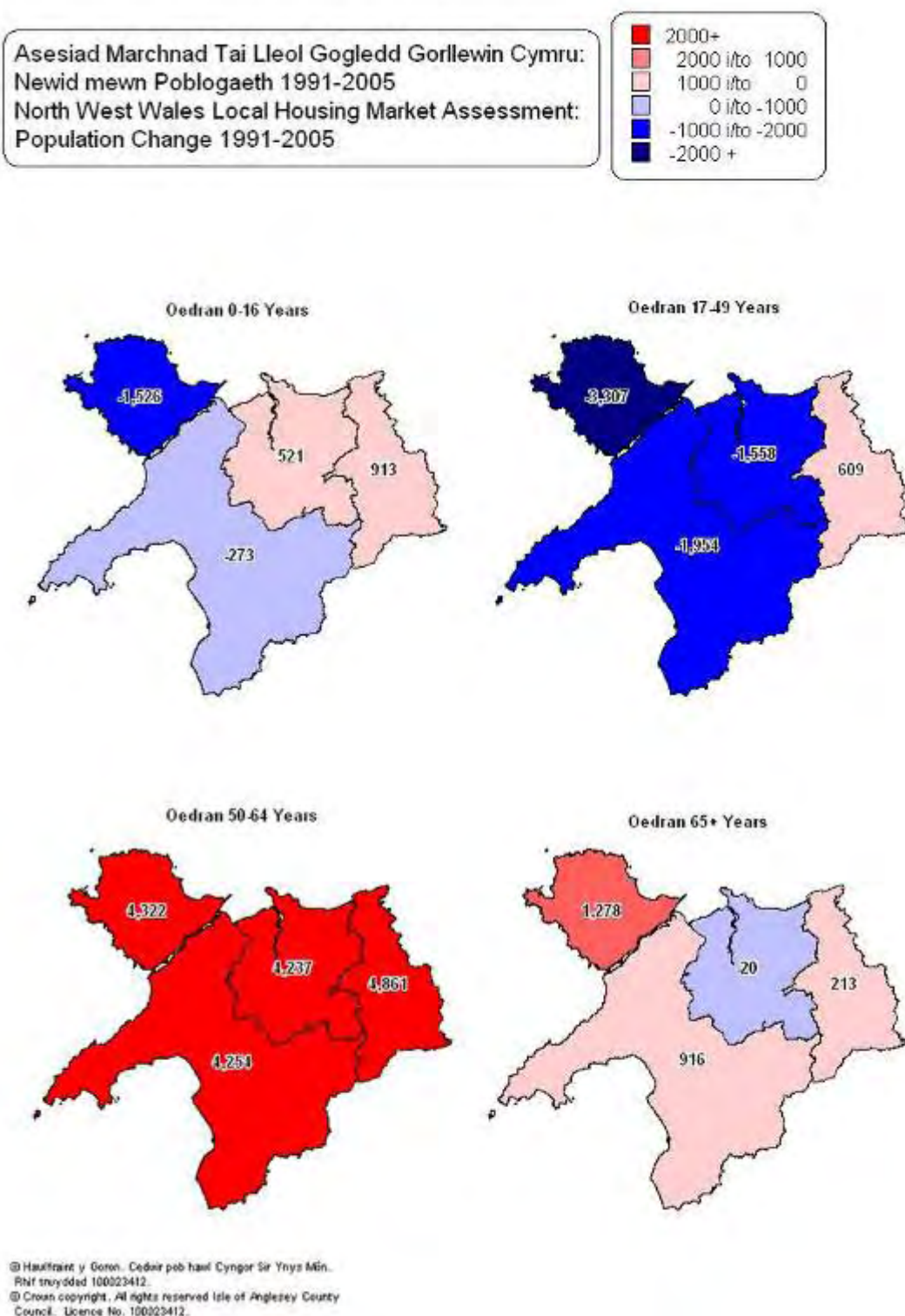
- 5.7 What Graph 2 does not portray however, is that North West Wales' steady population numbers is not due to natural change; rather it is net migration that has played an important part in the stability of the population levels. This is illustrated in detail for each authority in the appendix 1 but emphasises the central role that migration can play in influencing the housing market and determining changes within local areas.

## Non UK Migration

- 5.8 The figures derived from the National Insurance Register revealed that in-migration of non-UK Nationals recorded a 30.9% increase in migrant workers from 2002-2006 in North West Wales in which Denbighshire has seen the largest 33.6% increase. Although this over all increase is small compared to the total population a note of caution should be applied here as the National Insurance Register only records migrant workers that have registered to work, not those that have not. Therefore this does not necessarily present the full picture of the in-flow of migrant workers. Appendix 1 provides a chart illustrating National Insurance registrations of non-UK nationals 2002-2006. The assessment has noted this trend but believes further work is required to more fully understand the impact on the local housing markets of North West Wales. This is an issue providing an upward pressure on accommodation that is not fully reflected in current plans and strategies.

## Working age population

Maps 3: Population change 1991-2005



Source: Registrar general's mid year estimates of population

Note: data cannot be disaggregated for the NPA area.

5.9 The maps above demonstrate that from 1991-2005 there has been a reduction in the working age population and significant increase in the 50-64 age cohort. Indeed, according to Welsh Assembly 2003 based projections of household formation rates, the number of households headed by people aged 65+ are set to increase by almost a quarter between 2006 and 2016.

5.10 To summarise the key demographic findings for North West Wales are:

- Relatively Static Population level but an ageing population structure,
- Reduction in people of working age,
- Reduction in people of younger age groups,
- Significant increase in older age groups,
- Important changes due to migration but some uncertainty on impact of migration from non UK nationals,

### **Micro economics**

5.11 International economic factors also affect the micro economics of a particular area. The Welsh Economic Review warns that 'increased levels of competition particularly in the massive emerging economies of China and India, but also the EU Accession states, may be expected to impact regional manufacturing job prospects'.<sup>16</sup> As is demonstrated in the table below the local economies within both Denbighshire and Anglesey particularly depend on the manufacturing industry.

5.12 High levels of unemployment are an indicator of economic issues in an area. The table below summaries level of unemployment in NWW. Anglesey particularly stands out as the local authority area with the highest level of unemployment; however it is still below the Wales unemployment percentage. Furthermore, the unemployment figures recorded for 2006 by the Jobcentre Plus administrative system noted that unemployment rates actually decreased by 0.2% in Anglesey and by 0.1% in Gwynedd. Conwy's unemployment status remained the same in 2006 and only Denbighshire saw a 0.1% increase during the same year.<sup>17</sup>

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<sup>16</sup> Cardiff Business School, *Welsh Economic Review*, Vol 19.1 Spring 2007-10-10, p.15.

<sup>17</sup> Cardiff Business School, *Welsh Economic Review*, Vol 19.1 Spring 2007-10-10, p.16.

Table 2: The number of employees in each industrial sector in 2004

	<b>Conwy (including SNP)</b>		<b>Denbighshire</b>		<b>Gwynedd (including SNP)</b>		<b>Ynys Môn</b>	
<b>Employee jobs by industry</b>	<b>Total Number</b>	<b>%</b>	<b>Total Number</b>	<b>%</b>	<b>Total Number</b>	<b>%</b>	<b>Total Number</b>	<b>%</b>
<b>Manufacturing</b>	1,900	5.4	4,600	12.7	3,600	8.1	3,100	15.8
<b>Construction</b>	1,600	4.3	2,100	5.7	1,900	4.3	1,100	5.9
<b>Services</b>	32,200	89.5	29,600	81.1	38,600	86.1	14,600	75.1
<b>Distribution, hotels &amp; restaurants</b>	13,800	38.3	9,600	26.2	12,700	28.3	5,000	25.5
<b>Transport &amp; communications</b>	1,300	3.5	1,400	3.8	1,300	2.9	1,200	6.0
<b>Finance, IT, other business activities</b>	2,900	8.2	2,200	5.9	3,600	8.0	1,800	9.5
<b>Public admin, education &amp; health</b>	12,100	33.6	14,700	40.2	17,600	39.1	5,700	29.1
<b>Other services</b>	2,200	6.0	1,800	5.0	3,500	7.8	1,000	5.1
<b>Tourism-related</b>	6,000	16.7	4,300	11.8	5,900	13.1	2,000	10.2

Source: NOMIS official labour market statistic

Please note that the categories listed above have come from the Annual Business Enquiry (ABI). The Tourism-related employment refers to hotels, restaurants, camping sites, bars, library, archives, museums, travel agencies, sporting activities and other recreational activities.

Note: data cannot be disaggregated for the NPA area.

Table 3: Labour market statistics, April 2005 – March 2006

	<b>Employees</b>		<b>Self-employed</b>		<b>Unemployed</b>	
	<b>Numbers</b>	<b>%</b>	<b>Numbers</b>	<b>%</b>	<b>Numbers</b>	<b>%</b>
<b>Wales</b>	-	61.9	-	8.6	-	5.1
<b>Anglesey</b>	24,400	60.5	4,700	10.8	1,500	4.9
<b>Conwy</b>	39,600	61.4	9,400	13.1	1,800	3.4
<b>Denbighshire</b>	36,500	63.1	6,400	10.7	2,000	4.5
<b>Gwynedd</b>	41,800	59.3	10,000	13.7	1,900	3.5

Source: NOMIS official labour market statistic

## Identification of key drivers in local housing markets

- 5.13 From this data about the characteristics of the study area a workshop was organised to develop a better understanding of the drivers. A matrix was developed to assist this process which considered the likely impact and probability of the drivers influencing the housing markets in North West Wales. Key drivers were considered to be those things which will affect the housing market for the whole sub region over the next 5



years, and may also have an impact further into the future. Drivers can be attractors or repellents.

- 5.14 Each driver is rated by high, medium or low predictability and potential impact (displayed as predictability/impact in the list below). 'Predictability' can relate to how certain we are that a driver will have an impact and/or how well we are able to project/predict the way these factors will develop in the future.

Matrix 1

<b>High probability</b>	None	<ul style="list-style-type: none"> <li>Retirement migration</li> <li>Changes in service provision in rural areas.</li> </ul>	<ul style="list-style-type: none"> <li>Increase in single person households</li> <li>Ageing population structure</li> <li>Capacity constraints</li> <li>Commuting patterns</li> </ul>
<b>Medium probability</b>	None	<ul style="list-style-type: none"> <li>Nimbyism</li> <li>Ageing stock/ condition</li> <li>Quality of life</li> </ul>	<ul style="list-style-type: none"> <li>Reducing social housing stock</li> </ul>
<b>Low probability</b>	None	<ul style="list-style-type: none"> <li>Migration from EU accession countries</li> <li>Vacant stock</li> </ul>	<ul style="list-style-type: none"> <li>Job gains/losses</li> <li>House prices to income ratio</li> <li>LA/Govmt and other agencies policies, targets, strategies</li> </ul>
	<b>Low Impact</b>	<b>Medium Impact</b>	<b>High Impact</b>

- 5.15 Further analysis was carried out to identify the high impact drivers, as listed below:-

High impact and high predictability

- Increase in single person households
- Ageing population structure
- Capacity and Supply constraints (e.g. not building enough/wrong locations)
- Commuting patterns

High impact and medium predictability

- Reducing social housing stock

High impact and low predictability

- Jobs gains/losses – low/high

- House prices to incomes ratio – low/high
- LA, government and other agencies policies, targets and strategies – low/high

5.16 Many of the above listed drivers were also highlighted in stakeholder workshops held by the partnership. The qualitative data gathered in the workshops will go on form the more detailed profile of the housing market areas in the next phase of the assessment.

## 6 Housing profile

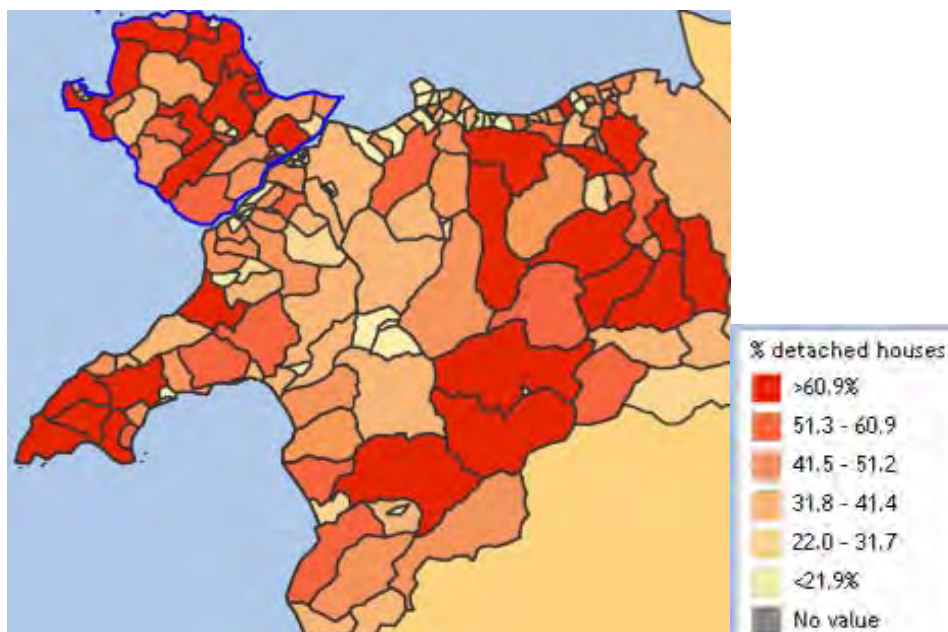
### Introduction

- 6.1 An essential component of the LHMA is an understanding of the housing stock available in North West Wales. Looking at housing tenure, type and supply this section provides a brief overview of the housing profile in North West Wales; further information regarding stock condition as well as other tenure prices and changes in demand over time can be found in the technical notes (appendix 2).

### Property types

- 6.2 Census 2001 confirmed that **detached properties** were the largest proportion of dwelling type in each local authority area in North West Wales. 15,068 of this property type in Anglesey, 48.6% of the stock on the island and 44.3% found in Denbighshire. Map 3 highlights the wards in which there were over 60.9% detached properties. Clusters of wards with over 60.9% are particularly prominent in the North Anglesey, the Llyn Peninsula, Bala and Vale of Clwyd HMAs.

Map 4: Detached properties

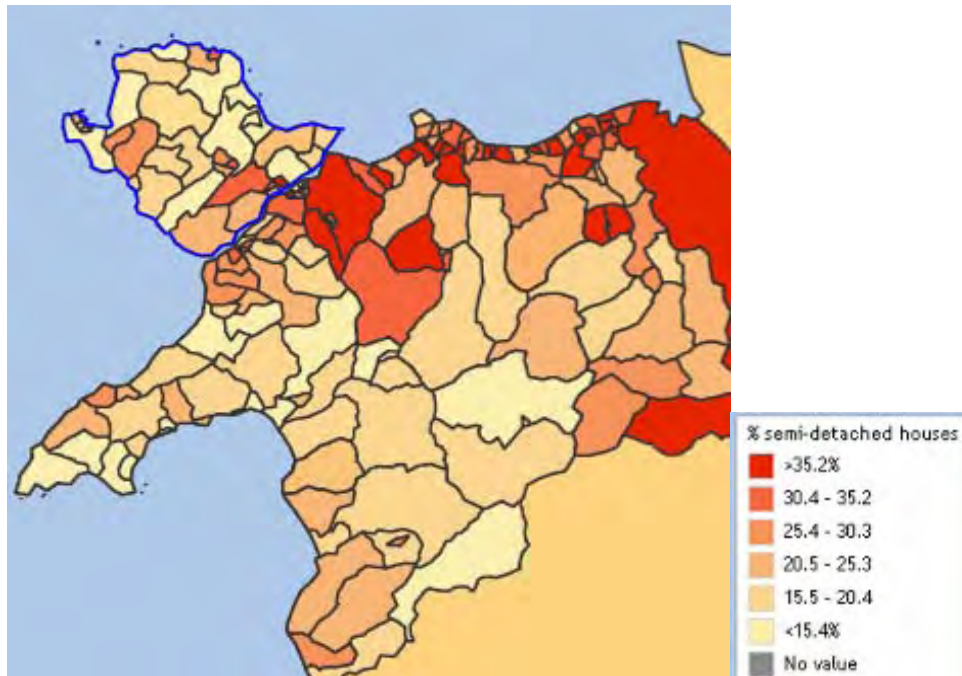


Source: Census 2001, Map © Hometrack 2007

- 6.3 Both Conwy and Denbighshire local authority areas have the largest proportion of semi detached properties within their housing stock. Census recorded that Conwy had 16,279 properties, equating to 35.3% of all property types in that local authority area. Denbighshire had 13,067 semi-detached properties, 31.4% of all property types. Particularly high concentrations of semi-detached properties are located in the

wards along the coastal strip, particularly the Menai, Llandudno, Bay of Colwyn and Rhyl HMAs.

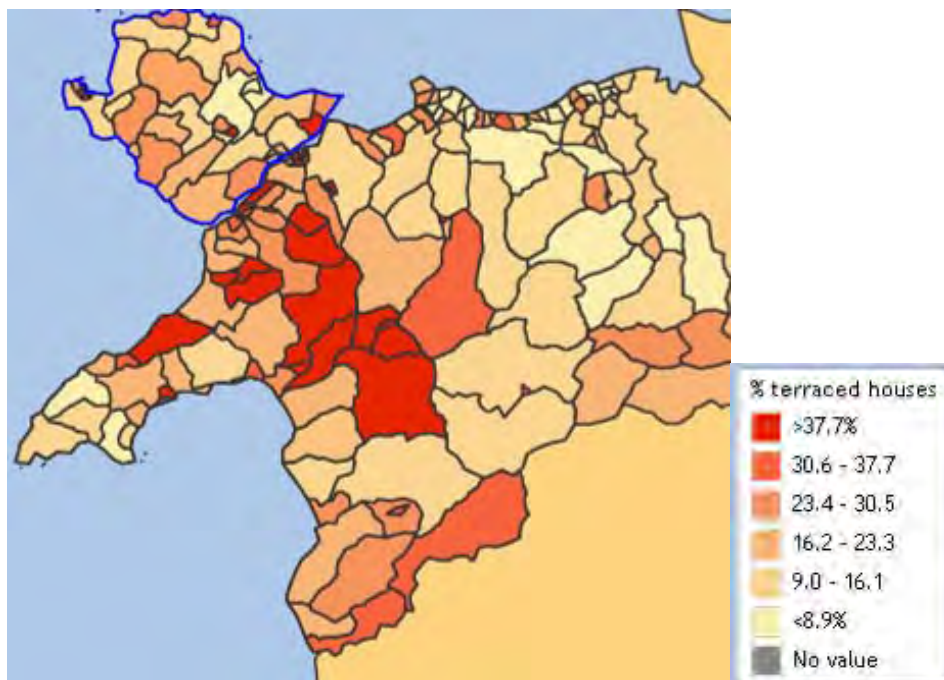
Map 5: Semi-detached properties



Source: Census 2001, Map © Hometrack 2007

- 6.4 Clusters of wards that contain high proportions of **terraced properties** are mainly located within the Porthmadog HMA. This also reflects the type of industries this property type was originally built for as many are in close proximity to quarries including Blaenau Ffestiniog and Dinorwic. Out of the four local authority areas Gwynedd has the highest proportion of terraced properties with 32.3%, 18,321 properties of this dwelling type recorded by Census 2001 and Anglesey with 20.1% of housing stock, 7,483 properties being terraced. Denbighshire has the lowest number of terraced properties just 5,499.

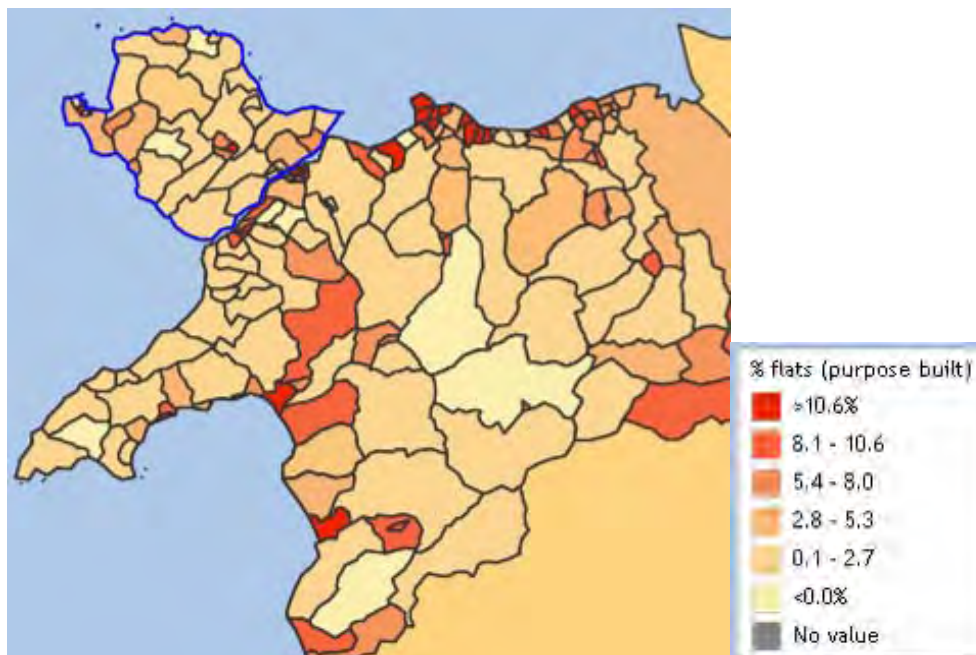
Map 6: Terrace properties



Source: Census 2001, Map © Hometrack 2007

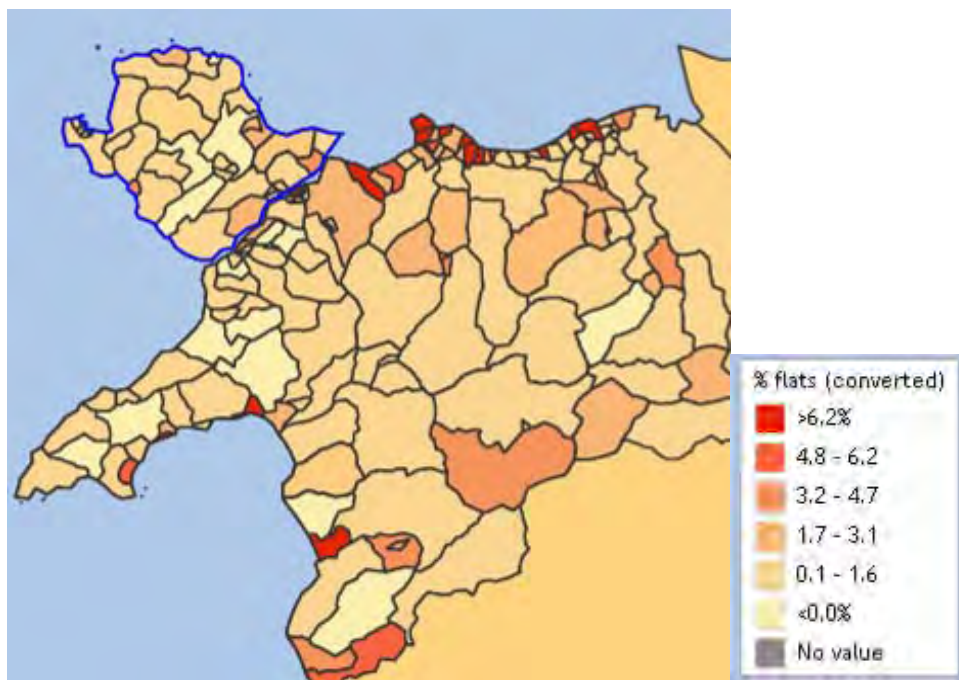
- 6.5 Compared to the other 3 local authority areas Conwy has the highest proportion of **purpose built block flats** make up 9.7% of Conwy's housing stock and conversion flats make up 5.9%. The majority of these property types are located in the urban and coastal wards that are within the Llandudno and Bay of Colwyn HMAs.

Map 7: Purpose built flats



Source: Census 2001, Map © Hometrack 2007

Map 8: Converted flats



Source: Census 2001, Map © Hometrack 2007

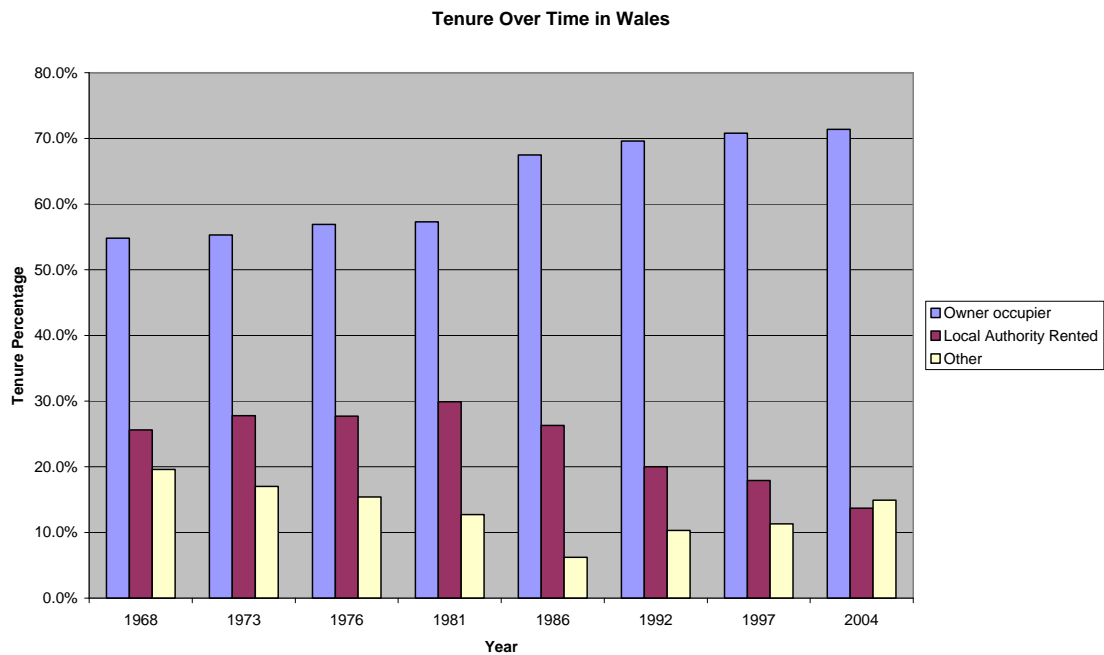
## Tenure

- 6.6 The Living in Wales Survey reported an increase in owner occupation from 69.6% of the population in 1992 to 70.8% in 1997 and 71.4% in 2004. Owner occupation is by far the largest proportion of tenure type in North West Wales as it is for the whole of Wales.
- 6.7 The chart below also illustrates the change in other (private rented and rented from a RSL) tenures from 1968 to 2004. In 1968 29% of the Welsh population were within this tenure category and at this time only 48% were in owner occupation. Significantly local authority rented has steadily declined since the introduction of Right to Buy in 1980, the above clearly demonstrates that by 1986 the affects of this policy were beginning to show. Coupled with little or no new local authority rented stock being built it has never replenished the reduction in this tenure. 1986 also signifies the point of change for other tenure, from this point private rented and RSL tenure increased to nearly 15% of Wales's tenure in 2004.



# North West Wales Local Housing Market Assessment Baseline report – consultation draft

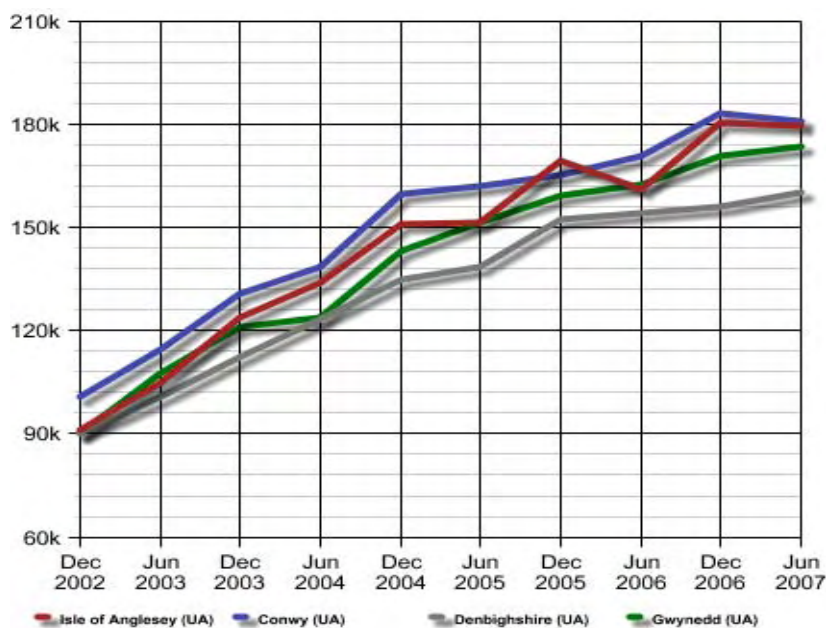
Chart 1



Source: Derived from the Living in Wales Survey 2004

- 6.8 Being the primary tenure in North West Wales, homeownership has witnessed a huge increase in house price from 2002 to 2007 as shown in the graph below. How the appearance of this graph will look in the coming years is open to speculation however monitoring such changes will continue to be a priority of this LHMA.

Graph: 3 Average house prices



Source: Hometrack

## Supply

- 6.9 The 2005 Welsh Housing Statistics estimated there were a total of 32,203 dwellings in Anglesey, 53,129 dwellings in Conwy, 40,217 dwellings in Denbighshire and 57,226 in Gwynedd. This gives a total of 182,775. Further information on the number of completions per year from as early as 1995 for some authorities can be found in appendix 2.

## Empty properties

- 6.10 There is some contention around the numbers of empty properties in North West Wales. Comparable data on empty properties is available from the 2001 Census, however some individual local authorities within the partnership are carrying out individual studies to assess the situation further. The 2001 Census reported on unoccupied household space, vacant household space and second residence/holiday accommodation as shown in the table below.

Table 4

	Isle of Anglesey (UA)		Conwy (UA)		Denbighshire (UA)		Gwynedd (UA)		SNP	
	No.	%	No.	%	No.	%	No.	%	No.	%
Occupied household space	28,354	91.4	48,062	93.2	39,891	95.7	49,237	86.7	11,211	20.8
Second residence/holiday accom	1,159	3.7	1,184	2.3	356	0.9	4,453	7.8	1,915	13.7
Unoccupied household space	2,678	8.6	3,488	6.8	1,804	4.3	7,559	13.3	2,763	19.8
Vacant household space	1,519	4.9	2,304	4.5	1,448	3.5	3,106	5.5	848	6.1
Total	31,032	100	51,550	100	41,695	100	56,796	100	13,974	100

Source: Census 2001

- 6.11 The baseline information which has been drawn together about the local housing market can be built upon to explore the likely needs and demands for homes in future years. Household numbers will continue to increase across the study and an understanding of these changes can help to shape planning and housing policy for the coming years.

## Assembly Government projections for North Wales

- 6.12 The Office for National Statistics have produced projections for North Wales on behalf of the Assembly Government which report as follows:



Table 5 - Welsh Assembly Government (ONS) population and household projections for North Wales- 2003-2026

	2003	2026	Change 2003-26	
Population projections	670,800	698,000*	27,200	4%
Household projections	285,200	330,900	45,700	16%

\* Population projections only provided by WAG up to 2023, so 2026 figure is extrapolated

- 6.13 The projections produced by the ONS are however not disaggregated to unitary authority area due to methodological issues. Further work was therefore required to produce material relevant to each authority and for the Local Housing Market study area.

### North Wales projections

- 6.14 During 2006-2007 the North Wales authorities cooperated in the production of population and household projections, and considered what such projections will mean for the supply of dwellings thorough development plans. The work is seen as a vital component in progressing new style Local Development Plans and updates previous projections for the North Wales area.
- 6.15 Regional demographic trends are a key element for individual local planning authorities in taking forward work on Local Development Plans and to underpin housing strategies. Local planning authorities are working together across North Wales to take account of regional demographic trends and this work also covers the authorities in the North West Wales Local Housing Market Assessment consortium.
- 6.16 Welsh Assembly Government Policy identifies the latest<sup>18</sup> national and sub-national household projections as the starting point for assessing household requirements and requires that local planning authorities should work together collaboratively, and with appropriate stakeholders, to apportion to each authority the Assembly Government household projections, or agree their own regional policy-based projections. This work is a valuable input to understand the potential supply of dwellings that will become available to meet the demands identified in this study.
- 6.17 There is a consensus amongst authorities on the local apportionment of the regional forecasts for population and, based on these, for future dwelling allocations. It proposes an apportionment of the regional figures to each planning authority in

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<sup>18</sup> 2003

accordance with national guidance and is intended to assist each authority in meeting the test of “soundness” in emerging Local Development Plans.

- 6.18 The North Wales Authorities have identified the following housing figures to reflect the local work on population and household projections.

Table 6 – proposed apportionment by Local Planning Authority (2008-2023)

	Annual requirement	Fifteen year equivalent
<b>Ynys Môn /Anglesey</b>	<b>175</b>	<b>2,625</b>
<b>Gwynedd</b>	<b>215</b>	<b>3,225</b>
<b>Conwy</b>	<b>355</b>	<b>5,325</b>
<b>SNP</b>	<b>40</b>	<b>600</b>
<b>Denbighshire</b>	<b>425</b>	<b>6,375</b>
<b>NWW LHMA study area sub total</b>	<b>1,210</b>	<b>18,150</b>
Flintshire	480	7,200
Wrexham	420	6,300
<b>North Wales</b>	<b>2,110</b>	<b>31,650</b>

The authorities may also give consent for affordable housing above this figure. The figures will be monitored through the annual monitoring reports of Local Development Plans and the land availability studies to ensure a five year supply of homes is maintained.

- 6.19 An important stage in agreeing baseline figures is to consider the implications with key stakeholders including elected representatives, the development industry, spatial plan colleagues and other providers of public services. Ongoing stakeholder debate about the baseline local housing market assessment will help in this task.

- 6.20 The North Wales Authorities have identified the following housing figures to reflect the local work on population and household projections.

## Summary

- 6.21 This over view of the existing housing stock across the study area shows the variations in the mix and type of dwellings. These are important factors which influence the current position and future of housing markets across North West Wales.

## 7 Affordability

### Policy context

- 7.1 Issues around affordability of homes for purchase and rent are central to much recent debate about housing markets. Chapter 5 indicated some of the uncertainties surrounding the macro economics but as we publish this baseline assessment it is none the less noted that national policy guidance make clear the central concern of ‘affordability’ to housing and planning policy. The Ministerial Interim Planning Policy Statement (MIPPS) on Housing<sup>19</sup> states that ‘a community’s need for affordable housing is a material planning consideration which must be taken into account in formulating development plan policies. Local Housing Market Assessments provide the evidence base supporting policies to deliver affordable housing through the land use planning system’. A key purpose of this chapter therefore is to explore the issues around affordability, house prices and rental levels and how they relate to incomes in the study area.
- 7.2 The MIPPS was reinforced by the review of Technical Advice Note 2 on Planning and Affordable Housing<sup>20</sup> which confirmed at paragraph 9.1.4 that an assessment was vital to underpin sound policies and ‘must include monitoring so that responses to changing housing requirements can be reflected in updated development plans and housing strategies’. Finally the production of ‘The Affordable Housing Toolkit’ in June 2006 completed a suite of fresh guidance emphasising the vital role of LHMAs in providing an understanding of need and demand across Wales.
- 7.3 The Barker Review<sup>21</sup> recognised that in the UK ‘in 2002, only 37% of new households could afford to buy a property, compared to 46% in the late 1980s’. While Barker’s review was primarily set in an English context it did warn that:

Declining affordability also has wider consequences, restricting labour market flexibility, hampering the delivery of public services and leading to longer commuting times affecting individuals’ quality of life and environment.

- 7.4 Affordability determines whether households have the financial ability to purchase or rent in the open market without subsidy, those that do not have the ability turn to the affordable housing options.

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<sup>19</sup> Welsh Assembly Government, June 2006

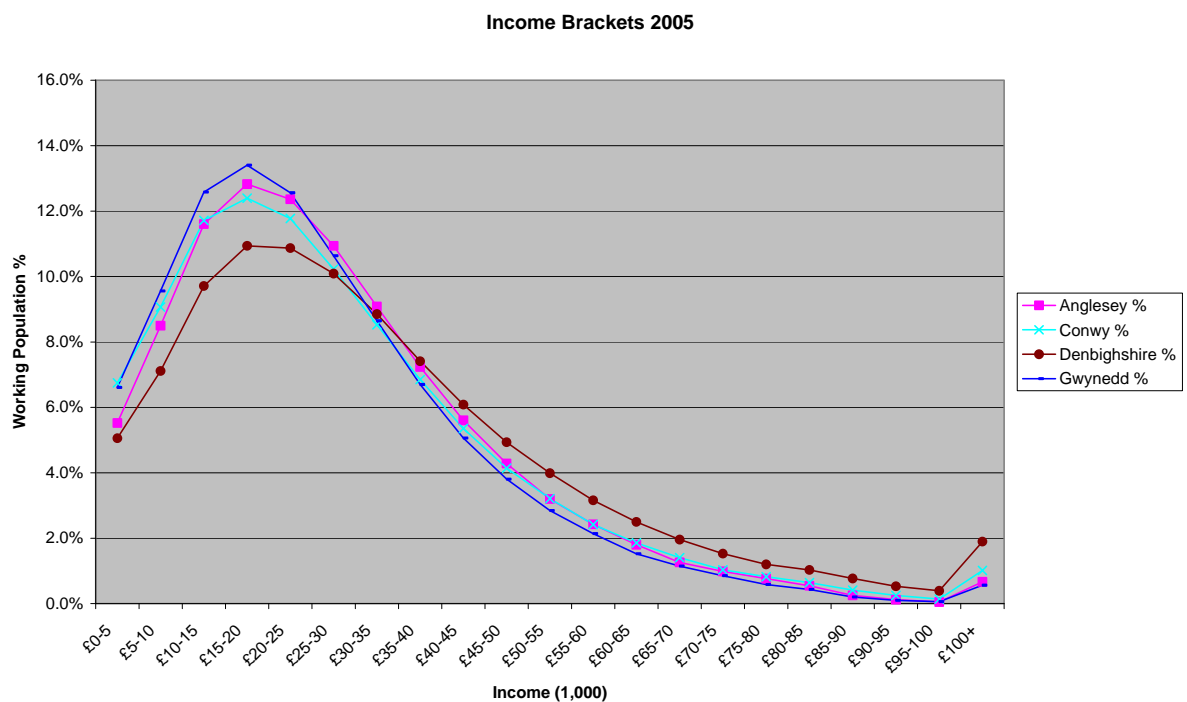
<sup>20</sup> Welsh Assembly Government, 2006

<sup>21</sup> *Interim Report – Analysis*, 2003, p.7.

