CYNGOR SIR YNYS MÔN
ISLE OF ANGLESEY COUNTY COUNCIL

Isle of Anglesey CC Construction Workers Accommodation. North Anglesey Study

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Contents

1. Introduction

1.1 Background

The Isle of Anglesey County Council (IACC) prepared a Construction Workers Accommodation Statement in March 2011 and this is currently the subject of review via a commission with Amec Foster Wheeler. This review revisits the potential impacts and benefits arising from a peak of between 9,200 and 10,500 construction workers directly associated with the Wylfa Newydd development as well as those associated with other Energy Island Proposals.

The implications of accommodating this demand and the changes in the previously anticipated timeline means that the Council existing position requires re-evaluation. It is anticipated as a result of the recent Horizon Construction Workers Topic Paper that a significant number of workers may be directed to, or to seek accommodation in, North Anglesey, an area defined for the purposes of this study are the community areas of Amlwch, Llanbadrig, Cylch y Garn, Mechell and Rhosybol.

1.2 Requirement

The provision of construction worker accommodation in these wards has the potential to deliver longer-term benefits for the host communities and help to re-balance the local housing market. However, new accommodation can also lead to negative impacts upon the environment and local communities if not properly planned.

It is therefore necessary to understand the availability of existing accommodation in terms of current tenures, affordability and demand within the wards and so assess their potential to accommodate an element of construction worker accommodation whilst ensuring that the type, location and amount minimises the potential for negative effects and supports the Council's aspirations for legacy benefits.

1.3 Structure

After a brief overview of the study area, Section 3 onwards addresses the characteristics of the North Anglesey study area, the capacity of the existing social infrastructure and individual profiles for each of the local areas. These set out the socio-economic and housing stock characteristics of each as well as the potential housing supply to meet the demands of both the existing population and those of construction workers associated with the New Nuclear Build at Wylfa as it is currently understood.

2. The North Anglesey Context

2.1 The Study Area

The data for the study area is not available for specified community areas which comprise the Twrcelyn, most of the Talybolion and part of the Llygwy wards. Hence, data has been drawn from Census Layer Super Output Areas (LSOAs) which 'best fit' to the community areas and all analysis is undertaken at this area geography. The study area is depicted on Figure 2.1.

Whilst each of the LSOA areas and the services within them are addressed separately it should be recognised that there is significant overlap between Amlwch Port and Amlwch Rural relating to the Urban Service Centre of Amlwch due to:

- the provision of services in the two LSOAs that all relate to the town. Despite Sir Thomas Jones Secondary School falling within the Amlwch Rural LSOA it relates to, and extends the urban area. This is also true of some of the JDLP allocations which extend the town beyond the Amlwch Port boundary;
- the lack of provision of any sort in any other location in Amlwch Rural.

Where appropriate, the interrelationship between the two LSOAs are highlighted.

2.2 Demographic and Housing Stock Profiles

2.2.1 Demographic Characteristics

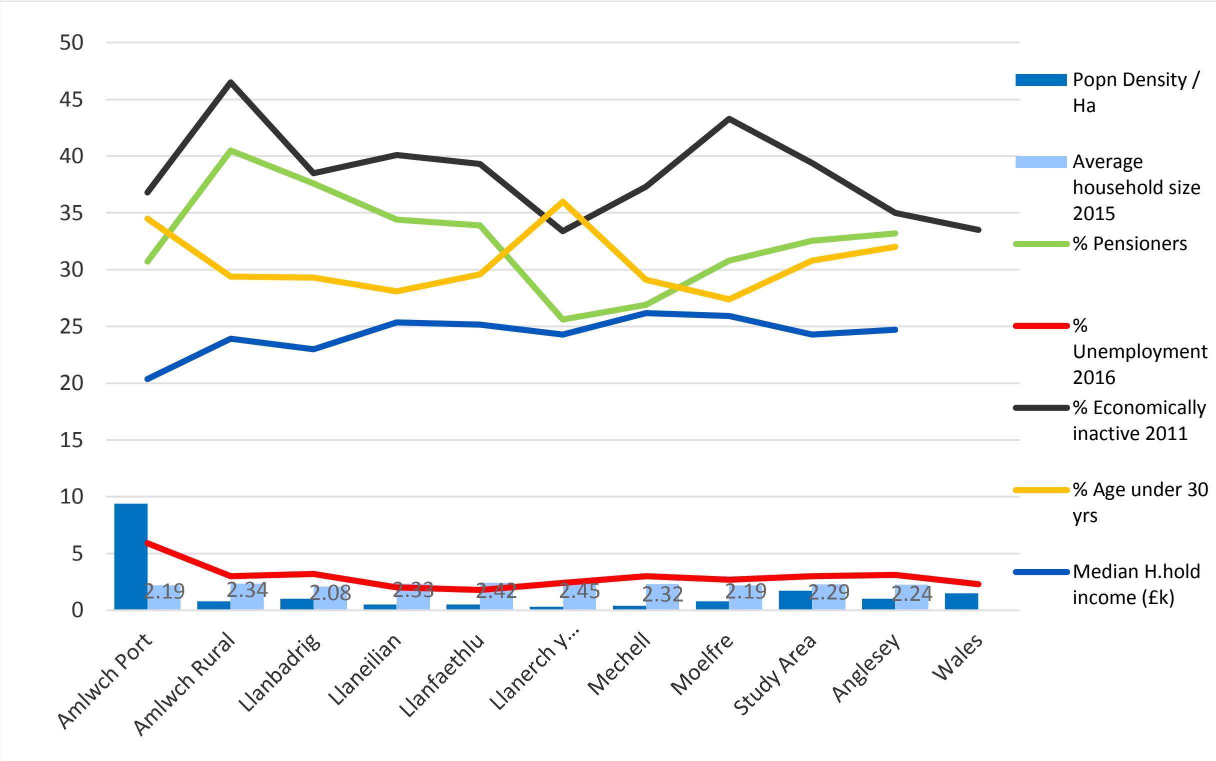
A demographic and housing stock profile for the study area produced from data underpinning the 2016 Local Housing Market Assessment is at Appendix A.

Figure 2.1 sets out the distinctive qualities of the aggregation areas in the study area by plotting the following key elements:

- population density (persons per hectare);
- household size (persons per household);
- % unemployment;
- % economically inactive;
- % pensioners;

- % population aged under the age of 30 years; and
- annual household income (£k).

Figure 2.1 A Comparison of Key Socio-Economic Characteristics



The main findings for the study area in relation to the wider Anglesey and Wales are as follow:

- The northern wards are relatively populous and growing. The area is twice as densely populated than Anglesey as a whole (2.2 and 1 person/ hectare respectively) and household sizes are rather larger. The population grew at twice the rate of Anglesey as whole (17% and 8% respectively) between 2001 and 2011.

- The population is relatively aged. This is most significant in the 45 to 74 year age range which makes up 43.4% of the population against 40.6% for the island. Both these are considerably higher than that for Wales. A third of households in the study area are made up by pensioners.

- Against a general improving trend, unemployment has fallen only slightly over the past two years. This has seen the northern wards move from being comparable to the Welsh average to that of the poorer performing island. Rates are now at just over 3% which is approximately 1% adrift of the national figure.

- Self-employment is far more common. This amounts to 22% of the economically active against 18% for Anglesey and 14% for Wales. There is a greater prevalence of skilled workers (occupation groups 4 and 5) but a corresponding lack of managerial skills (groups 1 to 3).

- Educational attainment is lower than the wider island with a slightly higher proportion in unqualified and a lower proportion in Level 4 qualifications and above.

- Household savings and equity of owner occupiers are 4% and 8% higher than those for the island as a whole although average household incomes are slightly lower reflecting the higher levels of retired.

2.2.2 Housing Characteristics

Figures 2.2 and 2.3 demonstrate that the stock in the study area tends to be larger (3 bedrooms and above) than for Anglesey and Wales and there is a significantly higher proportion of detached and semi-detached stock.

Figure 2.2 Comparative Size of Housing Stock

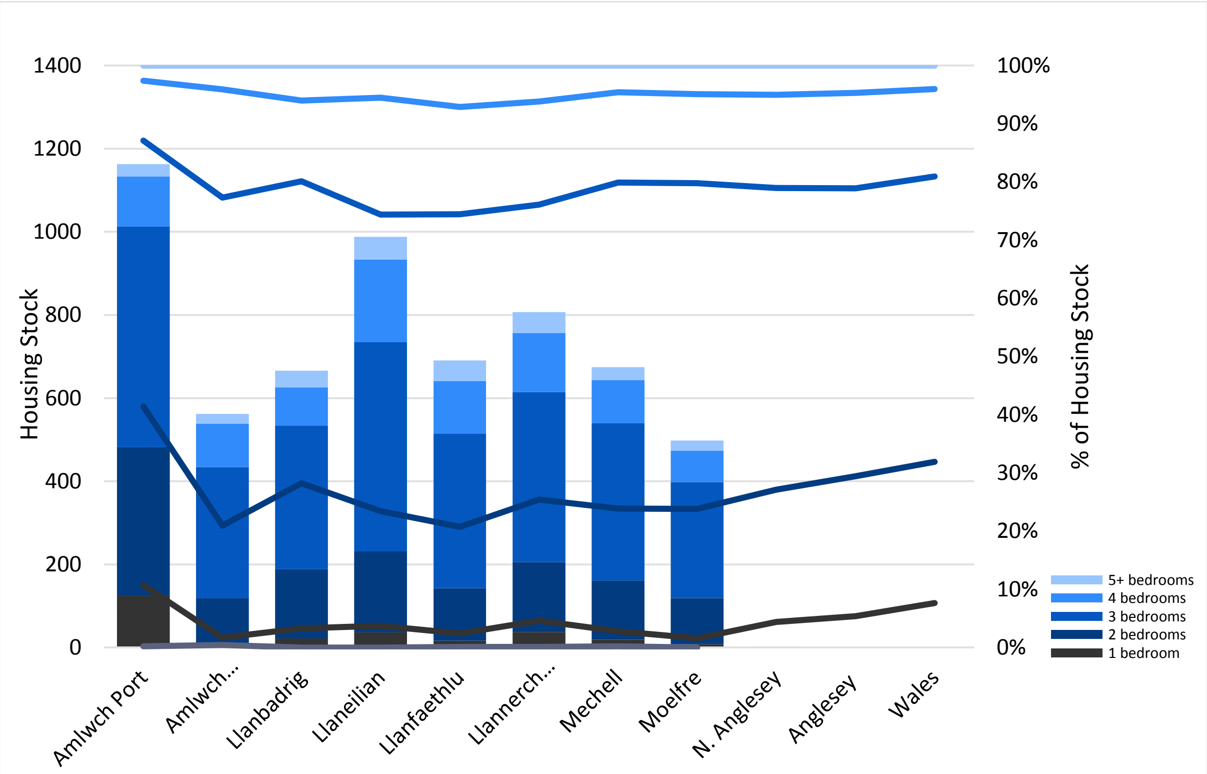
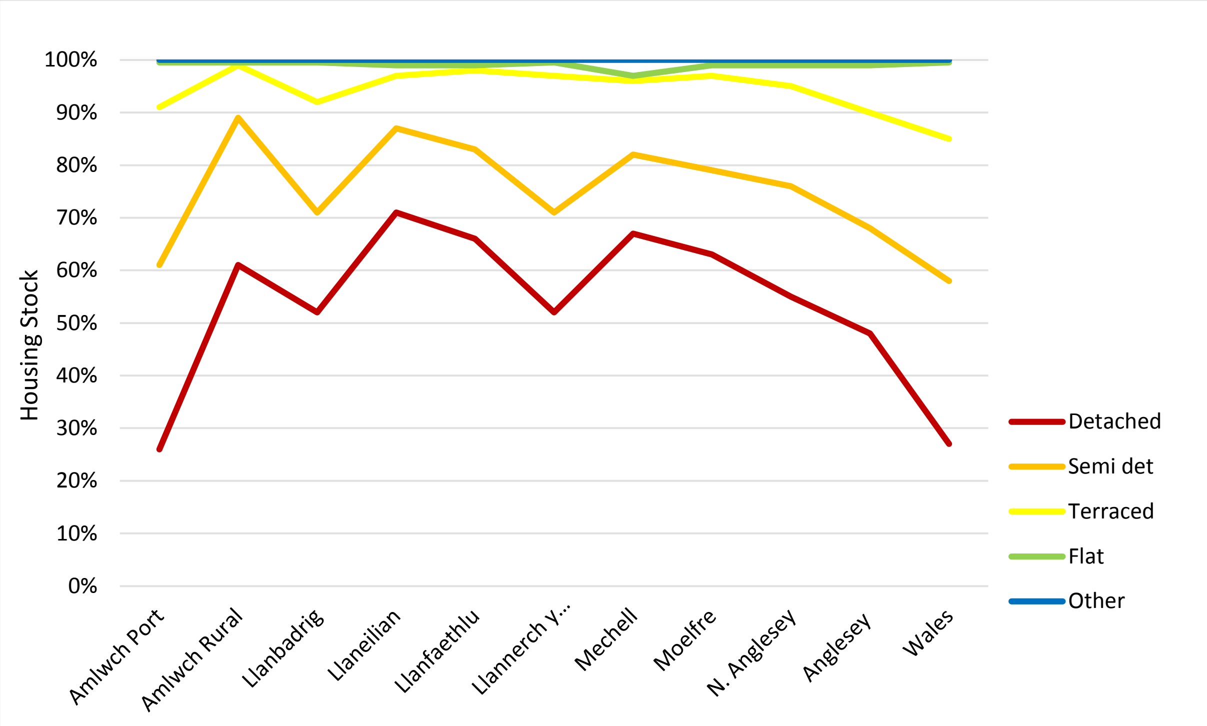


Figure 2.3 Comparative Type of Housing Stock



The contribution of owner-occupation as a proportion of total housing stock split within aggregation area is shown at Figure 2.4. This indicates that in general owner occupation is more prevalent in the study are than across the island and Wales as a whole.

Figure 2.4 Comparative Proportion of Owner Occupied Stock

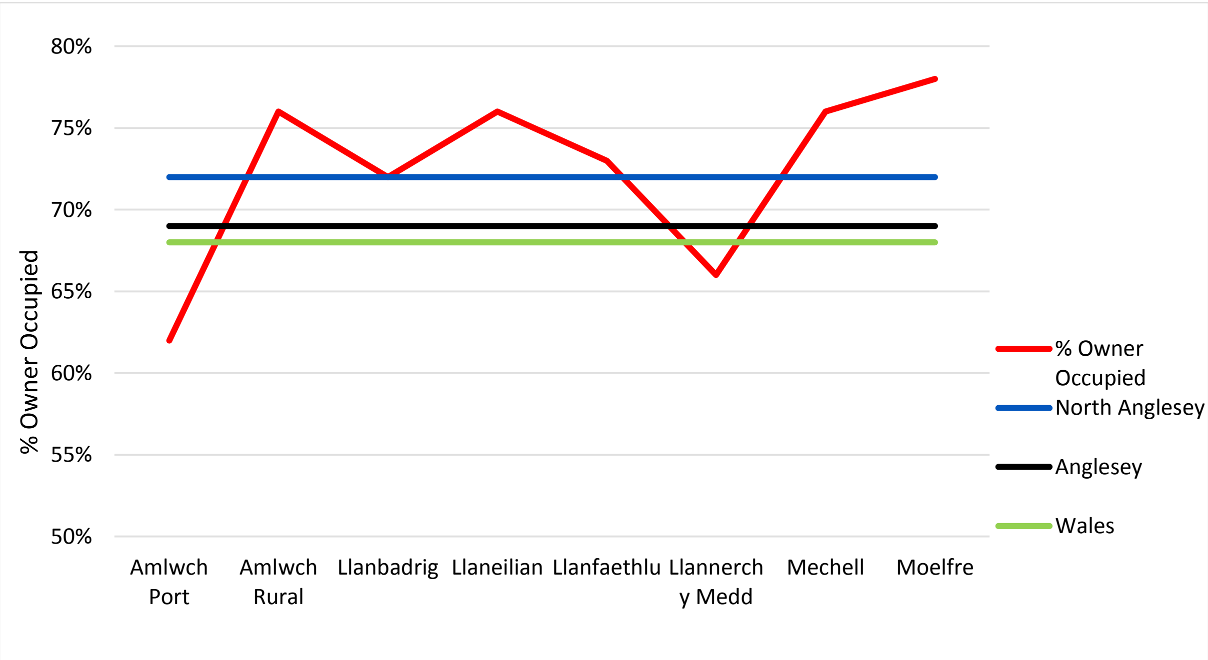
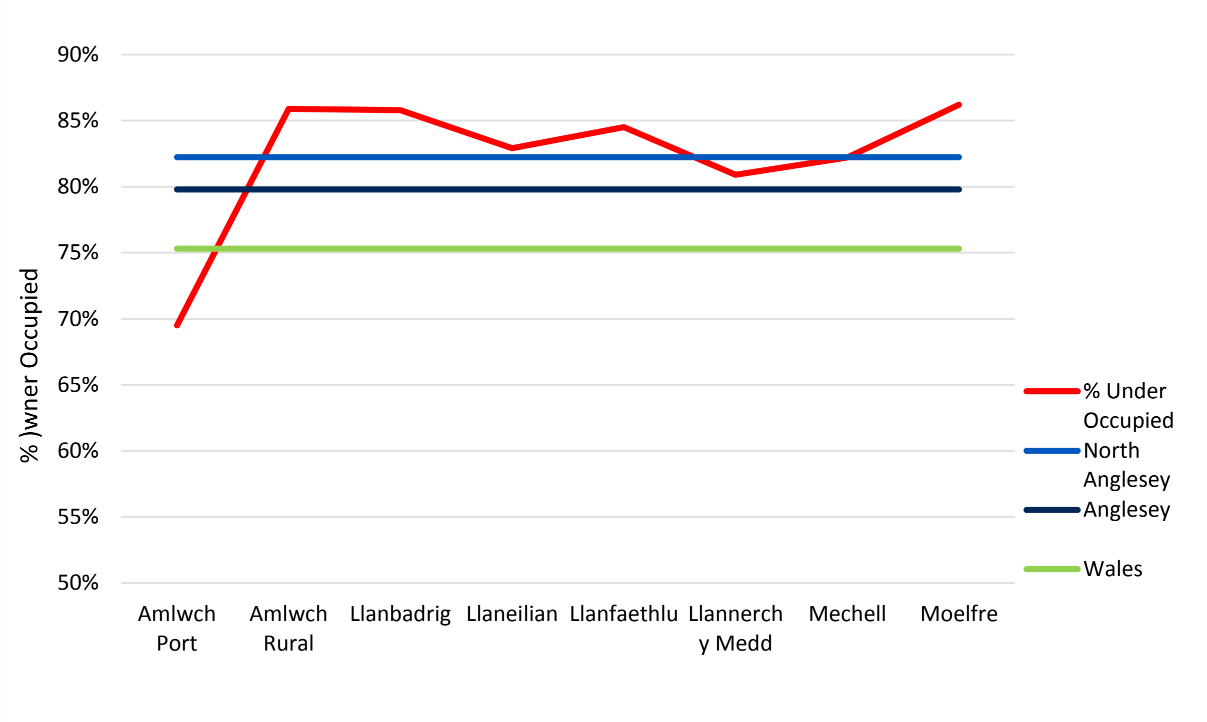