## Local incomes

- 7.5 Looking at Graph 4 below CACI Paycheck data reveals that the largest proportion of the working population in North West Wales earned around £20 thousand in 2005. Gwynedd had the highest proportion, 13.4% of the working population. 12.8% in Anglesey, 12.4% in Conwy and only 10.9% in Denbighshire. Although Denbighshire had the lowest percentages of those earning between £5-10 thousand and £30-35 thousand it had the highest percentages of those earning over £35-40 thousand and £100 +.

Graph 4



Source: CACI Paycheck 2005

Note: the data is not disaggregated to NPA area

## Property for sale and rent

- 7.6 This section of the assessment considers information on the price of property for sale or rent in the study area by differing types of property.

### Private rental

- 7.7 The National Housing Federation defines private rent affordable if working households taking up new tenancies are not on housing benefit or spending over 25% or their income on rent.<sup>22</sup> This affordability limit is applied to CACI income data

<sup>22</sup> House of Commons, *Rent Levels, Affordability and Housing Benefit Research Paper*, 1998, p.36.

and is compared to median rental figures across the consortium area (last updated in August 2006) based on statistical returns from local estate agents collected by Hometrack.

Table: 7

	<b>Median Annual Income</b>	<b>1 bedroom properties median annual rent</b>	<b>2 bedroom properties median annual rent</b>	<b>3 bedroom properties median annual rent</b>
<b>Anglesey</b>	£22,500	£4,732	£5,096	£5,356
<b>Conwy</b>	£22,500	£4,160	£5,980	£6,552
<b>Denbighshire</b>	£17,500	£4,472	£5,668	£6,292
<b>Gwynedd</b>	£22,500	£1,924	£5,096	£6,552

Source: CACI Paycheck 2005, Hometrack

Note: the data is not disaggregated to NPA area

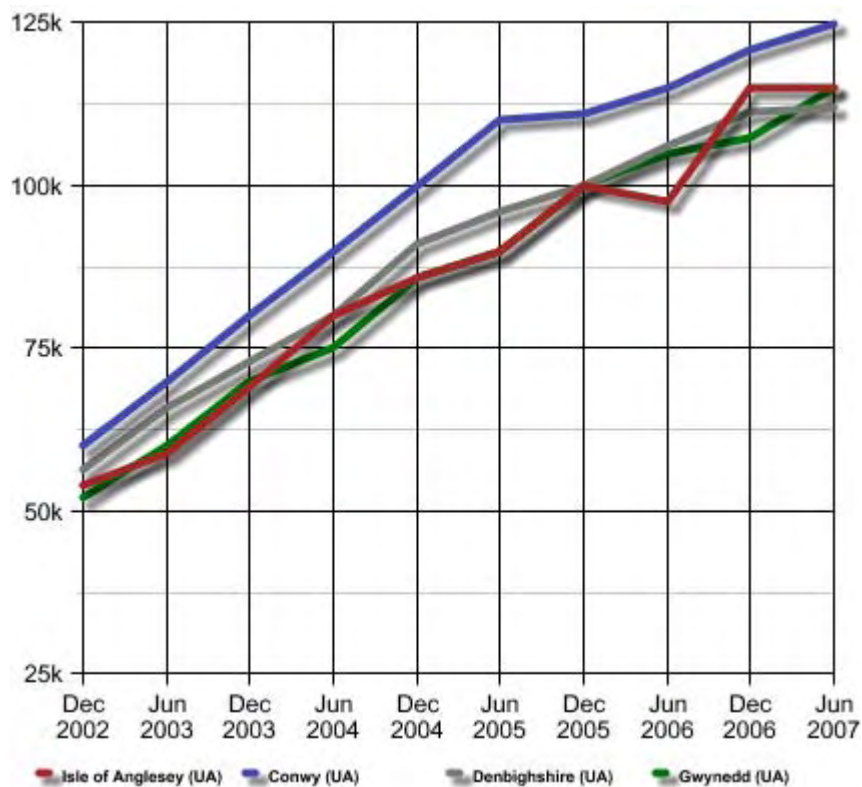
- 7.8 The only median rent that is deemed affordable by this definition in the above table is rent for 1 bedroom properties in all four local authority areas as all annual rents for this property is under the £5,625 in Anglesey, Conwy and Gwynedd and below the £4,375 for Denbighshire. Only 2 bedroom properties for Denbighshire and 2 bedroom properties for Anglesey and Gwynedd are deemed affordable. In all 5 authority areas no resident earning the median income or less would be able to afford to rent a 3 bedroom property. In all 4 unitary authority areas and in the Snowdonia National Park area no resident earning the median income or less would be able to afford to rent a 3 bedroom property.

### **Owner occupation**

- 7.9 The WAG Guide<sup>23</sup> advises that the lower quartile house prices are used in order to assess affordability as it reflects 'the typical entry-level price rather than the cheapest available property since the lowest prices will reflect sub-standard quality or environmental factors.'

<sup>23</sup> Welsh Assembly Government, 2006, p.43.

Graph 5: Lower quartile property prices



Source: Hometrack

Table: 8

	Annual Income	Entry level property prices for all property types	
	Median	Lower quartile	House price to income ratio
Anglesey	£22,500	£117,300	5.2
Conwy	£22,500	£126,200	5.6
Denbighshire	£17,500	£112,700	6.4
Gwynedd	£22,500	£111,200	4.9

Source: CACI Paycheck, Land Registry

Note: the data is not disaggregated to NPA area

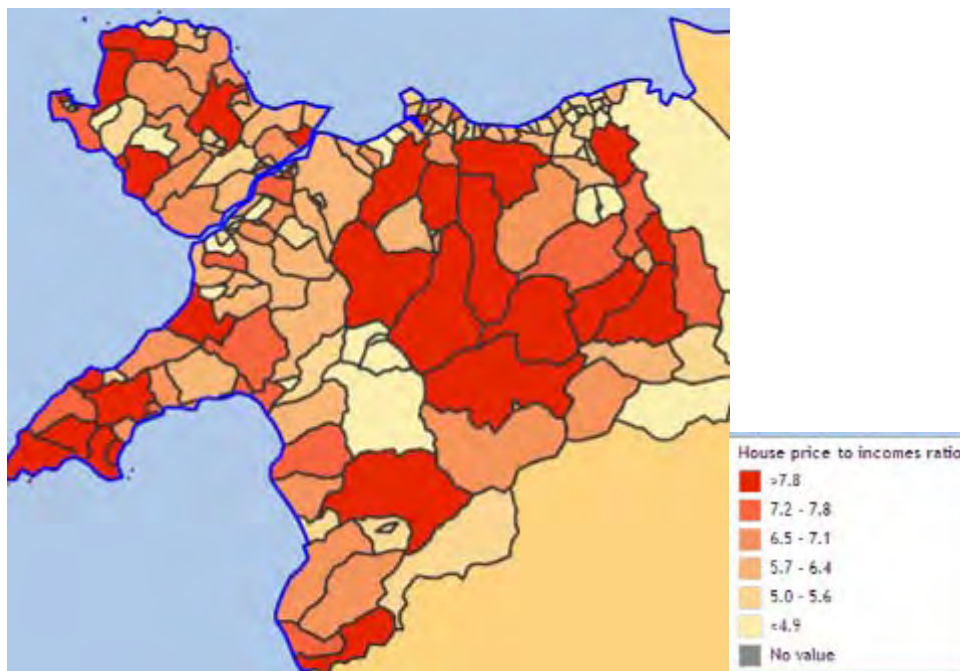
- 7.10 When these entry level house prices (as of December 2006 and rounded to the nearest hundred) are compared to median household income levels (CACI Paycheck 2005) in North West Wales it becomes apparent that in none of the local authority areas are the house price to income ratio close to 3.5. Indeed in Denbighshire the income ratio is 6.4 to 1, therefore a household would have to be able to obtain a mortgage over 6 times the household income. Although the above example is very broad in the sense that it does not apply capital to the household income it serves the

purpose of highlighting the stark variances now present in North West Wales between incomes and the cost of purchasing at entry level.

### Property “Hot spots”

- 7.11 The affordability issues are more pronounced in some areas. Certain “hot spots” in which the house price to income ratio is beyond 7.8 to 1 are illustrated in the map below, examples include the wards that are located in the Llyn Peninsula HMA and Dyffryn Conwy Housing Market Areas. HMA, Bala HMA and Dyffryn Conwy Housing Market Areas.

Map 9: House price to incomes ratio



Source: Hometrack & CACI Paycheck, Map © Hometrack 2007 (data last updated in June 2007)

- 7.12 These income to house price relationships show there may be a need for specific policy measures to assist particularly hard pressed communities, although the nature of those local policy responses may be limited by requirements of national policy.
- 7.13 The detailed findings of this part of the study are attached to this report in appendix 3 – affordability profile.

## 8 Housing needs

- 8.1 Over the last decade housing market changes across North West Wales have led to a significant focus on housing needs in local communities. As stated by Welsh Assembly Government:

In much of Wales there is a net shortage of affordable housing, and decisions about how much more to build should be based on levels of housing need. This chapter looks at the need, rather than the demand, for affordable housing.<sup>24</sup>

- 8.2 All four local authorities involved in the NWWLHMA have carried out a Housing Needs Survey through various consultants within the last 7 years. The following paragraphs summarise the Housing Needs Assessments carried out by each LA to date. Each assessment will have to be considered on its own merits as there are variances between the dates and sample of each.
- 8.3 The Isle of Anglesey County Council Housing Needs Survey was carried out by Fordham Research in 2001 and the completed report was published in December of that year. The sample consisted of 500 face-to-face interviews and 4,289 postal survey responses – a total sample of 4,789 responses of which were weighted for any measurable bias, 'this was done in terms of estimates of the numbers of households in each tenure group as well as estimates of the numbers of resident households in each of 40 sub-areas.'<sup>25</sup> In total Fordham estimated that a total of **311** affordable units per year for the next 5 years would be required in order to meet the backlog of existing needs and to contend with newly arising need.
- 8.4 Conwy County Borough Housing Needs Study was carried out by Opinion Research Services in 2002 in which a face-to-face survey of 1500 households, a postal census of rural areas based on a random and representative sample. A total of **209** were estimated to be the shortfall of affordable units per annum over a 5 year period. The housing needs assessment figures are for the Conwy local authority area and are not disaggregated to the two planning authorities that operate within Conwy (Conwy local planning authority area and the Snowdonia National Park planning authority area).
- 8.5 Fordham Research carried out a Market Demand & Housing Need Study for Denbighshire County Council in 2003. This was based on 303 face-to-face interviews and 3,198 postal questionnaire responses. The survey data was weighted to ensure

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<sup>24</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p. 61.

<sup>25</sup> Fordham Research, *Isle of Anglesey County Council Housing Needs Survey Volume 1 – Assessing Housing Need*, 2001, p.15.



that it was representative of all households in Denbighshire – this was done in terms of the number of households in each sub-area and within five main tenure groups. **645** units per annum was the affordable housing shortfall estimated by Fordham for a 5 year period.

- 8.6 Gwynedd Council Housing Needs Assessment was carried out by Market Research Wales in 2002 and was based on a programme of face-to-face interviews in 3,250 households based on a random sample. The sample was stratified by 13 key service delivery areas in Gwynedd, with an even distribution of 250 interviews to be achieved in each area all carried out between December 1998 and January 1999. A total of **314** affordable units per annum for a 5 year period was the shortfall estimated by Market Research Wales for Gwynedd. The housing needs assessment figures are for the Gwynedd as a whole and are not disaggregated to the two planning authorities that operate within local authority (Gwynedd local planning authority area and the Snowdonia National Park planning authority area).
- 8.7 Previously Housing Needs Assessments have been led by the housing authorities and there has been no expectation on the Snowdonia National Park Authority as a local planning authority to undertake housing needs assessment. As a result Snowdonia National Park Authority (nor the local planning authorities of Gwynedd and Conwy) does not have access to disaggregated data from the housing needs assessments referred to in 8.3 and 8.5 above.
- 8.8 As part of this baseline report the NWWLHMA initially attempted to follow Version A of the WAG guidance in order to carry out the assessment, by using only secondary sources an estimate of need by each local authority and national park was the intended output. Various information technology and other issues arose around extracting the data from each LA & HA housing register until it became apparent that this method would take longer than the allotted WAG timescale for the initial NWWLHMA report to be submitted. However in appendix 4 Housing Needs Assessment following Version A of the WAG guidance was completed for Conwy local authority area. This one calculation sets the precedent for the future Housing Needs Assessments that will be carried out as part of the second phase of the NWWLHMA for each local authority and national park area.

## Summary

- 8.9 This baseline analysis has been dependent upon existing housing need surveys of various dates. These surveys have in some places been supplemented by the work

of Rural Housing Enablers, or other local studies that have updated the initial surveys. Given the importance of the housing need debate then the partnership will have to make an early decision during the next phase of work whether, and what, additional survey work is required to update all the existing surveys. One focus of this work will be the statutory housing registers held by local authorities. Such enhanced survey work would enhance existing secondary data and enhance the LHMA.

## 9 Identification of local housing market areas

### Introduction

- 9.1 Based on the study of the context of the housing market and key drivers, this section of the report sets out an analysis of the baseline housing market areas across North West Wales. The baseline assessment identifies 13 potential local housing market areas (map 12) and this section of the report explains how the areas were identified. These areas are not set in stone and a key purpose of the consultation period is to seek reaction and comment to these baseline findings.
- 9.2 Identifying housing market areas within North West Wales has a number of benefits including encouraging partnership working between Authorities by observing that housing market boundaries do not necessarily adhere to local authority boundaries. A clear objective of identifying housing market areas and the overarching purpose of identifying them is to be able to understand the levels of demand and need within. As explained in the WAG guidance once these levels have been identified the assessment will be able to ascertain whether:
- In a high demand area, which areas can be regarded as sufficiently remote that the provision of additional affordable housing will not undermine the achievement of housing policy objectives in the core area; and conversely
  - in a low demand area, which areas are regarded as remote in that the provision of new housing would not undermine demand in the core area.<sup>26</sup>
- 9.3 Identifying the levels of demand and need within the housing market areas is an important objective of the second phase of the LHMA. Prior to this it is paramount that the housing market areas are identified and the methodology for doing so is agreed upon within the partnership.
- 9.4 Following WAG guidance it is noted that functional housing market areas are ‘the geographical area within which there are clear links between where people both live and work’<sup>27</sup>. To explore this interrelationship and help identify the housing markets the assessment starts to look at housing markets and issues concerning them based on travel-to-work patterns.

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<sup>26</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p.14.

<sup>27</sup> Ibid, p.10.

- 9.5 Map 10 shows that a high proportion of the people who live on the **Isle of Anglesey** travel to Gwynedd to work. Around 7,000\* people (over 20.1% of the working age population) live in Anglesey and work in Gwynedd. 70% of the residents live and work in Anglesey; this is the lowest level of self containment in North West Wales.
- 9.6 There is a high level of self containment in **Gwynedd** as 91% (47,000) of the resident working population work within Gwynedd. Around a 1,000 of the remaining population work in Anglesey and 1,000 in Conwy.
- 9.7 In **Conwy** 74% of the residents work within the local authority area; a slightly higher level of self-containment than is found in Anglesey. Conwy has the strongest links with Denbighshire with over 7,000 residents working in that local authority area; whereas 3,000 Denbighshire residents work in Conwy.
- 9.8 **Denbighshire** has the highest number of residents that work outside Wales compared to the other local authority areas in North West Wales; 6.8% of the residents are within this category. Denbighshire also has the largest proportion (11.4%) of residents that work in other Welsh local authority areas, of which there is 2,000 that work in Wrexham and 3,000 in Flintshire. 73% of Denbighshire's population live and work within the local authority area a slightly lower level of self-containment than Conwy and a higher level than that of Anglesey. The North East Wales Local Housing Market Assessment concurs with this picture that Denbighshire has stronger links with the North West in terms of living and working patterns than with the other local authority areas within the North East Wales assessment area.

## Methodology

- 9.9 Having identified the importance of travel to work patterns as a key driver in helping to identify potential local housing markets, the NWWLHMA partnership decided to use the 2001 Census based Travel-to-work areas (TTWA) (map 11) as the building blocks for the geographical identification of local housing markets at a sub-unitary authority level. Based on lower level super output areas, these TTWA are not confined by local authority boundaries, and seek to identify self-contained employment markets. Having already intuitively drawn up local housing market maps based on local knowledge, the analysis of data at the TTWA level helped to refine the

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\* Please note that the above figures are rounded to the nearest thousand.

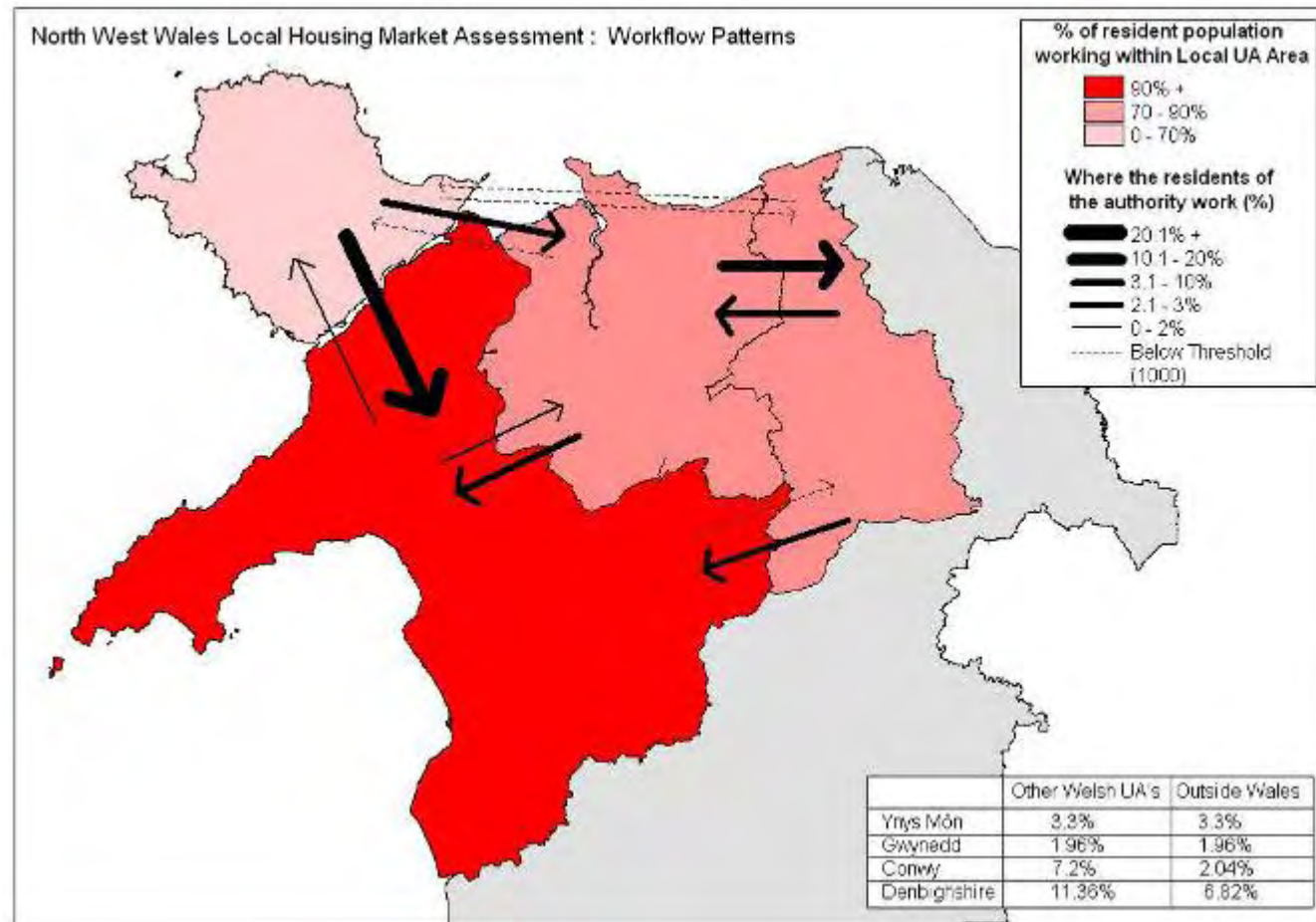
partnership's understanding of the LHMA. Combining the two approaches, an initial map of local housing market areas was drawn up and is presented in map 12.

- 9.10 In a Housing Market Area workshop the partnership looked at several methods to help consider market areas including census units such as super output areas. The most useful fit was found when considering ward boundaries in relation to TTWA areas and these were mapped to begin identifying HMAs in the study area. This is not to say that LHMA partnership perceptions of Housing Market Areas (HMAs) adhere to ward boundaries but by using ward boundaries in the first instance it allowed the partnership to be able to begin building and testing the HMAs. Therefore the ward boundaries are not to be taken prescriptively – they provided the partnership with a means to begin testing the areas by aggregating census data into these areas.
- 9.11 By building HMA profiles and beginning to map the housing market areas it is essential to the partnership approach that the HMAs are considered through a consultation process. This consultation process has already begun through the workshops held in the Stakeholder Event in Venue Cymru, (Autumn 2007). Particular areas that are already being discussed within the partnership are the LA boundaries that currently prescript where the bottom of the lower end of HMAs join mid Wales. Furthermore whether area 8 split diagonally would be a more accurate representation of the HMAs in that area.
- 9.12 Further considerations as evidence of housing markets that the partnership could consider is school catchment areas and distribution of local newspapers. The LHMA partnership also agrees that once further analysis of the HMAs is carried out we will find that 'in geographically peripheral areas it is particularly likely that there will be some degree of overlap with other functional housing markets.'<sup>28</sup>

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<sup>28</sup> Ibid. p.15.

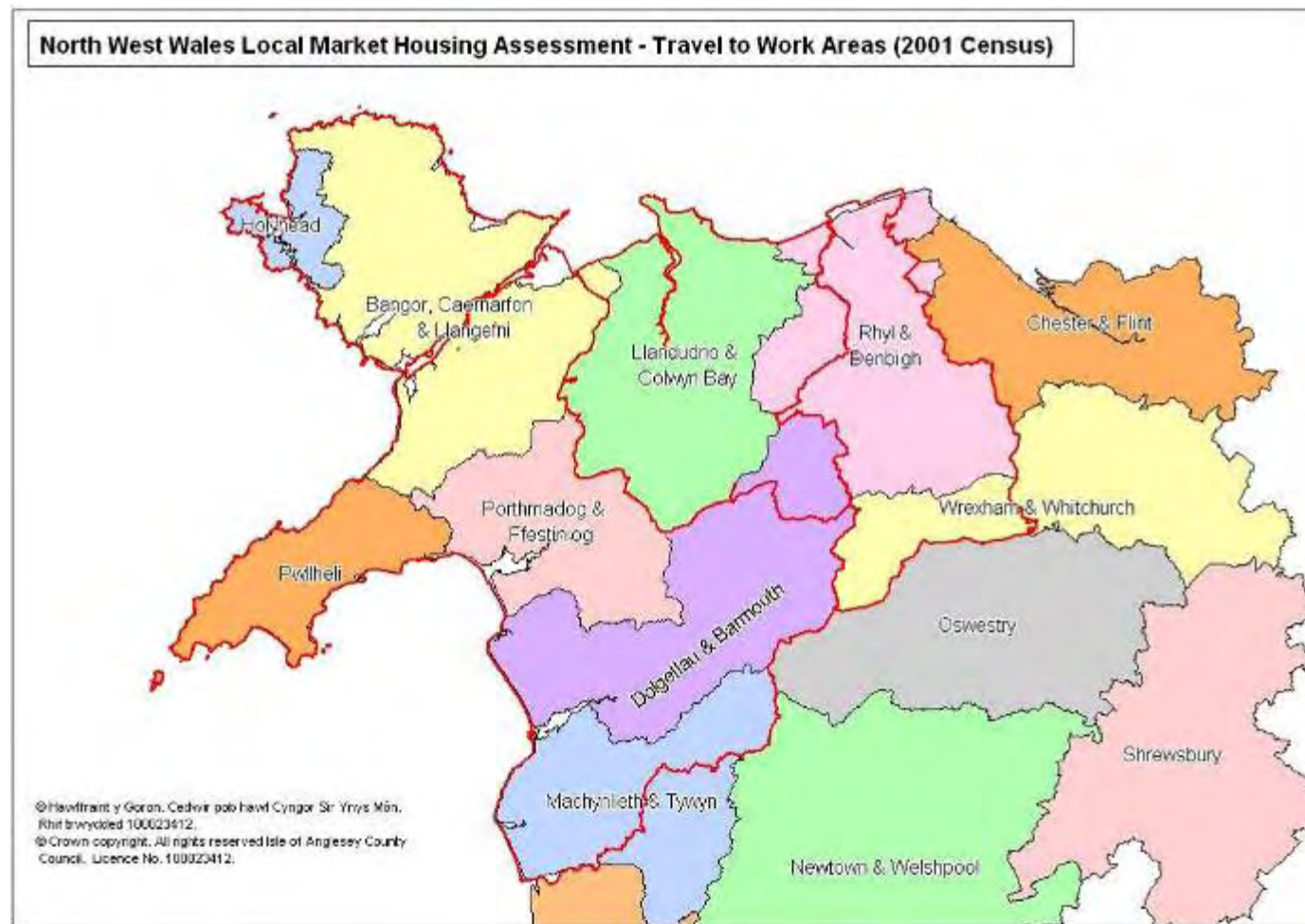
Map 10: commuting patterns



Source: ONS Commuting Statistics 2005

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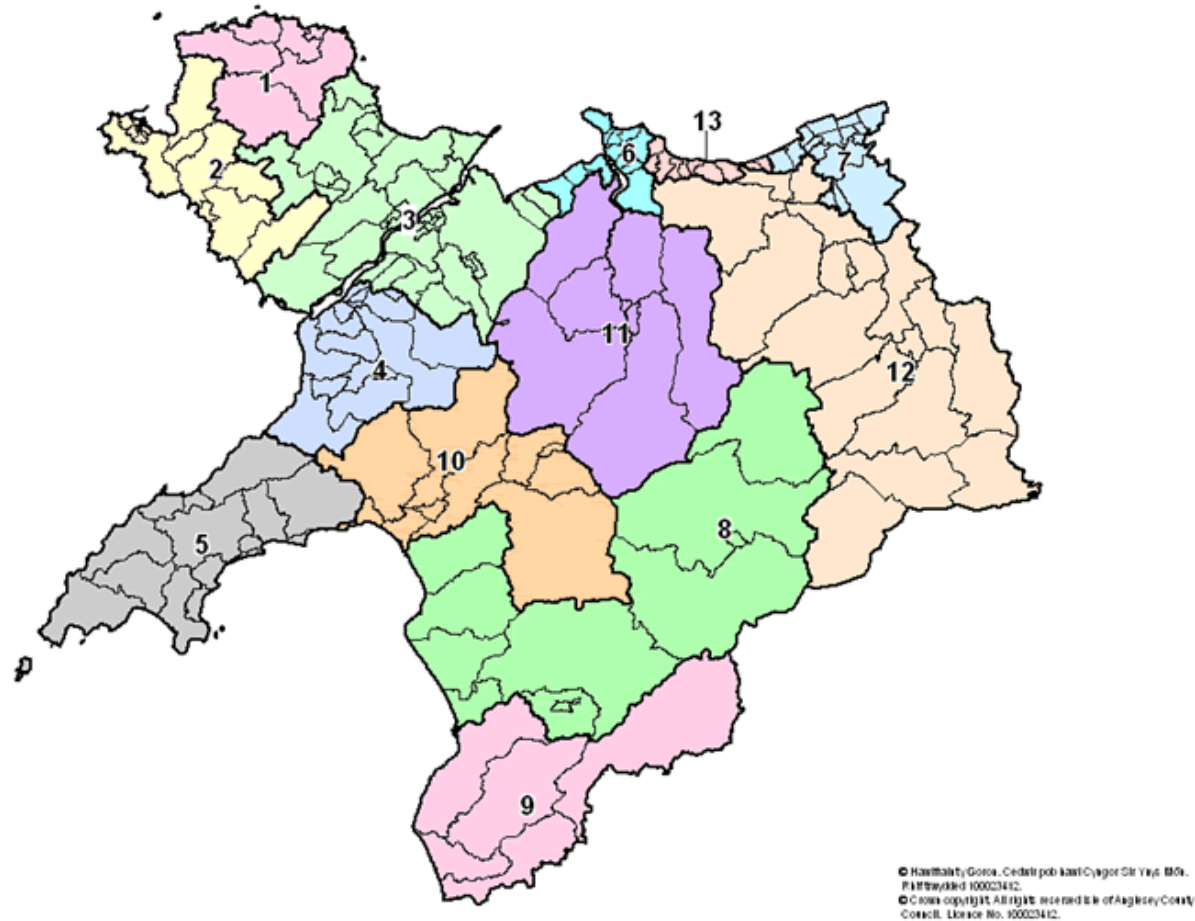
Map 11: Travel to work areas 2001



Source: Census 2001

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Map 12: local housing market areas, based on wards



LHMA number	Name
LHMA01	North Anglesey
LHMA02	Holyhead
LHMA03	Menai
LHMA 04	Caernarfon
LHMA05	Llyn Peninsula
LHMA06	Llandudno
LHMA07	Rhyl
LHMA08	Bala
LHMA09	South Gwynedd
LHMA10	Porthmadog
LHMA11	Dyffryn Conwy
LHMA12	Vale of Clwyd
LHMA13	Bay of Colwyn



## Local housing market area profiles

- 9.13 Working with the 13 housing markets identified it is found that each has a distinct economic profile. For example in 2001 **North Anglesey housing market area (1)** had over 7% of the population working in agriculture compared to just 2.5% in Wales. The highest proportion of those employed in North Anglesey was in the Public administration, education and health industries similar to the North West Wales and Wales profiles. The most populated areas are Cemaes and Amlwch although North Anglesey has a density of only 0.52 persons per hectare in the whole market area. This market area originally played host to one of world's largest open cast copper mines located at Mynydd Parys near Amlwch. But by 2001 this market area had the highest level of economic inactivity of those aged 16-74 (43%) in North West Wales and a high level of unemployment.<sup>29</sup> The Wylfa power station is located near Cemaes Bay and began electricity generation in 1971 but is set to cease producing in 2010. The Isle of Anglesey Council<sup>30</sup> is working with partners to cushion this blow to the local economy by capitalising on the Mon a Menai Programme in order to minimise the effects of Wylfa's decommissioning.
- 9.14 **Holyhead HMA (2)** has a ferry port located in Holyhead town and compared to the other HMAs it had the largest percentage of the resident population working within the transport industry, 9% compared to just 5.1% in North West Wales and 5.5% in Wales.<sup>31</sup> There has been recent investment in the Ferry Port in Holyhead and the waterfront is a continuing focus for potential regeneration. Not only is the maritime and leisure industry set to expand Holyhead is also an important international gateway providing potential to capture benefits from links with Ireland and is viewed as such by the Wales Spatial Plan. The Isle of Anglesey Council has also earmarked Holyhead town for a Regeneration Strategy. The Holyhead market area has the highest proportion of those working in manufacturing industry in North West Wales, 17% of the working population are within this sector, similar to the Wales figure of 17.3%.
- 9.15 The **Menai HMA (3)** encompasses the city of Bangor, and a number of towns/large villages including Benllech, Llangefni, Llanfair PG, Beaumaris and Menai Bridge, Y Felinheli and Bethesda. Tourist attractions within this market area include Beaumaris castle, the longest named village – Llanfair PG and the Benllech beach. The

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<sup>29</sup> Source: Derived from Census 2001 (see appendix 4)

<sup>30</sup> Economic Development Unit, *Business Plan 2007-2008*,

<sup>31</sup> Source: Derived from Census 2001 (see appendix 4)

ESYS<sup>32</sup> report also recognised this 'Menai Hub' as an economic area of growth and lists the following as main contributors to the employment growth in the sub-region: The University with its numerous research centres for example the Centre for Industrial and Commercial Optoelectronics, the Centre of Excellence for Technology and Industrial Collaboration, the Institute of Medical and Care Research and further potential and growth of other investment sources including IBM for the Technium CAST located in Bangor. The report also outlined the public administration and the health and care sector within the Menai Hub as being very significant for economic growth; Ysbyty Gwynedd (Gwynedd Hospital) is particularly mentioned as it is the main base for the North West Wales NHS trust. Not surprisingly then that Menai had over 34% of the population working within the public administration, education and health industries the highest in North West Wales.<sup>33</sup>

- 9.16 Caernarfon town is the main retail centre within the **Caernarfon HMA (4)**. It is also an important tourist area as a number of historical sites can be found in this market area including Caernarfon Castle. 22% of the market area population work within the distribution, hotels and catering industry, slightly higher than the Wales figure for the same industry. One of the largest employers in the area is Gwynedd Council, but there are other public sector employers meaning 32% of employees in the housing market area work within the public administration, education and health industries. Caernarfon town has received recent investment in the Victoria Dock area involving mixed use regeneration including apartments. The stakeholder session for the NWWLHMA showed that a number of local stakeholders' believe it will stimulate growth in this housing market area as the town of Caernarfon has been perceived as a relative housing market "cold spot".
- 9.17 The **Llyn Peninsula HMA (5)** is located at the most western point of North West Wales. Agriculture makes up 8.3% of employment in this market area, higher than the North Anglesey figure and particularly significant when compared to the 2.5% for Wales. A fifth of the population aged between 16-74 work from home and 27% of the resident population work in distribution, hotels and catering industries. Tourist attractions: beaches of Nefyn on the North coast of the peninsula and the beaches in Abersoch and Cricceth create further tourist pull into this market area and generate property "hot spots" given the high demand for second and holiday homes.

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<sup>32</sup> WAG, *North West Wales Economic Futures*, 2006, p.13.

<sup>33</sup> Source: Census 2001

- 9.18 The five HMAs mentioned above broadly fit within the Wales Spatial Plan area of Eryri a Mon. Within the WSP actions for this area include plans for further investment in other environmental power, the knowledge economy particularly around the maritime and marine energy sector. The WSP also recognised the Menai Hub, that is the cluster of towns located around the Menai Straits as being a significant area for future economic activity.
- 9.19 The following 3 HMAs fit within the Wales Spatial Plan areas of North East Wales, Boarder & Coast although this area also extends over to Flintshire and Wrexham.
- 9.20 **Llandudno HMA (6)** includes major tourist towns such as Conwy with heritage sites including Conwy Castle. Llandudno town was originally a Victorian tourist location and continues to attract significant numbers of tourists to the area. Venue Cymru is a new theatre of national standing. Correspondingly then this housing market area has the highest proportion of the working population 31.3%, working in the distribution, hotels and catering industries compared to a North West Wales figure of 24.7% and the Wales figure of 21.7%. The WSP notes that Llandudno, Conwy and Llandudno Junction are an economic hub as a service, retail and employment centre that links North East and North West Wales. Llandudno Junction will be the base for the new offices of the Welsh Assembly Government in North Wales and this is expected to impact upon the local housing market as a major new focus of employment is provided.
- 9.21 Adjacent to Llandudno HMA is the **Bay of Colwyn HMA (13)** which includes the coastal town of Colwyn Bay and Rhos on Sea. This market area is the most densely populated HMA in North West Wales; Census 2001 recorded over 11.22 persons per hectare compared to the Wales figure of 1.40. 32% worked within the public administration, education and health industries and 26.6% within the distribution, hotels and catering industries. This HMA is next to the **Rhyl HMA (7)** that comprises Abergele and Rhyl costal towns. As well as having the business park at St Asaph which has a number of administration, business services and public administration centres, this market area also plays host to manufacturers including Pilkington in St Asaph and Indesit at Bodelwyddan. The latter is also the home of a district general hospital, fittingly the highest proportion (28%) of the working population worked within the public administration, education and health industries.<sup>34</sup> A significant future development in this market area is the Rhyl West Development. According to Denbighshire County Council Development Brief they plan to regenerate Rhyl West

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<sup>34</sup> Source: Census 2001

to remedy the imbalance of tenure in the area, to improve the open space areas and to update the tourism function in the area.

- 9.22 The following 5 housing market areas also fall within one of the WSP areas, the Central Wales area although this also encompasses most of Mid and West Wales including Ceredigion and Powys counties. The 5 HMAs occupy the northern most section of Central Wales and include **Porthmadog HMA (10)**. This HMA is mainly positioned within Snowdonia National Park deemed by the ESYS<sup>35</sup> as having a healthy employment performance and recognise important employment sectors and contributors within agriculture and forestry. Other key employment sectors of the national park are the tourism, attractions within this HMA include Llanberis slate mine. Porthmadog HMA nearly 30% worked within the distribution, hotels and catering industries.
- 9.23 Similarly a considerable section of **Dyffryn Conwy HMA (11)** is within the Snowdonia National Park area. Betws-y-coed is one of the centres of tourist activity in this HMA. This HMA actually has a high economic activity rating of 64% noted by Census 2001, which also found that one fifth of the population aged 16-74 work from home.
- 9.24 Both **Bala HMA (8)** and **South Gwynedd HMA (9)** are located entirely within Snowdonia National Park. Both HMAs are similar in the sense that they are both located along the west coast and predominantly rural in nature. Both have a similar number of persons per hectare, 0.18 in Bala and 0.19 in South Gwynedd. The agricultural industry is also a key employment sector in both, 8% in South Gwynedd and 9% in Bala of the working population were noted by Census 2001 to have worked in this industry. Similarly both HMA have comparable percentages of those working with the other significant industries to the HMAs including public administration, education and health and distribution, hotels and catering industries. The partnership has not reached any firm conclusion about HMAs 8 and 9 and will continue the dialogue about these areas with partners in the Central Wales Spatial Plan process.
- 9.25 Out of the five HMAs within Central Wales (WSP) the **HMA Vale of Clwyd (12)** is not located in partly or entirely within Snowdonia National Park. Vale of Clwyd is the largest housing market area geographically in North West Wales. It also boasts the highest economic activity rating in North West Wales (66%). Qualitative data from the NWWLHMA stakeholder session noted that perceptively it was felt that this area's

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<sup>35</sup> WAG, *North West Wales Economic Futures*, 2006, p.66.

economy particularly leans more to the north east than the other four HMAs in Central Wales (WSP).

- 9.26 After publication of the baseline report the HMA will be enhanced with a more detailed analysis of the current housing stock, changing demand and housing need profile to deepen our understanding of the changing housing requirements in the study area.

### **Summary**

- 9.27 A review of key economic and social data informed by travel to work patterns in the study area has led to the identification of 13 local Housing Market Areas. Consultation with key local stakeholders will provide a critical review of the baseline findings in this report and make a valuable contribution to the ongoing assessment. The partnership has some unresolved questions about the boundaries between some HMA upon which the views of stakeholders would be greatly appreciated.

## 10 Conclusions

10.1 The Local Housing Market Assessment for North Wales has been produced by a consortium initially lead by local authorities including the Snowdonia National Park. The consortium has been coordinated by an appointment from Bangor University based with Conwy County Borough Council. The LHMA process will continue over the next two years in order to help refine and improve the assessment, and coordinate local responses to other tasks identified in the future work programme. Core funding from the Welsh Assembly Government helped to move the agenda of 'Making the Connections' across organisational and geographical boundaries a reality.

10.2 After reviewing a broad range of social and economic data the key drivers for housing markets across North West Wales have been suggested and will be reviewed in the light of consultation. The drivers include:

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

A number of more detailed statistics about the study area are set out in a technical appendix to this main report.

10.3 The drivers identified by the study can be viewed in the light of travel to work patterns which this assessment suggests broadly shapes the local housing markets. Thirteen (13) initial market areas are identified. While some of these are contained wholly within the boundaries of a single authority (e.g. Llyn in Gwynedd) other market areas are cross boundary in nature (e.g. Menai market area).

10.4 There are a number of major challenges facing housing markets in the study area. These revolve around issues of affordability and supply and the future health of the economy. They include issues about the culture of the planning system and its ability to deliver the necessary changes in local markets.

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- 10.5 However there are also important issues relating to collaboration between local authorities in data management and securing consistency of systems. Such matters have been built in to the work programme of the LHMA consortium.
- 10.6 The consortium/partnership which will oversee this work now needs to be revised and extended to provide for better engagement beyond the core local authority partners.
- 10.7 A key issue for the North West Wales LHMA has been the building of capacity/skills to maintain this type of work in the future. By adopting a consortium approach in partnership with the University it is hoped that the skills and experience will be strengthened and retained locally so that stakeholders gain from that process. Indeed the production of this initial report has depended upon the different contributions of staff from various Councils working to a common brief.
- 10.8 The assessment will also benefit from the consultation with stakeholders and responses to this report will be carefully considered to help ensure a robust market assessment appears to inform work on housing, planning, regeneration and spatial strategies for the coming years.

## 11 Next steps

- 11.1 The purpose of this chapter is to refine the project for the next phase. The partnership recognises that its aims are ambitious and wide ranging, and that success can only be attained by a robust project management approach, ensuring that progress is monitored and evaluated as the project moves through the three year programme.

### Timescales and phasing

- 11.2 The process of carrying out the North West Wales LHMA is to be carried out over a number of different phases. On writing this report the first phase has been completed and this involved:

- building the initial partnership
- preliminary engagement with local stakeholders,
- defining housing markets,
- reporting the preliminary findings as a basis for stakeholder consultation,
- providing material to help inform housing strategies and LDPs.

Tasks for the next phase of work include:

- Strengthening stakeholder participation
- reviewing the results of consultation and amending the housing market areas assessment as necessary,
- updating housing need data for the study area at local authority, national park and housing market level,
- progressing work on Gypsy and Traveller assessment to ensure accommodation issues are addressed,
- developing a better understanding of the requirements of black and ethnic minority households.

These tasks will be reviewed in the light of responses to this baseline report.



## **Local Housing Market Assessment - Appendices**

### **Introduction**

A.0 A baseline report has been published as a local housing market assessment is undertaken for North West Wales. In support of that emerging assessment a number of detailed statistical studies have been undertaken. This appendix sets out detailed findings in support of the main report in order to enhance stakeholders understanding of the study area. The appendices which follow are broadly organised around the content of the baseline report and deal with:

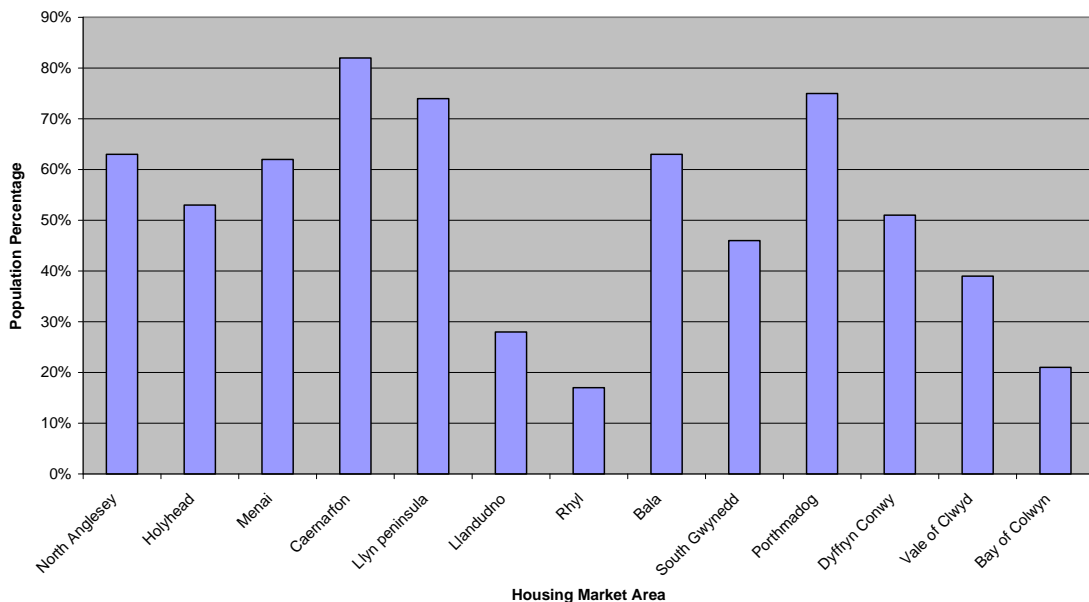
- socio-economic conditions,
- housing profile,
- affordability,
- housing need,
- housing market area profiles,
- future changes.

## Appendix 1 – Socio-economic profile of the area

### Cultural identity – the Welsh language

A1.1 The native language of Wales is Welsh. Almost all of the population also speaks English and both languages have equal status in Wales.<sup>36</sup> 45% of the North West Wales population speaks Welsh. In terms of the NWWLHMA being aware of the level of Welsh speakers in each housing market area provides an insight of the cultural identity within HMA, this is illustrated in the chart below. The housing market area with the highest level of Welsh speakers is Caernarfon and the lowest level is in Rhyl with 17%. Bay of Colwyn is the closest to the Wales profile as both have around 21% of the population that speak Welsh.

Chart A1.1: Welsh speakers in local housing market areas as a percentage of the population



Source: 2001 Census

<sup>36</sup> WAG (online)

## Cultural identity – ethnic group

Table A1.1: Ethnic groups in North West Wales, 1991 and 2001

	Anglesey	Gwynedd	Conwy	Denbighshire	North West Wales
<b>All people 1991</b>	69,149	113,331	106,336	90,568	379,384
<b>White</b>	99.5%	99.0%	99.3%	99.4%	99.3%
<b>Black</b>	0.1%	0.2%	0.1%	0.1%	0.1%
<b>Asian</b>	0.2%	0.3%	0.2%	0.3%	0.3%
<b>Chinese</b>	0.1%	0.2%	0.2%	0.1%	0.1%
<b>Other</b>	0.1%	0.3%	0.2%	0.1%	0.2%
<b>All people 2001</b>	66,802	116,869	109,629	93,066	386,366
<b>White</b>	99.3%	98.8%	98.9%	98.9%	98.9%
<b>Mixed</b>	0.3%	0.4%	0.4%	0.5%	0.4%
<b>Black</b>	0.1%	0.1%	0.1%	0.1%	0.1%
<b>Asian</b>	0.1%	0.4%	0.3%	0.3%	0.3%
<b>Chinese</b>	0.1%	0.2%	0.2%	0.1%	0.2%
<b>Other</b>	0.1%	0.1%	0.1%	0.1%	0.1%

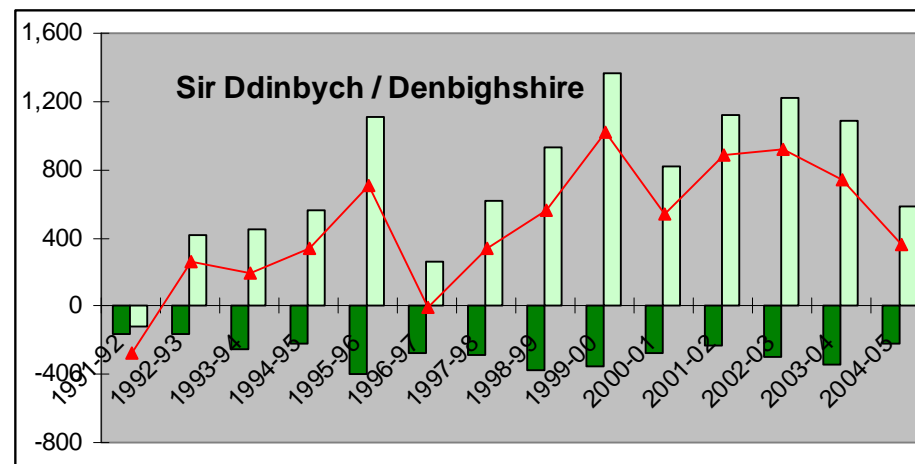
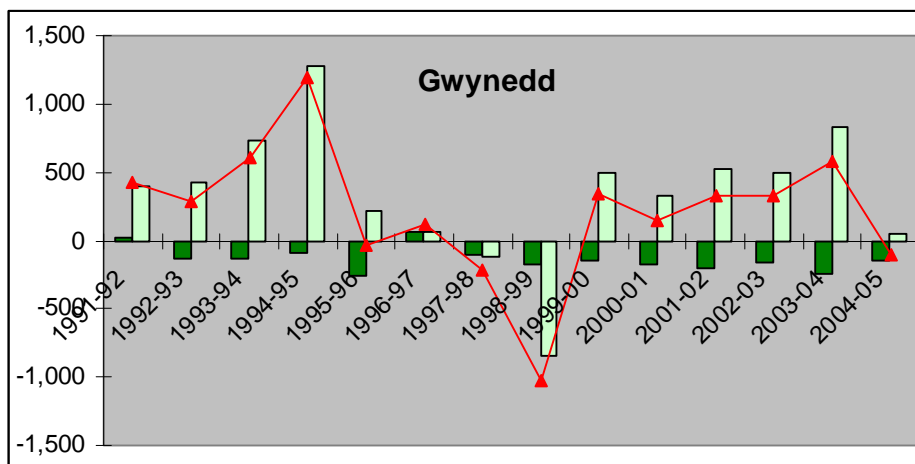
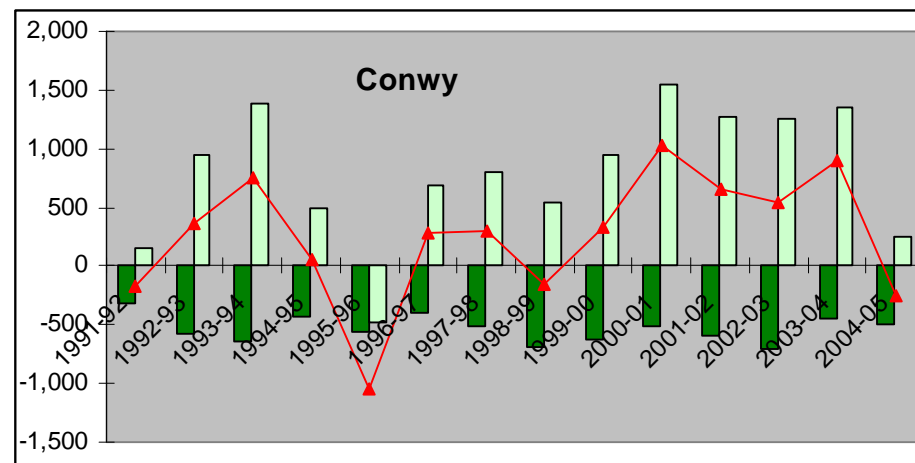
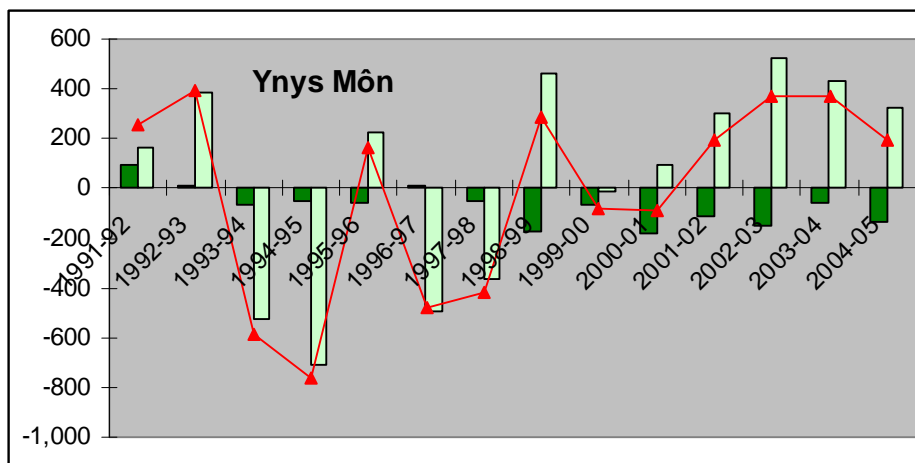
Source: 1991 Census, table L06; 2001 Census, table KS06

A1.2 The above table indicates only small numbers of Black Minority and Ethnic households in North West Wales and little change between the 1991 and 2001 Census figures. The second phase of the NWWLHMA intends to build upon the relationship already established with bodies such as the North Wales Race Equality Network (NWREN) in order to assess the housing provision and needs of BME households. With the aim to overcome issues such as those highlighted in an article by Tai Pawb in which it noted CRE concerns 'that poor planning can lead to increased segregation, and that poor consultation and engagement can mean that the needs of BME communities are not adequately embedded.'<sup>37</sup>

<sup>37</sup> Welsh Housing Quarterly: new ideas for housing & regeneration, *Changing times in race equality and social justice in housing*, (67), 2007, p.31.

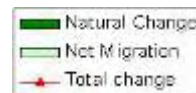
# North West Wales Local Housing Market Assessment Appendix 1

Charts A1.2: Components of population change in North West Wales



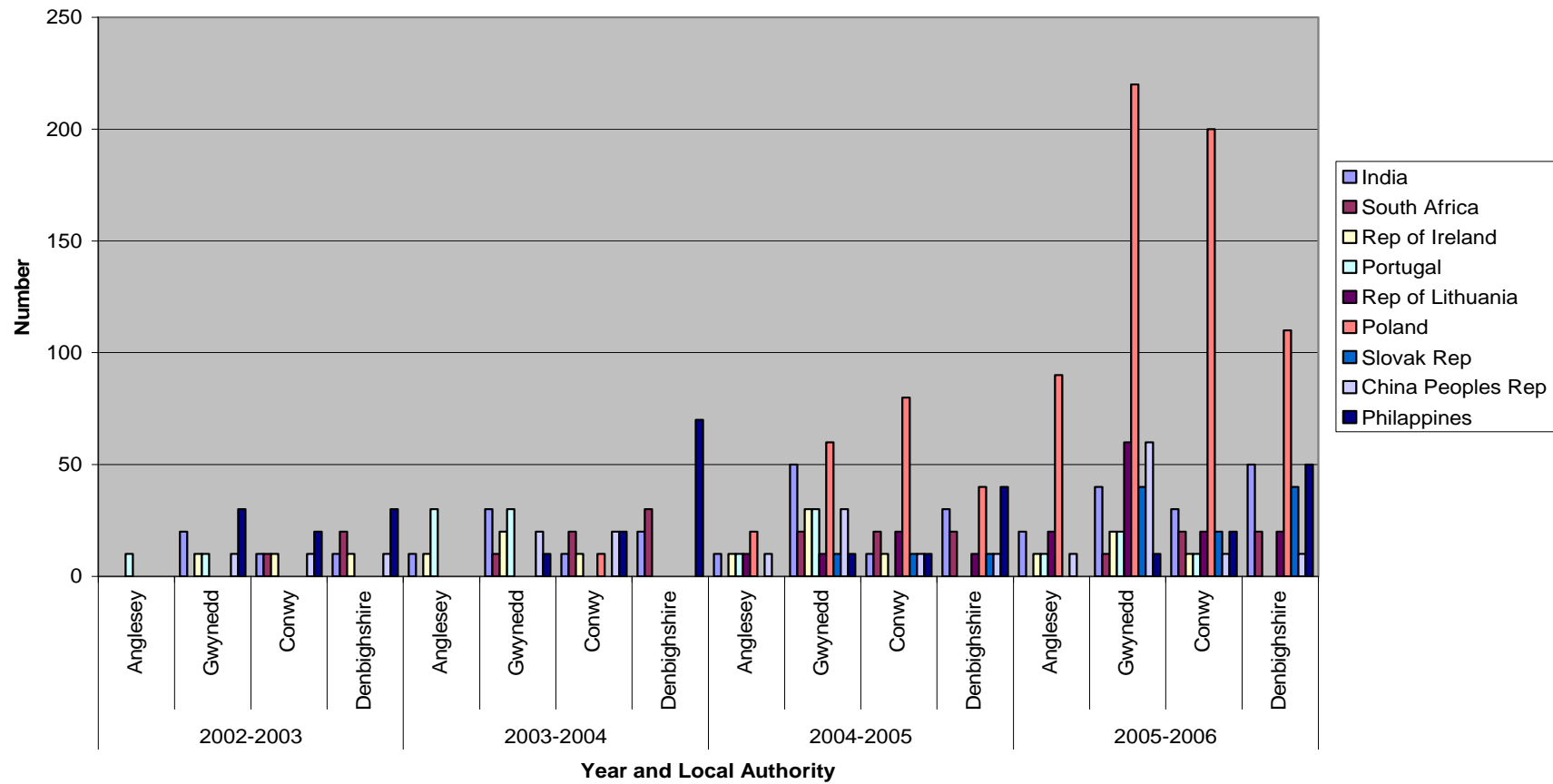
Source: Registrar general's mid year estimates of population, ONS

Note: this data is not disaggregated for the NPA



# North West Wales Local Housing Market Assessment Appendix 1

Chart A1.3: National Insurance registrations of non-UK nationals



Source: National Insurance Recording System (NIRS) based on a 100% sample

Note: Numbers rounded to the nearest 10. Above table only presents the country of origin if one of the LA areas listed has 30+ non-UK National registered in that time period.

Note: this data is not disaggregated for the NPA

## Household composition

A1.3 Census recorded that households in North West Wales have increased from 153,475 in 1991 to 165,547 in 2001. By 2016 there is estimated to be 192,050 households in North West Wales<sup>38</sup>. Both Llandudno and South Gwynedd HMAs had the smallest average household size in 2001 with an average of just 2.16 persons per household and North Anglesey HMA had the highest average household size of 2.42. With the average North West Wales household size reduced from 2.43 in 1991 to 2.29 in 2001, this trend is set to continue according to the North Wales Population and Housing Research Group (NWPHRG) average household size estimated to decrease to around 2.09 by 2016. By local authority this has been estimated at 2.15 in Anglesey, 2.09 in Gwynedd, 2.08 in Denbighshire and only 2.04 in Conwy.

Table A1.2: household composition in North West Wales, 1991 and 2001

	Anglesey	Gwynedd	Conwy	Denbigh-shire	North West Wales
<b>Total households 1991</b>	27,020	45,333	44,064	37,058	153,475
<b>Average household size</b>	2.55	2.48	2.34	2.39	2.43
<b>Lone pensioner households</b>	4,231	8,249	8,560	6,876	27,916
<b>Other lone person households</b>	2,729	4,984	4,576	4,004	16,293
<b>1 adult with dependent child(ren)</b>	924	1,287	1,399	1,229	4,839
<b>2 adults with dependent child(ren)</b>	5,808	8,844	7,648	6,905	29,205
<b>Other households with dependent child(ren)</b>	1,758	2,895	2,276	2,058	8,987
<b>2 adults no dependent child(ren)*</b>	8,457	13,962	15,187	12,096	49,702
<b>Other multi-person households*</b>	3,113	5,112	4,418	3,890	16,533
<b>Total households 2001</b>	28,356	49,237	48,062	39,892	165,547
<b>Average household size</b>	2.33	2.31	2.23	2.29	2.29
<b>Lone pensioner households</b>	4,580	8,593	9,222	7,177	29,572
<b>Other lone person households</b>	3,709	7,304	6,517	5,689	23,219
<b>Other all pensioner households*</b>	3,131	5,212	6,405	4,550	19,298
<b>1 adult with dependent child(ren)</b>	1,952	3,105	2,869	2,591	10,517
<b>Couple with dependent child(ren)</b>	5,602	9,569	8,736	7,849	31,756
<b>Other households with dependent child(ren)</b>	566	890	874	800	3,130
<b>Couple no children</b>	5,009	7,866	8,177	6,570	27,622
<b>Other multi-person households</b>	3,807	6,698	5,262	4,666	20,433

Source: 1991 Census, table L42, L40; 2001 Census, table KS

\* In 1991 'other all pensioner households' were included in the counts of '2 adults and no dependant children' and 'other multi person' households.

<sup>38</sup> North West Wales Population and Housing Research Group, *2005 based household projections summary report*, 2007.

# North West Wales Local Housing Market Assessment

## Appendix 1

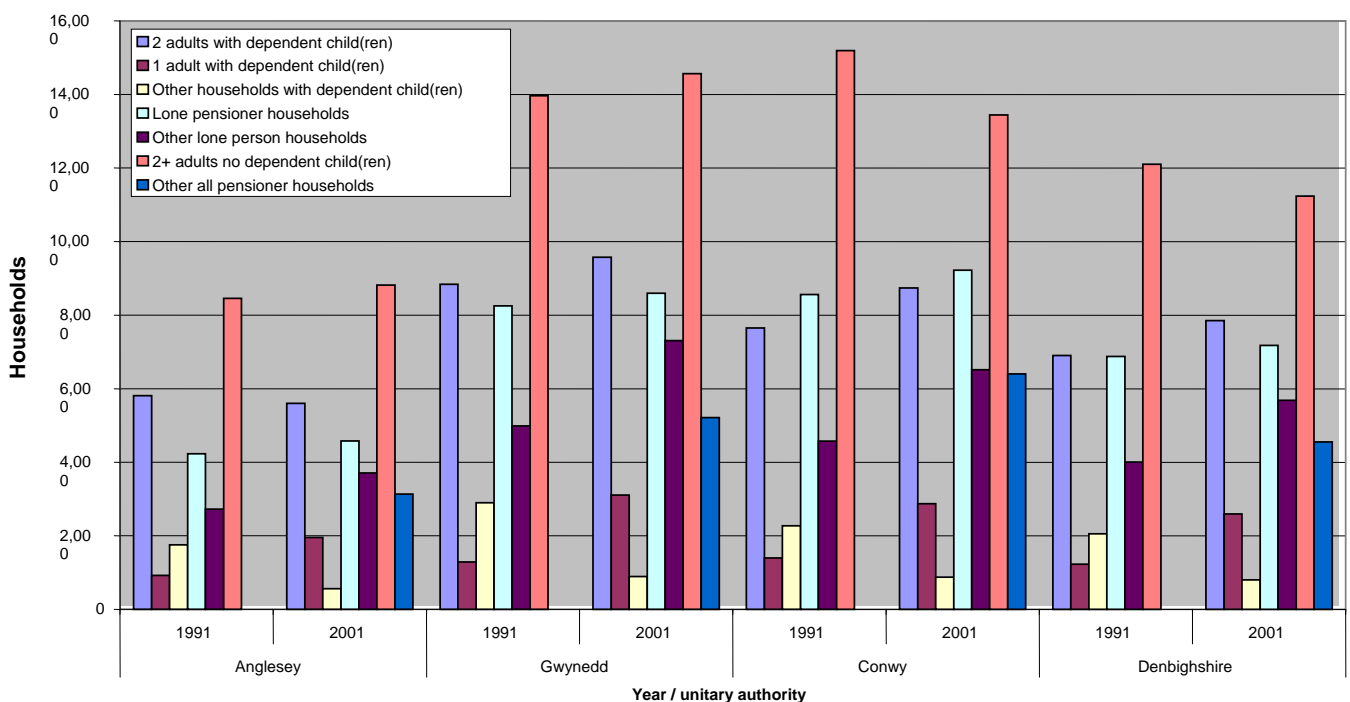
A1.4 Census 2001 data is available for Snowdonia National Park Authority see table below:

Table A1.3

	SNP
<b>Total Households 2001</b>	11,211
<b>Average household size</b>	2.4
<b>Lone pensioner households</b>	2,050
<b>Other lone persons households</b>	1,583
<b>Other all pensioners households</b>	1,382
<b>1adult with dependant child(ren)</b>	531
<b>Couple with dependant child(ren)</b>	2,056
<b>Other households with dependant child(ren)</b>	148
<b>Couple no children</b>	2,097
<b>Other multi-person households</b>	1,538

Source: Census 2001

Chart A1.4: Household composition in unitary authority areas, 1991 and 2001



Source: 1991 Census, table L42, L40; 2001 Census, table KS20

A1.5 Between 1991 and 2001 there has been a decline in '2 adult households with no dependent child(ren)' across North West Wales however this change will not be considered as a housing market driver as there are differences between the household categories recorded in each census, for example the 2001 Census had an additional category of 'other all pensioner households' which was not a category in 1991. When these two categories are combined there is no significant change in

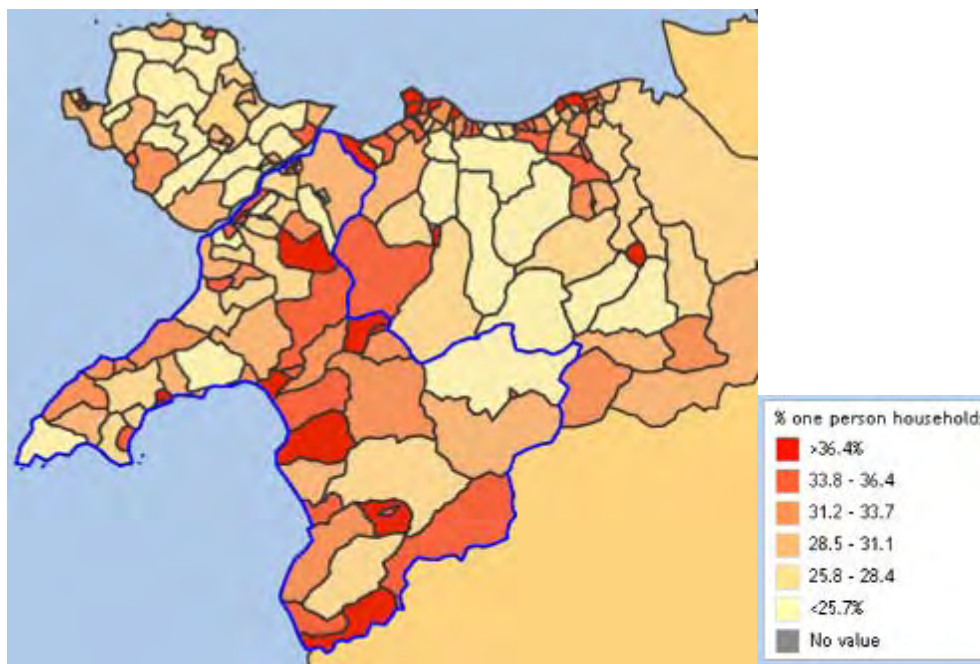
household types but is still one of the largest proportions of household types in North West Wales.

- A1.6 '2 adults with children households' and 'lone pensioner households' are also one of the largest proportions of household type in North West Wales, for example in Conwy 2001 'lone pensioner households' made up 19.2% of the household types and 'adults with children households' made up 18.2%. In the whole of North West Wales there were 31,756 '2 adults with children households' and 29,572 'lone pensioner households' in 2001. Relating this household type to tenure according to the Living in Wales Survey 2004 80% of two adults with children households are owner occupiers.
- A1.7 In all four local authority areas there has been an increase in lone person non pensioner households. For example in Gwynedd this household type increased from 11% of the population to 14.8% during the 10 year period and in Denbighshire from 10.8% to 14.3% during the same. As there is a significant increase in lone person non pensioner households it is considered as a housing market driver. Across North West Wales 'lone person' non pensioner households have increased from 16,293 households in 1991 to 23,219 in 2001. This trend is set to continue as the NWPHRG estimate that one person households are set to increase from 56,084 households in 2005 to possibly 70,482 households in 2016. According to the Living in Wales Survey 2004 61.7% of single person households are owner occupiers. The wards that had the highest percentages of this type of household are illustrated in Map A1.2.
- A1.8 Cadnant ward in Anglesey had 43% one person households and over 44% in Holyhead Town. Significantly both wards are particularly urban for the area, Holyhead Town ward being the busy ferry port town with the links to Ireland and in the Cadnant ward which is noted later in this report as having a notable student presence.
- A1.9 Conwy's concentration of one person households is located in the urban areas of the local authority area, particularly in Mostyn and Gogarth which had 41.1% and 45% respectively. This corresponds with the Llandudno HMA in which Census 2001 data revealed that one fifth of all households were lone pensioner households. Again in Denbighshire one person households are in the costal and urban areas, Rhyl East recording over 36.7% of the households and 48.5% in Rhyl West.



## North West Wales Local Housing Market Assessment Appendix 1

Map A1.1: distribution of one person households in North West Wales



Source: 2001 Census, Map © Hometrack 2007

A1.10 Gwynedd local authority area paints a slightly different picture to its counterparts although the urban areas of the county do have high percentages of one person households, for example Hiracl and Deiniol wards having over 44%. There are a number of more rural wards with over 36.4% one person households, for example Bowydd and Rhiw having over 38.7%. Also over one fifth of all households were lone pensioner households in the rural South Gwynedd HMA.

A1.11 Although 1 adult with dependent child(ren) make up a relatively small percentage of the households in North West Wales ranging from 2.8% in Gwynedd and 3.4% in Anglesey in 1991, Census has recorded an increase in the household type in North West Wales increasing to as much as 6.9% in Anglesey. Overall the Census recorded an increase from 4,839 in 1991 to 10,517 in 2001 in this household type in North West Wales. Again this trend is set to continue increasing to nearly 17,861 household in 2016. <sup>39</sup>According to the Living in Wales Survey 2004 40.4% of one parent households in Wales are owner occupiers and 30.2% rent from a local authority.

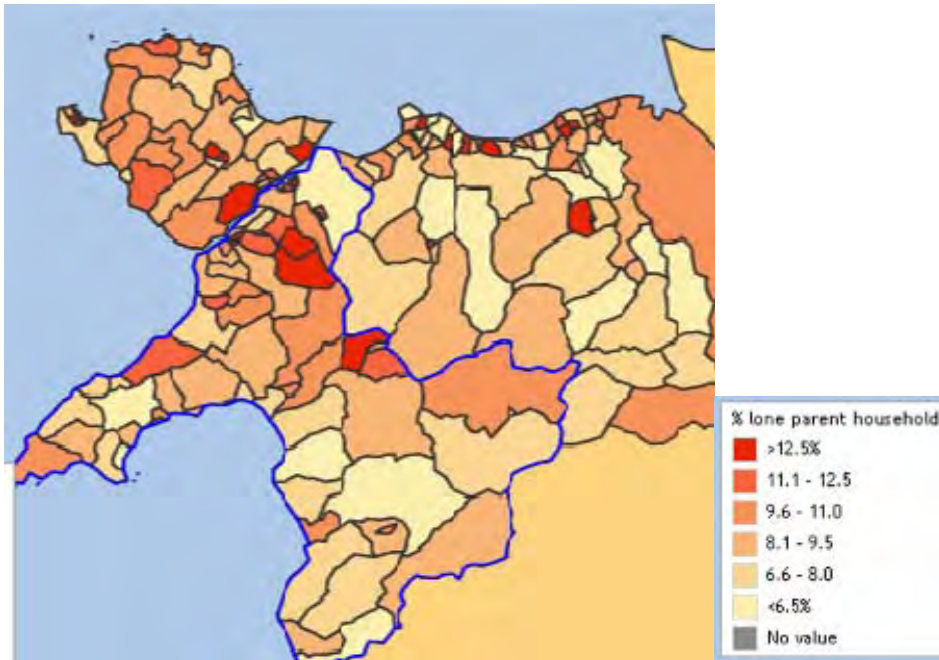
A1.12 Similarly to one person households, the highest percentage of lone parent households are in the wards surrounding Rhyl in Denbighshire, the South East ward having 13.3% of all households and 18.6% in the South West ward. Likewise lone

<sup>39</sup> North West Wales Population and Housing Research Group, *2005 based household projections summary report*, 2007.

## North West Wales Local Housing Market Assessment Appendix 1

parent household like one person households have both an urban and coastal location in Conwy, both Mochdre and Tudno having over 13.2% and Llysfaen 16.8% of this type of household.

Map A1.2: distribution of one parent households in North West Wales



Source: 2001 Census, Map © Hometrack 2007

A1.13 In Gwynedd local authority area lone parent households are similar to single person households, located in Bowydd and Rhiw with 12.8%. However Marchog ward having the highest percentage with 22.7% lone parent households.

A1.14 The majority of lone parent households in Anglesey are found in Holyhead Town and surrounding wards and particularly the Morawelon ward having the 18% as illustrated below:

Map: A1.3



Source: Census 2001, Map © Hometrack 2007

A1.15 Out of the HMAs lone parent households made up 8% of all households in Holyhead, 7.5% of all households in Caernarfon and Rhyl HMAs.

## Student households

A1.16 All Student Households make up a small percentage of the total population in North West Wales, for example in Anglesey the Census 2001 notes that they make up only 0.1% of the population and even less in Conwy and Denbighshire. Gwynedd has the highest percentage of All Student Households, 0.7% of the total population. Although 0.7% seems a relatively small proportion when we look at ward level (Maps 13 & 14) there is a high concentration of this household type in the wards that are located within close proximity of Bangor University. Bangor (Menai) has the highest proportion of student households at 17.5% and Deiniol 13.7%. Within the Menai HMA there were a 4,600 full-time students aged 18 and over living in the area in 2001 also 3.5% of the population, mostly students, were living in communal establishments. Student numbers are set to increase substantially from the 1990/91 figures, the intake of students then to University of Wales Bangor was only 3,523<sup>40</sup> whereas it now it receives over 9,000 students.<sup>41</sup>

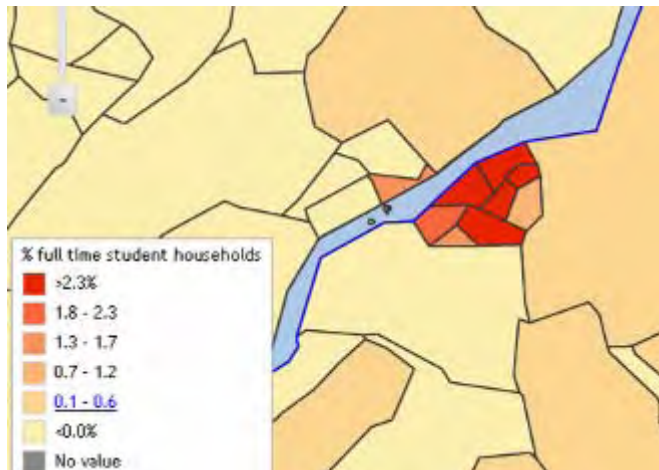
Maps A1.4 concentration of student households in Bangor



<sup>40</sup> Welsh Office, *Digest of Welsh Statistics No 38*, 1992, p71.