Figure 2.5 suggests that a consequence of larger housing stock serving less variable average household sizes is that the level of under-occupation of stock in the study area is higher than across the island and significantly higher than that for Wales.

Figure 2.5 Comparative Proportion of Under Occupied Bedspaces



In summary, the northern wards possess a growing but aged population that is less likely to work and therefore relatively unresponsive to wider trends in unemployment. The population is likely to live in relatively large, often detached or semi-detached accommodation which is relatively under occupied. Owner-occupation is more prevalent and homes are more likely to be wholly owned.

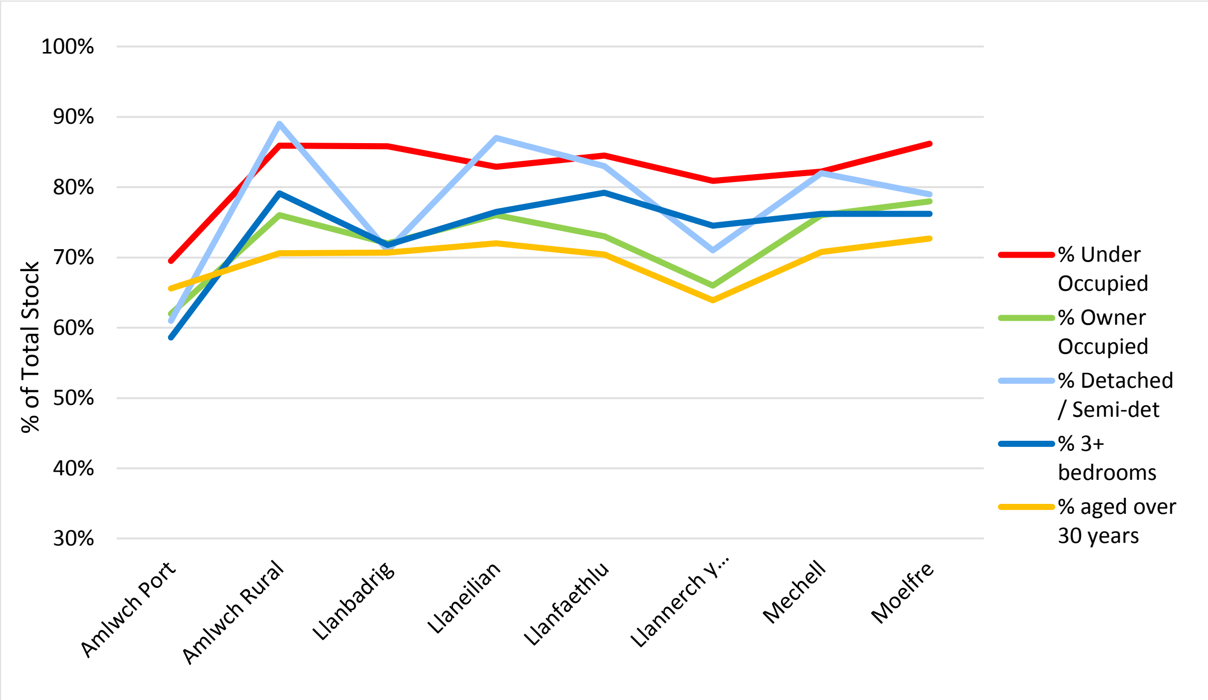
2.2.3 Aggregation Area Indicators

Figure 2.6 seeks to out the distinctive qualities of the aggregation areas in the study area by plotting the following key elements:

- tenure (% owner-occupied);
- house type (% detached and semi-detached);
- house size (% with 3 bedrooms or more);
- occupancy (% of stock under occupied); and

- age (% of householders aged 30 years and over).

Figure 2.6 A Comparison of Key Housing Stock Characteristics



Before considering each of the aggregation areas in detail, the above section and other data in Appendix A, allows the following general characteristics to be drawn out.

The spatial hierarchy of the Council's Joint Local Development Plan (JLDP) is well reflected in the housing stock profiles reflecting their historic growth. All three of the higher order settlements have a significantly higher proportion of terraces with fewer bedrooms within a denser urban fabric.

The characteristics of Amlwch make it the most distinctive settlement. Apart from being much the largest in the study area its historical development has left a legacy of smaller largely terraced housing which are more likely to be rented than elsewhere in the study area. The smaller size of the stock also means that occupancy is relatively high but that overcrowding (3.5% of households) contributes significantly to performance of the study area as a whole (2.3%) being worse that for the island as a whole (2.2%). It also possesses a relatively youthful but relatively poorly qualified population.

The housing stock in Llanbadrig also reflects the historical growth of its main centre which is the village of Cemaes. Housing stock is smaller, has fewer bedrooms and is less likely to be owner occupied than in rural areas. Despite this smaller stock, under-occupancy is high which probably reflects its significantly lower average household size (2.08pph) against the study area (2.29pph) and elsewhere within it (up to 2.45pph).

The housing stock in Llannerch-y-Medd also reflects its historical development with some larger terraces but is also distinguished by low owner occupancy and by far the most youthful population in the study area. However, under occupancy is high when compared to Amlwch but this is counterbalanced by high levels of overcrowding suggesting that both these issues may have a patchy distribution.

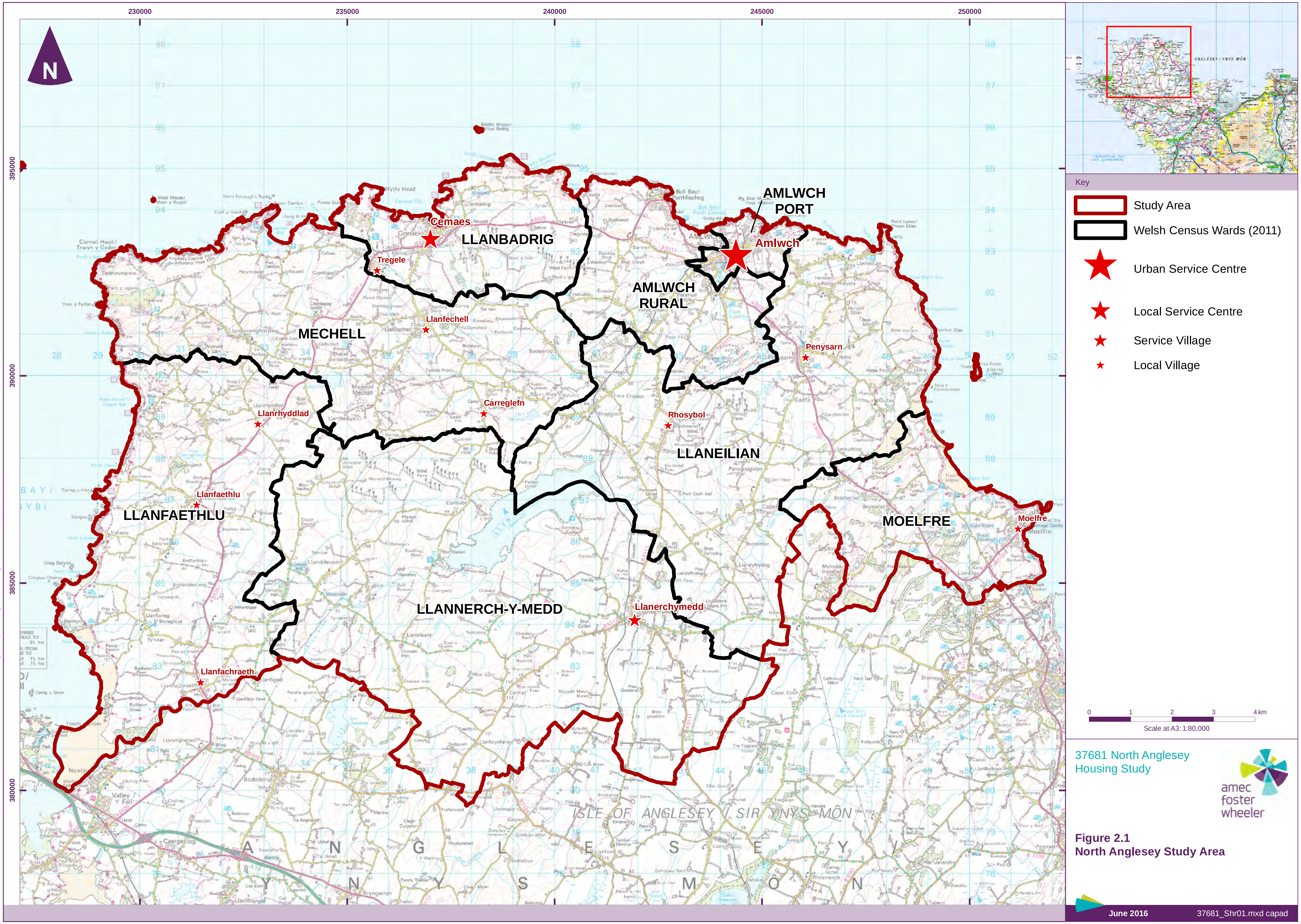
The distinction between the remaining rural areas is rather less although the following characteristics are evident:

- Amlwch Rural is very different from Amlwch Port. It possesses the highest proportion of detached and semi-detached dwellings (close to 90%) and with the greatest average number of bedrooms. Owner occupation, under occupation and average age of the population are all the highest, or close to the highest, in the study area. Llaneilian and Mechell also possess these general characteristics but to slightly lesser degrees.

- Llanfaethlu is distinct from these settlements in that its stock is the largest in the study area and has a correspondingly low level of occupancy. It also has the highest proportion of rented properties in the rural area.

- Moelfre diverges from this general pattern for the rural area. The main settlement is a traditional coastal village with relatively few detached dwellings with the best qualified but most aged population in the study area (42% is aged 60 and above). It has relatively large stock and has the highest levels of owner occupation in the study area – the proportion of wholly owned stock is particularly high.

All aggregation areas possess a high proportion of welsh speakers and this is particularly the case in the western and central areas. The language is slightly less prevalent in the east with Amlwch Rural and Moelfre possessing a less percentage than for the island as a whole.



37681 North Anglesey Housing Study

amec foster wheeler

Figure 2.1
North Anglesey Study Area

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3. Housing Demand and Existing/ Planned Supply

3.1 LHMA Demand

Taken from the 2016 Local Housing Market Assessment Update (LHMA), the project future demand for housing the northern area has been apportioned into aggregation areas. The current stock and that projected by the growth of the existing population are in Table 3.1. The date of 2033 has been selected (which is six years beyond the JLDP timeline) to account for the post construction effects of Wylfa Newydd.

Table 3.1 Projected Household Growth by Aggregation Area

Aggregation Area	Households 2015	Projected Growth	Households 2033
Amlwch Port	1,163	189	1,352
Amlwch Rural	561	76	637
Total Amlwch	**1,724**	**265**	**1,989**
Llanbadrig	666	70	736
Llaneilian	989	86	1,075
Llanfaethlu	691	87	778
Llanerch y Medd	808	157	965
Mechell	674	52	726
Moelfre	498	64	562
TOTAL	**6,050**	**781**	**6,831**

3.2 Wylfa Newydd Demand

Having establish housing demand both in North Anglesey as a result of predicted growth in the current Anglesey population, it is necessary to consider the housing supply available to meet that demand as well as that presented by the construction of the Wylfa Newydd Generating Station.

This demand is based upon information contained within the Horizon Accommodation Strategy and its supporting data. The approach to modelling demand was undertaken in several stages. The assumptions used are set out in full in Section 4 to the Construction Worker Accommodation Evidence Base Report and are not repeated here.

A demand profile has been generated for construction workers detailing, the amount and location of each type of accommodation required within every year of the construction period. The demand profile for the owner-occupied and private rented sectors resulting from the construction workers also details the size of home required within these tenures.

3.3 Modelling of Bedspace Demand Scenarios

The Scenario Assessment Report describes the demand and supply model which has been developed to understand the potential implications arising from the accommodation of construction workers upon the local housing market. It presents the scenarios modelled and the implications for the local housing market that could arise should they be taken forward. This report then assesses the relevant performance of each scenario before concluding with the recommended or preferred scenario, the spatial implications and mitigation recommendations for which are then explored.

The scenarios considered are:

- Scenario 1 - The non-intervention, or demand-led scenario, this scenario assigns accommodation based upon the construction workers ideal demand profile. In other words, based upon the relative incomes of the different worker groups, and their assumed length of stay, the model allocates what is considered to be the most suitable type of accommodation without any attempt to manage demand. For example, the higher skilled and professional managers with the higher incomes, staying for all or a significant proportion of the construction programme are more likely to invest in owner occupation then a comparatively lower income, low-skilled short-term worker.

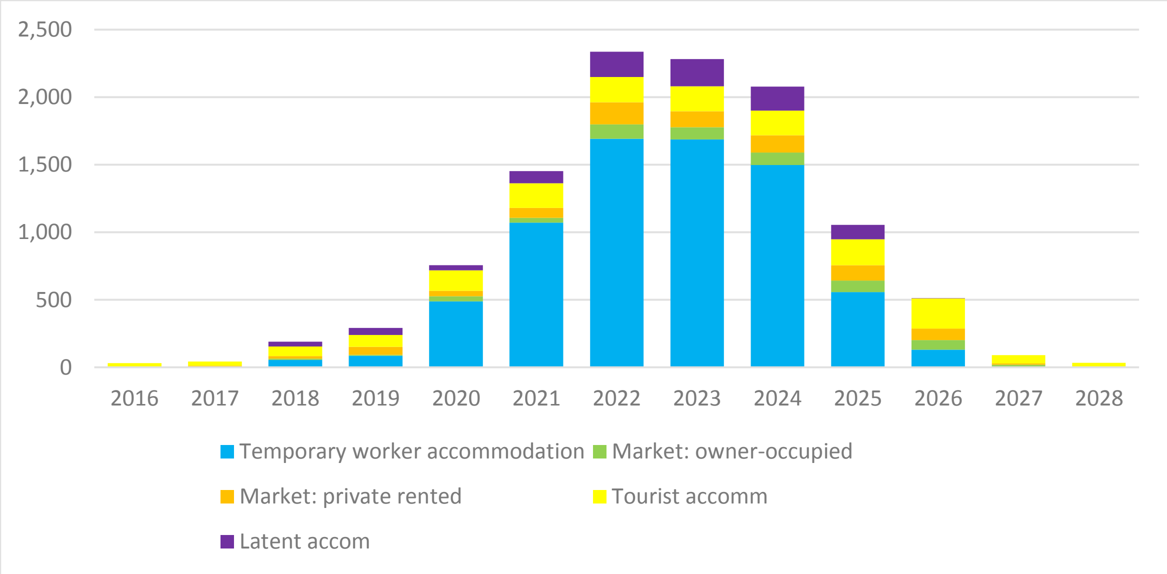
- Scenario 2 - The scenario uses the numbers and breakdown of construction workers and the phasing of construction workers accommodation as set out within Horizon's Consultation Update January 2016 (modified in discussion with Horizon during the course of this study). The demand identified by Horizon is modelled against the supply of temporary construction worker accommodation as proposed by Horizon Essentially therefore, rather than seeking to place workers in accommodation as influenced by their income and length of stay, this model is an interventionist approach whereby Horizon is proposing to direct workers to certain accommodation types over the course of the construction programme.