<sup>41</sup> University of Wales Bangor, *About the University* (online) (2007).

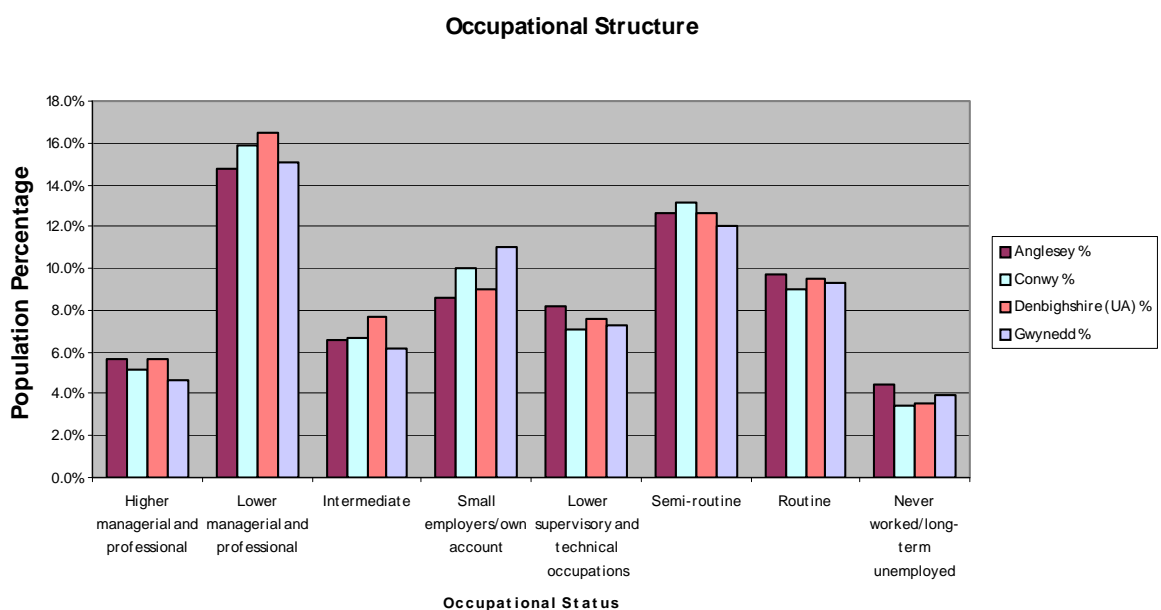
# North West Wales Local Housing Market Assessment Appendix 1



Source: 2001 Census, Map © Hometrack

A1.17 The chart below details the occupational structure of the study area by local authority. It shows important variations in the economies of the authorities within the partnership.

Chart A1.5



Source: Census 2001

A1.18 Lower managerial and professional is the highest proportion employment category in North West Wales, Denbighshire having 16.5%, 10,739 people, Conwy 15.9%, 12,167 people within this category, Anglesey 14.8%, 7,114 people Gwynedd having the highest overall number 12,591 working in the lower managerial and professional occupational status category making up 15.1% proportionately.

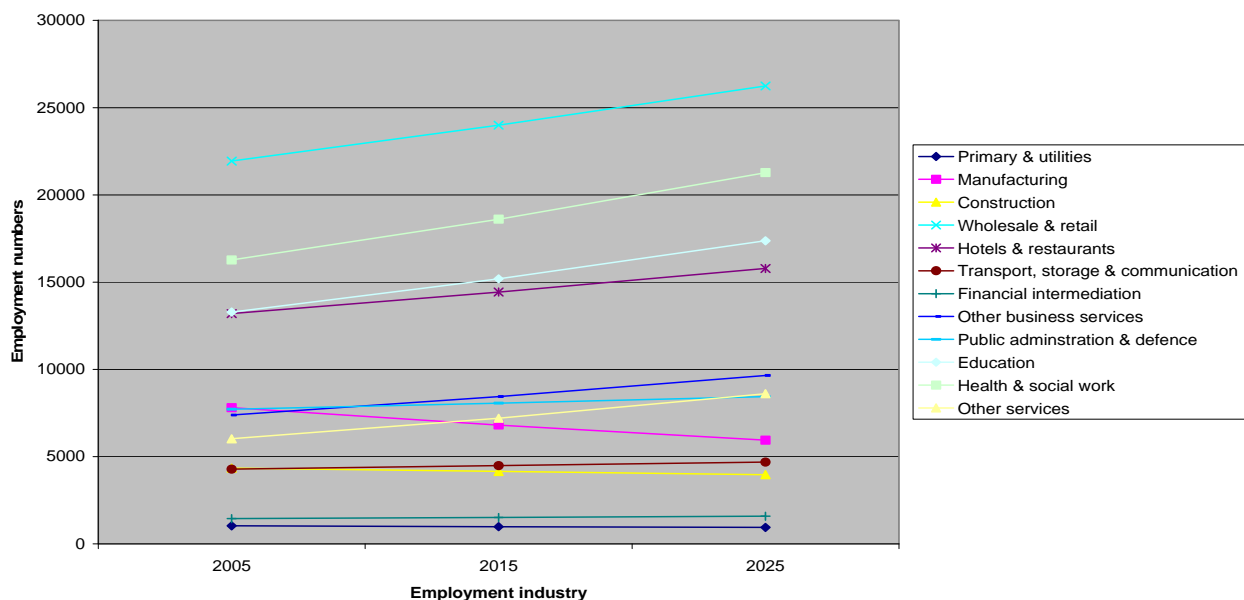
A1.19 Semi-routine occupational status is the second highest proportion of occupation in North West Wales with according to Census 2001 Conwy had the highest proportion

## North West Wales Local Housing Market Assessment Appendix 1

of those in that category, 13.1%, over 10,000 of the population. Both Anglesey and Denbighshire had 12.6% of the population within this category and Gwynedd had the smallest proportion at just 12%; again over 10,000 people within this occupational status, Anglesey had the smallest number within this category at 6,046.

A1.20 How local economic factors will affect the housing markets within North West Wales in the future is definitely something that the second phase of the NWWLHMA must continue to monitor. At this stage the NWWLHMA can consider employment forecasts such as that provided by the North West Wales Spatial Development Strategy. The graph below summarises this forecast:

Graph A1.1: Employment forecast for North West Wales



Source: Old Bell, 2007

A1.21 The above graph clearly shows that Old Bell perceive an increase in numbers employed in the wholesale & retail, health & social work, education, hotels & restaurants, other business services, public sector & defence sectors and a slight increase in other services, financial intermediation and transport, storage & communication industries. They estimate a slight decline in primary and utilities, a decline in construction and a decline particularly in manufacturing to just 5,947 employed in this industry by 2025.

## Appendix 2 – Housing profile

### Housing stock

A2.1 There are a total of 179,300 housing units in North West Wales consisting 31,400 dwellings in Anglesey, 51,200 dwellings in Conwy, 40,500 dwellings in Denbighshire and 56,200 in Gwynedd.<sup>42</sup> The table below details the number of dwellings in each market area:

Table A2.1: number of dwellings by housing market area, 2001

Housing market area	Number of dwellings
1. North Anglesey	4,300
2. Holyhead	12,300
3. Menai	29,100
4. Caernarfon	11,900
5. Llyn peninsula	9,900
6. Llandudno	18,000
7. Rhyl	29,500
8. Bala	8,600
9. South Gwynedd	5,400
10. Porthmadog	8,700
11. Dyffryn Conwy	6,000
12. Vale of Clwyd	20,600
13. Bay of Colwyn	16,800

Source: 2001 Census

### Residential new builds and demolitions

A2.2 The table below numbers the total number of new builds in each local authority and national park area. This assessment wanted to compare these new additions against the stock reductions in each local authority area but according to Data Unit Wales there was only 3 dwellings in total in North West Wales in that year that were closed in pursuit of a closing order or undertakings but not yet demolished in the private sector 1 in Anglesey and 2 in Gwynedd.

<sup>42</sup> Digest of Welsh Local Area Statistics, 2004

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Table A2.2: Table A2.2: Housing Completions: Conwy, Denbighshire, Gwynedd

	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	Total Completions	Ave. Annual Completions
<b>Anglesey</b>	188	223	160	126	226	923	185
<b>Conwy</b>	353	340	499	419	384	1995	399
<b>Gwynedd</b>	203	151	210	292	196	1052	210
<b>Denbighshire</b>	306	350	360	282	210	1508	302

Source: Joint Housing Land Availability Study, Conwy County Borough Council 2006, "Monitoring Planninig Consents," page 4, accessed through [www.gwynedd.gov.uk](http://www.gwynedd.gov.uk), "Planning," "Residential Land Survey.", Joint Housing Land Availability Study, Denbighshire County Council, 1st April 2006. House Monitoring Survey 2006 Isle of Anglesey County Council

Table: A2.3: Housing completions: Snowdonia

	1995-1999	1999-2001	2001-2003	2003-2005	Total Comp	Ave. Annual Completions
<b>SNP</b>	226	96	96	117	535	54

Source: Snowdonia National Park Authority 2007

A2.3 The WAG guidance<sup>43</sup> recommends that 'if the rate is in excess of approximately 3% and properties are vacant for considerable periods of time; these should be counted as surplus stock'. Some local authorities have provided void data: Conwy County Borough Council noted 66 long term voids (properties empty for more than 13 weeks) in 2005-2006. Denbighshire County Council had 86 long term voids in 3 years, 2003-2005, an average of 29 per annum. Some housing associations also provided void data for this assessment: Wales and West Housing Association noted 3 long term voids in Conwy and 5 in Gwynedd (2006 figures available only). Clwyd Alyn recorded just 3 properties in Denbighshire that were void for over 13 weeks in 2005. Tai Clwyd recorded just 16 total void properties between 2005 and 2006 and no long term voids were specified during this time period.

A2.4 There is also very small numbers of properties that have been vacant for longer than 6 months within the local authority stock for example the Welsh Housing Statistics 2005 noted a total of 13 in Anglesey, 8 in Conwy, 0 in Denbighshire and 27 in Gwynedd. Furthermore Welsh Housing Statistics<sup>44</sup> recorded only 65 vacant properties in Anglesey in 2005, 123 vacant properties in Gwynedd, 63 in Conwy and 39 in Denbighshire all of which make up less than 2% of the total local authority housing stock and therefore will not be counted in this calculation. Clwyd Alyn reported no voids exceeded the 3% within each local authority area compared to all social stock in the period 2005-2006.

<sup>43</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p.69.

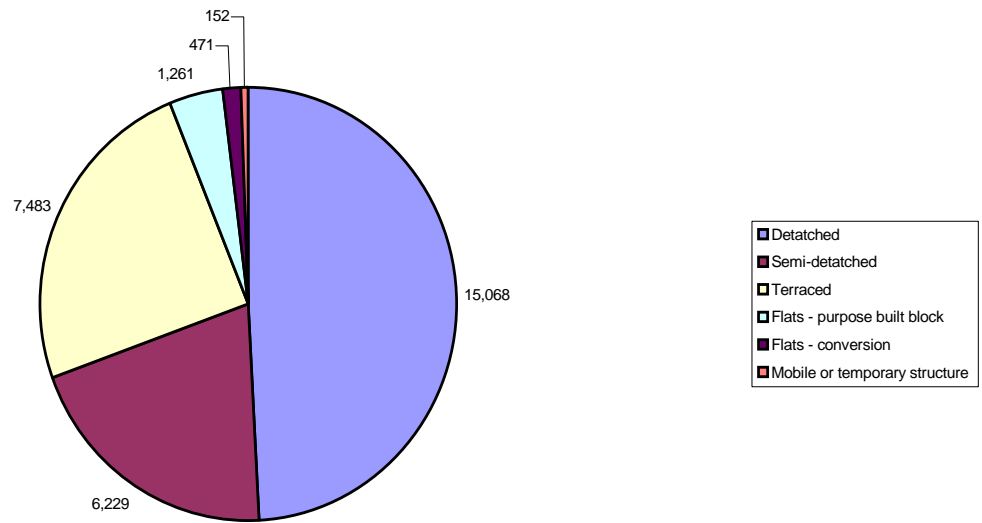
<sup>44</sup> Welsh Assembly Government, *Welsh Housing Statistics*, 2005, p.66.



# North West Wales Local Housing Market Assessment

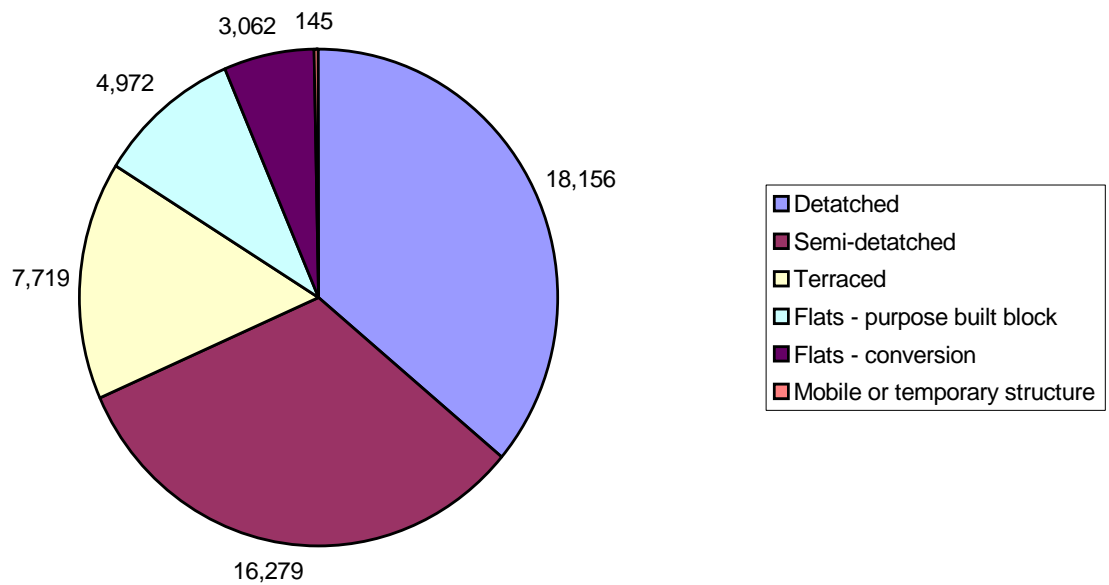
## Appendix 2

Chart: A2.1: Anglesey



Source: derived from Census 2001

Chart: A2.2: Conwy



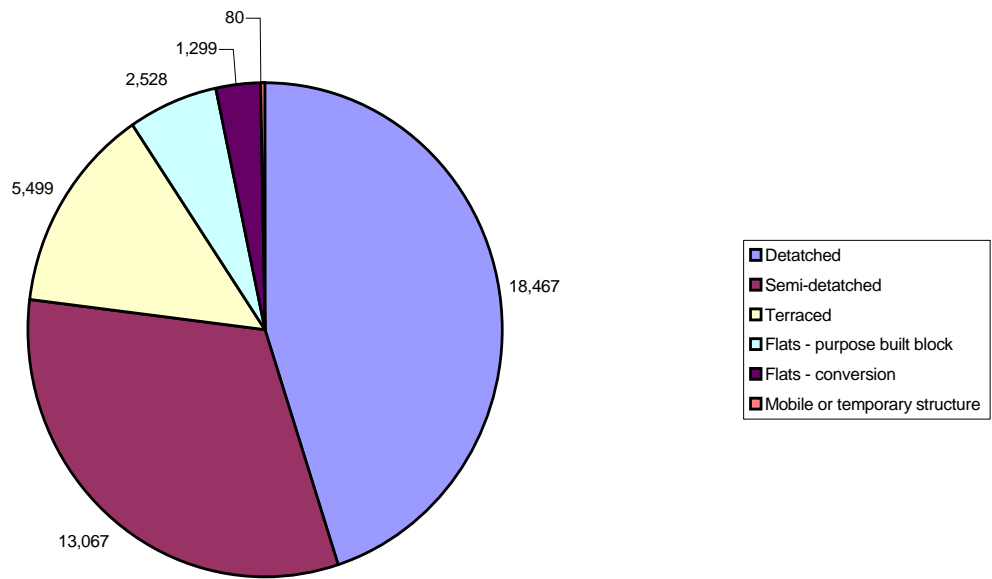
Source: derived from Census 2001



# North West Wales Local Housing Market Assessment

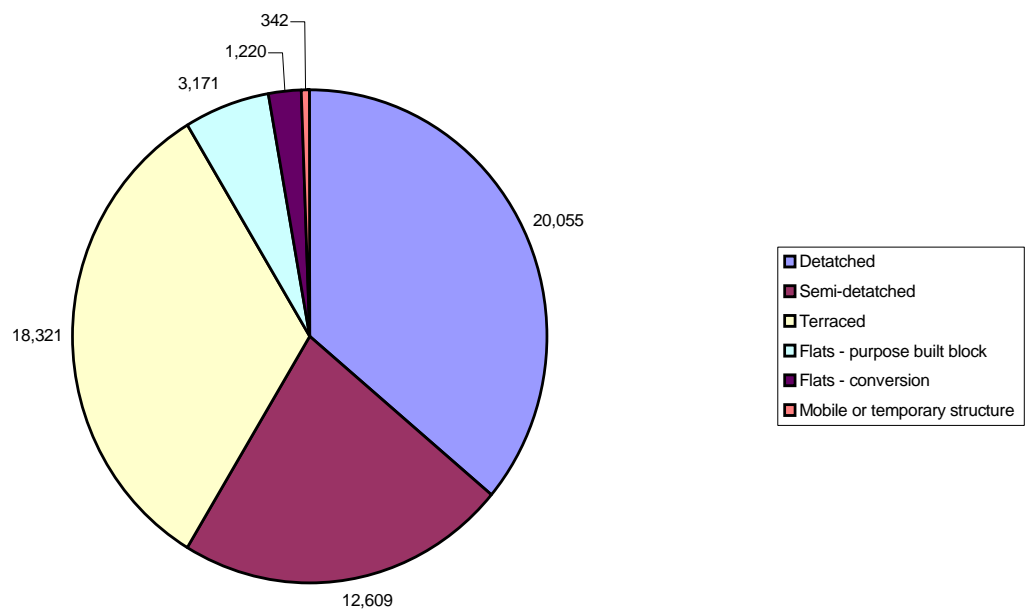
## Appendix 2

Chart: A2.3: - Denbighshire



Source: derived from Census 2001

Chart: A2.4: Gwynedd

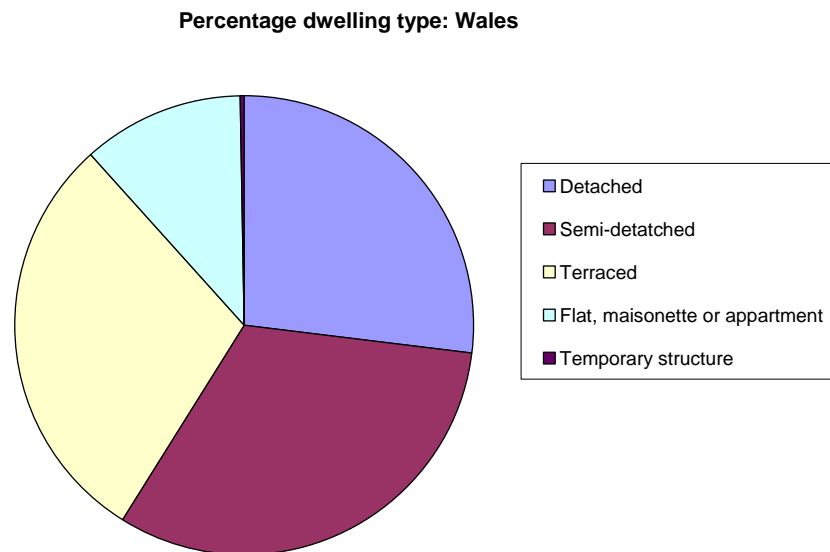


Source: derived from Census 2001

# North West Wales Local Housing Market Assessment

## Appendix 2

Chart A2.5: Snowdonia National Park:



Source: SNPA derived from Census 2001

### Stock condition

A2.5 The condition of the housing stock in North West Wales was assessed in the Welsh House Condition Survey 1998; it noted the total number of unfit dwellings by housing type and by the age of property, see the tables below for the North West Wales comparison:

Table: A2.5 Housing unfitness, North West Wales, 1998

	Unfit dwellings		
	Number	As % of stock in UA	As % of stock in study area
<b>Anglesey</b>	1,200	4.4	10.8
<b>Conwy</b>	2,300	4.8	20.7
<b>Denbighshire</b>	2,700	7.2	24.3
<b>Gwynedd</b>	4,900	10.5	44.1
<b>North West Wales</b>	11,100	7.0	100.0

Source: Welsh House Condition Survey, 1998

Note: data cannot be disaggregated for the NPA area

A2.6 The rate of unfitness in North West Wales is highest in Gwynedd at 10.5% compared with a rate of 8.5% for the whole of Wales. The unfitness rates in Anglesey and Conwy are significantly better at 4.4% and 4.8% respectively whilst the rate in Denbighshire is 7.2%.

North West Wales Local Housing Market Assessment  
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Table A2.6 Housing unfit by housing type, North West Wales, 1998

	% Unfit dwellings by type of accommodation				
	Det.	Semi.	Terr.	Flat/Mais.	All
<b>Anglesey</b>	1.8	3.5	8.3	-	4.4
<b>Conwy</b>	3.0	5.1	6.1	7.3	4.8
<b>Denbigh.</b>	5.2	5.7	11.8	13.5	7.2
<b>Gwynedd</b>	7.2	5.1	10.3	16.6	10.5
<b>North West Wales</b>	4.3	4.9	9.3	-	7.0
<b>Wales</b>	6.8	6.1	11.4	9.5	8.5

Source: Welsh House Condition Survey, 1998

Note: data cannot be disaggregated for the NPA area

Table: A2.7 Housing unfit by age of property, North West Wales, 1998

	% Unfit dwellings by date of construction in UA				
	Pre 1919	1919-44	1945-64	Post 1964	All
<b>Anglesey</b>	8.9	7.3	2.8	0.9	4.4
<b>Conwy</b>	12.7	2.9	2.8	0.2	4.8
<b>Denbigh.</b>	17.5	7.5	3.2	2.0	7.2
<b>Gwynedd</b>	16.9	5.5	7.4	2.6	10.5
<b>Study area</b>	14.6	5.4	4.1	1.3	7.0
<b>Wales</b>	14.9	9.3	8.0	2.4	8.5

Source: Welsh House Condition Survey, 1998

Note: data cannot be disaggregated for the NPA area

A2.7 The local authorities in both Denbighshire and Conwy are completing a Stock Condition Survey in 2007; Gwynedd's Stock Condition Survey was completed in 2003<sup>45</sup>. The findings from Gwynedd's survey were based upon a sample of 1,548 dwellings that made up 2.1% of the housing stock, some 58,431 total dwellings. The Survey revealed that 2.1% of the properties surveyed were deemed 'seriously defective'. 1.8% of the dwellings had serious problems that were deemed 'borderline' unfit. 7% had major problems requiring major repairs but unlikely to be deemed unfit. 16.2% of the properties were in a poor condition and in need of several minor repairs. While 35% were in a reasonable condition, 30.2% were in a good condition and 7.7% were in an excellent condition.

A2.8 Overall 9% of Gwynedd's surveyed properties were deemed unfit compared to the North Wales average of 6.6%. The report goes some way to explain why Gwynedd had scored higher percentages than the North Wales average attributing some of it to the older age of many of Gwynedd's properties. 56.5% of the Gwynedd stock was deemed older compared to 32% nationally. 22% of all properties were built before

<sup>45</sup> 2004

1891 in Wales, 14.9% build between 1891 and 1918 and 11.9% between 1919 and 1944 compared to the UK.

- A2.9 Looking at those properties in North West Wales that did not have access to central heating in 2001, North Anglesey HMA, Holyhead HMA, Caernarfon HMA all had over one fifth of the market area households without central heating and the Llyn peninsular HMA had the highest proportion of households without central heating with 27% compared to a Wales figure of 7.5%.<sup>46</sup>

## **Turnover**

### **Socially rented**

- A2.10 In March 2006 there was a total of 4446 socially rented properties in Anglesey, 5,963 in Conwy, 5,395 in Denbighshire and 8,372 in Gwynedd.<sup>47</sup> From April 2005 to March 2006 there were 305 social housing re-lets in Anglesey, 453 in Conwy, 285 in Denbighshire and 506 in Gwynedd.<sup>48</sup> The turnover rate for 2006 was 6.7% in Anglesey, 8.4% in Conwy, 3.4% in Denbighshire and 6.0% in Gwynedd.

### **Private rental**

- A2.11 It is particularly difficult to obtain information on the turnover levels of private rental; however in the tenure section below the NWWLHMA was able to obtain private rent ranges from the Wales Rent Officer.

### **Owner occupation**

- A2.12 Using the HM Land Registry this assessment is able to calculate the turnover rates in from 2003 to 2006 in North West Wales.
- A2.13 The following charts compare the cost of buying by property type within each local authority area from 2003 to 2006. The charts also illustrate the levels of turnover by property type and price. Please note that the data cannot be disaggregated for the NPA area.

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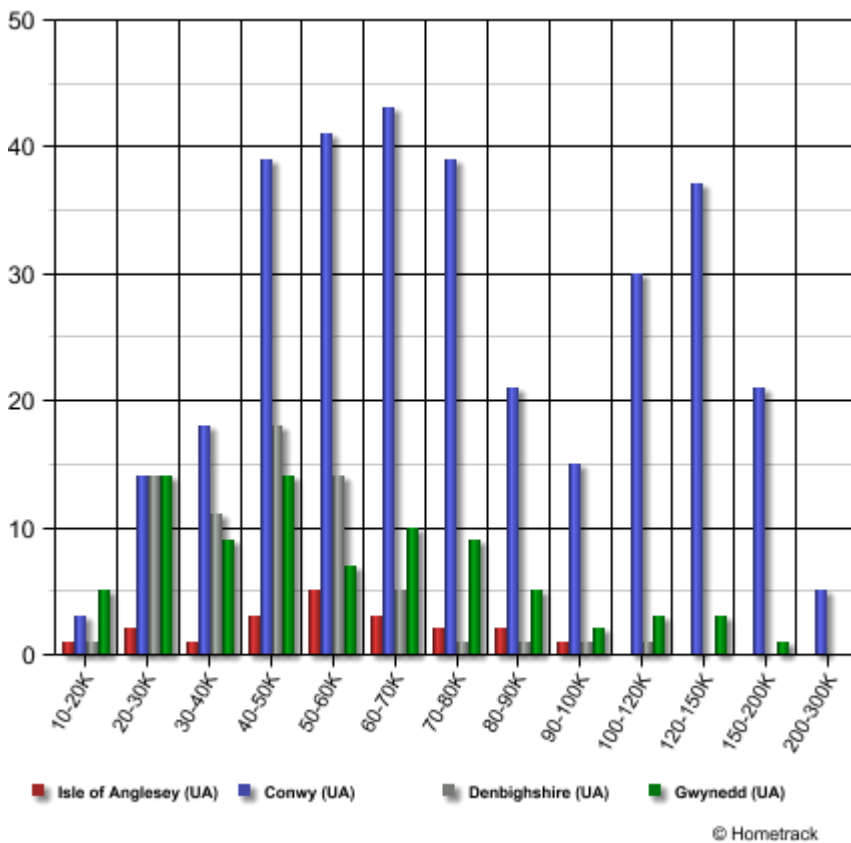
<sup>46</sup> Source: Census 2001

<sup>47</sup> Welsh Assembly Government, LA rental data from Housing Revenue Account Subsidy (HRAS) second advance form for 2006-07.

<sup>48</sup> Local Government Data Unit Wales, *Housing Management and Performance WHO4*, 2006.

# North West Wales Local Housing Market Assessment Appendix 2

Chart A2.6: Flat Sales in 2003

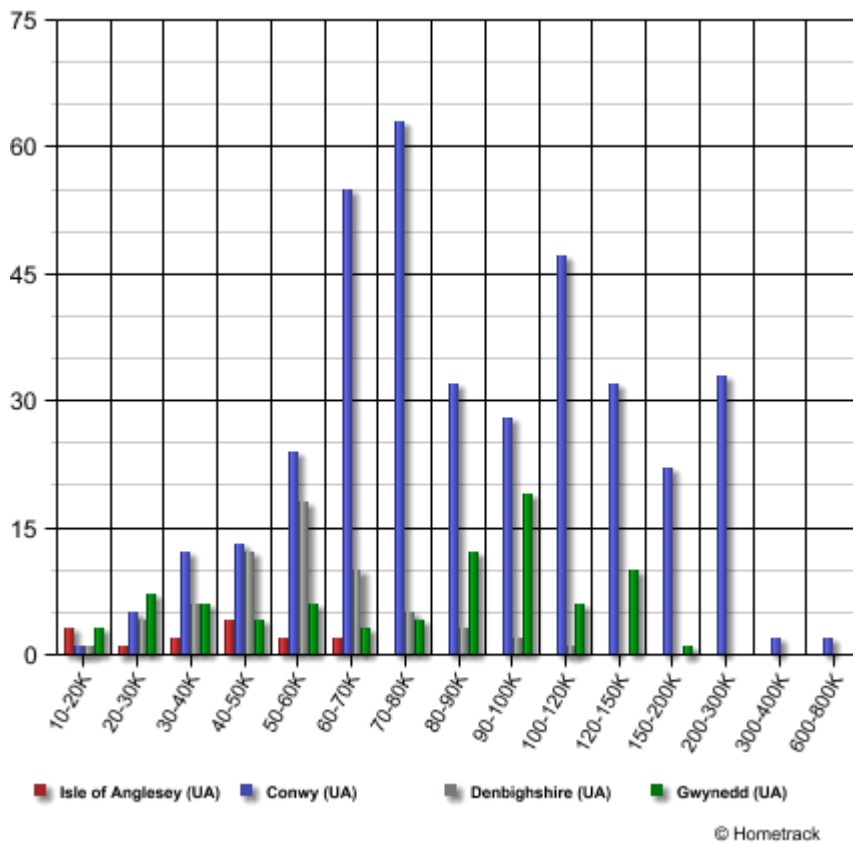


Source: Land Registry

A2.14 Corresponding with Conwy having the highest number of this housing stock type the charts below that Conwy has seen the highest number of sales for this property type in this time period with a total of 326 flats sold in 2003. The highest proportion of flat sales in 2003 was in the £60-70k range in Conwy with over 40 (12%) sales in the price range. The 3 other local authorities has far less over all sales of this property type for example Denbighshire's highest proportion of flat sales was in the £40-£50k but with fewer than 20 (29%) sales within this range. Again Gwynedd had fewer than 15 sales in the £20-£30k and £40-£50k price ranges respectively. Anglesey having the least number of flat sales in 2003, just 20 sales in total with the highest proportion 25% of flat sales in the £50-£60k range.

# North West Wales Local Housing Market Assessment Appendix 2

Chart A2.7 : Flat Sales in 2004:

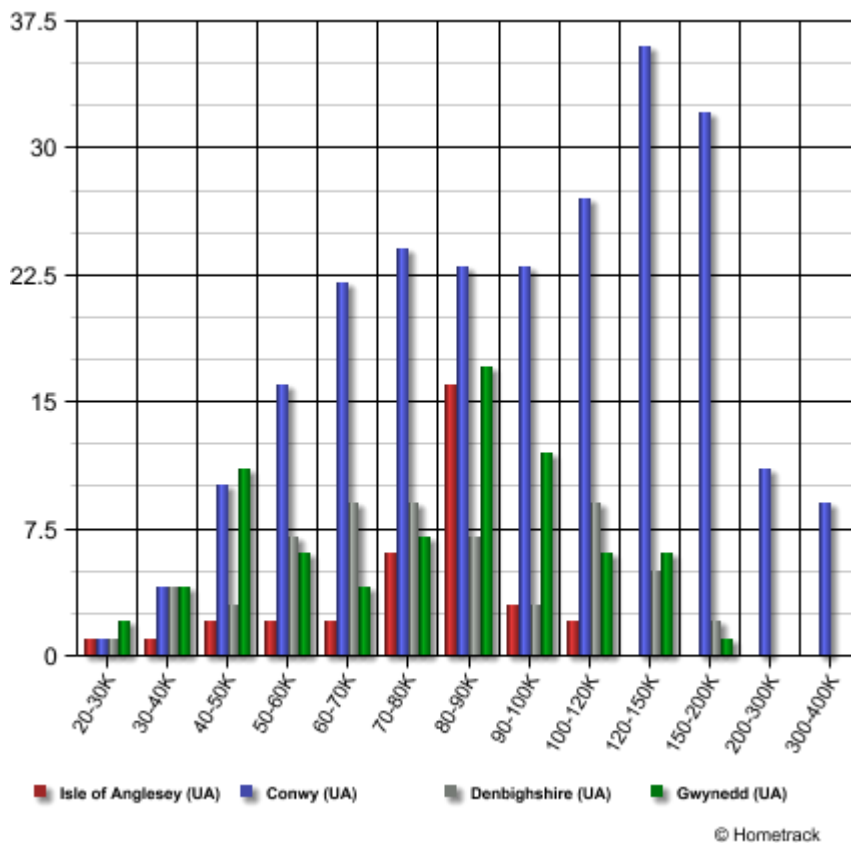


Source: Land Registry

A2.15 In 2004 the highest proportion (16%) of flat sales in Conwy was in the £70-£80k range, a higher range than the previous year. The highest proportion (24%) of flats sold in Denbighshire was in the £50-£60k range, a higher range than the previous year's highest proportion. The highest proportion of flat sales in Anglesey were at an even lower range and less than the previous year at £40-£50k, with under 5 sales in this range. The highest proportion (24%) of flat sales in Gwynedd was in the highest range compared to the other local authority areas with nearly 20 sales in the £90-£100k range.

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Chart A2.8: Flat Sales in 2005:

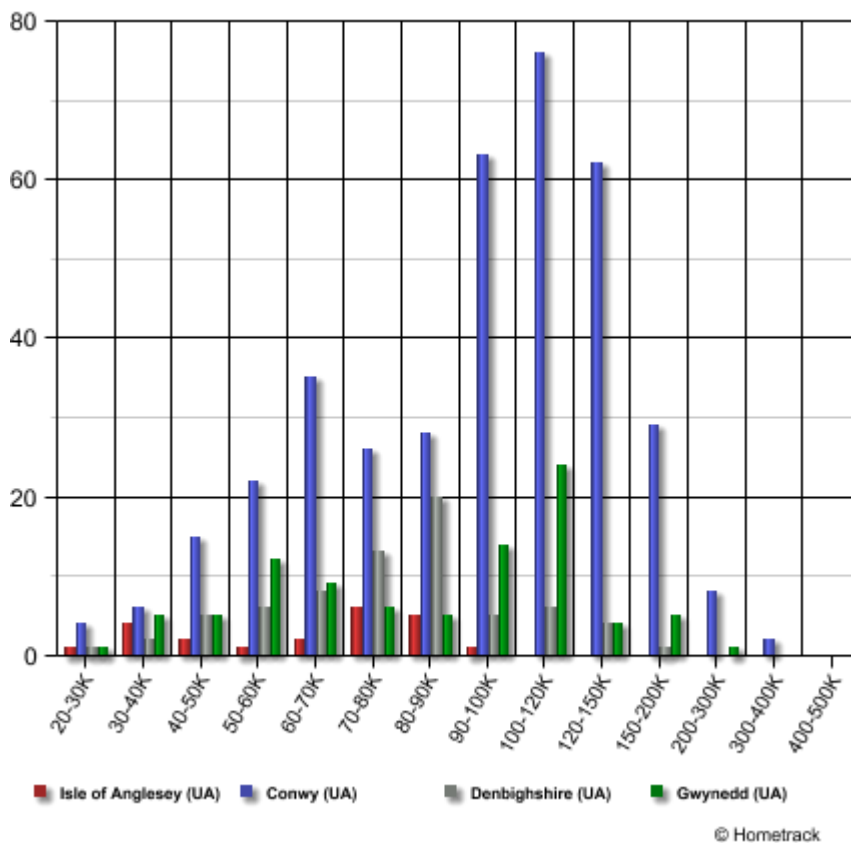


Source: Land Registry

A2.16 The highest proportion (15%) of flat sales, nearly 37 sales in Conwy were in the £120-£150k range a marked increase on the previous year's highest proportion. Gwynedd's highest proportion of flat sales in 2005 was less than the previous year's highest proportion at the £80-£90k range with over 15 sales. 56% of Denbighshire's sales in 2005 were split evenly between the £60-£70k, £70-£80k and £100-£120k price ranges. At a higher range than the previous year's highest proportion in 2005 Anglesey saw over 15 sales in the £80-£90k range (42%).