- Scenario 3 - This third scenario seeks also to intervene with the demand as modelled in Scenario 1. It differs from Scenario 2 in that it seeks to provide additional mitigation for the local housing market by reassigning worker numbers to accommodation tenures in a way by which some of the pressures modelled can be reduced.

Full details of the assumptions, assessment methodology and conclusions of each scenario are in Sections 3, 4 and 5 of the Scenario Assessment Report.

The preferred scenario is Scenario 3 which seeks to intervene with and to provide additional mitigation for the local housing market by reassigning worker numbers to accommodation tenures in a way by which some of the pressures modelled can be reduced. The bedspace demand for North Anglesey is illustrated in Figure 3.1.

Figure 3.1 North Anglesey Bedspace Demand under Scenario 3 (The Preferred Scenario)



For North Anglesey, the following patterns emerge:

- Temporary worker accommodation begins to come on stream in 2018, two years after the nominal start of construction. This is considered to be a reasonable time period in which it should be possible to obtain consent and construct. The worker accommodation builds relatively gradually to 2020. At peak, the total number is higher than for the other scenarios thereby reducing pressure on other types of supply.

- Demand for owner occupied accommodation rises relatively gradually until 2020, rising to a peak in 2022. However the total peak of 108 is less than the Scenario 2 peak of 121. Furthermore the number drops away more significantly to between 93 and 71 over the period to 2026.

- Demand for private rented accommodation also builds more gradually than other scenarios rising to a lower peak. A ‘mini-peak’ occurs in 2019 when private rented would be required to take up the demand until the first significant tranche of temporary worker accommodation arrives in 2020.

In common with the results of the demand modelled under the preferred scenario pressure on the owner occupied is relatively low in the early years of construction. Private rented pressures are felt due to the need for private rental sector to take up more of the demand ahead of significant temporary worker accommodation being delivered. If delivery of this form of supply can come forward in a greater number sooner, then additional alleviation of housing market pressure will be achieved.

In relation to the scenarios tested in the island wide report, the preferred scenario places considerably less pressure on one bed owner occupied in the northern wards.

Table 3.2 Owner Occupied Pressure Medium to Long Term – Preferred Scenario

		2021	2022	2023	2024	2025	2026	2027	2028
Anglesey northern wards	1 bed	-10.9%	199.0%	-30.2%	8.3%	57.8%	-58.0%	65.1%	60.0%
	2 bed	-0.6%	32.1%	-5.6%	1.4%	10.9%	-7.9%	9.3%	-9.8%
	3 bed	0.5%	12.1%	-2.6%	0.5%	5.2%	-1.7%	2.5%	-4.5%
	4+ bed	0.8%	10.5%	-2.4%	0.4%	4.9%	-0.9%	1.7%	-4.7%
	Total	-0.3%	26.2%	-4.7%	1.1%	9.3%	-6.1%	7.4%	-8.6%

Differences in private rented demand are less pronounced. Pressure under the preferred scenario is slightly delayed in most cases up to 2019) In the medium term additional pressures are of a similar magnitude although the preferred option achieves fewer instances of unsustainable market pressure for larger private rented accommodation in North Anglesey.

Table 3.3 Private Rented Medium to Long Term – Preferred Scenario

		2020	2021	2022	2023	2024	2025	2026	2027	2028
Anglesey northern wards	Shared room	13.9%	20.3%	41.3%	30.4%	31.3%	26.2%	19.1%	2.6%	2.0%
	1 bed	34.7%	59.8%	130.7%	102.0%	106.2%	95.2%	72.2%	9.3%	4.4%
	2 bed	9.7%	17.6%	37.7%	28.9%	30.2%	27.0%	20.2%	2.4%	1.3%
	3 bed	8.7%	16.8%	35.7%	28.1%	29.7%	26.8%	19.9%	2.2%	1.3%
	4+ bed	17.5%	34.1%	70.3%	56.5%	59.5%	53.4%	39.3%	4.2%	2.9%
	Total	12.8%	22.8%	48.3%	37.4%	39.1%	34.8%	25.9%	3.1%	1.8%

3.4 Meeting the Demand – Joint LDP Supply

The Deposit JLDP makes provision through the allocation of specific sites and a non-site specific target for windfalls for each settlement. These are set out against the LHMA assessment of local demand in Table 3.4.

Table 3.4 Joint LDP Supply

Aggregation Area	LHMA Household Growth	Allocated Sites	Shortfall to LHMA Growth	Windfall Sites	Shortfall to Demand
Amlwch Port	189	163	26	142	-116
Amlwch Rural	76	210	-134		-134
Total Amlwch	**265**	**373**	**-108**	**142**	**-250**
Llanbadrig	70	60	10	18	-8
Llaneilian	86		86	82	4
Llanfaethlu	87		87	46	41
Llanerch y Medd	157	17	140	22	118
Mechell	52		52	44	8
Moelfre	64		64	32	32
TOTAL	**781**	**450**	**331**	**386**	**-55**

The allocations of the JLDP conform to the Plan settlement hierarchy. Those sites in Amlwch Port and Amlwch Rural all serve to intensify or extend the urban area which straddles the boundary between them. Taken together, and given the position of the town as a Local Service Centre in the Plan settlement hierarchy, the allocations would meet LHMA growth whilst the addition of the windfall allowance could exceed this growth by 250 dwellings. It is anticipated that the release of sites and granting of permissions for wind fall would, in the absence of additional demand from Wylfa workers, be monitored annually by the Council.

In Llanbadrig, including Cemaes, planned supply is closely aligned to the LHMA demand. The allocations and a modest number of windfalls would meet the projected growth in demand.

The LHMA expects demand in Llanerch–y–Medd to grow markedly as the population structure changes. In this case the JDLP would appear to underprovide meeting approximately a third of the projected demand.

There are no allocations across the wider rural area. The Plan windfall allowances all fall short of the LHMA demands to varying extents with just half the demands in Llanfaethlu and Moelfre being met.

3.5 Other Sources of Supply

This section considers the potential supply of accommodation that could arise from properties that are currently empty, the potential of the existing tourism accommodation and latent supply that could be provided through provision of lodgings.

In the early years supply from the tourism accommodation could form a helpful source of supply. In 2015 the County Council commissioned a bedstock survey of a 50% sample of the 350 known sources of accommodation on the island. For the North Anglesey area, the survey identified a present tourist accommodation mix which is dominated by self-catering accommodation. The results of the tourism survey has suggested that some 132 bed spaces could be available year round in North Anglesey as set out in Table 3.5.

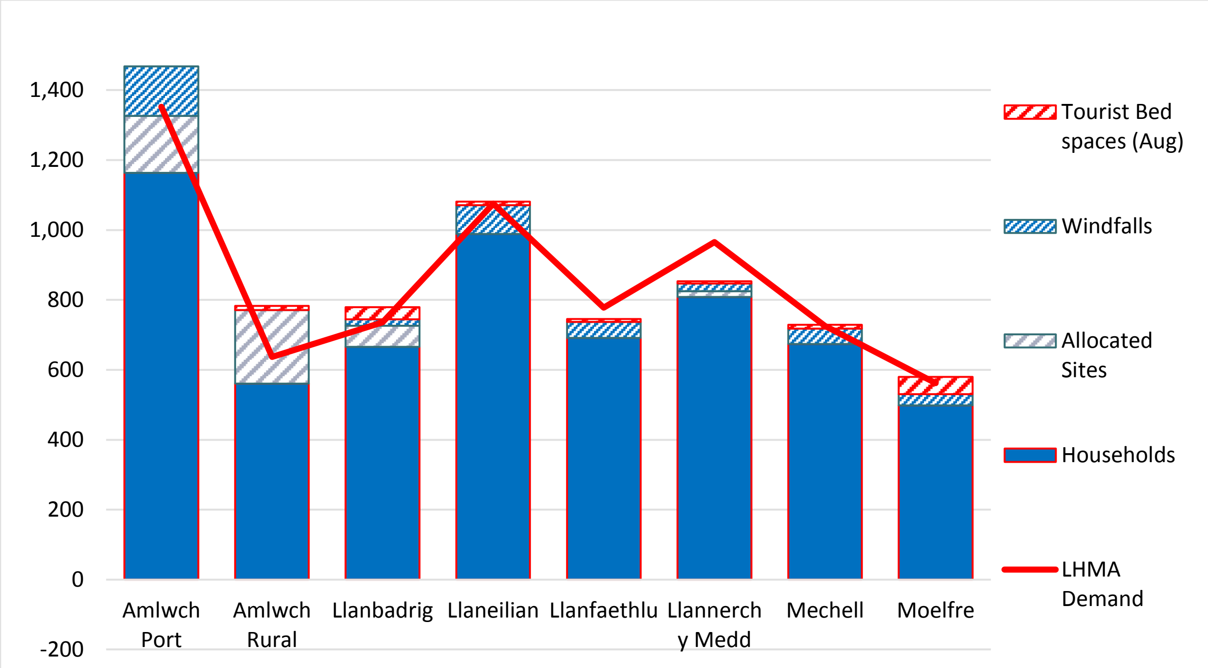
Table 3.5 Availability of Tourist Bed spaces by Aggregation Area

Aggregation Area	**Bed spaces of 172 Establishments (50% Sample)**		**Derived spaces for 100% Sample**	
	Available August	Total Bedspace	Available August	Total Bedspace
Amlwch Port	0	2	0	4
Amlwch Rural	6	26	12	52
Total Amlwch	**6**	**28**	**12**	**56**
Llanbadrig	18	51	35	102
Llaneilian	5	23	10	46
Llanfaethlu	4	18	8	36
Llanerch y Medd	3	12	6	24
Mechell	6	19	11	38
Moelfre	25	51	50	102
TOTAL	**66**	**202**	**132**	**404**

Supply against the LHMA demand is summarised in Figure 3.2. The contribution of the tourism sector would meet the LHMA demand in Moelfre but still leave shortfalls in Llanfaethlu and Llannerch–y–Medd.

It should be recognised that tourism accommodation is unlikely to feature as a source of accommodation for existing local communities, when the rates charged to tourists often exceed private rents. In reality therefore this source of supply is more appropriately considered as potential for construction worker accommodation.

Figure 3.2 Projected Supply against LHMA Demand Projections



3.6 Vacant Homes

The Council advised that as at February 2016 there were 784 empty market sector homes on the Island that were considered as being vacant beyond a typical transactional period (i.e. the length of time a home may be empty due to a change in the resident household). The Council considers that these homes require action to enable them to rejoin the housing market.

After consultation with the Council's Empty Homes Officer the following assumptions were agreed as being realistic to determine the likely supply arising from empty homes:

- 70% of empty homes in the northern wards are likely to be brought back into use.
- In response to discussions with empty property owners in each area, it is presumed that 90% of returned empty homes in the northern wards will become available for private rent, with 10% available to purchase.
- These empty homes will be brought back into use over a period of five years from 2017.
- The size profile of these returned empty homes will match the profile of other dwellings in the tenure within the location.

Table 3.6 sets out a schedule of currently empty properties being brought back into the housing market based upon the above assumptions. To achieve this level of supply it is likely that interventions will be required. These are considered later within this report.

Table 3.6 Currently Empty Properties being brought back into Occupation

Location	Tenure	2017	2018	2019	2020	2021
Northern wards	Private rented	23	24	24	24	24
	Owner-occupied	2	2	3	3	3
	TOTAL	25	26	27	27	27

Table 3.7 sets out a schedule of potentially available supply from planned provision, tourist sector bedspaces and vacant properties.

Table 3.7 Currently Empty Properties being brought back into Occupation

Aggregation Area	Demand	JLDP Provision	Tourist Bed spaces (Aug)	Sub Total	Balance to Demand	Vacant Homes	Balance to Demand
Amlwch Port	189	305	0	305	116		
Amlwch Rural	76	210	12	222	122		
Total Amlwch	**265**	**515**	**12**	**527**	**238**		
Llanbadrig	70	78	35	113	43		
Llaneilian	86	82	10	92	6		
Llanfaethlu	87	46	8	54	33		
Llanerch y Medd	157	39	6	45	-112		
Mechell	52	44	11	55	3		
Moelfre	64	32	50	82	18		
TOTAL	**781**	**836**	**132**	**968**	**187**	**132**	**219**

3.7 Latent Supply

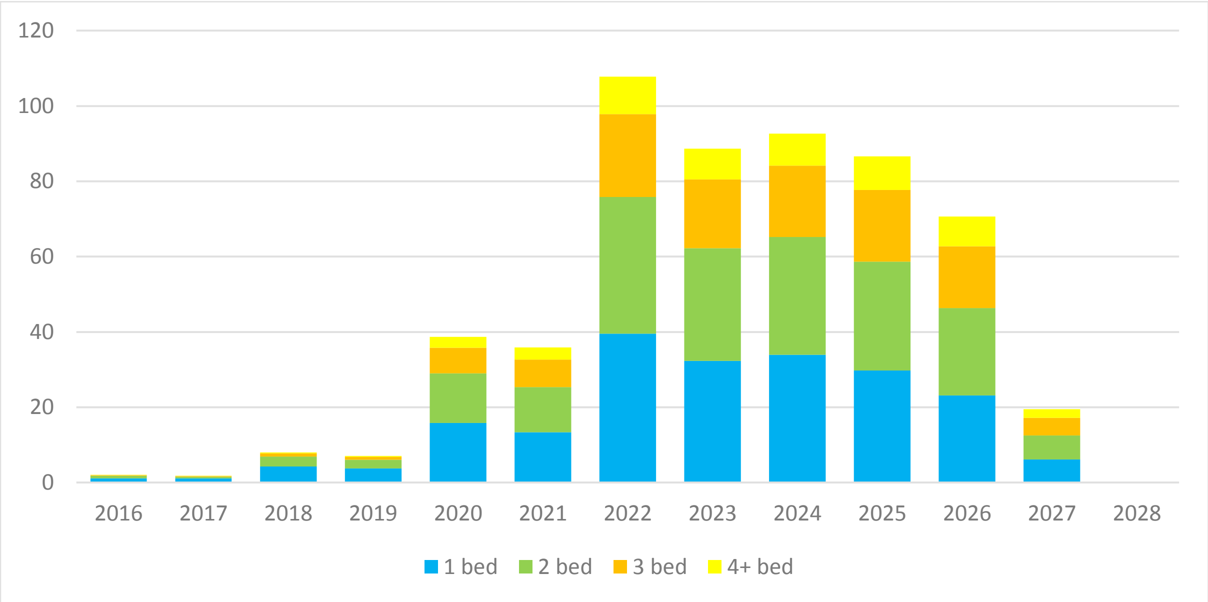
High levels of under-occupancy across the study area suggest that there is potential for 'latent' supply lodging. The supply of this form of accommodation is derived from the updated household survey dataset.

The household survey asked whether households would be interested in renting a room to a lodger associated with the Energy Island developments. The updated household survey dataset indicates that there are 153 households that have one or more spare bedrooms in their home that would be prepared to let one to a construction worker as a lodger.

3.8 Preferred Scenario Conclusions

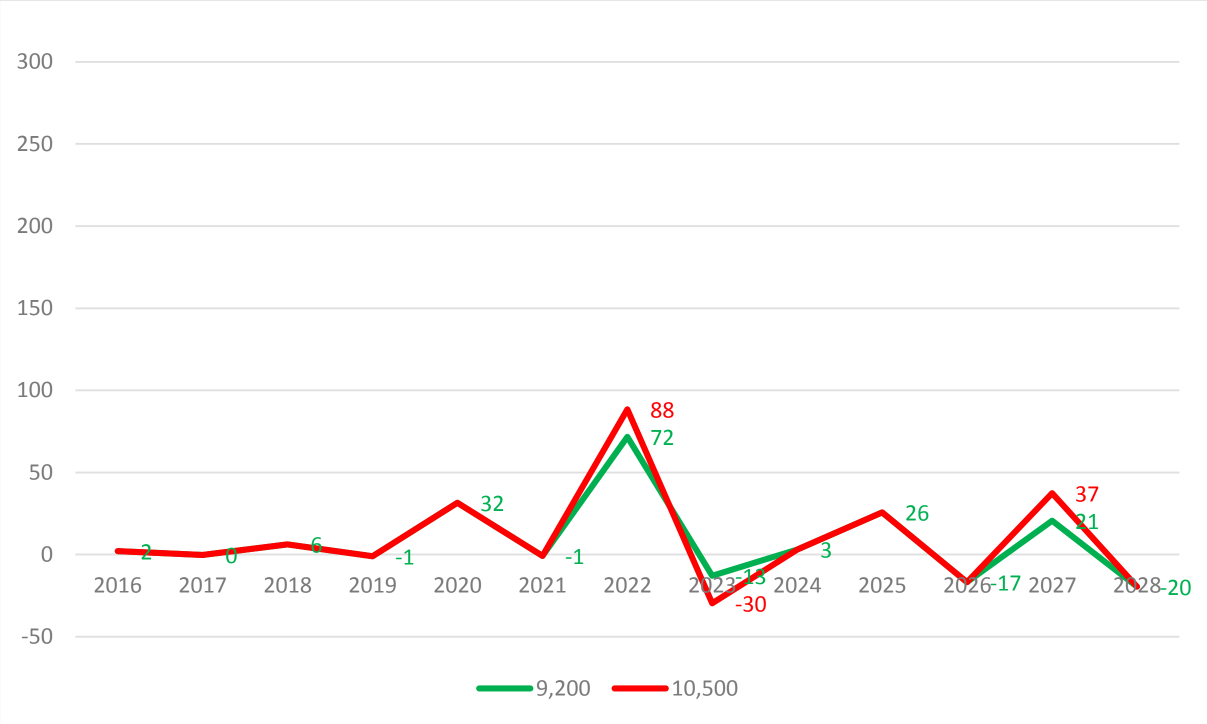
In order to accommodate the Preferred Scenario following peak demand in 2022 of 108 demand for additional turnover in owner occupied accommodation required to reduce market pressure would reduce to around 90. This requirement could be met in the short term by the bringing forward of JLDP housing targets earlier in the plan period.

Figure 3.3 North Anglesey Owner Occupied Demand – Preferred Scenario



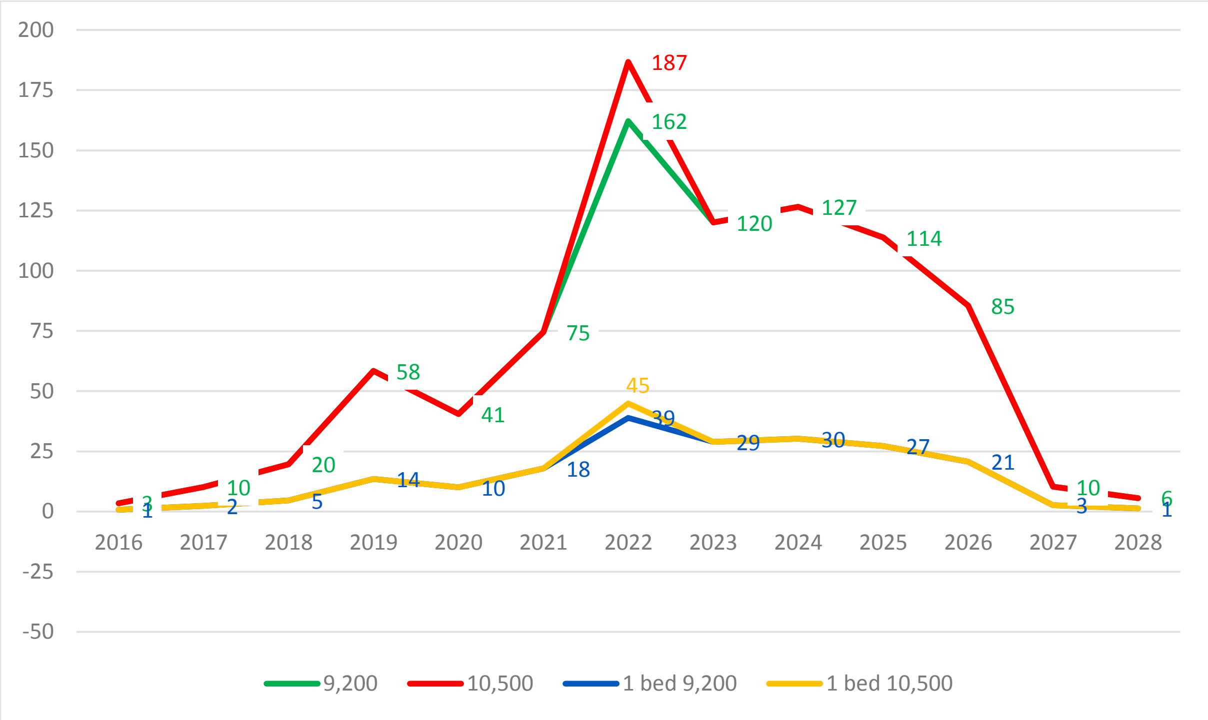
Whilst a proportion of this demand can be accommodated within the existing churn of owner occupied accommodation, Figure 3.4 shows that without the availability of additional dwellings in 2022 pressure may be unsustainable. This would be exacerbated should the eventual construction workforce exceed the 9,200 assumed by the modelling. The impact of an increase to a 10,500 workforce is also should in Figure 3.4.

Figure 3.4 North Anglesey Pressure on Market Owner Occupied



For private rented accommodation the pressure on supply peaks in 2022 and reduces beyond 2022. Demand for one bedroom private rented peaks at a demand for 39 additional units. Again an increase from the modelled workforce to 10,500 would exacerbate the demand in the peak years as should in Figure 3.5.

Figure 3.5 North Anglesey Pressure on Private Rental



3.9 Emerging Conclusions

It can be concluded that the severity and longevity of pressure on the housing market in North Anglesey can be alleviated through the greater use of temporary worker accommodation and the timing of delivery and its amount. This can act as a mitigating factor.

It is however clear to see that local communities could face competition from comparatively well paid workers during the construction programme. Local communities currently exhibit a comparative high degree of need for intervention within the housing market and even without the Wylfa Newydd project this is likely to increase as the population ages and the character of households change. In addition to the earlier construction of temporary accommodation it is also recommended that further mitigation should be brought forward in the provision of intermediate and social rented accommodation particularly of smaller, one bed properties.

Further mitigation could be delivered through attempts to maximise the use of latent accommodation. Furthermore, open market private rented, particular one bed, and owner occupied accommodation identified within the JLDP plan period should be encouraged to come forward before 2019 where appropriate.

4. The Impact upon Wards

4.1 Summary

The housing demand in each of the aggregation areas is dependent upon its current socio-economic structure, the nature of its housing stock, planned provision of development and the nature of the demands from construction workers.

The attached area summaries build upon the introduction for each area within the context in Section 2. They characterise the population and housing stock then set out the proposed growth in demand and the consequential pressures resulting from the construction worker accommodation preferred scenario. In each case the demand for development according to the expected demand from households is specified with mitigation measure and potential legacy benefits highlighted.

However, and despite the distinction between the rural and urban and the clear distinction between the three main towns, there are common needs across the study area that imply interventions and potential candidate schemes to deliver a legacy.

4.2 Housing

In general terms, there is a need to adjust housing stock to meet the demand identified by the LHMA and the modelling of the preferred scenario. Three quarters of this demand is predicted to be market housing of a broadly equal mix between two, three and four bedroomed stock. The demand intermediate and social rented accommodation comprises the remaining quarter of demand but has a greater emphasis upon single bedroomed stock with a corresponding lesser proportion of four bedroomed dwellings. There is little predicted demand for shared ownership/help to buy schemes – just two per annum required until 2033.

There are important spatial variations within this picture mainly reflecting the distinction between the three main settlements:

A need to boost the average size of stock in Amlwch through predominantly market housing. Demand for rented stock amounts to 45 units of larger three and four bedroomed dwellings.

Cemaes broadly conforms to these needs but with a rather lesser emphasis on the market sector with a profile of smaller dwellings – two and three bedroomed dwellings. The rented sector market housing has a greater focus on smaller units including one bedroomed dwellings.

The demand in Llannerch y Medd does not appear to be met by the JLDP. If this were addressed, then a range of sizes of market housing would be required and a rental development of predominantly two bedroomed dwellings could also be required.

As the peak construction period is expected to exert pressure on all these settlements, there is the opportunity to proactively take forward the allocations or identify windfall sites that would ensure that need is met during and beyond this period. These sites could either fall within the boundaries or form extensions and a focus on public sector land (if available) would also serve to assure delivery. Each of the attached area summaries include indicative locations for potential growth. These are chosen to correspond to sites promoted through, but not allocated by, the JLDP. In preparing the JLDP the Council undertook a rigorous selection of sites based upon site assessment methodology. We have taken this as a starting point and have adapted its methodology to assess potential sites within each of the aggregation areas. Such sites would come forward under Draft JLDP Policy TAI10 Housing Exception Sites.

All three towns have the highest proportion of Welsh speakers in the study area which has the potential to be supported through the proactive meeting of local need.

4.3 Infrastructure

Figure 4.1 graphically depicts the presence and availability of social infrastructure in the study area against the settlement classifications of the JLDP. This shows that:

- the Urban Service Centre of Amlwch possesses a full range of services and represents the most sustainable location for future development in the study area;
- the Local Service Centre of Cemaes also has a good range of local shops, a primary school, a branch GP surgery and a pharmacy;
- the Service Village of Llanerch-y-Medd also possesses a local shop, a primary school and a branch GP surgery; and
- elsewhere across the rural areas, services are restricted to a dispersed network of primary schools and the occasional small local shop usually providing post office services.

Given these findings, the settlement categorisation in the JLDP is an appropriate basis for assessment of potential construction sites.

Figure 4.1 also expresses the present capacities of primary schools and GP surgeries. It shows that primary school capacities are under pressure in all three of the main settlements, but especially in Amlwch where additional three classes would be required across all age ranges up to 2021 with additional provision required during the construction period beyond. Addressing these capacity issues is a clear candidate for legacy provision.

The GP services provided by the Glanrafon Medical Centre in Amlwch are also close to benchmark capacities and this also applies to the branch surgery in Cemaes. Again, additional facilities could also be a candidate for legacy provision.

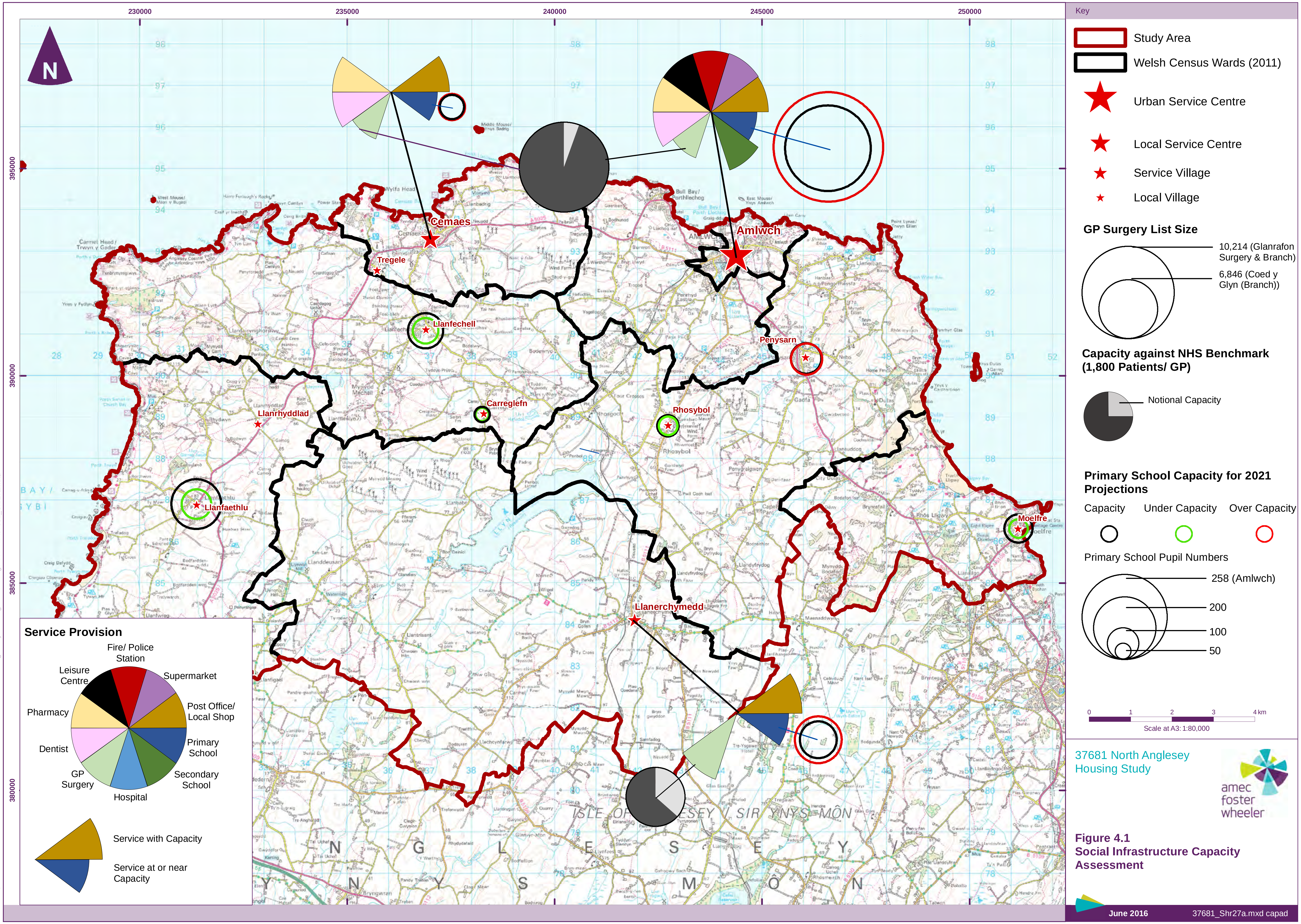


Figure 4.1
Social Infrastructure Capacity Assessment

Appendix A
Area Socio-Economics and Housing Characteristics

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Amlwch Port

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Demographic profile, Amlwch Port

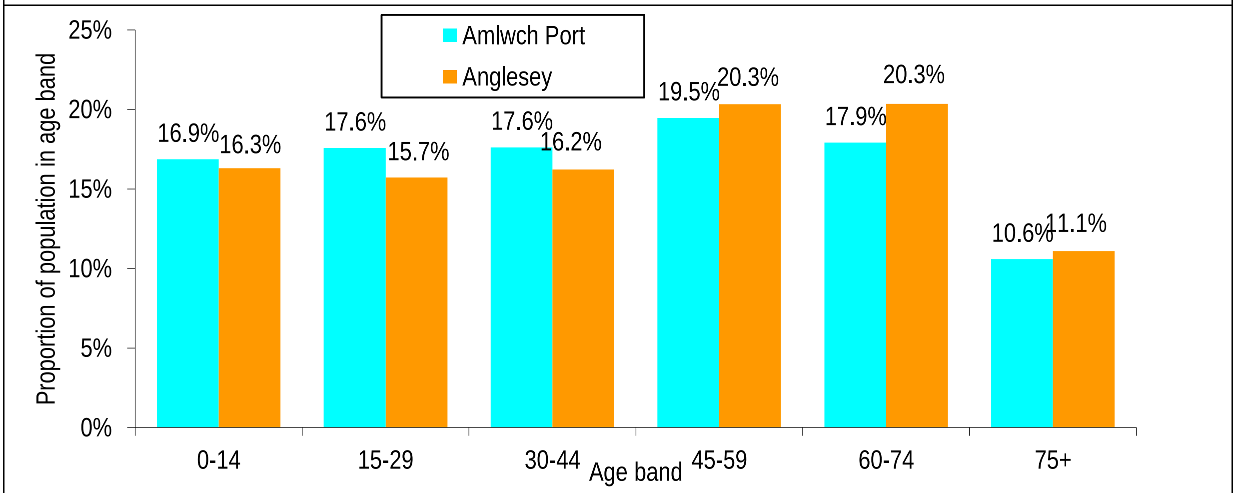
Population, 2015**: 2,547	Total households, 2015**: 1,163

Average household size 2015**		Change in total households, 2001-11*	
Amlwch Port	2.19	Amlwch Port	90.4%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