## North West Wales Local Housing Market Assessment Appendix 2

Chart A2.9: Flat Sales in 2006:



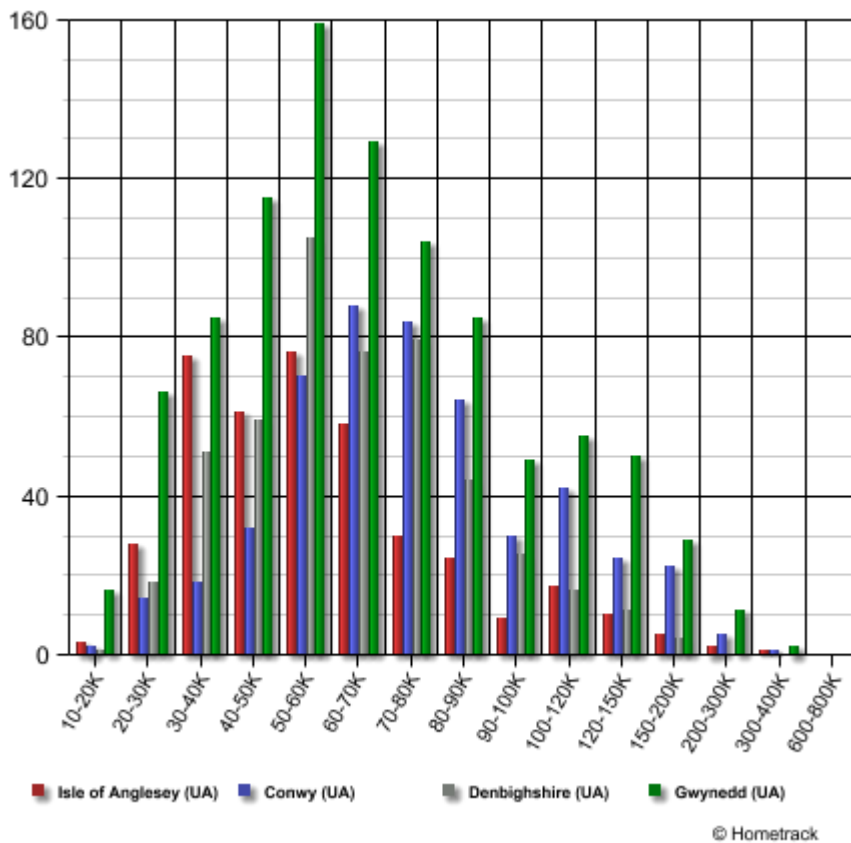
Source: Land Registry

A2.17 By 2006 the highest proportion (19%) of flat sales in Conwy was in a lower range at £100-£120k with over 70 sales. The highest proportion (28%) of flat sales in Denbighshire was in the £80-£90k range and the highest proportion of flat sales in Gwynedd were in the £100-£120k range, an increase on the previous year's highest proportion, with over 20 sales. Anglesey saw a reduced turnover and reduced price range for the highest proportion of flat sales in 2006, with the highest proportion, only 5 sales in the £70-£80k range.



## North West Wales Local Housing Market Assessment Appendix 2

Chart A2.10: Terrace sales in 2003:

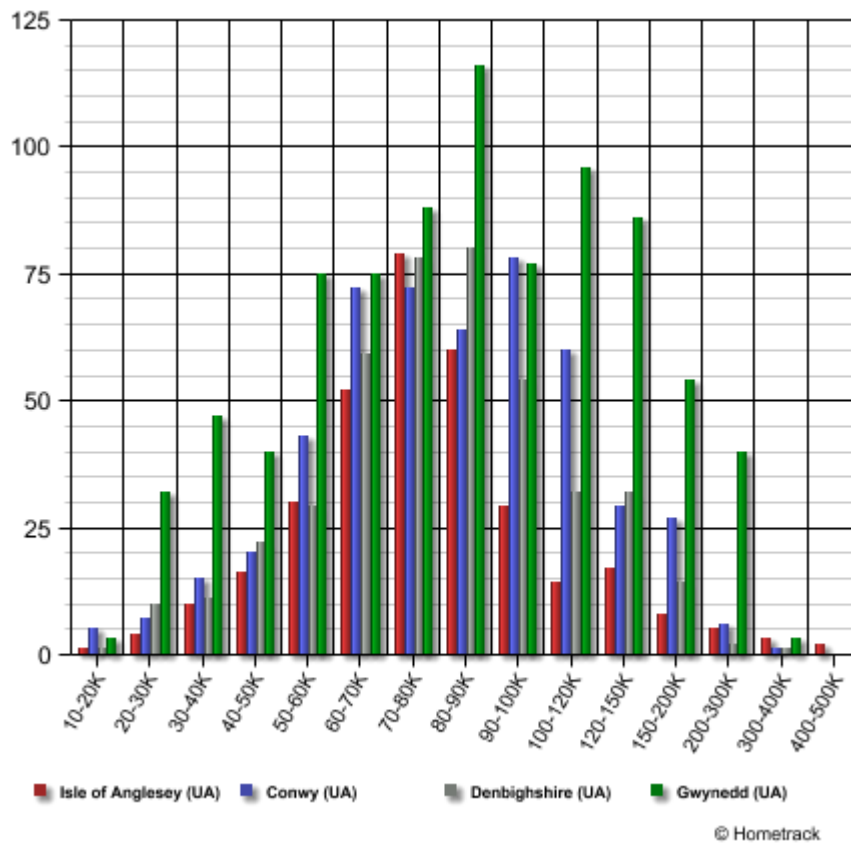


Source: Land Registry

A2.18 Gwynedd had the highest over all number of terrace sales compared to the other local authority areas in 2003-2006, this corresponds with Gwynedd having the highest number of this housing stock type. 955 terrace properties were sold in 2003 in Gwynedd, this was the highest number of terrace sales in Gwynedd, indeed in all the local authorities between 2003-2006. In 2003 the highest proportion of terrace sales sold in Gwynedd and Denbighshire were in the £50-£60k range, the former saw nearly 160 (16%) sold and the latter over 100 (20%). In Conwy the highest proportion of terrace sales was in the £60-£70k range in Conwy, 18%. Anglesey had equal proportions of 19% of terrace properties sold in both the £30-£40k range and £50-60k range.

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Chart A2.11: Terrace sales in 2004:

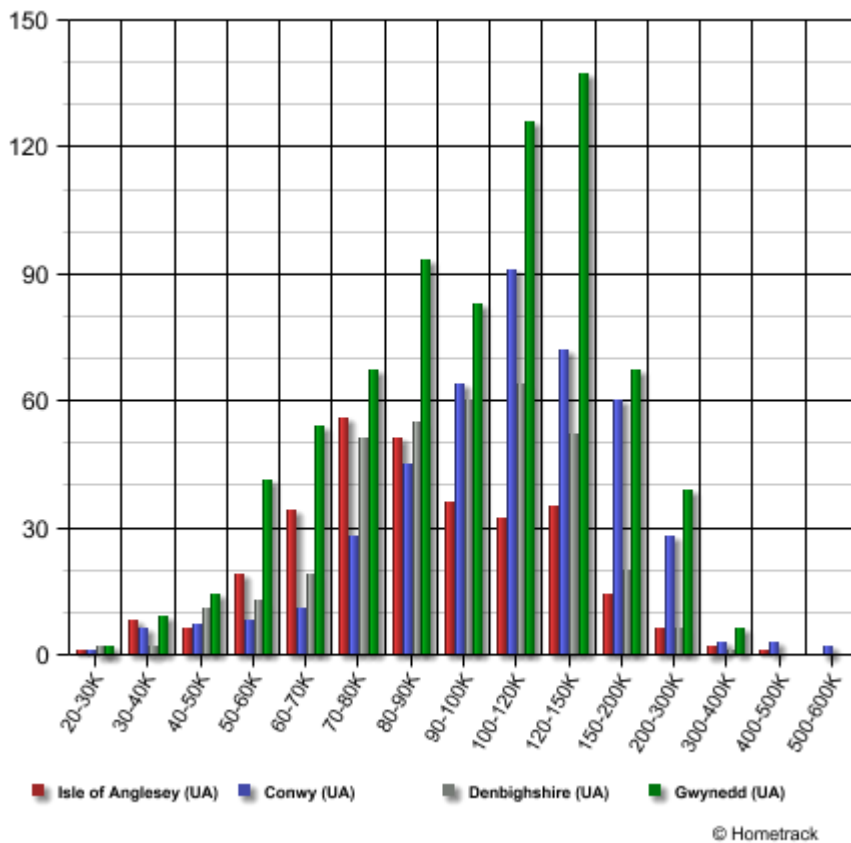


Source: Land Registry

A2.19 The highest proportion of terrace sales in North West Wales had increased in 2004, in Gwynedd they had increased to £80-90k range 13% of all terrace sales. In the £70-80 range 24% terrace sales in Anglesey were in this range and 18% in Denbighshire, and 15% in the £90-£100k range in Conwy.

## North West Wales Local Housing Market Assessment Appendix 2

Chart A2.12: Terrace sales in 2005:

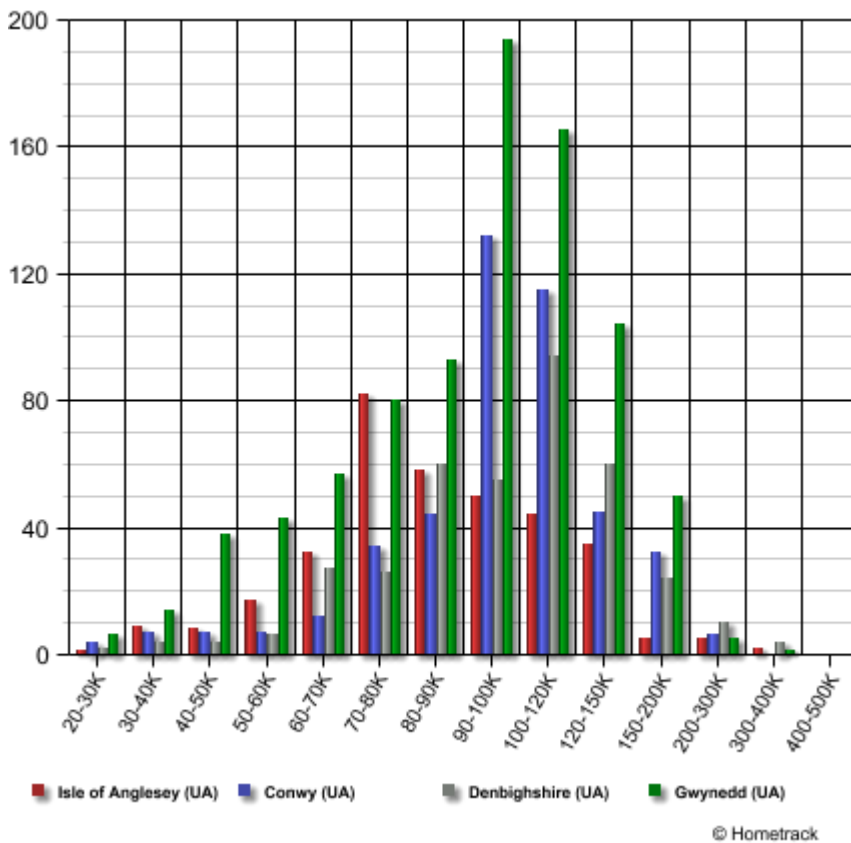


Source: Land Registry

A2.20 By 2005 the highest proportion (19%) of terrace sales in Gwynedd was in £120-£150k range, higher than the previous year's highest proportion. In Conwy the highest proportion of terrace sales had also moved up the price range scale with 90 sales in the £100-£120k range. The highest proportion (17%) of terrace sales in Denbighshire was also in the same price range and the same increase as Conwy with a little over 60 (14%) sales in this range. Only the highest proportion of terrace sales in Anglesey remained at the same price range, with fewer sales in this range than in 2004.

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Chart A2.13: Terrace sales in 2006:

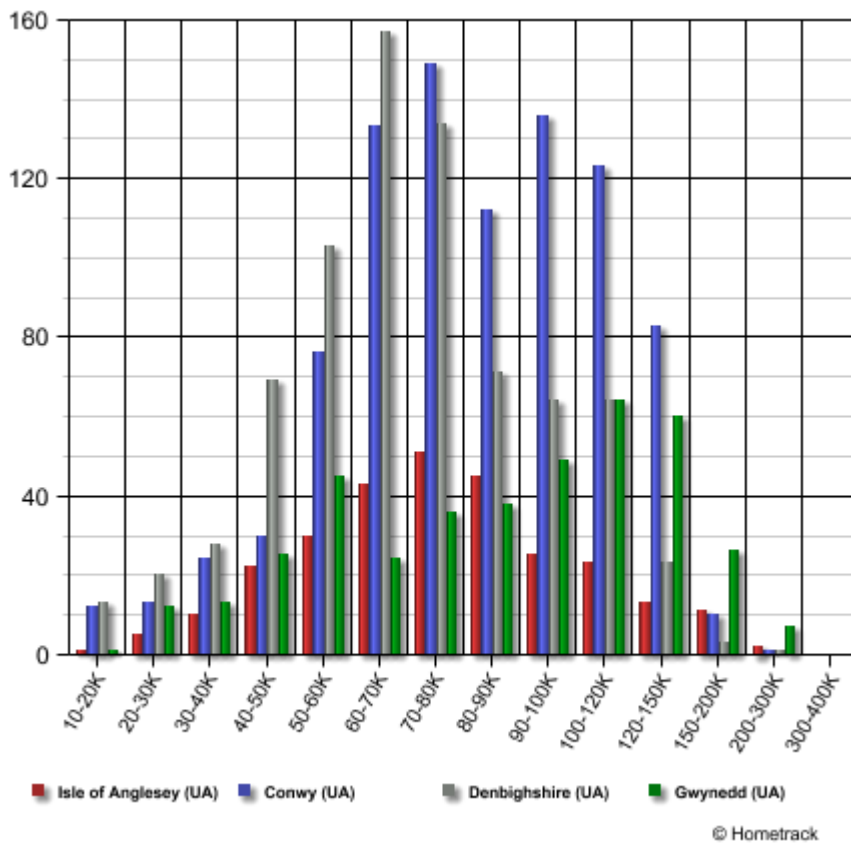


Source: Land Registry

A2.21 An increase on the previous year the highest proportion (23%) of sales was within the £90-£100k range in Gwynedd 2006. The highest proportion of terrace sales was also in the same price range in Conwy as they were in Gwynedd in 2006, with less overall sales, but with a higher proportion of sales at 29%. The highest proportion of terrace sales in Denbighshire was in the £100-£120k price range an increase on the previous year's highest proportion and with over 90 sales. The highest proportion of terrace sales in Anglesey remained at the same range as 2005 but with an increased turnover of over 80 sales, 21% proportionately.

## North West Wales Local Housing Market Assessment Appendix 2

Chart A2.14: Semi-detached sales in 2003:

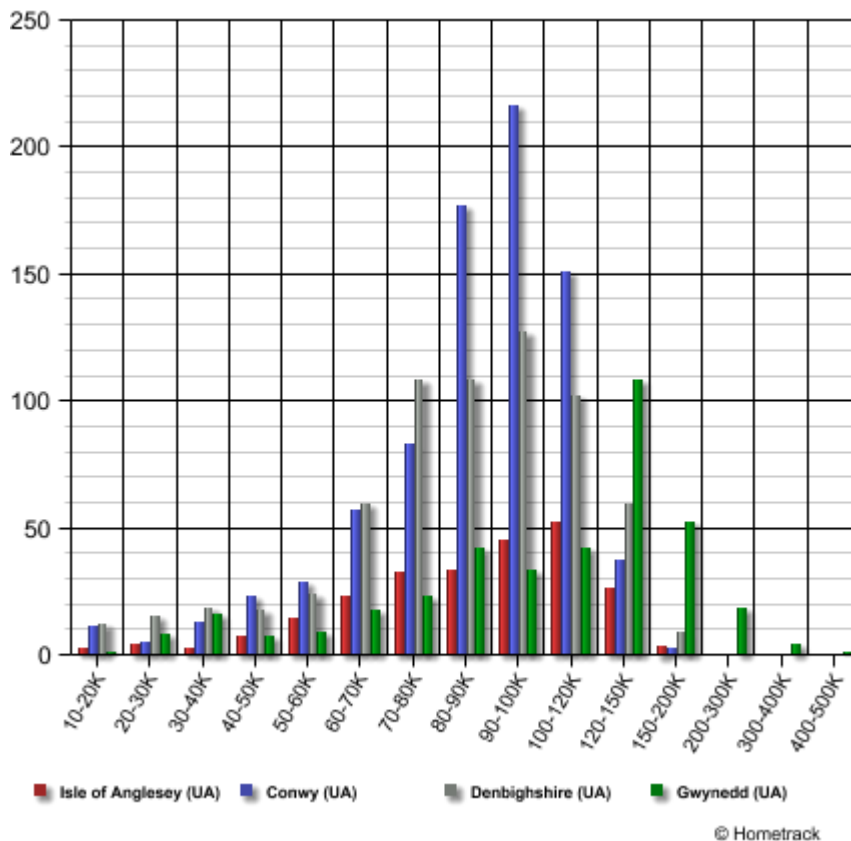


Source: Land Registry

A2.22 Between 2003 and 2006 Conwy saw the highest overall number of semi-detached sales compared to the other NWW local authorities with 902 sales in 2003. In 2003 Denbighshire saw the highest proportion (20%) of semi-detached property sales in the £60-70k range. The highest proportion of semi-detached sales in Conwy and Anglesey were at a slightly higher price range, £70-80k for the same period, the former with nearly 150 sales (17%) and the latter only 50 sales (18%). Gwynedd's highest proportion of semi-detached house price sales were at the higher price range of £100-120k for over 60 sales in 2003.

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Chart A2.15: Semi-detached sales in 2004:

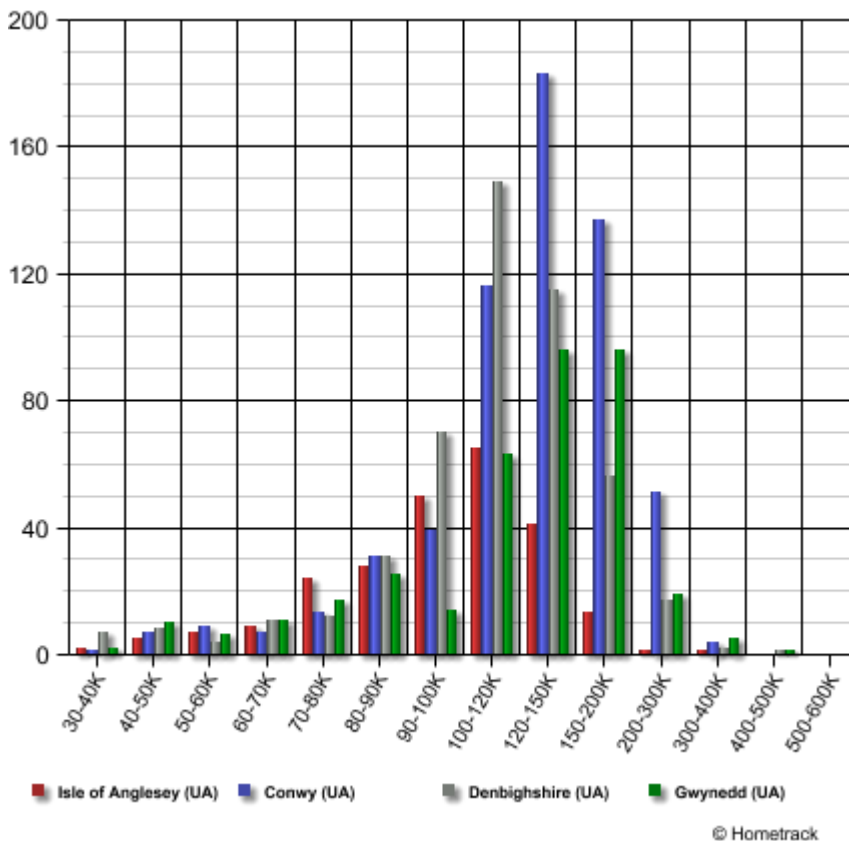


Source: Land Registry

A2.23 In 2004 the highest proportion (26%) of semi-detached properties sold in Conwy was in the £90-£100k range, over 200 sold within this price range also a higher price range than the highest proportion in the previous year and a higher turnover. Denbighshire saw the highest proportion (18%) of semi-detached properties sold within the £90-£100k range, again a higher price range than the highest proportion sold in the previous year with over 120 within this range sold. The highest proportion (20%) of semi-detached properties sold in Anglesey was in the £100-£120k range, an increase on the previous year's highest proportion sold. Gwynedd's highest proportion (26%) of semi-detached properties sold in 2004 were in the £120-£150k, with over 100 properties sold a higher turnover than the largest proportion sold the year previously and also at a higher price range.

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Chart A2.16: Semi-detached sales in 2005:

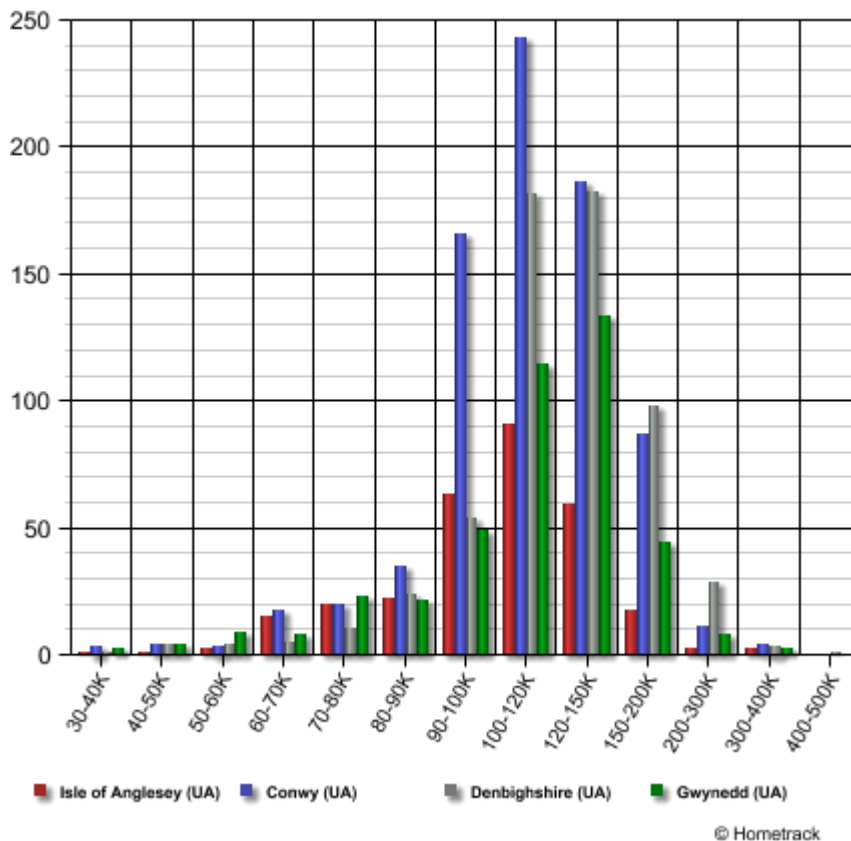


Source: Land Registry

A2.24 By 2005 semi-detached house price sales had moved up the price range scale even further. The highest proportion (30%) of Conwy's semi-detached property sales were in the £120-£150k range with over 180 properties sold. Denbighshire's highest proportion sold (30%) was in the £100-£120k range with nearly 150 properties sold, an increase on the previous year's highest proportion of this property type sold. Gwynedd saw equal proportions of over 25% in both the £120-150k price range sales and £150-200k sales for semi-detached property sales. Only Anglesey differed to the other 3 comparatives, the highest proportion of semi-detached properties sold was in the £100-£120k range, the same as the previous year, but with a higher turnover than the previous year.

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Chart A2.17: Semi-detached sales in 2006:



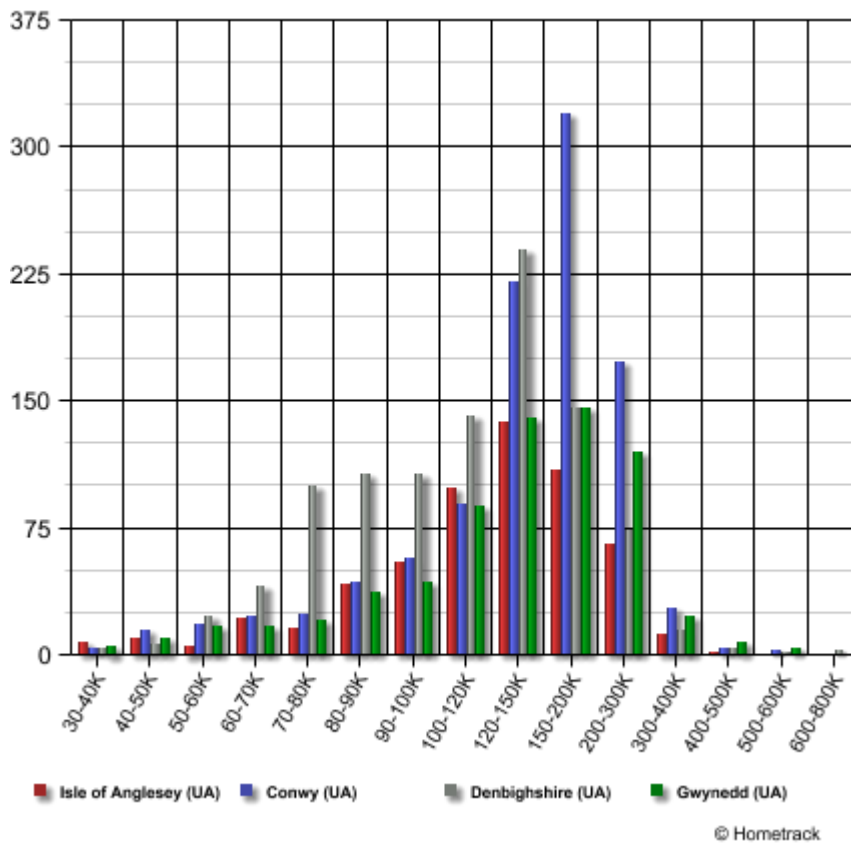
Source: Land Registry

A2.25 In Anglesey the price range of the highest proportion (31%) of semi-detached property sales remained at the same £100-£120k range as the previous 2 years with an increasing turnover of over 90 properties sold in 2006. Gwynedd saw a higher number of semi-detached property sales at the £120-£150k range, with over 130 sold. In Denbighshire there were an equal proportion of semi-detached properties sold in the £100-£120k price range and the £120-£150 price range with over 30% of semi-detached properties sold in each range. The highest proportion of semi-detached properties sold in Conwy in 2006 was in a lower price range than the previous year with over 240 properties sold in the £100-£120k price range.



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Chart A2.18: Detached sales in 2003:

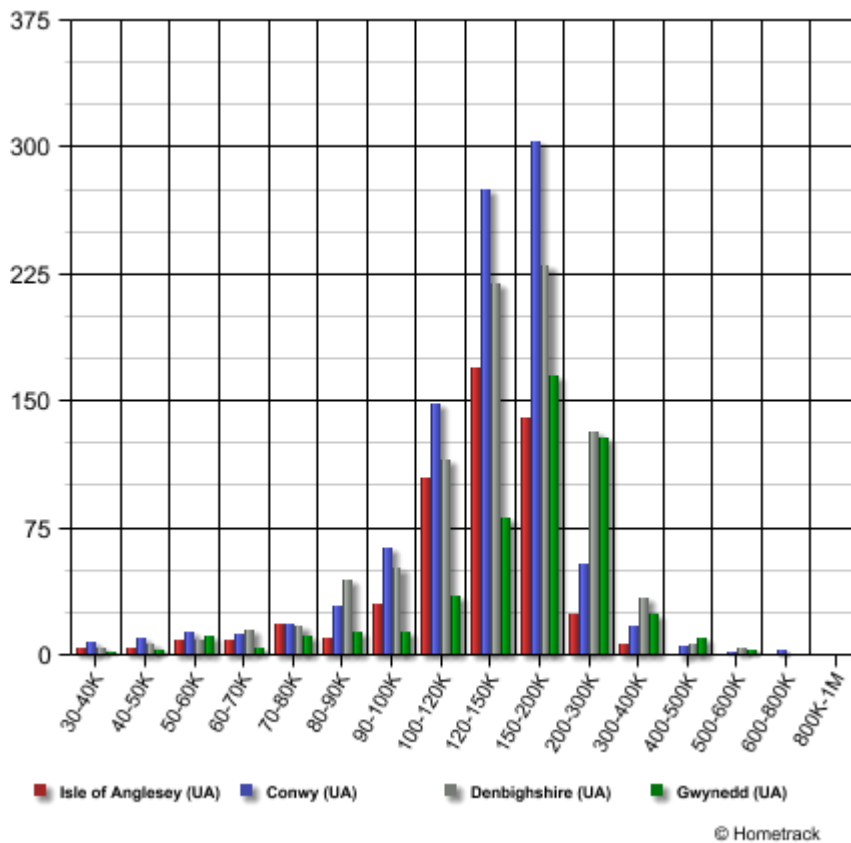


Source: Land Registry

A2.26 Both Conwy and Anglesey saw over 1,000 detached properties sold in 2003, the highest number between 2003-2006 compared to the other NWW local authorities. In 2003 the highest proportion (22%) of detached property sales in Anglesey was in the £120-150k price range with over 125 properties sold. Similarly Denbighshire's highest proportion (22%) of detached properties sold was in the £120-£150k price range with a higher number of 225 properties of this range sold. Gwynedd's highest proportion (22%) of this property type was in the £150-£200k price range with nearly 150 properties of this range sold. Compared to Conwy in which the highest proportion (30%) of detached property sold were in the same price range but at with a far higher turnover of over 300 properties in this range sold.

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Chart A2.19: Detached sales in 2004:

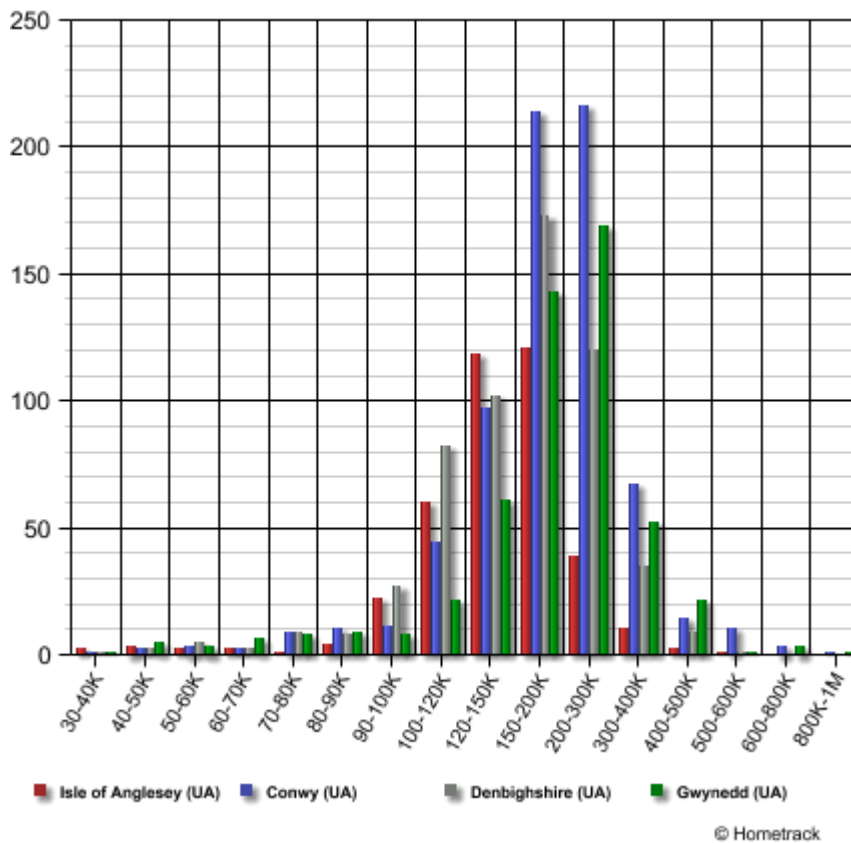


Source: Land Registry

A2.27 In 2004 the highest proportion (29%) of detached properties sold in Anglesey remained in the same price range but with an increased turnover, over 150 properties sold in this range. Gwynedd's highest proportion of detached properties sold also remained in the same price range but with fewer sales in this range than the previous year. Similarly highest proportion of detached properties sold in Conwy also remained within the same price range as the previous year, with turnover remaining at the same number for this range. The highest proportion (26%) of detached properties sold in Denbighshire was in the £150-£200k range with over 225 sold in this range.

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Chart A2.20: Detached sales in 2005:

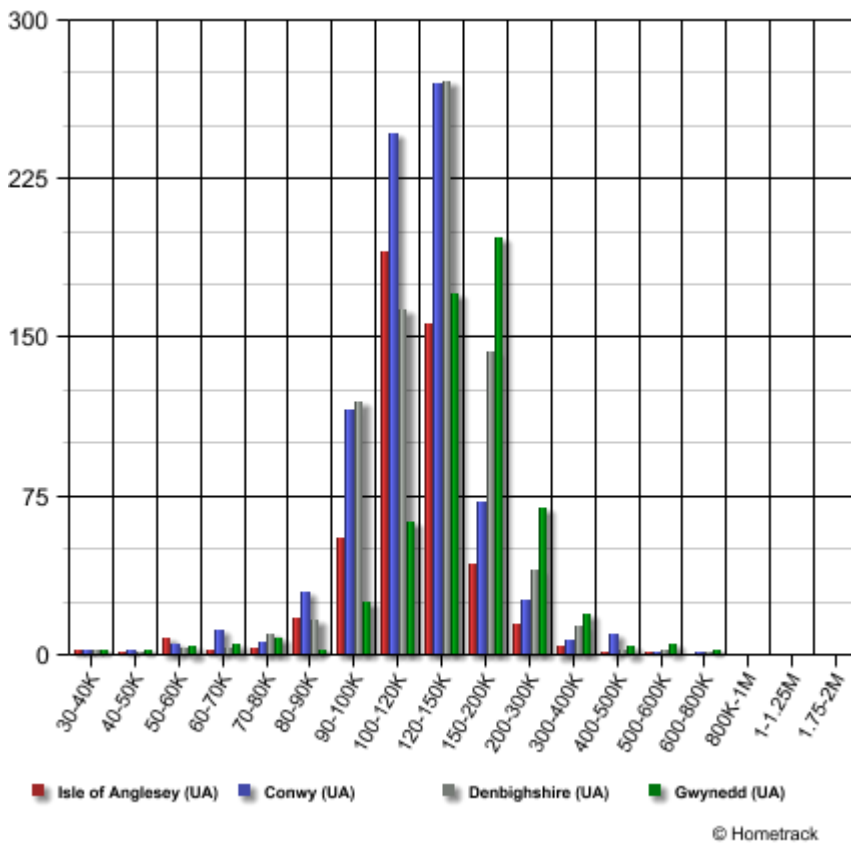


Source: Land Registry

A2.28 In Conwy in 2005 nearly equal proportions (30%) were sold in the £150-£200k price range and £200-£300k price range. Denbighshire's highest proportion of detached property sales remained in the same range as the previous year with a reduction of sales in this range. Similarly the highest proportion of detached properties sold in Gwynedd was in the same price range as Denbighshire however was in a higher range than the previous year and with over 150 in this range sold. Anglesey saw an increase in the highest proportion (31%) of property sales with over 120 properties sold in this range and just fewer than 120 sold within the £120-£150k price range.

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Chart A2.21: Detached sales in 2006:



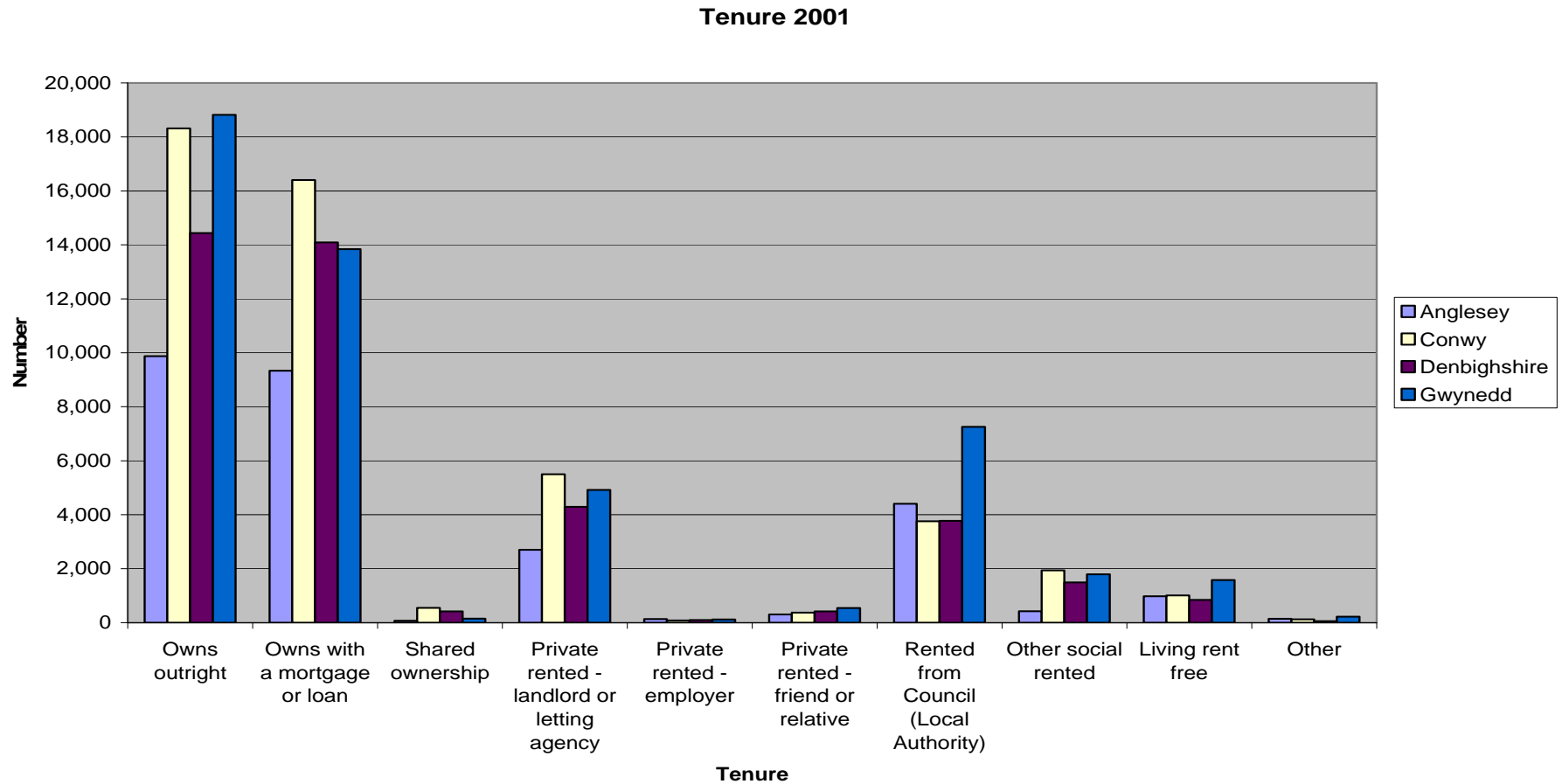
Source: Land Registry

A2.29 By 2006 the highest proportion (31%) of detached property sales in Conwy was in the lesser price range of £120-£150k, with over 250 sold in this range. Similarly Denbighshire saw the same number and highest proportion as Conwy in 2006, again a lesser price range than the previous year. Again a similar pattern can be found in Anglesey as the highest proportion of detached properties sold was in a lesser price range than the previous year. Gwynedd also saw the highest proportion (30%) of detached property sales in a lesser price range than in the previous year, over 175 properties sold within the £150-£200k price range.