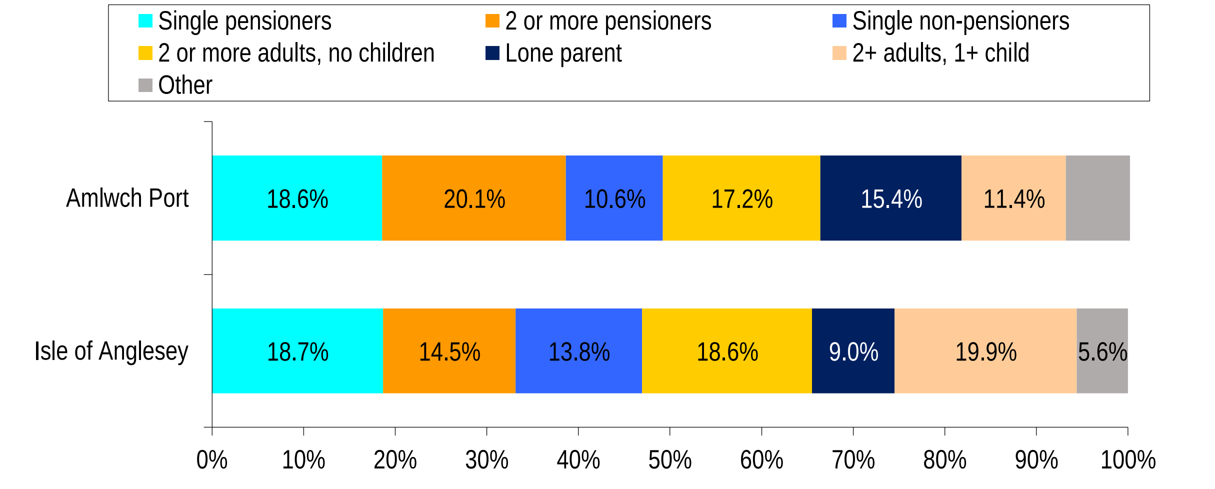
Population density* (persons per hectare)		Proportion BME*		Resident in UK* Over 5 years (includes born in UK)	
Amlwch Port	9.4	Amlwch Port	1.3%	Amlwch Port	99.5%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		Health problem* (day-to-day activities limited a lot)		Can speak, read or write Welsh*	
Amlwch Port	26.3%	Amlwch Port	13.6%	Amlwch Port	65.8%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



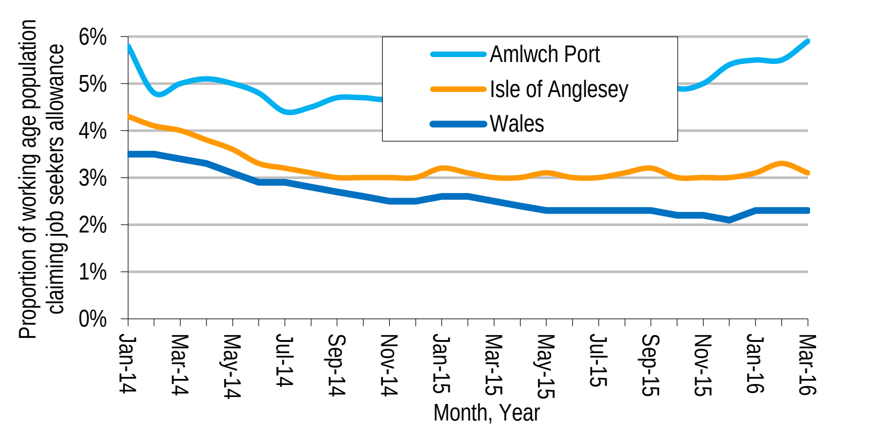
Household composition, 2015**



Socio-economic profile, Amlwch Port

Unemployment, March 2016***	
Amlwch Port	5.9%
Isle of Anglesey	3.1%
Wales	2.3%
Proportion of workforce economically inactive, 2011* (Of all persons aged 16 to 74)	
Amlwch Port	36.8%
Isle of Anglesey	35.0%
Wales	33.5%

Level of unemployment (2014-2016)***



Occupation structure, 2011*

*Occupation Groups*** **	Amlwch Port	the Isle of Anglesey	Wales
Group 1-3	24.5%	35.2%	35.8%
Group 4-5	26.6%	26.6%	24.5%
Group 6-7	22.2%	19.5%	19.6%
Group 8-9	26.6%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Amlwch Port	the Isle of Anglesey	Wales
Employed full-time	61.8%	58.7%	65.6%
Employed part-time	24.2%	23.6%	20.5%
Self-employed	14.0%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

Amlwch Port	The Isle of Anglesey	Wales	Level 4 or above
			Level 3
			Level 2
			Level 1

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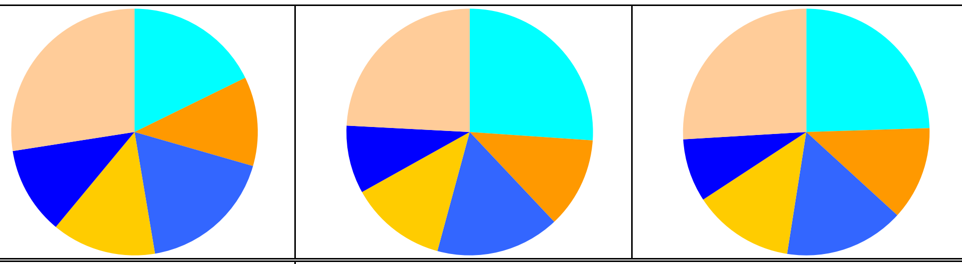


Other	
No qualifications	

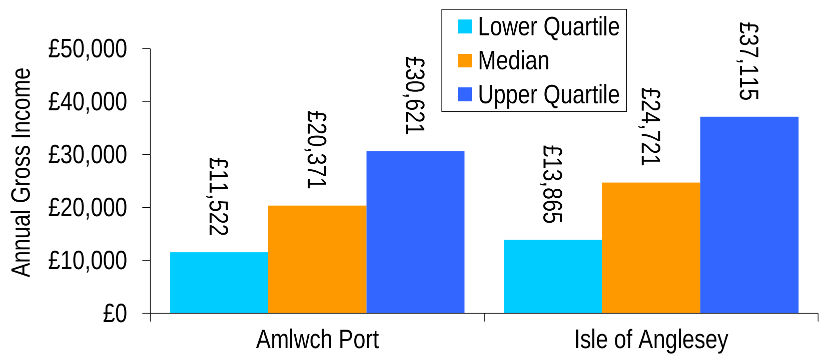
Median household savings, 2015**

Amlwch Port	£2,407
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**

Amlwch Port	£123,500
Isle of Anglesey	£155,953

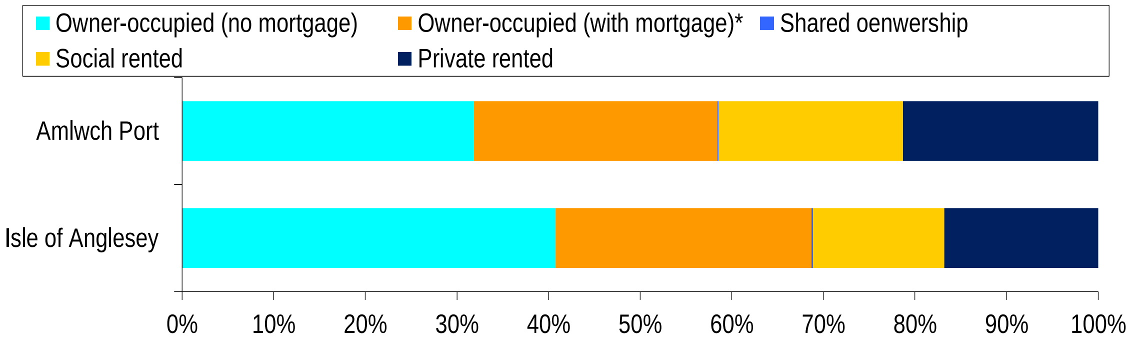
Household income, 2015**



Accommodation profile, Amlwch Port

Number of household spaces, 2011*:1,235	Proportion vacant, 2011*: 9.2%

Tenure profile, 2015**



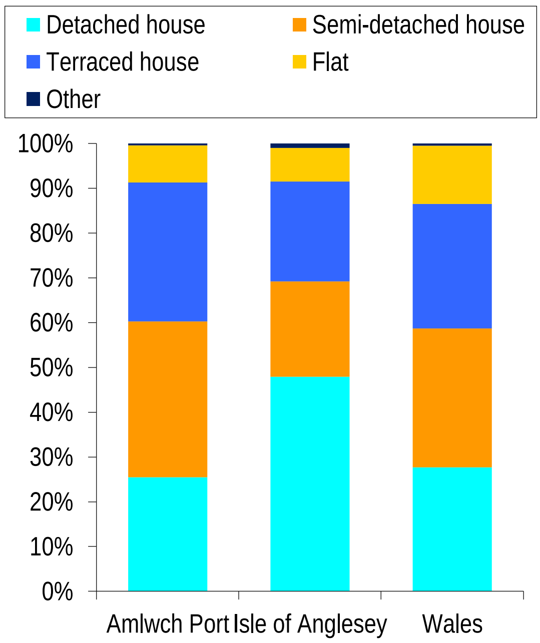
Size of dwelling stock, 2011*

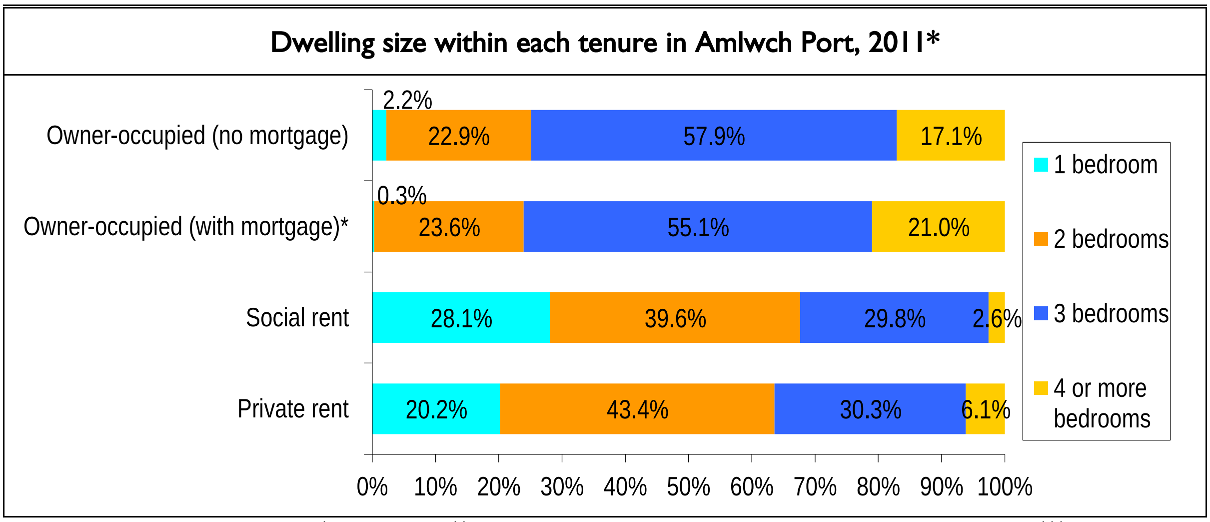
Property size	Amlwch Port	the Isle of Anglesey	Wales
No bedrooms	0.2%	0.1%	0.2%
1 bedroom	10.5%	5.4%	7.6%
2 bedrooms	30.7%	24.0%	24.2%
3 bedrooms	45.7%	49.4%	48.9%
4 bedrooms	10.3%	16.4%	15.0%
5 or more bedrooms	2.6%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Amlwch Port	3.5%	69.5%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*





Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Amlwch Port

Tenure of new accommodation required in Amlwch Port over the next 18 years				
Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	928	1,083	155	81.9%
Shared ownership/help-to-buy	2	6	4	2.2%
Intermediate rent/social rented	234	264	30	16.0%
Total	1,164	1,353	189	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Amlwch Port over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	56	66	10	6.3%
Two bedrooms	259	303	43	28.0%
Three bedrooms	469	530	61	39.0%
Four or more bedrooms	143	184	41	26.7%
Total	928	1,083	155	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Amlwch Port over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	1	1	25.0%
Two bedrooms	1	2	1	25.0%
Three bedrooms	1	2	1	25.0%
Four or more bedrooms	0	1	1	25.0%
Total	2	6	4	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new intermediate rented/social rented accommodation required in Amlwch Port over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	66	53	-13	-41.4%
Two bedrooms	93	98	5	17.2%
Three bedrooms	70	100	30	100.4%
Four or more bedrooms	6	13	7	23.7%
Total	234	264	30	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

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Report 2: Impact on Northern wards of Anglesey

Amlwch Rural

April 2016

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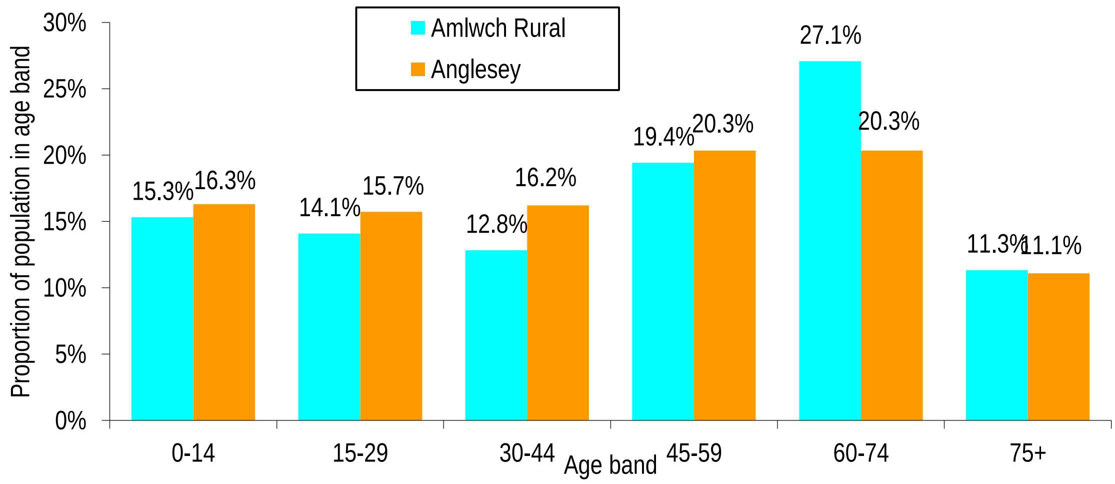
Demographic profile, Amlwch Rural			
Population, 2015: 1,313**		**Total households, 2015**: 561**	
Average household size 2015**		**Change in total households, 2001-11***	
Amlwch Rural	2.34	Amlwch Rural	6.7%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

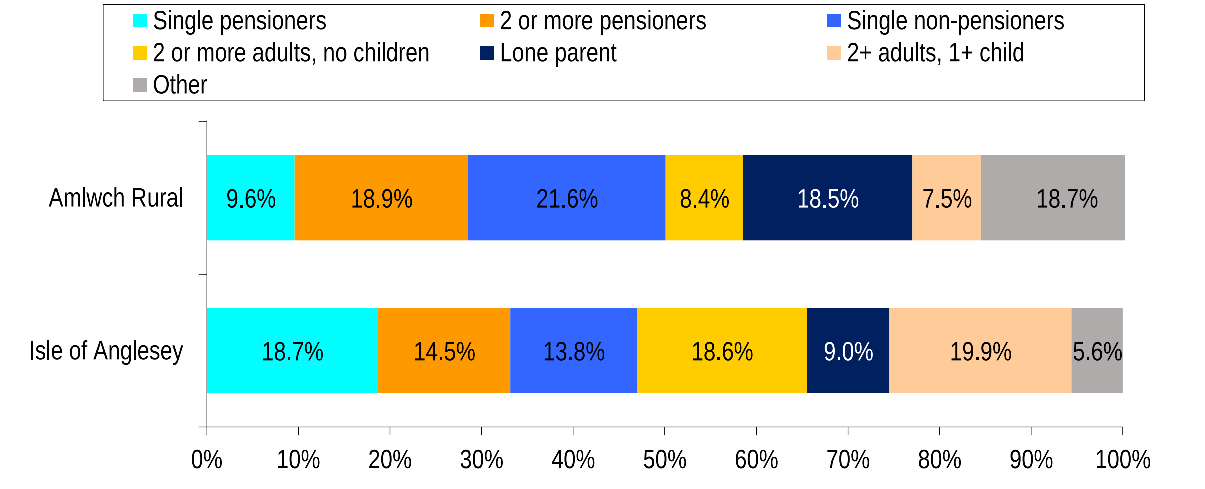
Population density* (persons per hectare)		**Proportion BME***		**Resident in UK*** Over 5 years (includes born in UK)	
Amlwch Rural	0.8	Amlwch Rural	1.2%	Amlwch Rural	99.5%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		**Health problem*** (day-to-day activities limited a lot)		**Can speak, read or write Welsh***	
Amlwch Rural	26.1%	Amlwch Rural	13.7%	Amlwch Rural	55.7%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



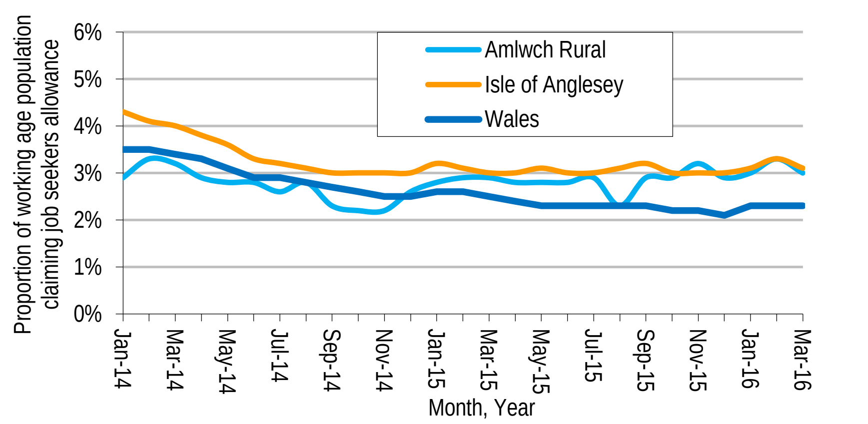
Household composition, 2015**



Socio-economic profile, Amlwch Rural

Unemployment, March 2016***	
Amlwch Rural	3.0%
Isle of Anglesey	3.1%
Wales	2.3%
Proportion of workforce economically inactive, 2011* (Of all persons aged 16 to 74)	
Amlwch Rural	46.5%
Isle of Anglesey	35.0%
Wales	33.5%

Level of unemployment (2014-2016)***



Occupation structure, 2011*

*Occupation Groups*** **	Amlwch Rural	the Isle of Anglesey	Wales
Group 1-3	33.8%	35.2%	35.8%
Group 4-5	25.4%	26.6%	24.5%
Group 6-7	19.9%	19.5%	19.6%
Group 8-9	20.9%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Amlwch Rural	the Isle of Anglesey	Wales
Employed full-time	53.8%	58.7%	65.6%
Employed part-time	25.3%	23.6%	20.5%
Self-employed	20.9%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

Amlwch Rural	The Isle of Anglesey	Wales	
			Level 4 or above
			Level 3
			Level 2
			Level 1

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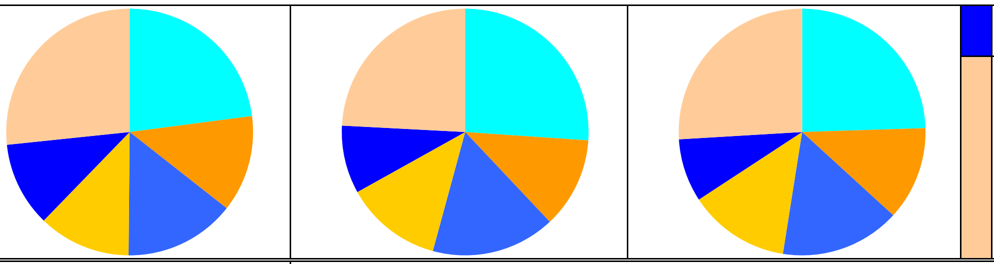
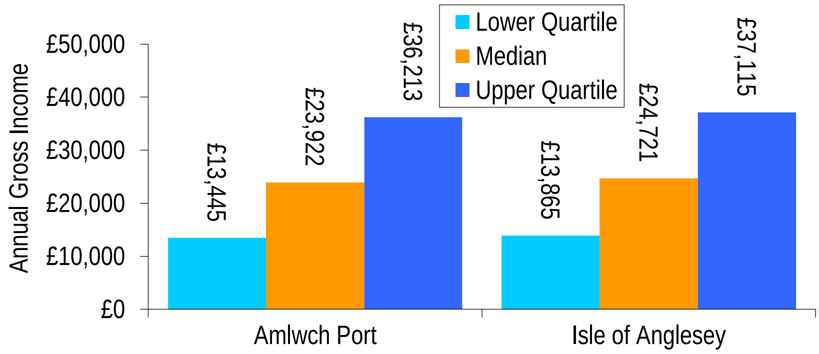


Median household savings, 2015**	
Amlwch Rural	£3,460
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**	
Amlwch Rural	£182,342
Isle of Anglesey	£155,953

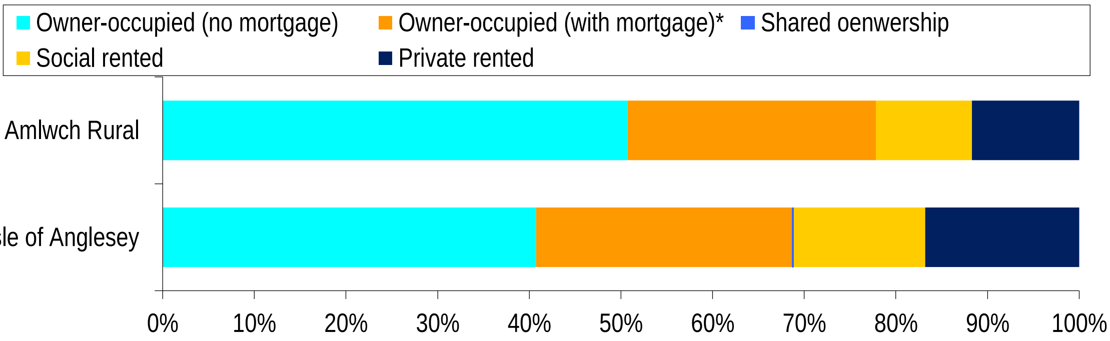
Household income, 2015**



Accommodation profile, Amlwch Rural

Number of household spaces, 2011*:604	Proportion vacant, 2011*: 8.8%

Tenure profile, 2015**



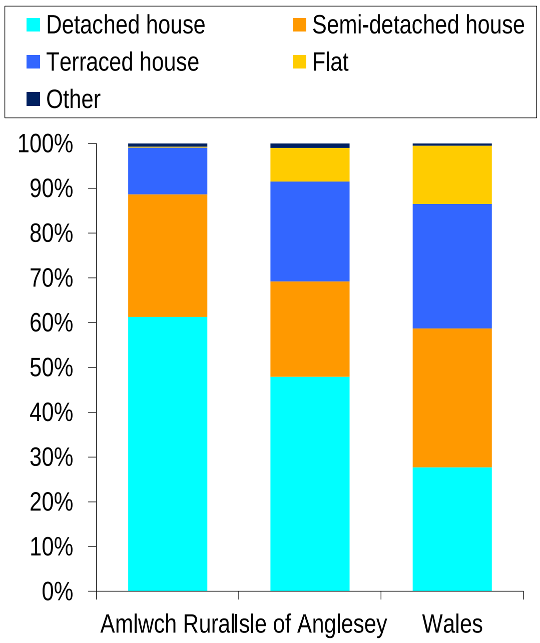
Size of dwelling stock, 2011*

Property size	Amlwch Rural	the Isle of Anglesey	Wales
No bedrooms	0.4%	0.1%	0.2%
1 bedroom	1.3%	5.4%	7.6%
2 bedrooms	19.3%	24.0%	24.2%
3 bedrooms	56.4%	49.4%	48.9%
4 bedrooms	18.6%	16.4%	15.0%
5 or more bedrooms	4.1%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

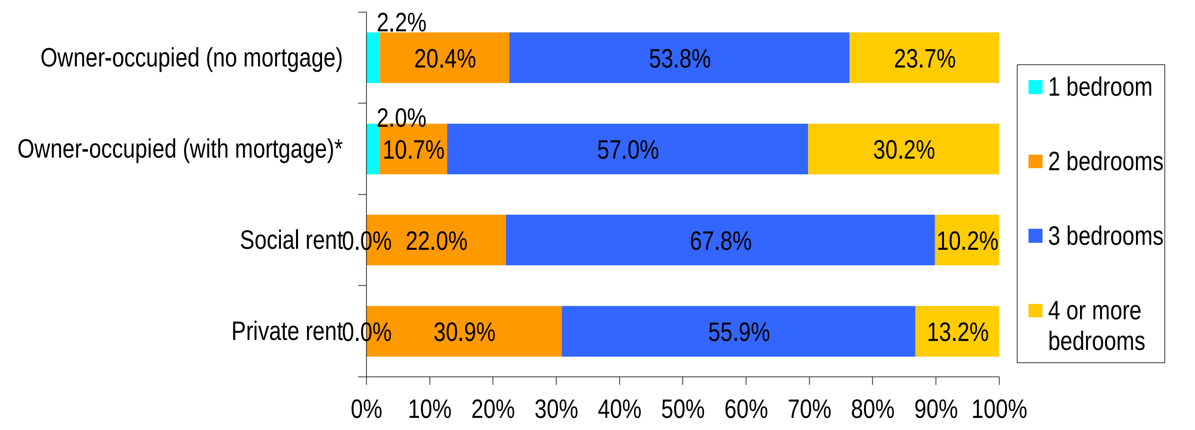
Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Amlwch Rural	1.6%	85.9%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*



Dwelling size within each tenure in Amlwch Rural, 2011*



Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Amlwch Rural

Tenure of new accommodation required in Amlwch Rural over the next 18 years				
Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	501	559	59	77.0%
Shared ownership/help-to-buy	0	3	3	3.9%
Intermediate rent/social rented	59	74	15	19.1%
Total	560	636	76	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Amlwch Rural over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	9	13	4	6.4%
Two bedrooms	96	113	17	29.2%
Three bedrooms	273	295	21	36.4%
Four or more bedrooms	122	139	16	27.9%
Total	501	559	59	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Amlwch Rural over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	0	0	0.0%
Two bedrooms	0	1	1	33.3%
Three bedrooms	0	2	2	66.7%
Four or more bedrooms	0	0	0	0.0%
Total	0	3	3	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new intermediate rented/social rented accommodation required in Amlwch Rural over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	4	4	30.8%
Two bedrooms	13	21	8	53.4%
Three bedrooms	40	42	2	12.6%
Four or more bedrooms	6	6	0	3.2%
Total	59	74	15	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Report 2: Impact on Northern wards of Anglesey

Llaneilian

April 2016

Demographic profile, Llaneilian

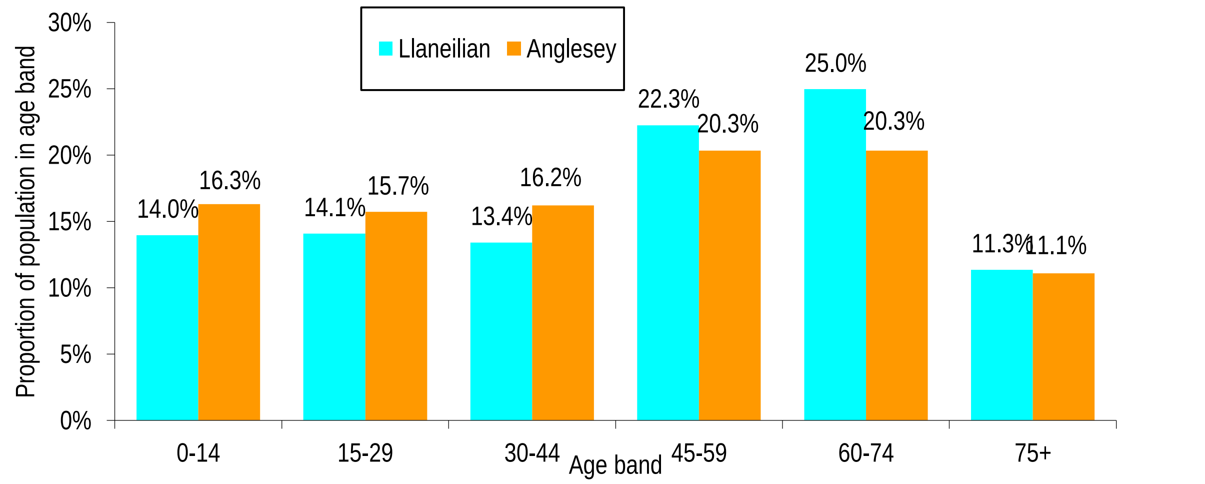
Population, 2015**: 2,308	Total households, 2015**: 989

Average household size 2015**		Change in total households, 2001-11*	
Llaneilian	2.33	Llaneilian	9.1%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

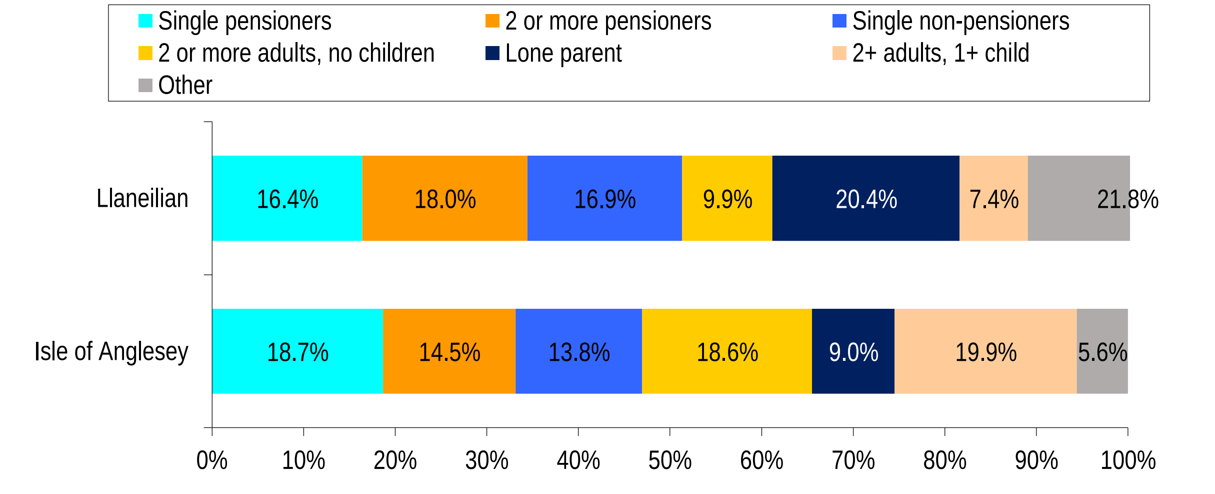
Population density* (persons per hectare)		Proportion BME*		Resident in UK* Over 5 years (includes born in UK)	
Llaneilian	0.5	Llaneilian	1.2%	Llaneilian	99.6%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		Health problem* (day-to-day activities limited a lot)		Can speak, read or write Welsh*	
Llaneilian	27.6%	Llaneilian	14.4%	Llaneilian	60.3%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



Household composition, 2015**



Socio-economic profile, Llaneilian

Unemployment, March 2016***

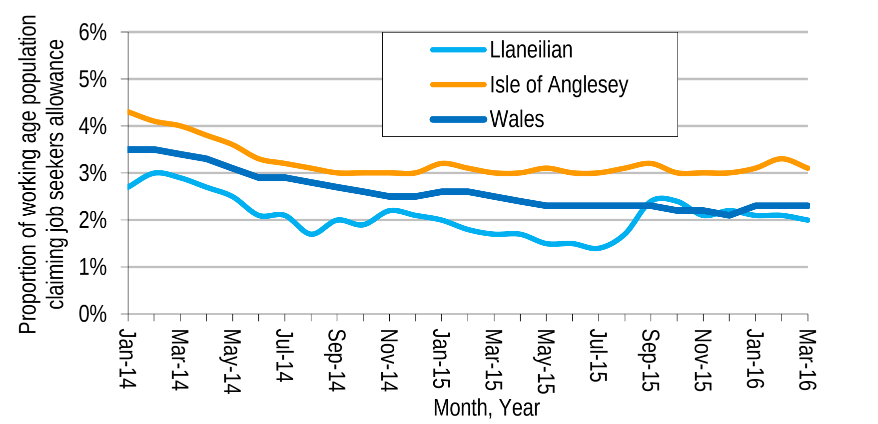
Llaneilian	2.0%
Isle of Anglesey	3.1%
Wales	2.3%

Proportion of workforce economically inactive, 2011*

(Of all persons aged 16 to 74)