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## Tenure

Chart A2.22

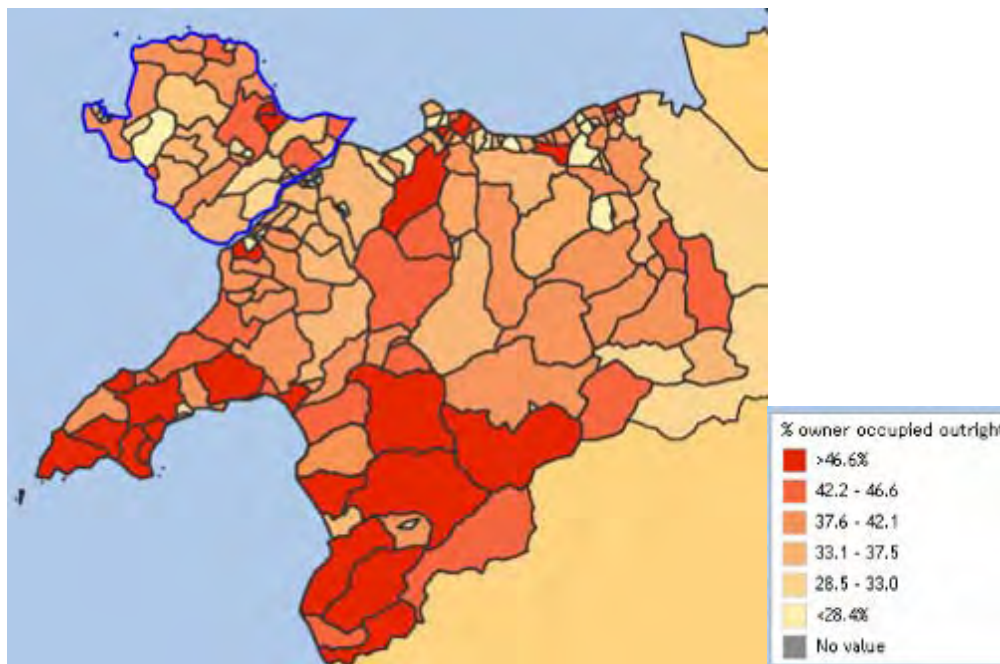


Source: Census 2001

Note: data cannot be disaggregated for the NPA area

### Owner Occupied Outright

Map A2.1: tenure of dwellings in North West Wales, by ward – owned outright



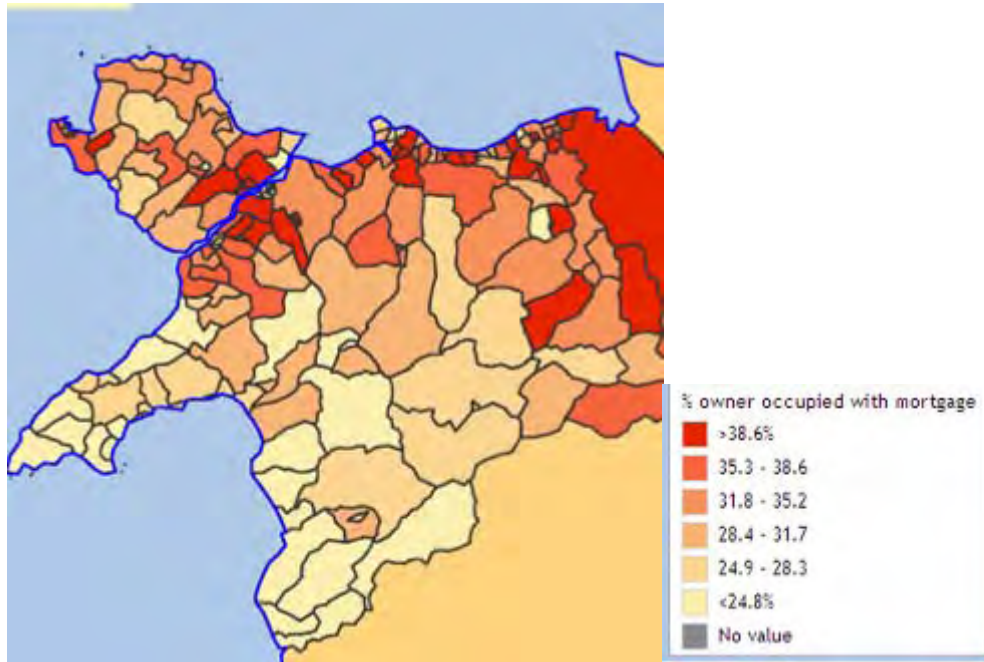
Source: 2001 Census, Map © Hometrack 2007

A2.30 The Census 2001 recorded that the Llanbedrgoch ward in Anglesey had 51.2% owned outright properties. Both Deganwy and Gele wards in Conwy had over 53% properties owned outright. The only ward that had over 46.6% owned outright occupation was Prestatyn North with 49.6%. Gwynedd had a large number of wards that were over 46.6% owned outright; within the 13 wards highlighted Llanbedrog, while wards within the Snowdonia National Park - Dyffryn Ardudwy and Brithdir and Llanfaechreth had over 53%, Llanbedr with the highest proportion at 58.5%.

A2.31 The Llyn peninsula and Bala HMAs had a high number of wards that contained over 46.6% owner occupied outright tenure. However out of the housing market areas Llandudno HMA had the highest level of owner occupation (76%) and the lowest level of public rented tenure (8.5%) in North West Wales.

### Owner occupied with mortgage

Map A2.2: tenure of dwellings in North West Wales, by ward – owner occupied with mortgage

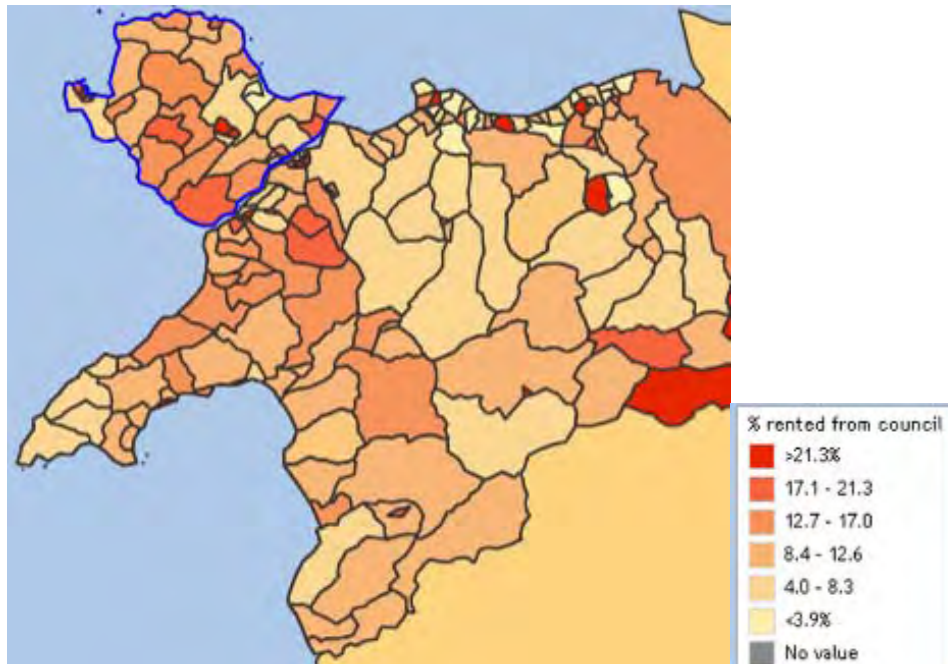


Source: 2001 Census, Map © Hometrack 2007

- A2.32 Contrastingly the wards highlighted for owner occupied with mortgage are not in the same areas as those that are owned outright. The wards surrounding the Menai Hub, particularly in the Menai HMA are noticeable as having the higher proportion of those with owner occupation with a mortgage particularly Llanfihangel Ysgeifiog with 45.2% and Braint 47.7% in Anglesey and Pentir 40.8%, Penisarwaun 45% and Bethel 46.2%.
- A2.33 The costal wards of Conwy local authority area have the highest proportion of owner occupiers with a mortgage, Capelulo and Kinmel Bay both had 41.4% and Llandulas had 43.8%. Within Denbighshire local authority area Rhyl South East had 46.4% and 46.2% in Lower Denbigh. Particular clusters of wards with a high percentage of owner occupation with a mortgage are also located in the Llandudno, Bay of Colwyn and Rhyl HMAs.

### Rented from Local Authority

Map A2.3: tenure of dwellings in North West Wales, by ward – rented from local authority



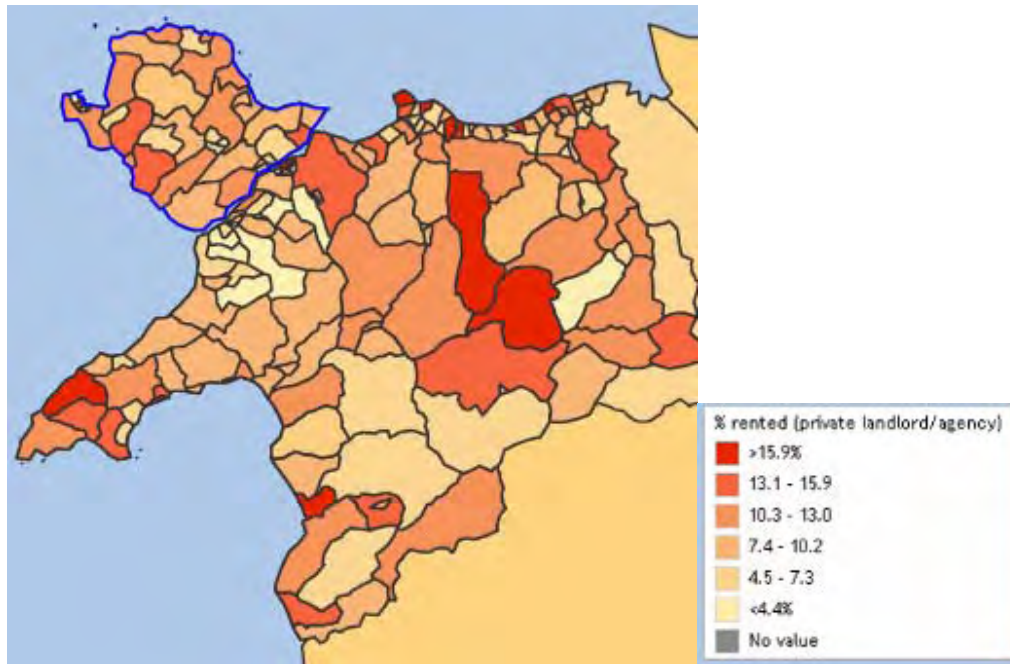
Source: 2001 Census, Map © Hometrack 2007

- A2.34 The percentage of households in the owner occupied and private rented sectors are relatively consistent in North West Wales the only obvious variance is only found in local authority rental whereby this tenure makes up as little as 7.8% of the total tenure in Conwy and 9.5% in Denbighshire compared to the higher proportions in Gwynedd 14.7% percent and 15.5% in Anglesey.
- A2.35 In Anglesey local authority area the wards surrounding Holyhead both Maeshyfyrd and Porthyfelin wards had over 25% rented from the local authority and Morawelon had 45.2%. In Gwynedd the Marchog ward with 53% and Peblig with 56.1% percent particularly stood out as having high proportions of properties rented from the local authority. Correspondingly Holyhead housing market area had a fifth of households renting from public sector housing providers.
- A2.36 In Denbighshire and Conwy the proportions of those that rent from the local authorities are far less than those in Gwynedd and Anglesey this could be attributed to less condensed local authority stock in these local authority areas. In Conwy the Llysfaen had the highest proportion of 23.6% and in Denbighshire Denbigh Upper/Henllan had 33%.



### Privately Rented

Map A2.4: tenure of dwellings in North West Wales, by ward – rented privately



Source: 2001 Census, Map © Hometrack 2007

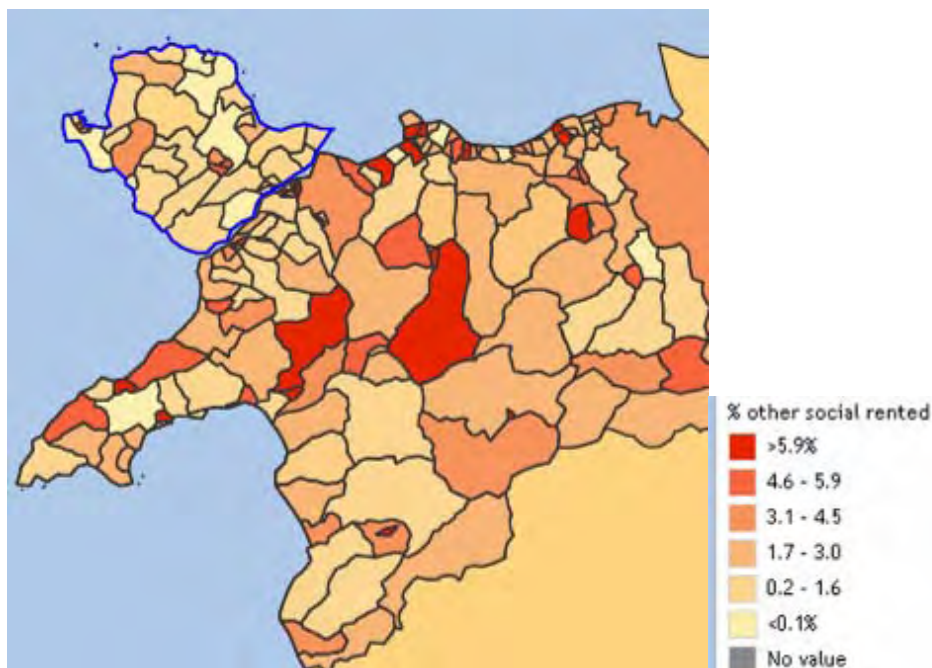
- A2.37 In all local authority areas in North West Wales, between 9.5% and 11.5%, rent from a private landlord or letting agency which is close to the Wales figure of 10.3% for renting privately or from a housing association in 1992. An overall increase in 'other' tenure was recorded from 1986 to 2004. The 'other' tenure refers to privately renting and renting from housing associations and as expected local authority renting has declined since the introduction to the Right to Buy in the 1980s and this has as a result increased owner occupation tenure and other rented.
- A2.38 The above map illustrates all the wards that had over 15.9% rented from a private landlord or agency in 2001. Particularly the Holyhead Town ward in Anglesey with 24.2% private rental and the Rhyl West ward in Denbighshire with 38.5% private rental are the only wards in the 2 local authority areas that have over 15.9% of this particular tenure type.
- A2.39 Gwynedd local authority area has 6 wards over 15.9% private rental, particularly high proportions were found in the wards surrounding Bangor, for example Menai (Bangor) with 38.5% and Deiniol with 35.2%. Considering the transient university population that occupy the wards surrounding the university could go some way to explain such high proportions.

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A2.40 Conwy County Borough had the largest quantity of wards compared to the other local authority areas with 8 wards containing over 15.9% private rental in 2001. Glyn ward had 24.5% private rental and Gogarth had 29.4%.

**Other Socially Rented**

Map A2.5: tenure of dwellings in North West Wales, by ward – other socially rented

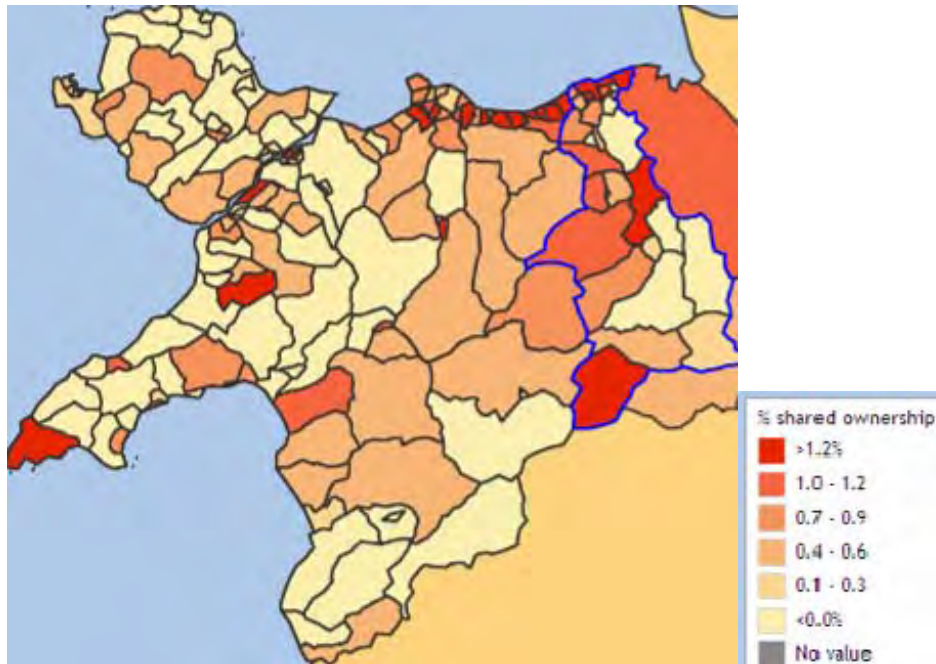


Source: 2001 Census, Map © Hometrack 2007

A2.41 Chart A2.2 demonstrate an obvious variance with regards to Housing Association rental, Anglesey particularly stands out in this sector as having a lower proportion than its counterparts at only 1.5%, only 422 properties of this tenure. The island's highest proportion of other socially rented properties is located in the centre of island with Tudur having 4.7% and Cefni 4.9%. The above map illustrates the wards with the highest proportion of other social rented tenure.

### Shared Ownership

Map A2.6: tenure of dwellings in North West Wales, by ward – shared ownership



Source: 2001 Census, Map © Hometrack 2007

A2.42 In 2001 shared ownership made up a very small tenure percentage in North West Wales for example just 0.3% of Gwynedd and Anglesey tenure were Shared Ownership, just 149 properties in Gwynedd and 70 in Anglesey. Conwy had the highest number of Shared Ownership properties at 546 and within Conwy Towyn (3.1%) and Kinmel Bay (3.9%) were the wards with the highest proportion of this tenure. There were 420 Shared Ownership tenures in Denbighshire within which the Prestatyn East (3.4%) and the Rhyl South East (3.2%) had the highest proportion. In Denbighshire and Conwy Shared Ownership made up just 1.1% of tenure in both local authority areas.

## Tenure prices

### Socially rented:

Table A2.8: The weekly cost of socially rented properties in North West Wales in 2005.

	1 bedroom		2 bedrooms		3 bedrooms		4 or more bedrooms	
	Houses & bungalows	Flats	Houses & bungalows	Flats	Houses & bungalows	Flats	Houses & bungalows	Flats
<b>Anglesey</b>	43.87	43.00	45.49	43.43	49.58	48.14	52.01	.
<b>Conwy</b>	45.84	44.96	47.63	50.09	51.60	57.26	58.19	50.37
<b>Denbighshire</b>	40.15	43.48	44.19	46.94	51.53	54.58	56.21	.
<b>Gwynedd</b>	42.25	49.09	47.24	49.85	48.99	52.80	50.37	55.60

Source: Wales Housing Statistics 2005 (WAG)

Note: data cannot be disaggregated for the NPA area

A2.43 In North West Wales Denbighshire had the cheapest 1-2 bedroom socially rented houses and bungalows in 2005 and Gwynedd had the cheapest 3 bedroom houses and bungalows. The most expensive socially rented properties were found in Conwy at £58.19 rent per week for a 4 or more bedroom house or bungalow.

### Privately rented:

A2.44 Data from the Rent Officer Wales indicates that there has been an increase in private rental prices across the counties in North West Wales for all property types with the exception of Anglesey's detached 2 bedroom properties and 2 bedroom terrace properties in Gwynedd. The table below also indicates that during the period April 2005 to March 2007 Gwynedd offered some of the cheapest private rental terrace properties and Denbighshire some of the cheapest private rental flats.

A2.45 Although some cheaper rent ranges can be found in the private rental sector than can be found in the socially rented sector these rental figures will not be relied upon to measuring affordability later on in the assessment as these rental figures may be based on sub-standard properties with little or no amenities.

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Table A2.9: Private rents

Property Type	Anglesey Rent Range		Conwy (including SNP) Rent Range		Denbighshire Rent Range		Gwynedd (including SNP) Rent Range	
	04/05 – 03/06	04/06 – 03/07	04/05 – 03/06	04/06 – 03/07	04/05 – 03/06	04/06 – 03/07	04/05 – 03/06	04/06 – 03/07
<b>Terrace 1 Bed</b>	*	*	*	*	60 – 98	26 – 100	42 – 121	38 – 109
<b>Terrace 2 Bed</b>	50 – 115	58 – 120	37 – 137	36 – 137	30 – 196	41 – 196	40 – 156	40 – 138
<b>Terrace 3 Bed</b>	46 – 150	70 – 150	58 – 150	60 – 173	65 – 143	50 – 156	40 – 185	55 – 160
<b>Terrace 4+ Bed</b>	*	90 – 225	104 – 173	63 – 297	78 – 180	85 – 138	55 – 404	44 – 330
<b>Semi-detached 1 Bed</b>	*	*	48 – 91	75 – 145	85 – 104	*	50 – 75	*
<b>Semi-detached 2 Bed</b>	69 – 115	69 – 127	45 – 144	60 – 183	51 – 127	42 – 127	60 – 127	69 – 183
<b>Semi-detached 3 Bed</b>	61 – 133	58 – 150	23 – 156	40 – 156	60 – 150	47 – 153	69 – 173	54 – 173
<b>Semi-detached 4+ Bed</b>	*	*	57 – 300	83 – 165	45 – 156	114 – 150	115 – 230	143 – 184
<b>Detached 1 Bed</b>	*	*	*	*	*	*	45 – 80	*
<b>Detached 2 Bed</b>	77 – 110	35 – 104	34 – 137	76 – 156	89 – 114	65 – 137	34 – 137	40 – 99
<b>Detached 3 Bed</b>	63 – 231	69 – 121	40 – 173	55 – 208	70 – 225	65 – 173	40 – 173	*
<b>Detached 4+ Bed</b>	70 – 183	92 – 173	90 – 278	46 – 265	92 – 392	72 – 207	90 – 277	46 – 156
<b>Flat 1 Bed</b>	50 – 104	45 – 114	38 – 155	38 – 212	20 – 120	41 – 115	35 – 110	35 – 121
<b>Flat 2 Bed</b>	60 – 180	55 – 104	40 – 184	43 – 183	50 – 140	24 – 138	28 – 133	28 – 225
<b>Flat 3 Bed</b>	40 – 173	70 – 133	42 – 161	55 – 173	46 – 150	68 – 183	45 -	56 – 164
<b>Flat 4+ Bed</b>	*	*	58 – 120	*	*	*	*	*

Source: derived from Rent Officer Wales 2007

\* Please note that the figures provided in the rent range are in whole pounds per weekly rent. Also note that information could not be provided in numbers as the rent office does not record the information that way so the above table only gives the rent range for a particular time period per local authority area.

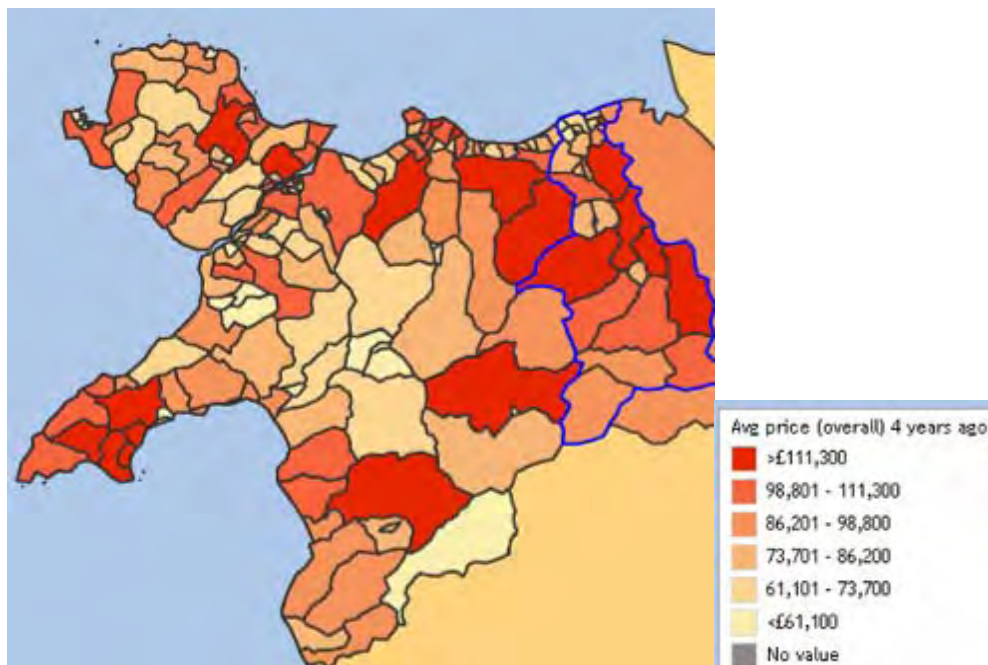
Note: data cannot be disaggregated for the NPA area

### Owner occupation

A2.46 There is a noticeable increase in house price in North West Wales when examining the two maps below. For comparison Table 12 details specific wards that demonstrate significant house price change of particular note is the Betws-y-Coed ward with a 66.3% increase and Aberdovey with a 65.1% increase.

A2.47 here is a noticeable increase in house price in North West Wales when examining the two maps below. For comparison the corresponding table below details specific wards that demonstrate significant house price change. Of particular note is the Betws-y-Coed ward with a 66.3% increase and Aberdyfi with a 65.1% increase both are within the Snowdonia National Park.

Map A2.7: Average house prices in 2002

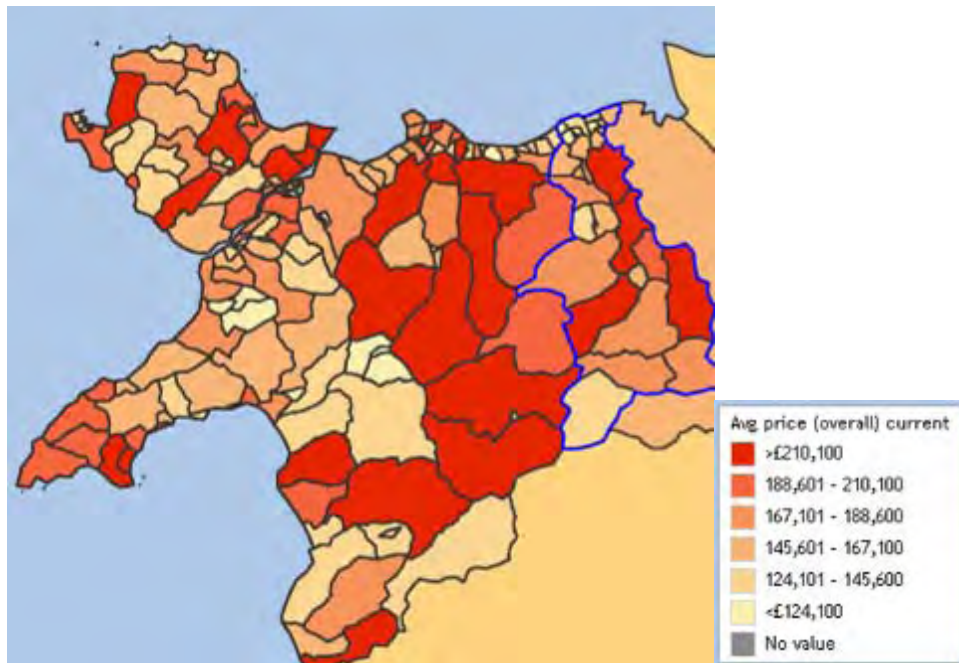


Source: Hometrack and HM Land Registry, Map © Hometrack



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Map A2.8: Average house prices in 2006



Source: Hometrack and HM Land Registry, Map © Hometrack

Table A2.10

LA	Ward	2002 Avg Price	2006 Avg Price	Increase	% Increase
Anglesey	Bodorgan	106,200	218,500	112,300	51.4%
Anglesey	Beaumaris	102,200	224,000	121,800	54.4%
Anglesey	Llangoed	103,200	219,400	116,200	51.9%
Conwy	Deganwy	110,300	268,100	157,800	58.9%
Conwy	Rhiw	109,400	222,300	112,900	50.8%
Conwy	Llansanffraid	95,800	212,000	116,200	54.8%
Conwy	Llangernyw	92,900	219,300	126,400	57.6%
Conwy (within SNP)	Betws-y-Coed	72,100	214,100	142,000	66.3%
Conwy (partly within SNP)	Uwch Conwy	82,000	217,300	135,300	62.3%
Denbighshire	Efenechtyd	108,600	229,900	121,300	52.8%
Gwynedd (within SNP)	Llanbedr	105,400	216,100	110,700	51.2%
Gwynedd (within SNP)	Llanuwchllyn	83,900	219,600	135,700	61.8%
Gwynedd (partly within SNP)	Llandderfel	114,000	226,600	112,600	49.7%
Gwynedd (within SNP)	Aberdovey	98,200	281,000	182,800	65.1%

Source: Derived from Hometrack and HM Land Registry

## Appendix 3 – Affordability profile

### Local incomes

- A3.1 Between 2005 and 2006 earning in Wales rose by 3.3% compared to 4.1% rise for the UK according to ASHE data<sup>49</sup>. The average weekly income in North West Wales in 1999 was £330.80 compared to a Wales average of £358.70 and UK average of £410.80. This increased to £369.80 for NWW in 2001 compared to £385.80 for Wales as a whole and £449.70 in the UK. In 2004 NWW average income increased to £422.20 compared to £444.10 for Wales and £506.20 in the UK.
- A3.2 Although this data provides a useful comparison of NWW income levels to national incomes it does not portray a clear picture of income levels and how they have changed within North West Wales it also only provides (mean) average therefore it is not an accurate measure of average to assess local income as the distribution of income. Comparing the mean income level to the median as this takes the middle point of incomes. Again looking at ASHE incomes income levels at a localised level in 2005 in Anglesey the mean weekly income was £364.70 compared to a median income of £331.10. The mean weekly income for Conwy in 2005 was £375.30 compared to the median income of £317.40, in Denbighshire in 2005 the mean income was £341.90 compared to £274.20 median weekly income. The mean weekly income was £360.80 for Gwynedd in 2005 compared to £278.60 median weekly income.
- A3.3 This analysis now compares the ASHE 2005 income data to CACI Paycheck 2005 income data as the former is not a household figure and does not take into account those who are self employed, whereas the latter is both household income and includes the self employed. The median household income bracket for Anglesey is £20-25 thousand compared to £15-20 thousand income bracket ASHE figure. The median household income bracket in Conwy is the same as Anglesey at the £20-25 income bracket compared to £15-20 thousand income bracket ASHE figure. The median household income for Denbighshire in 2005 was £15-20 thousand income bracket compared to £10-15 thousand income bracket (ASHE). The median household income for Gwynedd in 2005 was the same as that of Anglesey and Conwy at the £20-25 thousand income bracket whereas the ASHE income bracket is less than the latter counties at £10-15 thousand.

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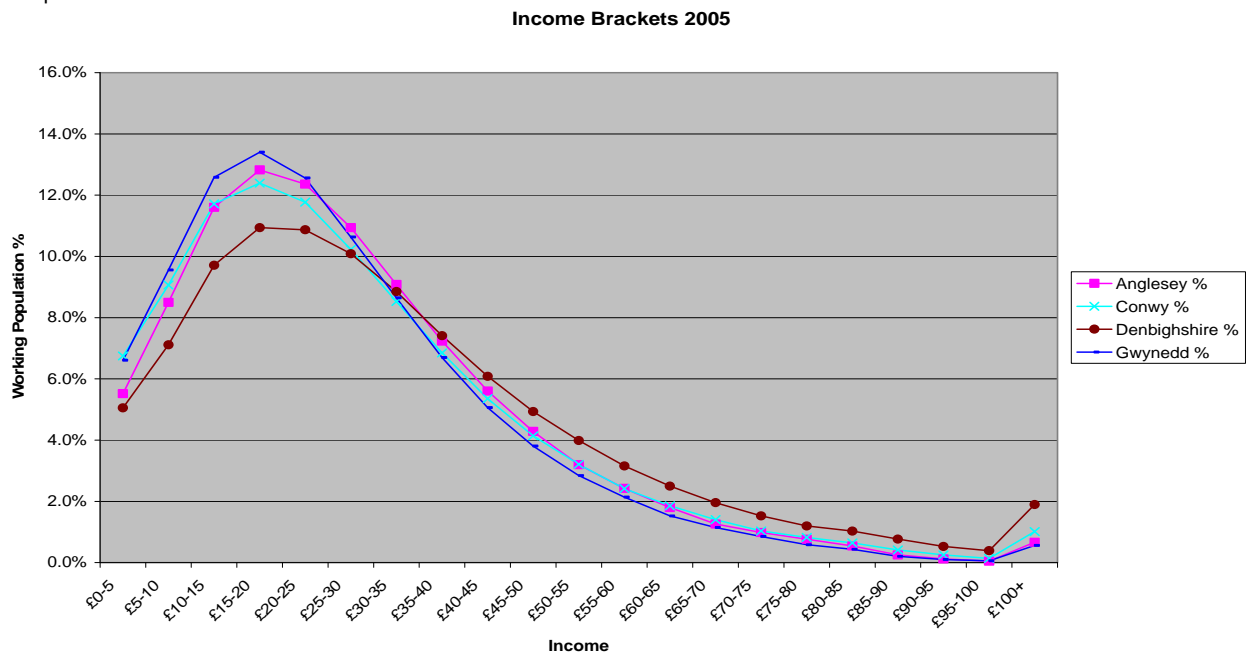
<sup>49</sup> National Assembly for Wales, *Statistical Bulletin, Annual Survey of Hours and Earnings*, 2006, p.1, p.8.



## North West Wales Local Housing Market Assessment Appendix 3

A3.4 Looking at the graph below CACI Paycheck data reveals that the largest proportion of the working population in North West Wales earned around £20 thousand in 2005. Gwynedd had the highest proportion, 13.4% of the working population. 12.8% in Anglesey, 12.4% in Conwy and only 10.9% in Denbighshire. Although Denbighshire had the lowest percentages of those earning between £5-10 thousand and £30-35 thousand it had the highest percentages of those earning over £35-40 thousand and £100 +.

Graph A3.1



Source: CACI Paycheck 2005

Note: Data not disaggregated for the Snowdonia National Park area

### Affordable housing

A3.5 Affordable housing is defined as accommodation that is provided to households whose incomes do not sufficiently enable them to meet their needs (to buy or rent) on the open market. TAN2 <sup>50</sup> further stipulates that 'affordable housing should encompass both low-cost market and subsidised housing (irrespective of tenure, exclusive or shared ownership, or financial arrangements) that will be available to people who cannot afford to occupy houses generally available on the open market'.

A3.6 The outlet in which affordable housing is provided is through the socially rented and intermediate housing market. In North West Wales socially rented accommodation is still provided by all four local authorities and by the following housing associations Clwyd Alyn Housing Association had a total of 4,910 rental properties, 1,933 of which

<sup>50</sup> TAN2, *Planning Guidance (Wales)*, 1996

are in North West Wales as of March 2007. North Wales Housing Association has a total of 2,127 properties all situated in North West Wales. Tai Eryri also has all its properties situated in North West Wales and as of March 2007 this included 1,799 rental units. Wales and West Housing Association has over 9,000 rental units and within North West Wales there are 590 properties. Tai Clwyd Housing Association has over 1,600 rental properties, 1,229 of which are in North West Wales. The total number of socially rented properties in the study area in North West Wales is noted in paragraph 5.14.