Llaneilian	40.1%
Isle of Anglesey	35.0%
Wales	33.5%

Level of unemployment (2014-2016)***



Occupation structure, 2011*

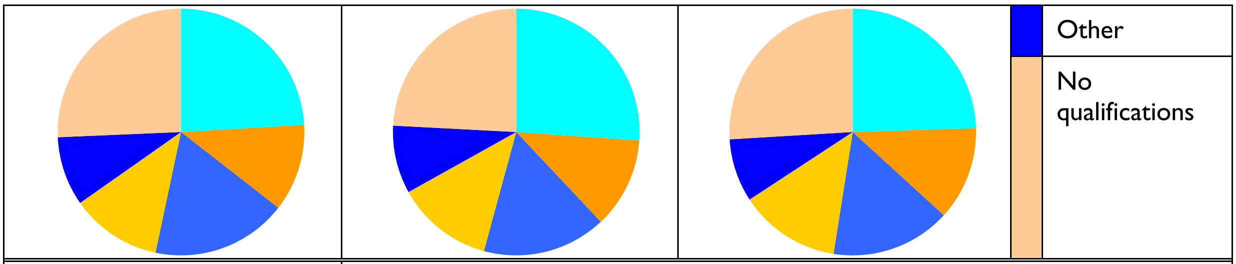
*Occupation Groups*** **	Llaneilian	the Isle of Anglesey	Wales
Group 1-3	30.8%	35.2%	35.8%
Group 4-5	34.5%	26.6%	24.5%
Group 6-7	18.5%	19.5%	19.6%
Group 8-9	16.1%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Llaneilian	the Isle of Anglesey	Wales
Employed full-time	53.8%	58.7%	65.6%
Employed part-time	21.5%	23.6%	20.5%
Self-employed	24.7%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

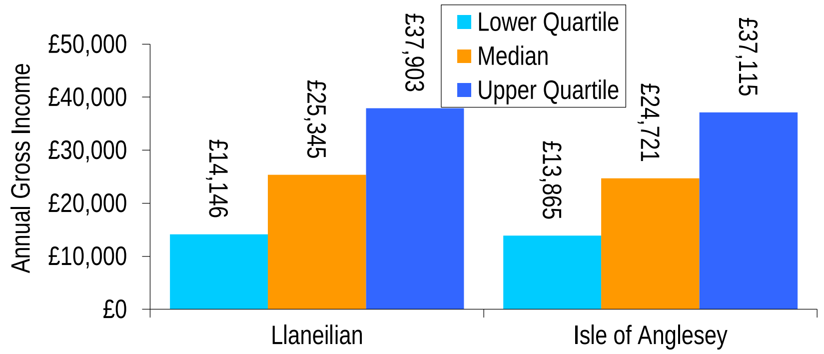
Llaneilian	The Isle of Anglesey	Wales	
			Level 4 or above
			Level 3
			Level 2
			Level 1



Median household savings, 2015**	
Llaneilian	£3,487
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**	
Llaneilian	£184,374
Isle of Anglesey	£155,953

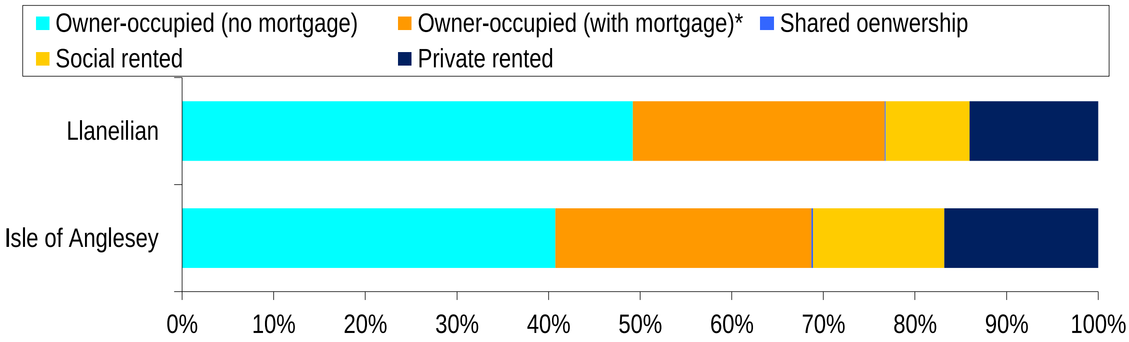
Household income, 2015**



Accommodation profile, Llaneilian

Number of household spaces, 2011*:1,075	Proportion vacant, 2011*: 11.1%

Tenure profile, 2015**



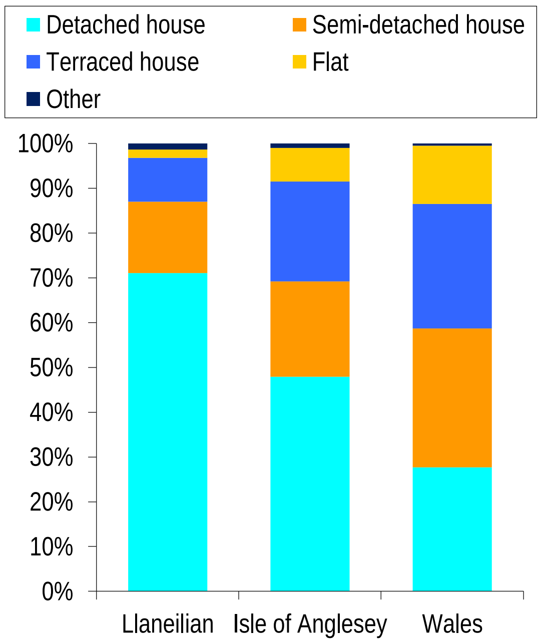
Size of dwelling stock, 2011*

Property size	Llaneilian	the Isle of Anglesey	Wales
No bedrooms	0.0%	0.1%	0.2%
1 bedroom	3.7%	5.4%	7.6%
2 bedrooms	19.7%	24.0%	24.2%
3 bedrooms	50.9%	49.4%	48.9%
4 bedrooms	20.1%	16.4%	15.0%
5 or more bedrooms	5.5%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

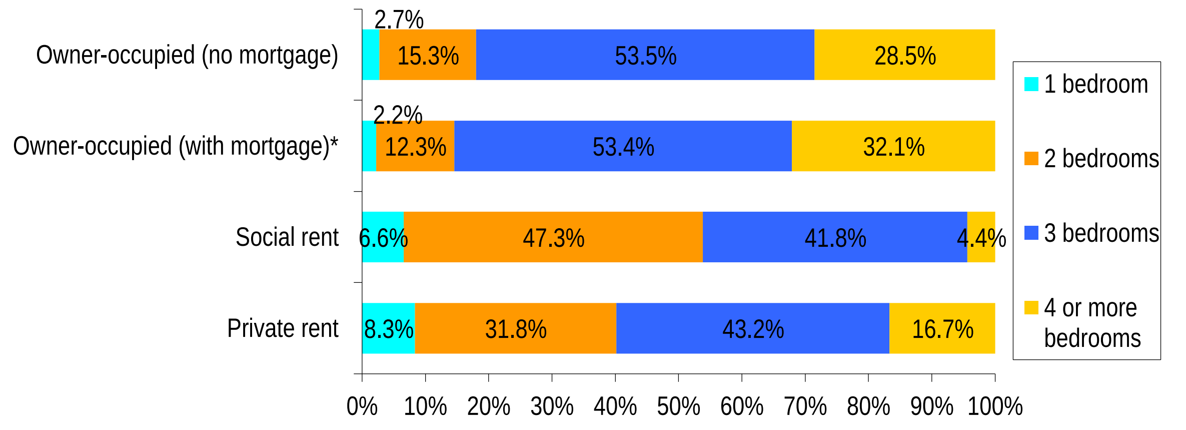
Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Llaneilian	1.5%	82.9%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*



Dwelling size within each tenure in Llaneilian, 2011*



Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Llaneilian

Tenure of new accommodation required in Llaneilian over the next 18 years				
Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	897	957	59	68.7%
Shared ownership/help-to-buy	1	5	4	4.7%
Intermediate rent/social rented	91	114	23	26.6%
Total	989	1,076	86	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Llaneilian over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	30	36	5	9.2%
Two bedrooms	154	171	17	29.0%
Three bedrooms	464	488	24	40.7%
Four or more bedrooms	249	261	12	21.1%
Total	897	957	59	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Llaneilian over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	1	1	25.0%
Two bedrooms	1	2	1	25.0%
Three bedrooms	0	1	1	25.0%
Four or more bedrooms	0	1	1	25.0%
Total	1	5	4	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new intermediate rented/social rented accommodation required in Llaneilian over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	6	11	5	20.4%
Two bedrooms	43	47	4	15.5%
Three bedrooms	38	50	12	52.2%
Four or more bedrooms	4	7	3	11.9%
Total	91	114	23	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Report 2: Impact on Northern wards of Anglesey
Llanfaethlu

April 2016

Demographic profile, Llanfaethlu

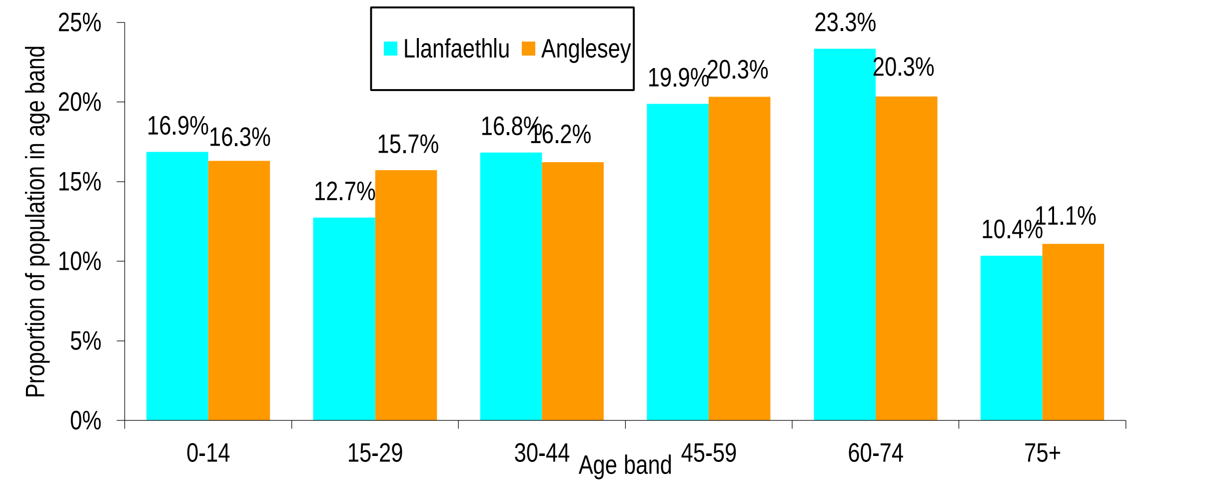
Population, 2015**: 1,676	Total households, 2015**: 691

Average household size 2015**		Change in total households, 2001-11*	
Llanfaethlu	2.42	Llanfaethlu	9.4%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

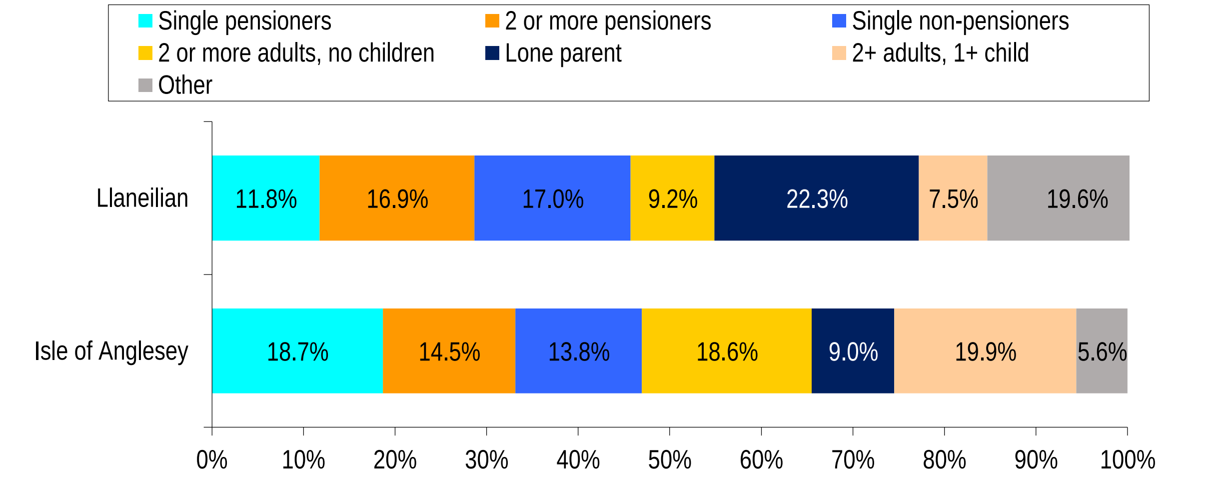
Population density* (persons per hectare)		Proportion BME*		Resident in UK* Over 5 years (includes born in UK)	
Llanfaethlu	0.5	Llanfaethlu	1.0%	Llanfaethlu	99.0%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		Health problem* (day-to-day activities limited a lot)		Can speak, read or write Welsh*	
Llanfaethlu	25.7%	Llanfaethlu	10.8%	Llanfaethlu	65.6%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



Household composition, 2015**



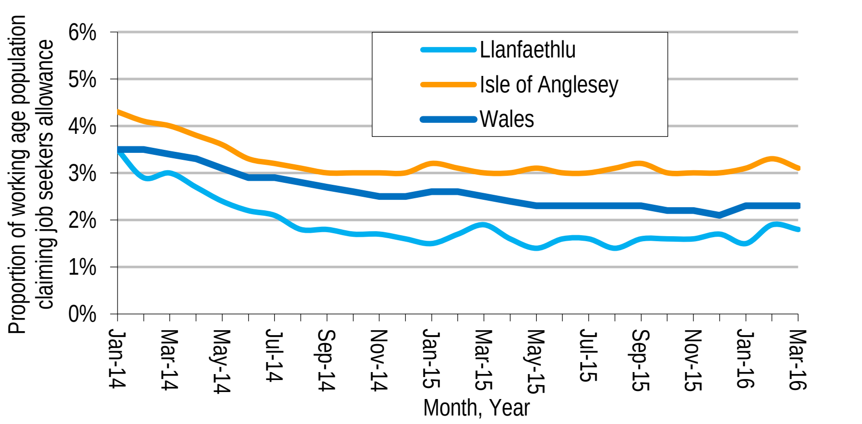
Socio-economic profile, Llanfaethlu

Unemployment, March 2016***	
Llanfaethlu	1.8%
Isle of Anglesey	3.1%
Wales	2.3%

Proportion of workforce economically inactive, 2011*
(Of all persons aged 16 to 74)

Llanfaethlu	39.3%
Isle of Anglesey	35.0%
Wales	33.5%

Level of unemployment (2014-2016)***



Occupation structure, 2011*

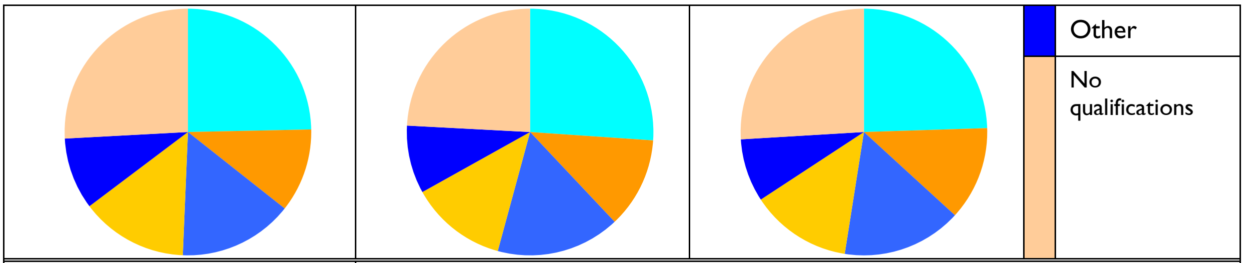
*Occupation Groups*****	Llanfaethlu	the Isle of Anglesey	Wales
Group 1-3	33.1%	35.2%	35.8%
Group 4-5	30.1%	26.6%	24.5%
Group 6-7	16.5%	19.5%	19.6%
Group 8-9	20.3%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Llanfaethlu	the Isle of Anglesey	Wales
Employed full-time	56.1%	58.7%	65.6%
Employed part-time	19.3%	23.6%	20.5%
Self-employed	24.6%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

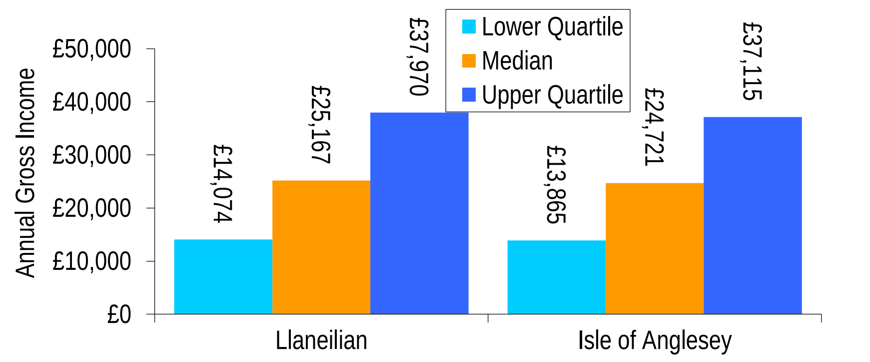
Llanfaethlu	The Isle of Anglesey	Wales		
				Level 4 or above
				Level 3
				Level 2
				Level 1