- A3.7 The intermediate market is defined as 'housing where prices or rents are above those of social rented housing but below market housing prices and rents. This can include equity sharing schemes (for example *Homebuy*).'<sup>51</sup> The different intermediate products in the North West Wales housing market include Shared Ownership. Shared ownership is a scheme that enables is an amalgamation of both renting and owning a home outright. Minimum purchase of 40%, 50% or 60% can be obtained with a mortgage or the percentage made up of both mortgage and savings in addition the purchaser continued to pay a percentage of the rent. Shared ownership schemes are offered by Tai Clwyd, North Wales, Clwyd Alyn and Tai Eryri housing associations.
- A3.8 A Homebuy schemes is also available to applicants in North West Wales. Homebuy is a loan that is awarded to an applicant to help assist them with a purchase of a property. The loan is interest free, and is only repayable if the property is re-sold – if sold then the vendor must pay the same percentage of the sale price regardless of an increase or decrease in the market price. This scheme is Provided by Conwy County Borough Council or in partnership with Cymdeithas Tai Clwyd. Anglesey's Homebuy schemes are administered via Cymdeithas Tai Eryri on behalf of the council since 1995/96. Denbighshire's Homebuy is run through the Cymedithas Tai Clwyd as does Gwynedd's Homebuy schemes.
- A3.9 Discounted for sale is another intermediate housing product available in which properties within housing developments are sold by the developer at less than the open-market value. There is usually a 30% discount. Only people who need this housing and who meet the condition set out below can buy one of these properties. To be considered, you must be on the affordable ownership register and you must meet the financial and local- connection conditions this is particularly offered by Conwy County Borough Council through their First Steps register and is also offered by Denbighshire Council.

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<sup>51</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p.184.

A3.10 It should be noted however that although such schemes do assist those onto the housing market that otherwise would not be able to afford to A recent Review of Low Cost Home Ownership Policies in Wales<sup>52</sup> carried out by the WAG concluded that the impact of such schemes on the whole housing market would be very minimal making up just 1.5% of the bottom quartile of the market in 2003-2005. The report concluded that:

The Homebuy scheme is, in fact, quite marginal in relation to the size of the market for home ownership, and this suggests there can be very little impact from the Homebuy programme in adding to inflationary pressures in the housing market.

### **Affordability**

A3.11 The Barker Review<sup>53</sup> recognised that in the UK 'in 2002, only 37% of new households could afford to buy a property, compared to 46% in the late 1980s'. Barker goes on to warn that:

Declining affordability also has wider consequences, restricting labour market flexibility, hampering the delivery of public services and leading to longer commuting times affecting individuals' quality of life and environment.

A3.12 Affordability determines whether households have the financial ability to purchase or rent in the open market without subsidy, those that do not have the ability turn to the affordable housing options described in the above section. The financial circumstance of each household presents a varied picture across North West Wales, capital and income levels and household debts combined make up the affordability profile of each household.

A3.13 Households with debts that threatened the loss of their market housing at the most extreme result in repossessions and evictions. There were a total of 158,075 landlord possession claims in 2006 and a total of 106,969 landlord possession orders made for the same period; both figures were less than the previous seven years. In 2006 there were 131,230 mortgage possession claims issued, 50% higher than the 2003 figure, and 90,667 orders made in 2006 compared to 41,038 in 2003 in England and Wales.<sup>54</sup> The Council of Mortgage Lenders says that although possessions have been significantly higher than in the recent past, the number is still low by historical standards.<sup>55</sup> Indeed, in 1990 the total number of standard procedure claims issues

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<sup>52</sup> p.3.

<sup>53</sup> *Interim Report – Analysis*, 2003, p.7.

<sup>54</sup> Ministry of Justice, *Statistics on mortgage and landlord possession actions in the county courts second quarter, 2007*

<sup>55</sup> CML, *Arrears and possessions statistics*, 2007

and orders made for both landlord possession actions and mortgage possession actions were close to (landlord possessions at 131,017) or more than the 2006 figure.<sup>56</sup>

### Private rental

A3.14 The National Housing Federation defines private rent affordable if working households taking up new tenancies are not on housing benefit or spending over 25% of their income on rent.<sup>57</sup> This affordability limit is applied to CACI income data and is compared to median rental figures across the consortium area (last updated in August 2006) based on statistical returns from local estate agents collected by Hometrack.

Table: A3.1

	<b>Median Annual Income</b>	<b>1 bedroom properties median annual rent</b>	<b>2 bedroom properties median annual rent</b>	<b>3 bedroom properties median annual rent</b>
<b>Anglesey</b>	£22,500	£4,732	£5,096	£5,356
<b>Conwy</b>	£22,500	£4,160	£5,980	£6,552
<b>Denbighshire</b>	£17,500	£4,472	£5,668	£6,292
<b>Gwynedd</b>	£22,500	£1,924	£5,096	£6,552

Source: CACI Paycheck 2005, Hometrack 2006

Note: the data is not disaggregated to NPA area

A3.15 The only median rent that is deemed affordable by this definition in the above table is rent for 1 bedroom properties in all four local authority areas as all annual rents for this property is under the £5,625 in Anglesey, Conwy and Gwynedd and below the £4,375 for Denbighshire. Only 2 bedroom properties for Denbighshire and 2 bedroom properties for Anglesey and Gwynedd are deemed affordable. In all 3 local authority areas no resident earning the median income or less would be able to afford to rent a 3 bedroom property.

### Owner occupation

A3.16 The WAG Guide<sup>58</sup> advises that the lower quartile house prices are used to assess affordability as it reflects 'the typical entry-level price rather than the cheapest available property since the lowest prices will reflect sub-standard quality or environmental factors,' this is highlighted in the table below.

<sup>56</sup> Ministry of Justice, *Statistics on mortgage and landlord possession actions in the county courts second quarter, 2007*

<sup>57</sup> House of Commons, *Rent Levels, Affordability and Housing Benefit Research Paper*, 1998, p.36.

<sup>58</sup> Welsh Assembly Government, 2006, p.43.

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Table: A3.3

**Property prices March 2005 – December 2006**

	Lower Quartile				Average				Upper Quartile			
	Anglesey	Conwy	Denbighshire	Gwynedd	Anglesey	Conwy	Denbighshire	Gwynedd	Anglesey	Conwy	Denbighshire	Gwynedd
<b>Mar-05</b>	85.0	109.2	93.0	85.0	141.3	160.7	128.9	137.0	170.7	190.0	156.7	166.8
<b>Jun-05</b>	90.0	106.3	94.9	95.0	148.0	156.7	134.2	148.8	180.0	186.3	154.0	180.0
<b>Sep-05</b>	103.8	112.0	99.0	98.3	167.9	163.6	147.2	151.3	202.5	187.2	167.7	181.7
<b>Dec-05</b>	91.3	106.7	100.3	96.0	154.6	156.7	142.0	155.4	174.5	179.0	165.8	181.8
<b>Mar-06</b>	93.0	110.3	100.0	102.1	145.1	161.0	140.6	150.5	172.2	185.2	158.8	182.5
<b>Jun-06</b>	97.5	119.2	107.0	102.2	160.1	169.7	146.7	156.9	185.0	194.2	170.0	183.7
<b>Sep-06</b>	112.7	122.3	113.1	106.7	167.8	178.8	147.4	158.6	192.5	209.0	165.3	191.7
<b>Dec-06</b>	117.3	126.2	112.7	111.2	192.5	187.1	155.8	170.5	218.2	225.0	171.3	197.8
<b>90th Percentile</b>												
	<b>Anglesey</b>	<b>Conwy</b>	<b>Denbighshire</b>	<b>Gwynedd</b>								
<b>Mar-05</b>	252.3	258.3	191.3	230.0								
<b>Jun-05</b>	265.8	247.3	204.2	253.3								
<b>Sep-05</b>	281.7	268.3	232.0	240.3								
<b>Dec-05</b>	266.7	253.3	213.3	254.0								
<b>Mar-06</b>	243.0	245.8	204.8	244.3								
<b>Jun-06</b>	264.7	266.7	223.3	244.3								
<b>Sep-06</b>	273.0	278.7	214.0	252.7								
<b>Dec-06</b>	346.7	289.0	235.7	281.7								

Source: HM Land Registry

Note: the data is not disaggregated to NPA area

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A3.17 When these entry level house prices (as of December 2006 and rounded to the nearest hundred) are compared to median household income levels (CACI Paycheck 2005) in North West Wales it becomes apparent that in none of the local authority areas are the house price to income ratio close to 3.5. Indeed in Denbighshire the income ratio is 6.4 to 1, the household would have to be able to obtain a mortgage over 6 times the household income. Although the above example is very broad in the sense that it does not apply capital to the household income it serves the purpose of highlighting the stark variances now present in North West Wales between incomes and the cost of purchasing at entry level.

Table: A3.2

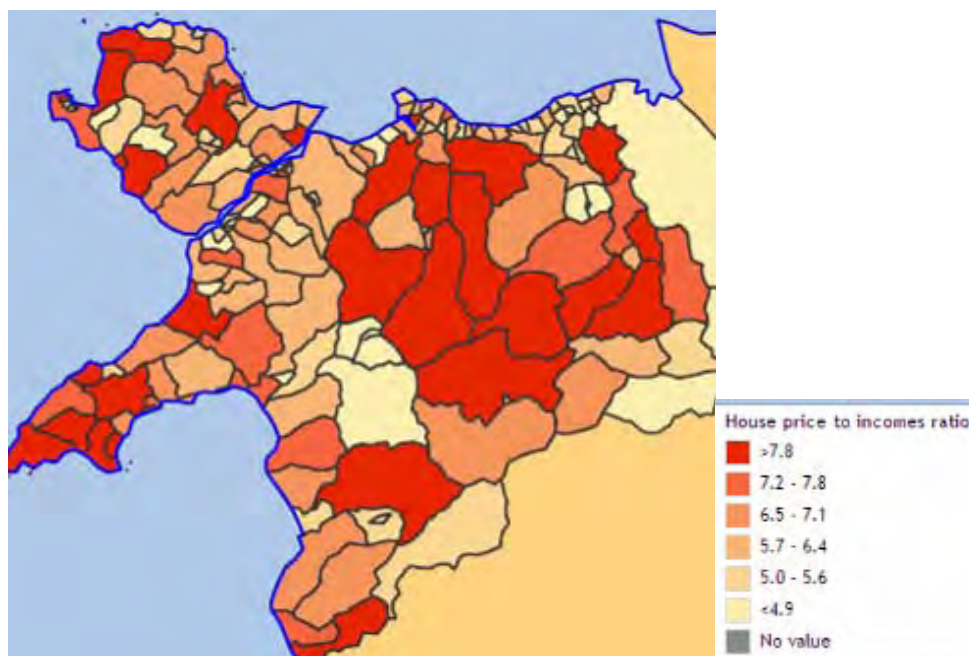
	Annual Income	Entry level property prices for all property types	
	Median	Lower quartile	House price to income ratio
Anglesey	£22,500	£117,300	5.2
Conwy	£22,500	£126,200	5.6
Denbighshire	£17,500	£112,700	6.4
Gwynedd	£22,500	£111,200	4.9

Source: CACI Paycheck 2005, Land Registry 2006

Note: the data is not disaggregated to NPA area

### Mapping affordability

Map A3.1: house price to income ratios, 2007



Source: Hometrack & CACI Paycheck, Map © Hometrack 2007 (data last updated in June 2007)

A3.18 Hometrack enables this assessment to map house price to income ratios in North West Wales. The above map clearly demonstrates that the majority of wards in North

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West Wales have ratios that are above 6.5 to 1 for average house prices. The highest ratios were found in Betws yn Rhos, Aberdaron, Mechell, Betws-y-Coed wards with over 9:1 ratios, Llanengan with 10.9 to 1 and Abersoch 12.8 to 1.

A3.19 WAG guidance that states:

A household should be taken as being able to afford market housing in cases where the rent payable would constitute no more than 25% of their gross household income.

A3.20 Using the same affordability criteria for owner occupation this analysis now compares the affordability of home ownership to private rental and looks at the proportion of households in each local authority area that cannot afford market housing. Based on statistical returns from local estate agents Hometrack can provide the median weekly rent across the consortium area (last updated in August 2006). The weekly cost of private renting is compared with owner occupation based on a 90 percent mortgage (capital and interest) on a 25 year mortgage term for the average value of a property in the area.

Table A3.4

	Anglesey			
	Annual mortgage Costs (£)	Income threshold (£)	Annual private rent costs (£)	Income threshold (£)
<b>1 bedroom</b>	3,645	14,580	4,732	18,928
<b>2 bedroom</b>	5,538	22,152	5,096	20,384
<b>3 bedroom</b>	10,114	40,456	5,356	21,424

Source: derived from Hometrack 2006

A3.21 The above table shows that in Anglesey the total annual cost of a 90% mortgage for a 1 bedroom property would require a minimum annual income of £14,580 to be within the 25% affordability measure and a minimum of £40,456 annual income for a 3 bedroom property. The income required to buy or purchase a 3 bedroom property is above the 25% affordability measure for households on or below the median household income. Over 78%<sup>59</sup> in Anglesey are below the £40-£45 thousand income level.

<sup>59</sup> Hometrack derived from CACI Paycheck data

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Table A3.5

	Conwy			
	Annual mortgage Costs (£)	Income threshold (£)	Annual private rent costs (£)	Income threshold (£)
<b>1 bedroom</b>	5,788	23,152	4,160	16,640
<b>2 bedroom</b>	9,448	37,792	5,980	23,920
<b>3 bedroom</b>	10,634	42,536	6,552	26,208

Source: derived from Hometrack 2006

A3.22 The above table shows that in Conwy the minimum annual incomes required in order to be able to afford a 3 bedroom property are £42,536 based on a 90% mortgage and £26,208 to privately rent. Only 1 bedroom properties are beneath 25% of the median income level in Conwy. 52%<sup>60</sup> in Conwy are beneath the £20-25 thousand income bracket, 77% are beneath the £35-£40 thousand income bracket and 83% beneath the £40-45 thousand income bracket.

Table: A3.6

	Denbighshire			
	Annual mortgage Costs (£)	Income threshold (£)	Annual private rent costs (£)	Income threshold (£)
<b>1 bedroom</b>	4,014	16,056	4,472	17,888
<b>2 bedroom</b>	6,469	25,876	5,668	22,672
<b>3 bedroom</b>	10,551	42,204	6,292	25,168

Source: derived from Hometrack 2006

A3.23 The above table shows that the minimum household income required to be able to afford to maintain mortgage payments for a 2 bedroom property based on a 90% mortgage and a 3 bedroom property to rent is over £25,000 in Denbighshire. Only 1 bedroom properties to rent or buy in Denbighshire are below 25% of the median income level. 76% in Denbighshire are beneath the £40-45 thousand income bracket in that area.

<sup>60</sup> Hometrack derived from CACI Paycheck data



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Table: A3.7

	<b>Gwynedd</b>			
	<b>Annual mortgage Costs (£)</b>	<b>Income threshold (£)</b>	<b>Annual private rent costs (£)</b>	<b>Income threshold (£)</b>
<b>1 bedroom</b>	5,309	21,236	1,924	7,696
<b>2 bedroom</b>	7,847	31,388	5,096	20,384
<b>3 bedroom</b>	11,289	45,156	6,552	26,208

Source: derived from Hometrack 2006

A3.24 The above table shows that in order to meet the annual rental requirement of £6,552 per annum for a 3 bedroom property in Gwynedd a minimum household income of £26,208 would be required. A minimum of £31,388 would be required in order to be able to afford the £7,847 annual mortgage costs. 2-3 bedroom properties to buy and 3 bedroom properties to rent are above 25% of the median income level for Gwynedd. 86% in Gwynedd are beneath the £44-£50 thousand income bracket.

## Appendix 4 – Housing needs assessment using secondary data

A4.1 The Housing Needs Assessment table below reveals a requirement of **331** affordable units each year for the next 5 years in Conwy. Each step in the table is accompanied with a commentary numbered in the sections below.

Table: A4.1

Element and step in calculation		Reference in report
<b>C: CURRENT NEED</b>		
1. Existing households in need of alternative housing.	<b>616</b>	
2. <i>plus</i> current non-households in need of affordable housing	<b>5</b>	
3. <i>minus</i> cases where they can afford to meet their needs in the market	<b>91</b>	
4. <i>equals</i> Total current housing need	<b>530</b>	1 + 2 – 3
<b>A: AVAILABLE STOCK TO OFFSET NEED</b>		
5. Current occupiers of affordable housing in need	<b>8</b>	
6. <i>plus</i> surplus stock	<b>0</b>	
7. <i>plus</i> committed supply of new affordable units	<b>203</b>	
8. <i>minus</i> planned units to be taken out of management	<b>0</b>	
9. <i>equals</i> Total available stock to meet current need	<b>211</b>	5 + 6 + 7 – 8
10. <i>equals</i> Total Current need	<b>319</b>	4 – 9
11. times quota progressively to reduce level of current need	<b>20%</b>	Policy judgement that current unmet needs should be eliminated in 5 years.
12. <i>equals</i> annual need to reduce level of current need	<b>64</b>	10 x 11
<b>N: NEWLY ARISING NEED</b>		
13. New household formation (gross p.a)	<b>355</b>	
14. <i>times</i> proportion unable to buy or rent in the market	<b>1%</b>	
15. <i>plus</i> existing households falling into need	<b>726</b>	
16. <i>minus</i> potential out-migrants unable to afford market housing	<b>0</b>	
17. <i>plus</i> in-migrants unable to afford market housing	<b>0</b>	
18. <i>equals</i> newly arising need	<b>730</b>	(13 x 14) + 15 + 16 + 17
<b>S: SUPPLY OF AFFORDABLE UNITS per year</b>		
19. Net supply of social re-lets	<b>453</b>	
20. <i>plus</i> supply of intermediate housing available for re-let or resale at sub market levels	<b>10</b>	
21. <i>equals</i> affordable supply	<b>463</b>	19 + 20
<b>NET SHORTFALL OR SURPLUS</b>		
22. Overall shortfall	<b>331</b>	12 + 18 - 21

## C. Current Need

### Step 1: Existing households in need of alternative housing

A4.2 There is a total of **616** existing households in need of alternative housing in Conwy. This consists of 449 applicants on Conwy County Borough Council's Housing Register that had points for homelessness, overcrowding and poor property condition. Evidently this does not include all the categories specified by the WAG guidance, for example a 'household containing a person with mobility impairment or other special needs living in unsuitable dwelling', as the points allocation system does not differentiate between a serious or desirable move required. 801 applicants that reside in Conwy fell within the 3 categories chosen by this Housing Needs Assessment but to avoid any risk of duplication they were cross referenced based on the area of origin. There is also an additional 167 (not including those that do not reside in the county) people on the Conwy County Borough Council's First Steps Housing Register for the Homebuy, Discounted for Sales and Shared Ownership schemes.

### Step 2: *plus* current non-households in need

A4.3 Current-households non-households in need, mainly relates to hidden homeless households who are not currently occupying a home of their own, including:

- Households living within another household (e.g family and friends) who want to live in their own self-contained accommodation;
- People who are currently in temporary accommodation;
- People who are currently homeless staying in hostels, night shelters or on the streets;
- Gypsy and Travellers and others living in caravans, vans or barges;
- Asylum seekers living in Home Office accommodation awaiting a decision on their asylum claim.<sup>61</sup>

A4.4 Out of the above categories this Housing Needs Assessment considers only those that are of No Fixed Abode as those in temporary accommodation have already been included in Step 1. All applicants that were of No Fixed Abode were not counted in step 1 are instead counted here - this equates to **5** applicants.

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<sup>61</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p.77.

**Step 3: *minus* cases where they can afford to meet their needs in the market**

A4.5 In line with the WAG guidance<sup>62</sup> this section of the calculation makes the assumption that those registered for social housing are unable to afford to meet their needs in the market. Referring to the income thresholds identified in Table A3.5 there are 13 applicants with an income over £26,208 therefore it is estimated that they would be able to afford 3 bedroom property to rent in the open market; a further 10 applicants that would be able to afford to rent a 2 bedroom property; 2 applicants that would be able to either to buy a 1 bedroom property or rent a 2 bedroom property; 66 applicants that would be able to privately rent a 1 bedroom property. Although these applicants may be able to afford market housing this does not necessarily mean that the property would be suitable, for example it could result in overcrowding as it is below the bedroom standard required. However adhering fully to the WAG guidance they will not be counted in this instance, only the 76 applicants that have an income of less than £16,640 will be counted as unable to afford market housing resulting in **91** that can afford to meet their needs in the market.

**Step 4: *equals* total housing need**

A4.6 A total housing need of 530 households.

**A. Available stock to offset need**

**Step 5: Current occupiers of affordable housing in need**

A4.7 A transfer list contains all those applicants that currently occupy RSL or LA properties, this list is separate to the Housing Register number counted in Step 1. The number of applicants on the First Steps Register that currently resides in affordable housing is 19; that is only 11% of the total number on the register. This calculation estimates therefore that only 11% of the 76 applicants that cannot afford market housing reside in affordable housing - a total of **8** households.

**Step 6: *plus* surplus stock**

A4.8 WAG guidance<sup>63</sup> recommends that 'if the rate is in excess of approximately 3% and properties are vacant for considerable periods of time; these should be counted as surplus stock'. Conwy County Borough Council noted 66 long term voids (properties empty for more than 13 weeks) in 2005-2006. There is also very small numbers of properties that have been vacant for longer than 6 months within the local authority

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<sup>62</sup> 2006, p.36

<sup>63</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p.69.

stock for example the Welsh Housing Statistics 2005 noted a total of 8 in Conwy. Furthermore Welsh Housing Statistics<sup>64</sup> recorded only 63 in voids in Conwy and make up less than 2% of the total local authority housing stock and therefore will not be counted in this calculation. Clwyd Alyn reported no voids exceeding the 3% within each local authority area compared to all social stock in the period 2005-2006.

**Step 7: *plus* committed supply of new affordable units**

A4.9 Conwy County Borough Council has been granted outline permission in May 2007 for residential development of 12 hectares in Llysfaen this includes 78 affordable units. McBryde Homes and Beech Homes have been granted conditional planning permission in June 2006 for the development for 8.3 hectares of land in Llandudno Junction which will include 76 affordable units. McBryde has also been granted permission to build 92 units in Rhos on Sea, 35 of which will be affordable. Pennaf has received planning permission for 12 affordable units in Abergele. The Laurels has received planning permission for 2 affordable units in Old Colwyn. This results in **203** affordable units in Conwy.

**Step 8: *minus* planned units to be taken out of management**

A4.10 The WAG guidance<sup>65</sup> specifies that in order to calculate the planned units that are to be taken out of management the assessment should only count demolition and conversion programmes and any regeneration schemes that involve taking any social rented or intermediate units that have been taken out of management. This does not include right-to-buy sales as authorities are not required to re-house these households and their impact upon stock is covered in the 'Net supply of social re-lets' stage of this calculation. No local authority or housing association stock is planned to be demolished, converted or regenerated that will impact on the stock numbers at the time of this assessment.

**Step 9: *equals* Total available stock to meet current need**

A4.11 A total stock of 211 units to meet current need.

**Step 10: *equals* Total current need**

A4.12 A total current need of 319 households.

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<sup>64</sup> Welsh Assembly Government, *Welsh Housing Statistics*, 2005, p.66.

<sup>65</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p.64.

**Step 11: *times* quota progressively to reduce level of current need**

A4.13 A quota of 20% to eliminate current need within 5 years.

**Step 12: *equals* annual need to reduce level of current need**

A4.14 64 units per annum are needed to reduce the current level of need.

**N: Newly arising need**

**Step 13: New household formation (gross p.a)**

A4.15 This calculation uses the North Wales Population and Housing Research Group 2003 based projections that takes the mid point between the 5 and 10 year migration trends, this was then moderated to reflect the WAG households figures control and an annual dwelling requirement of **355** per annum was derived from these figures, see appendix 6 for further details

**Step 14: *times* proportion unable to buy or rent in the market**

A4.16 Presently out of the estimated 48,750 households in Conwy there are 530 (step 4) noted in this calculation that are unable to buy or rent in the open market, this is 1% of the total population in Conwy. Although the affordability chapter does suggest that the proportion could be far larger that this percentage until further analysis of affordability can be carried out in the second phase of the assessment the 1% will be applied in this step of the calculation.

**Step 15: *plus* existing households falling into need**

A4.17 To establish the numbers of existing households that fall into need annually the WAG guidance<sup>66</sup> recommends that the housing needs calculation look at the numbers of new applicants that have entered onto the housing register within the last year. Conwy County Borough Council recorded **726** new applications

**Step 16: *minus* potential out-migrants unable to afford market housing**

A4.18 This is covered in the household projections above.

**Step 17: *plus* in-migrants unable to afford market housing**

A4.19 As step 16.

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<sup>66</sup> Welsh Assembly Government, *Local Housing Market Assessment Guide*, 2006, p.68.

**Step 18: *equals* newly arising need**

A4.20 A newly arising need of 730 households.

**S: Supply of affordable units per year**

**Step 19: Net supply of social re-lets**

A4.21 The 3 year average supply of social re-lets in Conwy from 2003 to 2006 was 348 per year. The 3 year average supply for Pennaf within Conwy for the same period was 45 per year resulting in a total of 393 to social re-lets per year. However this figure does not include other HA social re-lets so to avoid an undercount the total number taken by the WAG for 2006-2007 was **453** social re-lets for that year and will be used in this calculation as the net supply of social re-lets for Conwy.

**Step 20: *plus* supply of intermediate housing available for re-let or resale at sub market levels**

A4.22 There is very few intermediate housing available each year for re-let or re-sales available each year also forms of intermediate housing is on the increase. We currently have incomplete data but estimate that this will be less than 10 units per annum.

**Step 21: *equals* affordable supply**

A4.23 There is a supply of 463 units per annum.

**Step 22: Overall shortfall or surplus**

A4.24 There is an overall shortfall of 331 units required per annum for a 5 year period.

## **Appendix 5 – Population projections and future household and dwelling changes in the LHMA study area**

- A5.1 National planning policy for Housing is set out in Planning Policy Wales: Ministerial Interim Planning Policy Statement – Housing of June 2006, along with Technical Advice Notes 1 and 2. Paragraph 9.2.2. of the MIPPS states

The latest Assembly Government National and Sub-National Household projections for Wales should form the starting point for assessing housing requirements. Within each region local planning authorities should work together collaboratively, and with appropriate stakeholders, (for example house builders and utility companies) as necessary, to apportion to each authority the Assembly Government household projections, or agree their own regional policy-based projections. The Assembly Government encourages the development of this process wherever possible under the auspices of the Wales Spatial Plan regional groups.

### **Projections work**

- A5.2 The essential reference point for the debate in relation to Local Development Plans is the regional population forecast produced by the Office of National Statistics (ONS) on behalf of the Assembly.
- A5.3 Trend driven projections have been calculated to show how population and housing would change if past rates of migration or house building continued in the future. The Assembly (ONS) trend projections for the North Wales region are shown in the baseline report to provide a context for the debate on future changes.
- A5.4 Welsh Assembly projections have traditionally used a top down and trend based approach, that is the total population or household numbers for the North Wales region are derived from UK projections of births and deaths but especially levels of in-migration expected internationally, nationally and regionally. They are then used as constraints on the pattern of population movement within the individual unitary authority areas.
- A5.5 In contrast North Wales authorities have used a bottom up approach, building a North Wales total from each individual authority's projections, which have been modelled according to their local characteristics.
- A5.6 In order to marry together these two approaches and to arrive at an appropriate apportionment of the Assembly figures at local planning authority level, the apportionment exercise has taken the following steps:



- North Wales regional population and household forecasts 2003 – 2026 (Office of National Statistics, 'Top down') See chapter 6 of the baseline report. The North Wales figure is not sub divided for the LHMA area but places an expectation of an additional 48,500 dwellings by 2026 for North Wales, giving an annual additional requirement of 2110 households over the forward 23 year period.
- Projected dwelling changes for North Wales, the constituent authorities including Snowdonia, based on 5 and 10 year projections and the mid point between the two, (Table 1 below). This figure can be sub divided to the LHMA study area.
- Moderation (or adjustment) of the projected local planning authority dwelling changes ('the mid point') to reflect the Assembly Government's household figures control (Table 1 below, column 6).
- Projected dwelling requirements using both 5 year migration changes and 10 year migration changes with the inclusion of a "mid point" projection that matches the Assembly's north Wales forecasts (Table 1 below).

### **Implications of Wales Spatial Plan on the apportionments**

- A5.7 The baseline projections have been derived by calculation – forecasts, trends etc. However preparation of the Local Development Plan has to consider the needs of communities, as well as economic and environmental capacity issues. Policy forecasting cannot be based solely on such straightforward calculations, but needs to take into account national and regional patterns of growth.
- A5.8 The Wales Spatial Plan sets out the Assembly Government's aspirations for spatial development and regional patterns of growth and has a bearing on the allocations across the region as a whole and on the balance of affordable / local needs housing, intermediate and open market housing.
- A5.9 It sets a completely different context than previously experienced with the preparation of development plans. For example joint working is advancing to support the vision for Môn and Eryri (including the Môn Menai Board, Conwy Denbigh Spatial Development Strategy, Wrexham - Flintshire joint working and the Central Wales key settlement strategy.
- A5.10 This regional work is expected to have an impact on growth patterns within the region including:
- Sustaining Anglesey following the closure of Wylfa Power station and other major economic challenges
  - Regenerating significant centres such as Rhyl and Rhyl west

- Recognition of additional environmental constraints e.g. flood risk constraints and special designations
- Managing cross boundary pressures.

A5.11 It is the role of individual plan making processes will to address the relationship between the regionally apportioned figure set out in chapter 6 of this report, the need for sustainable development including capacity, economic restructuring and change and responses to local circumstances in Local Development Plan preparation. Stakeholder discussions, including Wales Spatial Plan inputs, along with inter authority negotiations might lead to some variation provided overall total is not significantly compromised and to bring a focus on issues like affordability and sustainability.

### **Detailed tables**

A5.12 Projections produced by the North Wales Population and Housing Research Group were used to help share out the Welsh Assembly Government's 2003 based household projections between the 7 North Wales planning authorities.

A5.13 A range of different projection scenarios had been produced by the Research Group, also using 2003 as the base year.

A5.14 Two of these projections scenarios – based on 5 year (a) and 10 year (b) migration trends respectively – gave potential high and low buffers around the Assembly Government's North Wales projection figure. A mid-point (c) between the 5 and 10 year projection gave an indication of how the Assembly projection might be apportioned. The figures for each planning authority were then controlled to the North Wales total dwelling requirement from the Assembly projections (d). Table 1 below shows the process.

A5.15 Assembly Government dwelling requirement was calculated by applying the North Wales household:dwelling ratio used in the production of the Research Group's projections. Household figures are converted into dwelling figures by taking into account vacant dwellings, dwellings not used as a main residence, and a household sharing factor. 2001 Census showed North Wales to have a households:dwellings conversion factor of 936:1,000.

North West Wales Local Housing Market Assessment  
Appendix 5

Table A5.1 – 2003 based population, household and dwelling projections for North Wales planning authorities

<b>Projected dwelling change 2003-2026</b>					
	<b>5 year migration trend<sup>(a)</sup></b>	<b>10 year migration trend<sup>(b)</sup></b>	<b>Mid-point<sup>(c)</sup></b>	<b>WAG household projection</b>	<b>Controlled to WAG NW total<sup>(d)</sup></b>
<b>Anglesey</b>	4,950	950	2,950	-	2,850
<b>Gwynedd</b>	3,700	4,300	4,000	-	3,900
<b>Conwy</b>	11,250	7,950	9,600	-	9,350
<b>SNP</b>	900	1,000	950	-	900
<b>Denbighshire</b>	11,500	8,550	10,025	-	9,750
<b>Sub Total LHMA area</b>	<b>32,300</b>	<b>22,750</b>	<b>27,525</b>		<b>26,750</b>
Flintshire	11,300	9,650	10,475	-	10,200
Wrexham	13,550	10,200	11,875	-	11,550
North Wales	57,150	42,550	49,875	48,500	48,500

A5.16 Table 2 below gives an indication of what this requirement would mean on an annual basis for each planning authority area. The average actual housing completion trend (e)<sup>67</sup> from 1997-2002 is also included in the table for comparison.

Table A5.2 – Projected annual dwelling requirement 2003-2026

	<b>5 year migration trend<sup>(a)</sup></b>	<b>10 year migration trend<sup>(b)</sup></b>	<b>Mid-point<sup>(c)</sup></b>	<b>WAG household projection</b>	<b>Controlled to WAG NW total<sup>(d)</sup></b>	<b>5 year housing completions trend<sup>(e)</sup></b>
<b>Anglesey</b>	210	40	125	-	120	170
<b>Gwynedd</b>	160	190	175	-	170	300
<b>Conwy</b>	490	340	415	-	400	410
<b>SNP</b>	40	40	40	-	40	57
<b>Denbighshire</b>	500	370	435	-	420	290
<b>Flintshire</b>	490	420	455	-	440	400
<b>Wrexham</b>	590	440	515	-	500	420
<b>North Wales</b>	2,480	1,850	2,160	2,110	2,110	1,980

<sup>67</sup> From Joint Housing Land Availability Studies

## **Appendix 6 – 2001 Census area profiles for local housing market areas**

- A6.1 This appendix contains area profiles for each of the local housing market assessment sub-areas, based on key characteristics of the areas which have been identified using 2001 Census data. Some key data for Wales and the North West Wales Local Housing Market Assessment Area as a whole has also been included, to provide comparisons. The profiles were prepared by Mari Kells (Project Officer NWW LHMA) and Janine Edwards (Conwy County Borough Council).
- A6.2 These Census profiles are just a standardised starting point to give us an easily comparable set of indicators for the area, and data from other sources can be added to the profiles if it is felt this is needed. However, the profile should be kept brief and to the point. At this stage we are interested in identifying general characteristics of each sub-area as a whole rather than looking at local hot-spots.
- A6.3 The full Census profiles and a map showing the boundaries of the sub-areas (as used to provide these statistical profiles) have been appended to this paper. The map was produced by Linda Lee, of the Isle of Anglesey Borough Council.

## **Wales**

Persons/hectare – 1.40  
Average household size – 2.37 persons  
Dwellings with usual residents – 95%

## **North West Wales LHMA area**

Population – 386,300  
Persons/hectare – 0.74  
Households – 165,500  
Average household size – 2.29 persons  
Dwellings – 181,000  
Dwellings with usual residents – 92%

## **North Anglesey (LHMA sub area 01)**

Population – 9,600  
Persons/hectare – 0.52  
Households – 3,900  
Average household size – 2.42 persons  
Dwellings – 4,300  
Dwellings with usual residents – 91%

- Welsh speaking heartlands (63% WS)
- High unemployment
- Highest level of economic inactivity in NWW (43% of all aged 16-74)
- Agricultural area (7% employment in this sector – compared to 2.5% all-Wales)
- Average household size of 2.42 – highest in NWW
- Over one fifth of households had no central heating

## **Holyhead (LHMA sub area 02)**

Population – 25,900  
Persons/hectare – 1.11  
Households – 11,000  
Average household size – 2.32 persons  
Dwellings – 12,300  
Dwellings with usual residents – 90%

- Younger age profile than NWW as a whole – similar to Wales profile
- High unemployment
- Manufacturing provided 17% of employment – by far the highest proportion in NWW
- One fifth of households rented their home from public sector housing providers
- Over one fifth of households had no central heating
- Over a quarter of all households had no access to a car
- Lone parent households made up 8% of all households

### **Menai (LHMA sub area 03)**

Population – 66,400

Persons/hectare – 1.20

Households – 27,200

Average household size – 2.35 persons

Dwellings – 29,100

Dwellings with usual residents – 94%

- Younger age profile than NWW as a whole – similar to Wales profile
- Welsh speaking heartland (62% WS)
- Almost a quarter of population in the AB (managerial and professional) social-classification grouping
- There were 4,600 full-time students aged 18 and over living in the area
- 3.5% of the population – mostly students – were living in communal establishments.

### **Caernarfon (LHMA sub area 04)**

Population – 26,300

Persons/hectare – 0.96

Households – 11,000

Average household size – 2.37 persons

Dwellings – 11,900

Dwellings with usual residents – 93%

- Youngest age profile in NWW
- Welsh speaking heartland (82% WS)
- High unemployment
- Over one fifth of households had no central heating
- Over a quarter of all households had no access to a car
- Lone parent households make up 7.5% of all households

### **Llyn peninsula (LHMA sub area 05)**

Population – 18,500

Persons/hectare – 0.49

Households – 7,900

Average household size – 2.31 persons

Dwellings – 9,900

Dwellings with usual residents – 80%

- Nearly a quarter of residents aged over 65
- Welsh speaking heartland (74% WS)
- Agricultural area (8% employment in this sector – compared to 2.5% all-Wales)
- One fifth of the population aged 16-74 worked at home
- Nearly 14% of dwellings identified as holiday or second homes
- Highest proportion of privately rented homes in NWW – over 17%
- Highest proportion of households without central heating in NWW – 27%

### **Llandudno (LHMA sub area 06)**

Population – 37,000

Persons/hectare – 5.61

Households – 16,800

Average household size – 2.16 persons

Dwellings – 18,000

Dwellings with usual residents – 93%

- A quarter of all residents aged over 65
- Over 30% of employment was in the tourism sector
- Highest level of owner occupation (76%) and lowest level of public rented tenure (8.5%) in NWW
- Smallest average household size in NWW (along with South Gwynedd) at 2.16 persons
- One fifth of all households were lone pensioner households

### **Rhyl (LHMA sub area 07)**

Population – 65,740

Persons/hectare – 5.98

Households – 28,500

Average household size – 2.27 persons

Dwellings – 29,500

Dwellings with usual residents – 97%

- Over a quarter of population had limiting long term illness – highest in NWW
- Lowest proportion of Welsh speakers in NWW (17%)
- A quarter of all aged 16-74 are economically inactive due to permanent sickness or disability
- Lowest proportion of vacant and second/holiday homes in NWW (3.5%)
- Highest proportion of households with no access to a car in NWW (28%)
- Lone parent households make up 7.5% of all households

### **Bala (LHMA sub area 08)**

Population – 16,800

Persons/hectare – 0.18

Households – 7,300

Average household size – 2.25 persons

Dwellings – 8,600

Dwellings with usual residents – 85%

- Welsh speaking heartland (63% WS)
- Agricultural area (9% employment in this sector – compared to 2.5% all-Wales)
- One fifth of the population aged 16-74 work at home
- 9% of dwellings identified as holiday or second homes

### **South Gwynedd (LHMA sub area 09)**

Population – 8,600

Persons/hectare – 0.19

Households – 4,000

Average household size – 2.16 persons

Dwellings – 5,400

Dwellings with usual residents – 74%

- Agricultural area (8% employment in this sector – compared to 2.5% all-Wales)
- One fifth of the population aged 16-74 work at home
- 20% of dwellings identified as holiday or second homes – highest proportion in NWW
- Smallest average household size in NWW (along with Llandudno) at 2.16 persons
- One fifth of all households were lone pensioner households

### **Porthmadog (LHMA sub area 10)**

Population – 16,800

Persons/hectare – 0.35

Households – 7,400

Average household size – 2.26 persons

Dwellings – 8,700

Dwellings with usual residents – 85%

- Welsh speaking heartland (75% WS)
- Nearly 30% of employment was in the tourism sector
- 8% of dwellings identified as holiday or second homes – highest proportion in NWW
- 7.5% of dwellings identified as vacant properties

### **Dyffryn Conwy (LHMA sub area 11)**

Population – 12,700

Persons/hectare – 0.20

Households – 5,400

Average household size – 2.32 persons

Dwellings – 6,000

Dwellings with usual residents – 90%

- High economic activity rate – 64% of all aged 16-74
- Agricultural area (9% employment in this sector – compared to 2.5% all-Wales)
- One fifth of the population aged 16-74 work at home
- High level of car ownership (four fifths of all households)



### **Vale of Clwyd (LHMA sub area 12)**

Population – 45,900

Persons/hectare – 0.47

Households – 19,500

Average household size – 2.31 persons

Dwellings – 20,600

Dwellings with usual residents – 95%

- Economic activity rate (66% of all aged 16-74) highest in NWW
- 26% of population in the AB (managerial and professional) social-classification grouping – highest proportion in NWW
- Highest level of car ownership in NWW – 83% of all households

### **Bay of Colwyn (LHMA sub area 13)**

Population – 36,200

Persons/hectare – 11.22

Households – 15,700

Average household size – 2.23 persons

Dwellings – 16,800

Dwellings with usual residents – 94%

- Nearly a quarter of all residents aged over 65
- Highest population density in NWW – 11.22 persons per hectare
- Only one fifth of the population speak Welsh
- One fifth of all households were lone pensioner households
- Lone parent households make up 7% of all households

# Wales

## Population

<u>Population Density 2001</u>	(persons/ha)	1.40	
	<u>Males</u>	<u>Females</u>	<u>Persons</u>
<b>Population 2001</b>	<b>1,403,782</b>	<b>1,499,303</b>	<b>2,903,085</b>
Population 1991	1,370,104	1,464,969	2,835,073
		<u>No.</u>	<u>%</u>
<u>Age Structure</u>			
0-4		167,903	5.8%
5-15		419,252	14.4%
16-64		1,811,156	62.4%
65+		504,774	17.4%
<u>Migrants</u>		324,133	
- Moved within area		-	0.0%
- Moved into area		-	0.0%
People who moved out of area		-	
Born in Wales		2,188,754	75.4%
Ethnicity - Not White		61,580	2.1%
Religion - Christian		2,087,242	71.9%
Persons with limiting long term illness		675,662	23.3%
(of persons aged 3+)			
Speak Welsh		575,640	20.5%
One or more skills in Welsh		797,717	28.4%

## Economic Activity

	<u>No.</u>	<u>%</u>
<b>All aged 16-74</b>	<b>2,075,347</b>	
Economically active	1,265,497	61.0%
- <i>Unemployed</i>	72,488	5.7%
Economically inactive	809,850	39.0%
- <i>Permanently sick/disabled</i>	191,342	23.6%
<b>Industry of Employment</b>	<b>1,186,256</b>	
Agriculture, forestry, fishing	29,499	2.5%
Energy, water, mining	15,986	1.3%
Manufacturing	205,709	17.3%
Construction	84,063	7.1%
Distribution, hotels, catering	257,140	21.7%
Transport	65,353	5.5%
Banking, finance, insurance	38,929	3.3%
Public admin, education, health	331,345	27.9%
Other	158,232	13.3%
Travel to work by car	832,889	70.2%

## Social Class

	<u>No.</u>	<u>%</u>
Managerial & professional	455,821	22.0%
Skilled	474,537	22.9%
Part/unskilled	460,626	22.2%
Students & Other	684,363	33.0%

## Housing

	<u>No.</u>	<u>%</u>
<b>Household spaces</b>	<b>1,275,816</b>	
With residents	1,209,048	94.8%
Vacant	51,252	4.0%
Holiday / second homes	15,516	1.2%
<b>Total households</b>	<b>1,209,048</b>	
Population in private households	2,859,489	98.5%
<u>Tenure</u>		
Owner occupied	862,343	71.3%
Public rented	216,523	17.9%
Other rented	130,182	10.8%
<u>Households with :</u>		
No central heating	90,789	7.5%
No car	313,797	26.0%
Shared/no bath /WC	4,676	0.4%
<u>Household composition</u>		
Average household size	2.37	
One person household	352,348	29.1%
- one person; pensioner	186,875	15.5%
Married & co-habiting couple households	539,496	44.6%
Lone parents with dependents	87,965	7.3%

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# North West Wales LHMA

Population				Economic Activity			Housing		
<u>Population Density 2001</u> (persons/ha) 0.74					<u>No.</u>	<u>%</u>		<u>No.</u>	<u>%</u>
	<u>Males</u>	<u>Females</u>	<u>Persons</u>	<b>All aged 16-74</b>	<b>273,568</b>		<b>Household spaces</b>	<b>180,994</b>	
<b>Population 2001</b>	<b>185,082</b>	<b>201,251</b>	<b>386,333</b>	Economically active	166,659	60.9%	With residents	165,546	91.5%
Population 1991	179,587	197,924	377,511	- <i>Unemployed</i>	10,776	6.5%	Vacant	8,358	4.6%
				Economically inactive	106,909	39.1%	Holiday / second homes	7,090	3.9%
				- <i>Permanently sick/disabled</i>	21,508	20.1%			
		<u>No.</u>	<u>%</u>	<b>Industry of Employment</b>	<b>155,086</b>		<b>Total households</b>	<b>165,546</b>	
<u>Age Structure</u>				Agriculture, forestry, fishing	6,123	3.9%	Population in private households	378,448	98.0%
0-4		21,279	5.5%	Energy, water, mining	2,766	1.8%			
5-15		52,845	13.7%	Manufacturing	17,628	11.4%	<u>Tenure</u>		
16-64		233,290	60.4%	Construction	12,711	8.2%	Owner occupied	116,279	70.2%
65+		78,919	20.4%	Distribution, hotels, catering	38,379	24.7%	Public rented	24,824	15.0%
<u>Migrants</u>		-		Transport	7,946	5.1%	Other rented	24,443	14.8%
- Moved within area		-	0.0%	Banking, finance, insurance	3,032	2.0%			
- Moved into area		-	0.0%	Public admin, education, health	46,072	29.7%	<u>Households with :</u>		
People who moved out of area		-		Other	20,429	13.2%	No central heating	27,748	16.8%
				Travel to work by car	104,471	67.4%	No car	38,780	23.4%
Born in Wales		239,753	62.1%				Shared/no bath /WC	979	0.6%
Ethnicity - Not White		4,100	1.1%						
Religion - Christian		297,720	77.1%	<b>Social Class</b>			<u>Household composition</u>		
Persons with limiting long term illness		86,574	22.4%		<u>No.</u>	<u>%</u>	Average household size	2.29	
(of persons aged 3+)				Managerial & professional	56,963	20.8%	One person household	52,791	31.9%
Speak Welsh		170,786	45.7%	Skilled	65,767	24.0%	- one person; pensioner	29,572	17.9%
One or more skills in Welsh		206,024	55.1%	Part/unskilled	59,937	21.9%	Married & co-habiting couple households	69,659	42.1%
				Students & Other	90,901	33.2%	Lone parents with dependents	10,517	6.4%

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### Economic Activity

## Holyhead LHMA 02

Population				Economic Activity			Housing		
<u>Population Density 2001</u> (persons/ha) 1.11					<u>No.</u>	<u>%</u>		<u>No.</u>	<u>%</u>
				<b>All aged 16-74</b>	<b>18,524</b>		<b>Household spaces</b>	<b>12,303</b>	
				Economically active	10,809	58.4%	With residents	11,029	89.6%
				- <i>Unemployed</i>	1,001	9.3%	Vacant	666	5.4%
				Economically inactive	7,715	41.6%	Holiday / second homes	608	4.9%
				- <i>Permanently sick/disabled</i>	1,751	22.7%			
<b>Population 2001</b>	<b>12,662</b>	<b>13,165</b>	<b>25,827</b>						
Population 1991	-	-	-						
		<u>No.</u>	<u>%</u>	<b>Industry of Employment</b>	<b>9,761</b>		<b>Total households</b>	<b>11,030</b>	
<u>Age Structure</u>				Agriculture, forestry, fishing	332	3.4%	Population in private households	25,543	98.9%
0-4		1,502	5.8%	Energy, water, mining	234	2.4%			
5-15		3,787	14.7%	Manufacturing	1,669	17.1%	<u>Tenure</u>		
16-64		16,105	62.4%	Construction	734	7.5%	Owner occupied	6,941	62.9%
65+		4,433	17.2%	Distribution, hotels, catering	2,023	20.7%	Public rented	2,238	20.3%
<u>Migrants</u>		-		Transport	875	9.0%	Other rented	1,851	16.8%
- Moved within area		-	0.0%	Banking, finance, insurance	145	1.5%			
- Moved into area		-	0.0%	Public admin, education, health	2,658	27.2%	<u>Households with :</u>		
People who moved out of area		-		Other	1,091	11.2%	No central heating	2,388	21.7%
				Travel to work by car	6,530	66.9%	No car	2,912	26.4%
Born in Wales		17,771	68.8%				Shared/no bath /WC	84	0.8%
Ethnicity - Not White		172	0.7%						
Religion - Christian		20,308	78.6%	<b>Social Class</b>			<u>Household composition</u>		
							Average household size	2.32	
Persons with limiting long term illness		6,012	23.3%	Managerial & professional	3,177	17.2%	One person household	3,404	30.9%
(of persons aged 3+)				Skilled	4,200	22.7%	- one person; pensioner	1,712	15.5%
Speak Welsh		13,235	53.1%	Part/unskilled	4,684	25.3%	Married & co-habiting couple households	4,729	42.9%
One or more skills in Welsh		16,541	66.4%	Students & Other	6,463	34.9%	Lone parents with dependents	893	8.1%

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# Menai LHMA 03

Population				Economic Activity			Housing		
<u>Population Density 2001</u> (persons/ha) 1.20					<u>No.</u>	<u>%</u>		<u>No.</u>	<u>%</u>
				<b>All aged 16-74</b>	<b>48,401</b>		<b>Household spaces</b>	<b>29,078</b>	
				Economically active	29,247	60.4%	With residents	27,214	93.6%
				- <i>Unemployed</i>	1,940	6.6%	Vacant	1,144	3.9%
				Economically inactive	19,154	39.6%	Holiday / second homes	720	2.5%
				- <i>Permanently sick/disabled</i>	3,328	17.4%			
<b>Population 2001</b>	<b>31,628</b>	<b>34,776</b>	<b>66,404</b>						
Population 1991	-	-	-						
		<u>No.</u>	<u>%</u>	<b>Industry of Employment</b>	<b>27,060</b>		<b>Total households</b>	<b>27,221</b>	
<u>Age Structure</u>				Agriculture, forestry, fishing	789	2.9%	Population in private households	64,029	96.4%
0-4		3,711	5.6%	Energy, water, mining	633	2.3%			
5-15		8,901	13.4%	Manufacturing	2,641	9.8%	<u>Tenure</u>		
16-64		42,397	63.8%	Construction	2,175	8.0%	Owner occupied	18,206	66.9%
65+		11,395	17.2%	Distribution, hotels, catering	5,988	22.1%	Public rented	4,859	17.9%
<u>Migrants</u>		-		Transport	1,395	5.2%	Other rented	4,156	15.3%
- Moved within area		-	0.0%	Banking, finance, insurance	464	1.7%			
- Moved into area		-	0.0%	Public admin, education, health	9,415	34.8%	<u>Households with :</u>		
People who moved out of area		-		Other	3,560	13.2%	No central heating	4,840	17.8%
				Travel to work by car	18,986	70.2%	No car	5,973	21.9%
Born in Wales		45,279	68.2%				Shared/no bath /WC	166	0.6%
Ethnicity - Not White		1,066	1.6%						
Religion - Christian		49,701	74.8%	<b>Social Class</b>			<u>Household composition</u>		
					<u>No.</u>	<u>%</u>	Average household size	2.35	
Persons with limiting long term illness		13,259	20.0%	Managerial & professional	11,151	23.0%	One person household	8,186	30.1%
(of persons aged 3+)				Skilled	10,384	21.5%	- one person; pensioner	4,268	15.7%
Speak Welsh		39,773	61.9%	Part/unskilled	9,550	19.7%	Married & co-habiting couple households	11,802	43.4%
One or more skills in Welsh		46,124	71.8%	Students & Other	17,316	35.8%	Lone parents with dependents	1,820	6.7%

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[illegible]

Population					
<u>Population Density 2001</u>		(persons/ha)	0.96		
<b>Population 2001</b>	Males	Females	Persons		
Population 1991	-	-	-		
	No.	%			
<u>Age Structure</u>					
0-4	1,741	6.6%			
5-15	3,814	14.5%			
16-64	16,128	61.4%			
65+	4,585	17.5%			
<u>Migrants</u>					
- Moved within area	-	0.0%			
- Moved into area	-	0.0%			
People who moved out of area	-				
Born in Wales	21,017	80.0%			
Ethnicity - Not White	218	0.8%			
Religion - Christian	19,619	74.7%			
Persons with limiting long term illness  (of persons aged 3+)	5,670	21.6%			
Speak Welsh	20,585	81.7%			
One or more skills in Welsh	21,944	87.1%			

	<u>Males</u>	<u>Females</u>	<u>Persons</u>
<b>Population 2001</b>	<b>12,540</b>	<b>13,729</b>	<b>26,269</b>
Population 1991	-	-	-

	<u>No.</u>	<u>%</u>
<u>Age Structure</u>		
0-4	1,741	6.6%
5-15	3,814	14.5%
16-64	16,128	61.4%
65+	4,585	17.5%

- Moved within area	-	0.0%
- Moved into area	-	0.0%
People who moved out of area	-	

Religion - Christian	19,619	74.7%
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(of persons aged 3+)		
Speak Welsh	20,585	81.7%
One or more skills in Welsh	21,944	87.1%

Economic Activity		
	<u>No.</u>	<u>%</u>
<b>All aged 16-74</b>	<b>18,593</b>	
Economically active	11,485	61.8%
- <i>Unemployed</i>	938	8.2%
Economically inactive	7,108	38.2%
- <i>Permanently sick/disabled</i>	1,592	22.4%
<b>Industry of Employment</b>	<b>10,505</b>	
Agriculture, forestry, fishing	298	2.8%
Energy, water, mining	270	2.6%
Manufacturing	1,066	10.1%
Construction	890	8.5%
Distribution, hotels, catering	2,313	22.0%
Transport	515	4.9%
Banking, finance, insurance	217	2.1%
Public admin, education, health	3,385	32.2%
Other	1,551	14.8%
Travel to work by car	7,099	67.6%
Social Class		
	<u>No.</u>	<u>%</u>
Managerial & professional	3,873	20.8%
Skilled	4,431	23.8%
Part/unskilled	4,160	22.4%
Students & Other	6,129	33.0%

Industry of Employment	10,505	
Agriculture, forestry, fishing	298	2.8%
Energy, water, mining	270	2.6%
Manufacturing	1,066	10.1%
Construction	890	8.5%
Distribution, hotels, catering	2,313	22.0%
Transport	515	4.9%
Banking, finance, insurance	217	2.1%
Public admin, education, health	3,385	32.2%
Other	1,551	14.8%

## Social Class

	<u>No.</u>	<u>%</u>
Managerial & professional	3,873	20.8%
Skilled	4,431	23.8%
Part/unskilled	4,160	22.4%
Students & Other	6,129	33.0%

# Housing

	<u>No.</u>	<u>%</u>
<b>Household spaces</b>	<b>11,865</b>	
With residents	10,985	92.6%
Vacant	587	4.9%
Holiday / second homes	293	2.5%
<b>Total households</b>	<b>10,990</b>	
Population in private households	26,051	99.2%
<u>Tenure</u>		
Owner occupied	7,371	67.1%
Public rented	2,468	22.5%
Other rented	1,151	10.5%
<u>Households with :</u>		
No central heating	2,373	21.6%
No car	2,821	25.7%
Shared/no bath /WC	87	0.8%
<u>Household composition</u>		
Average household size	2.37	
One person household	3,410	31.0%
- one person; pensioner	1,867	17.0%
Married & co-habiting couple households	4,805	43.7%
Lone parents with dependents	815	7.4%

<b>Total households</b>	<b>10,990</b>
-------------------------	---------------

Tenure

Owner occupied	7,371	67.1%
Public rented	2,468	22.5%
Other rented	1,151	10.5%

No central heating	2,373	21.6%
No car	2,821	25.7%
Shared/no bath/WC	87	0.8%

Average household size	2.37	
One person household	3,410	31.0%
- one person; pensioner	1,867	17.0%
Married & co-habiting couple households	4,805	43.7%
Lone parents with dependents	815	7.4%

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area profile - - 2001 Census area profile - - 2001 Census area profile - - 2001 Census area profile - - 2001 Census area profile

# Llyn peninsula LHMA 05

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# Llandudno LHMA 06

## Population

<u>Population Density 2001</u>	(persons/ha)	5.61	
	<u>Males</u>	<u>Females</u>	<u>Persons</u>
<b>Population 2001</b>	<b>17,672</b>	<b>19,324</b>	<b>36,996</b>
Population 1991	-	-	-
	<u>No.</u>	<u>%</u>	
<u>Age Structure</u>			
0-4	1,830	4.9%	
5-15	4,427	12.0%	
16-64	21,707	58.7%	
65+	9,032	24.4%	
<u>Migrants</u>	-		
- Moved within area	-	0.0%	
- Moved into area	-	0.0%	
People who moved out of area	-		
Born in Wales	19,895	53.8%	
Ethnicity - Not White	386	1.0%	
Religion - Christian	28,831	77.9%	
Persons with limiting long term illness	8,408	22.7%	
(of persons aged 3+)			
Speak Welsh	9,975	27.7%	
One or more skills in Welsh	14,346	39.9%	

## Economic Activity

	<u>No.</u>	<u>%</u>
<b>All aged 16-74</b>	<b>26,189</b>	
Economically active	16,268	62.1%
- <i>Unemployed</i>	914	5.6%
Economically inactive	9,921	37.9%
- <i>Permanently sick/disabled</i>	1,781	18.0%
<b>Industry of Employment</b>	<b>15,283</b>	
Agriculture, forestry, fishing	232	1.5%
Energy, water, mining	175	1.1%
Manufacturing	1,485	9.7%
Construction	1,128	7.4%
Distribution, hotels, catering	4,778	31.3%
Transport	764	5.0%
Banking, finance, insurance	363	2.4%
Public admin, education, health	4,264	27.9%
Other	2,094	13.7%
Travel to work by car	10,183	66.6%

## Social Class

	<u>No.</u>	<u>%</u>
Managerial & professional	5,723	21.9%
Skilled	6,254	23.9%
Part/unskilled	5,723	21.9%
Students & Other	8,489	32.4%

## Housing

	<u>No.</u>	<u>%</u>
<b>Household spaces</b>	<b>18,001</b>	
With residents	16,749	93.0%
Vacant	738	4.1%
Holiday / second homes	514	2.9%
<b>Total households</b>	<b>16,751</b>	
Population in private households	36,167	97.8%
<u>Tenure</u>		
Owner occupied	12,722	75.9%
Public rented	1,420	8.5%
Other rented	2,609	15.6%
<u>Households with :</u>		
No central heating	2,509	15.0%
No car	4,159	24.8%
Shared/no bath /WC	132	0.8%
<u>Household composition</u>		
Average household size	2.16	
One person household	5,794	34.6%
- one person; pensioner	3,371	20.1%
Married & co-habiting couple households	6,527	39.0%
Lone parents with dependents	876	5.2%

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# Rhyl LHMA 07

## Population

<u>Population Density 2001</u>	(persons/ha)	5.98	
	<u>Males</u>	<u>Females</u>	<u>Persons</u>
<b>Population 2001</b>	<b>30,992</b>	<b>34,748</b>	<b>65,740</b>
Population 1991	-	-	-
	<u>No.</u>	<u>%</u>	
<u>Age Structure</u>			
0-4	3,851	5.9%	
5-15	9,488	14.4%	
16-64	38,707	58.9%	
65+	13,694	20.8%	
<u>Migrants</u>	-		
- Moved within area	-	0.0%	
- Moved into area	-	0.0%	
People who moved out of area	-		
Born in Wales	34,489	52.5%	
Ethnicity - Not White	770	1.2%	
Religion - Christian	50,647	77.0%	
Persons with limiting long term illness	17,111	26.0%	
(of persons aged 3+)			
Speak Welsh	10,846	17.1%	
One or more skills in Welsh	16,074	25.3%	

## Economic Activity

	<u>No.</u>	<u>%</u>
<b>All aged 16-74</b>	<b>45,560</b>	
Economically active	26,769	58.8%
- <i>Unemployed</i>	1,839	6.9%
Economically inactive	18,791	41.2%
- <i>Permanently sick/disabled</i>	4,689	25.0%
<b>Industry of Employment</b>	<b>24,794</b>	
Agriculture, forestry, fishing	373	1.5%
Energy, water, mining	295	1.2%
Manufacturing	3,255	13.1%
Construction	1,914	7.7%
Distribution, hotels, catering	6,702	27.0%
Transport	1,321	5.3%
Banking, finance, insurance	607	2.4%
Public admin, education, health	6,922	27.9%
Other	3,405	13.7%
Travel to work by car	17,279	69.7%

## Social Class

	<u>No.</u>	<u>%</u>
Managerial & professional	8,542	18.7%
Skilled	10,385	22.8%
Part/unskilled	10,903	23.9%
Students & Other	15,730	34.5%

## Housing

	<u>No.</u>	<u>%</u>
<b>Household spaces</b>	<b>29,541</b>	
With residents	28,520	96.5%
Vacant	868	2.9%
Holiday / second homes	153	0.5%
<b>Total households</b>	<b>28,520</b>	
Population in private households	64,758	98.5%
<u>Tenure</u>		
Owner occupied	20,676	72.5%
Public rented	3,931	13.8%
Other rented	3,913	13.7%
<u>Households with :</u>		
No central heating	3,677	12.9%
No car	8,005	28.1%
Shared/no bath /WC	124	0.4%
<u>Household composition</u>		
Average household size	2.27	
One person household	9,293	32.6%
- one person; pensioner	5,243	18.4%
Married & co-habiting couple households	11,439	40.1%
Lone parents with dependents	2,155	7.6%

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[illegible]

Population			
<u>Population Density 2001</u>	(persons/ha)	0.18	
	<u>Males</u>	<u>Females</u>	<u>Persons</u>
<b>Population 2001</b>	<b>8,161</b>	<b>8,660</b>	<b>16,821</b>
Population 1991	-	-	-
		<u>No.</u>	<u>%</u>
<u>Age Structure</u>			
0-4		876	5.2%
5-15		2,151	12.8%
16-64		10,224	60.8%
65+		3,570	21.2%
<u>Migrants</u>		-	
- Moved within area		-	0.0%
- Moved into area		-	0.0%
People who moved out of area		-	
Born in Wales		10,698	63.6%
Ethnicity - Not White		109	0.6%
Religion - Christian		13,063	77.7%
Persons with limiting long term illness		3,516	20.9%
(of persons aged 3+)			
Speak Welsh		10,345	63.4%
One or more skills in Welsh		11,620	71.2%

Population				Economic Activity		
<u>Population Density 2001</u>	(persons/ha)	0.18			<u>No.</u>	<u>%</u>
	<u>Males</u>	<u>Females</u>	<u>Persons</u>	<b>All aged 16-74</b>	<b>12,102</b>	
<b>Population 2001</b>	<b>8,161</b>	<b>8,660</b>	<b>16,821</b>	Economically active	7,536	62.3%
Population 1991	-	-	-	- <i>Unemployed</i>	477	6.3%
				Economically inactive	4,566	37.7%
				- <i>Permanently sick/disabled</i>	736	16.1%
<u>Age Structure</u>		<u>No.</u>	<u>%</u>	<b>Industry of Employment</b>	<b>7,037</b>	
0-4		876	5.2%	Agriculture, forestry, fishing	656	9.3%
5-15		2,151	12.8%	Energy, water, mining	94	1.3%
16-64		10,224	60.8%	Manufacturing	686	9.7%
65+		3,570	21.2%	Construction	625	8.9%
<u>Migrants</u>		-		Distribution, hotels, catering	1,917	27.2%
- Moved within area		-	0.0%	Transport	278	4.0%
- Moved into area		-	0.0%	Banking, finance, insurance	86	1.2%
People who moved out of area		-		Public admin, education, health	1,837	26.1%
				Other	858	12.2%
Born in Wales		10,698	63.6%	Travel to work by car	3,981	56.6%
Ethnicity - Not White		109	0.6%			
Religion - Christian		13,063	77.7%			
Persons with limiting long term illness		3,516	20.9%			
(of persons aged 3+)					<u>No.</u>	<u>%</u>
Speak Welsh		10,345	63.4%	Managerial & professional	2,191	18.1%
One or more skills in Welsh		11,620	71.2%	Skilled	3,378	27.9%
				Part/unskilled	2,748	22.7%
				Students & Other	3,785	31.3%

Population			
<u>Population Density 2001</u> (persons/ha)      0.18			
	<u>Males</u>	<u>Females</u>	<u>Persons</u>
<b>Population 2001</b>	<b>8,161</b>	<b>8,660</b>	<b>16,821</b>
Population 1991	-	-	-
		<u>No.</u>	<u>%</u>
<u>Age Structure</u>			
0-4		876	5.2%
5-15		2,151	12.8%
16-64		10,224	60.8%
65+		3,570	21.2%
<u>Migrants</u>		-	
- Moved within area		-	0.0%
- Moved into area		-	0.0%
People who moved out of area		-	
Born in Wales		10,698	63.6%
Ethnicity - Not White		109	0.6%
Religion - Christian		13,063	77.7%
Persons with limiting long term illness		3,516	20.9%
(of persons aged 3+)			
Speak Welsh		10,345	63.4%
One or more skills in Welsh		11,620	71.2%
Economic Activity			
		<u>No.</u>	<u>%</u>
<b>All aged 16-74</b>		<b>12,102</b>	
Economically active		7,536	62.3%
- Unemployed		477	6.3%
Economically inactive		4,566	37.7%
- Permanently sick/disabled		736	16.1%
<b>Industry of Employment</b>		<b>7,037</b>	
Agriculture, forestry, fishing		656	9.3%
Energy, water, mining		94	1.3%
Manufacturing		686	9.7%
Construction		625	8.9%
Distribution, hotels, catering		1,917	27.2%
Transport		278	4.0%
Banking, finance, insurance		86	1.2%
Public admin, education, health		1,837	26.1%
Other		858	12.2%
Travel to work by car		3,981	56.6%
Social Class			
		<u>No.</u>	<u>%</u>
Managerial & professional		2,191	18.1%
Skilled		3,378	27.9%
Part/unskilled		2,748	22.7%
Students & Other		3,785	31.3%
Housing			
		<u>No.</u>	<u>%</u>
<b>Household spaces</b>		<b>8,630</b>	
With residents		7,340	85.1%
Vacant		488	5.7%
Holiday / second homes		802	9.3%
<b>Total households</b>		<b>7,341</b>	
Population in private households		16,547	98.4%
<u>Tenure</u>			
Owner occupied		4,943	67.3%
Public rented		1,162	15.8%
Other rented		1,236	16.8%
<u>Households with :</u>			
No central heating		1,429	19.5%
No car		1,615	22.0%
Shared/no bath /WC		56	0.8%
<u>Household composition</u>			
Average household size		2.25	
One person household		2,395	32.6%
- one person; pensioner		1,355	18.5%
Married & co-habiting couple households		3,141	42.8%
Lone parents with dependents		405	5.5%

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## Economic Activity

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# Dyffryn Conwy LHMA 11

Population			
<u>Population Density 2001</u> (persons/ha)      0.20			
	<u>Males</u>	<u>Females</u>	<u>Persons</u>
<b>Population 2001</b>	<b>6,158</b>	<b>6,516</b>	<b>12,674</b>
Population 1991	-	-	-
		<u>No.</u>	<u>%</u>
<u>Age Structure</u>			
0-4		651	5.1%
5-15		1,679	13.2%
16-64		7,730	61.0%
65+		2,614	20.6%
<u>Migrants</u>		-	
- Moved within area		-	0.0%
- Moved into area		-	0.0%
People who moved out of area		-	
Born in Wales		7,873	62.1%
Ethnicity - Not White		85	0.7%
Religion - Christian		9,935	78.4%
Persons with limiting long term illness		2,766	21.8%
(of persons aged 3+)			
Speak Welsh		6,217	50.6%
One or more skills in Welsh		7,369	59.9%
Economic Activity			
		<u>No.</u>	<u>%</u>
<b>All aged 16-74</b>		<b>9,123</b>	
Economically active		5,838	64.0%
- Unemployed		322	5.5%
Economically inactive		3,285	36.0%
- Permanently sick/disabled		649	19.8%
<b>Industry of Employment</b>		<b>5,505</b>	
Agriculture, forestry, fishing		511	9.3%
Energy, water, mining		53	1.0%
Manufacturing		545	9.9%
Construction		527	9.6%
Distribution, hotels, catering		1,411	25.6%
Transport		244	4.4%
Banking, finance, insurance		90	1.6%
Public admin, education, health		1,410	25.6%
Other		714	13.0%
Travel to work by car		3,494	63.5%
Social Class			
		<u>No.</u>	<u>%</u>
Managerial & professional		1,809	19.8%
Skilled		2,671	29.3%
Part/unskilled		1,979	21.7%
Students & Other		2,664	29.2%
Housing			
		<u>No.</u>	<u>%</u>
<b>Household spaces</b>		<b>5,996</b>	
With residents		5,402	90.1%
Vacant		267	4.5%
Holiday / second homes		327	5.5%
<b>Total households</b>		<b>5,401</b>	
Population in private households		12,505	98.7%
<u>Tenure</u>			
Owner occupied		3,938	72.9%
Public rented		611	11.3%
Other rented		852	15.8%
<u>Households with :</u>			
No central heating		898	16.6%
No car		981	18.2%
Shared/no bath /WC		19	0.4%
<u>Household composition</u>			
Average household size		2.32	
One person household		1,626	30.1%
- one person; pensioner		906	16.8%
Married & co-habiting couple households		2,426	44.9%
Lone parents with dependents		257	4.8%

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# Vale of Clwyd LHMA 12

Population			
<u>Population Density 2001</u> (persons/ha)      0.47			
	Males	Females	Persons
Population 2001	22,382	23,534	45,916
Population 1991	-	-	-
	No.	%	
<u>Age Structure</u>			
0-4	2,325	5.1%	
5-15	6,277	13.7%	
16-64	28,020	61.0%	
65+	9,294	20.2%	
<u>Migrants</u>			
- Moved within area	-	0.0%	
- Moved into area	-	0.0%	
People who moved out of area	-		
Born in Wales	29,087	63.3%	
Ethnicity - Not White	519	1.1%	
Religion - Christian	36,518	79.5%	
Persons with limiting long term illness	9,132	19.9%	
(of persons aged 3+)			
Speak Welsh	17,474	39.2%	
One or more skills in Welsh	22,718	50.9%	
Economic Activity			
	No.	%	
All aged 16-74	32,625		
Economically active	21,527	66.0%	
- Unemployed	869	4.0%	
Economically inactive	11,098	34.0%	
- Permanently sick/disabled	2,066	18.6%	
Industry of Employment	20,589		
Agriculture, forestry, fishing	1,341	6.5%	
Energy, water, mining	226	1.1%	
Manufacturing	2,789	13.5%	
Construction	1,682	8.2%	
Distribution, hotels, catering	4,083	19.8%	
Transport	856	4.2%	
Banking, finance, insurance	404	2.0%	
Public admin, education, health	6,556	31.8%	
Other	2,652	12.9%	
Travel to work by car	14,145	68.7%	
Social Class			
	No.	%	
Managerial & professional	8,387	25.7%	
Skilled	8,517	26.1%	
Part/unskilled	6,429	19.7%	
Students & Other	9,292	28.5%	
Housing			
	No.	%	
Household spaces	20,605		
With residents	19,477	94.5%	
Vacant	851	4.1%	
Holiday / second homes	277	1.3%	
Total households	19,480		
Population in private households	44,908	97.8%	
<u>Tenure</u>			
Owner occupied	14,215	73.0%	
Public rented	2,617	13.4%	
Other rented	2,648	13.6%	
<u>Households with :</u>			
No central heating	1,799	9.2%	
No car	3,379	17.3%	
Shared/no bath /WC	70	0.4%	
<u>Household composition</u>			
Average household size	2.31		
One person household	6,021	30.9%	
- one person; pensioner	3,400	17.5%	
Married & co-habiting couple households	8,837	45.4%	
Lone parents with dependents	970	5.0%	

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**Source:** 2001 Census Key Statistics, Office for National Statistics

Produced for the North West Wales Local Housing Market Assessment 2007 by Research and Service Support Team, Planning Department, Conwy County Borough Council

## Bay of Colwyn LHMA 13

Population				Economic Activity			Housing		
<u>Population Density 2001</u> (persons/ha) 11.22					<u>No.</u>	<u>%</u>		<u>No.</u>	<u>%</u>
				<b>All aged 16-74</b>	<b>24,723</b>		<b>Household spaces</b>	<b>16,765</b>	
				Economically active	14,704	59.5%	With residents	15,730	93.8%
				- <i>Unemployed</i>	971	6.6%	Vacant	899	5.4%
				Economically inactive	10,019	40.5%	Holiday / second homes	136	0.8%
				- <i>Permanently sick/disabled</i>	2,166	21.6%			
<b>Population 2001</b>	<b>16,954</b>	<b>19,223</b>	<b>36,177</b>						
Population 1991	-	-	-						
		<u>No.</u>	<u>%</u>	<b>Industry of Employment</b>	<b>13,640</b>		<b>Total households</b>	<b>15,728</b>	
<u>Age Structure</u>				Agriculture, forestry, fishing	174	1.3%	Population in private households	35,139	97.1%
0-4		1,887	5.2%	Energy, water, mining	169	1.2%			
5-15		5,065	14.0%	Manufacturing	1,339	9.8%	<u>Tenure</u>		
16-64		20,715	57.3%	Construction	1,039	7.6%	Owner occupied	11,152	70.9%
65+		8,510	23.5%	Distribution, hotels, catering	3,635	26.6%	Public rented	2,145	13.6%
<u>Migrants</u>		-		Transport	695	5.1%	Other rented	2,431	15.5%
- Moved within area		-	0.0%	Banking, finance, insurance	363	2.7%			
- Moved into area		-	0.0%	Public admin, education, health	4,405	32.3%	<u>Households with :</u>		
People who moved out of area		-		Other	1,821	13.4%	No central heating	2,391	15.2%
				Travel to work by car	9,670	70.9%	No car	4,148	26.4%
Born in Wales		18,200	50.3%				Shared/no bath /WC	64	0.4%
Ethnicity - Not White		443	1.2%						
Religion - Christian		27,727	76.6%	<b>Social Class</b>			<u>Household composition</u>		
					<u>No.</u>	<u>%</u>	Average household size	2.23	
Persons with limiting long term illness		8,963	24.8%	Managerial & professional	5,307	21.5%	One person household	5,260	33.4%
(of persons aged 3+)				Skilled	5,395	21.8%	- one person; pensioner	3,154	20.1%
Speak Welsh		7,238	20.6%	Part/unskilled	5,561	22.5%	Married & co-habiting couple households	6,251	39.7%
One or more skills in Welsh		10,747	30.6%	Students & Other	8,460	34.2%	Lone parents with dependents	1,098	7.0%

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## North West Wales Local Housing Market Assessment: Market Areas based on Wards