Median household savings, 2015**	
Llanfaethlu	£3,402
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**	
Llanfaethlu	£182,657
Isle of Anglesey	£155,953

Household income, 2015**

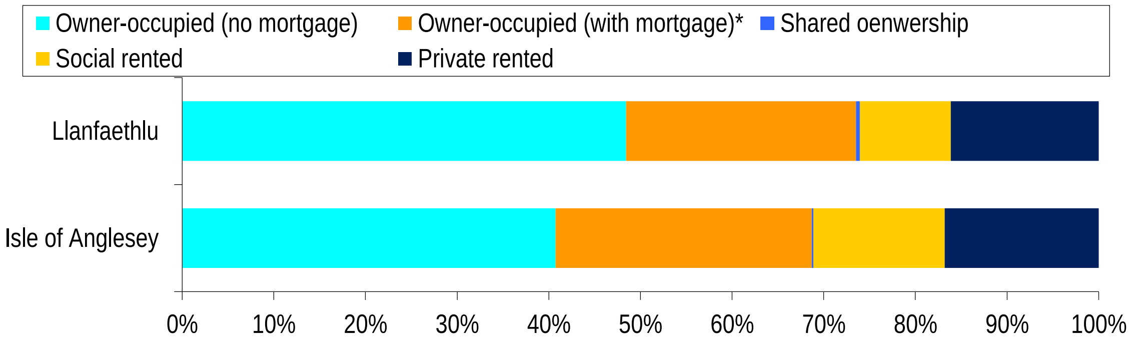


Accommodation profile, Llanfaethlu

Number of household spaces, 2011*:802

Proportion vacant, 2011*: 16.4%

Tenure profile, 2015**



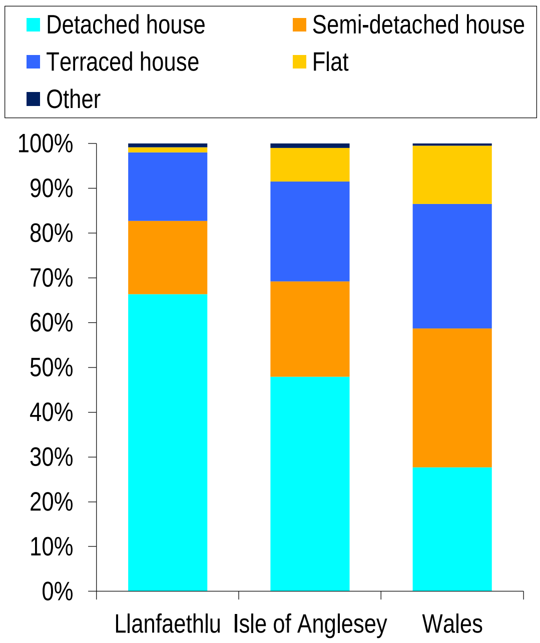
Size of dwelling stock, 2011*

Property size	Llanfaethlu	the Isle of Anglesey	Wales
No bedrooms	0.1%	0.1%	0.2%
1 bedroom	2.3%	5.4%	7.6%
2 bedrooms	18.3%	24.0%	24.2%
3 bedrooms	53.7%	49.4%	48.9%
4 bedrooms	18.4%	16.4%	15.0%
5 or more bedrooms	7.1%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

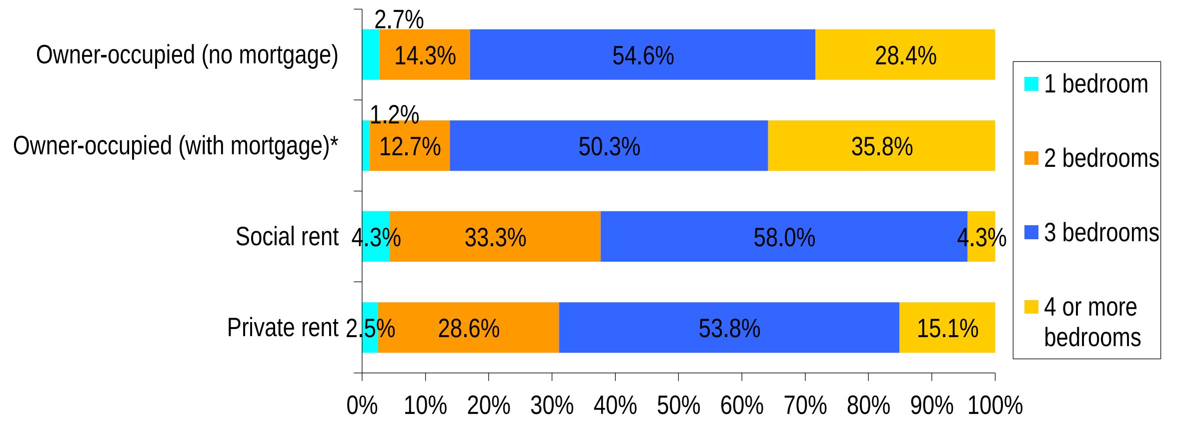
Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Llanfaethlu	3.8%	84.5%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*



Dwelling size within each tenure in Llanfaethlu, 2011*



Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Llanfaethlu

Tenure of new accommodation required in Llanfaethlu over the next 18 years				
Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	622	686	64	73.8%
Shared ownership/help-to-buy	3	8	5	5.9%
Intermediate rent/social rented	69	87	18	20.3%
Total	694	781	87	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Llanfaethlu over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	14	19	5	7.3%
Two bedrooms	94	112	18	28.5%
Three bedrooms	337	363	26	40.5%
Four or more bedrooms	176	192	15	23.7%
Total	622	686	64	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Llanfaethlu over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	2	2	40.0%
Two bedrooms	1	2	1	20.0%
Three bedrooms	2	3	1	20.0%
Four or more bedrooms	0	1	1	20.0%
Total	3	8	5	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new intermediate rented/social rented accommodation required in Llanfaethlu over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	3	7	4	23.5%
Two bedrooms	23	29	6	36.1%
Three bedrooms	40	45	5	28.5%
Four or more bedrooms	3	5	2	11.9%
Total	69	87	18	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Report 2: Impact on Northern wards of Anglesey

Llannerch-y-medd

April 2016

Demographic profile, Llannerch-y-medd

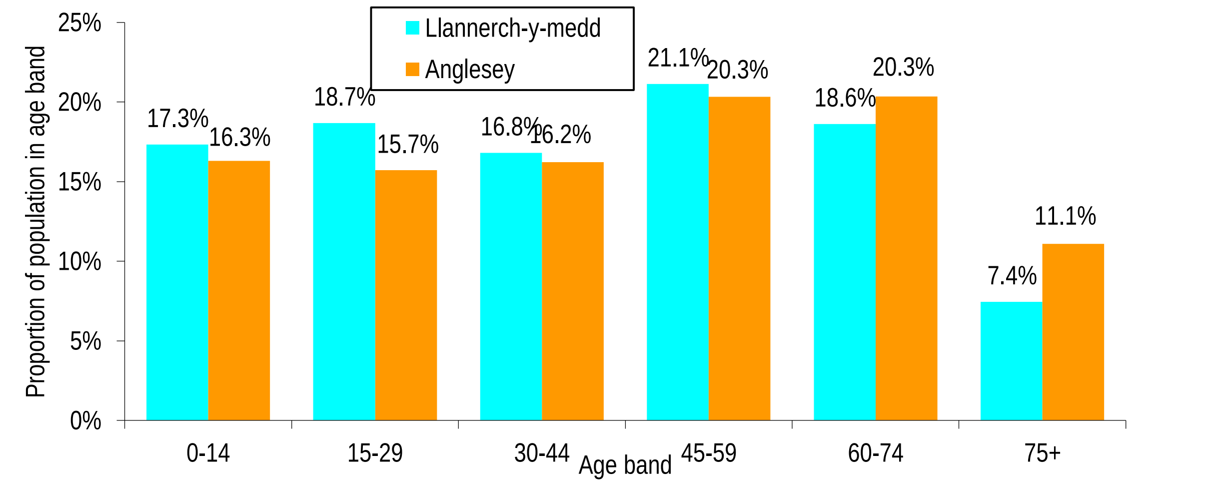
Population, 2015**: 1,965	Total households, 2015**: 808

Average household size 2015**		Change in total households, 2001-11*	
Llannerch-y-medd	2.45	Llannerch-y-medd	15.7%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

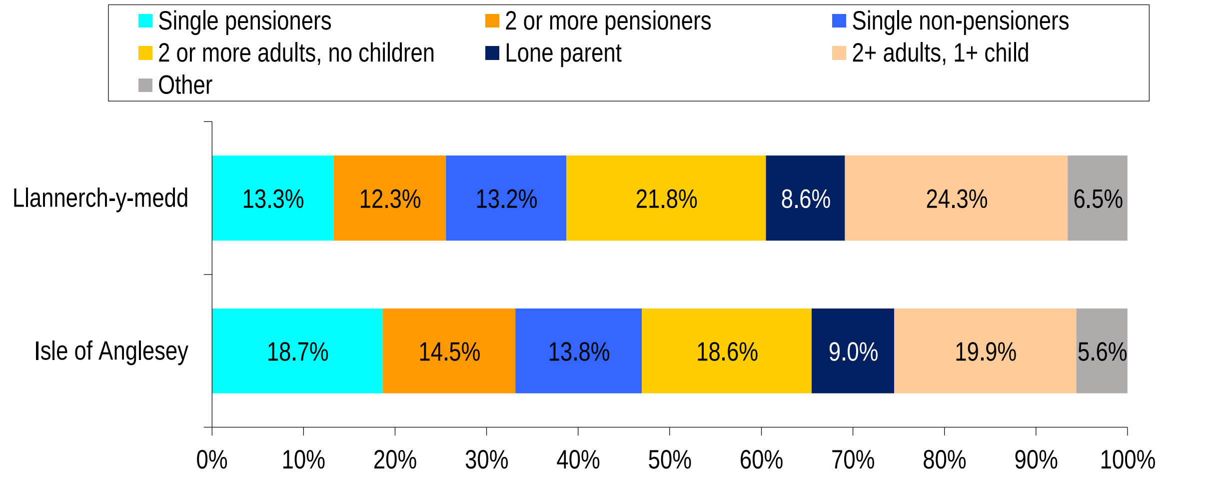
Population density* (persons per hectare)		Proportion BME*		Resident in UK* Over 5 years (includes born in UK)	
Llannerch-y-medd	0.3	Llannerch-y-medd	0.9%	Llannerch-y-medd	99.8%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		Health problem* (day-to-day activities limited a lot)		Can speak, read or write Welsh*	
Llannerch-y-medd	20.2%	Llannerch-y-medd	10.0%	Llannerch-y-medd	70.9%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



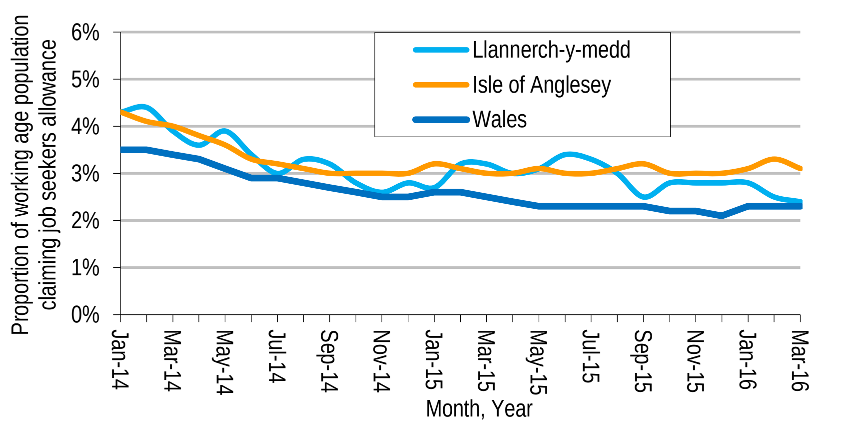
Household composition, 2015**



Socio-economic profile, Llannerch-y-medd

Unemployment, March 2016***	
Llannerch-y-medd	2.4%
Isle of Anglesey	3.1%
Wales	2.3%
Proportion of workforce economically inactive, 2011* (Of all persons aged 16 to 74)	
Llannerch-y-medd	33.4%
Isle of Anglesey	35.0%
Wales	33.5%

Level of unemployment (2014-2016)***



Occupation structure, 2011*

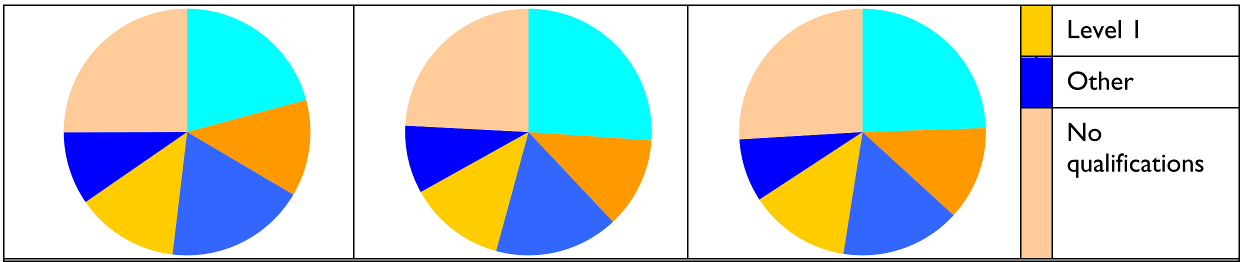
*Occupation Groups**** *	Llannerch-y-medd	the Isle of Anglesey	Wales
Group 1-3	28.6%	35.2%	35.8%
Group 4-5	33.4%	26.6%	24.5%
Group 6-7	20.3%	19.5%	19.6%
Group 8-9	17.7%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Llannerch-y-medd	the Isle of Anglesey	Wales
Employed full-time	56.0%	58.7%	65.6%
Employed part-time	21.3%	23.6%	20.5%
Self-employed	22.7%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

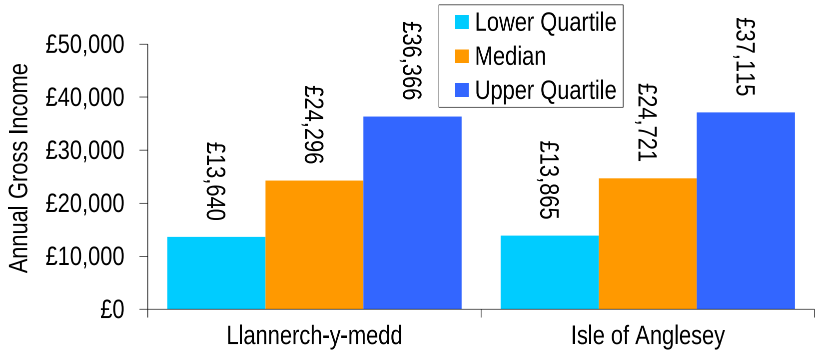
Llannerch-y-medd	The Isle of Anglesey	Wales		
				Level 4 or above
				Level 3
				Level 2



Median household savings, 2015**	
Llannerch-y-medd	£2,888
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**	
Llannerch-y-medd	£158,380
Isle of Anglesey	£155,953

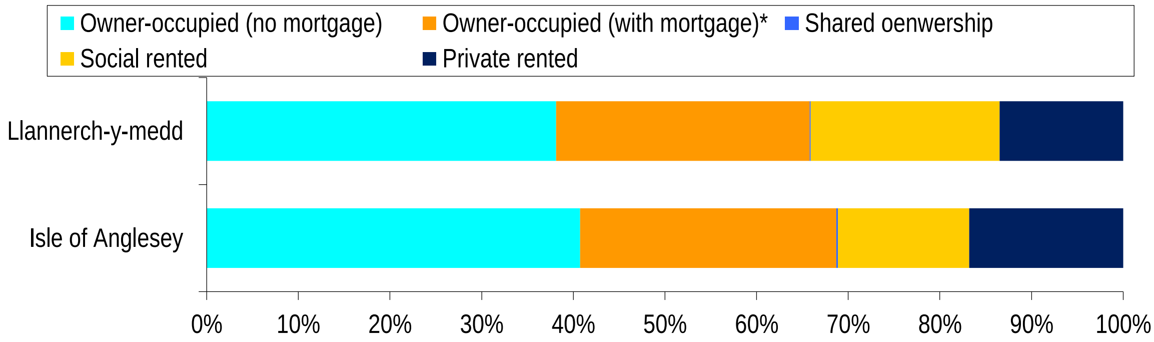
Household income, 2015**



Accommodation profile, Llannerch-y-medd

Number of household spaces, 2011*: 866	Proportion vacant, 2011*: 8.0%

Tenure profile, 2015**



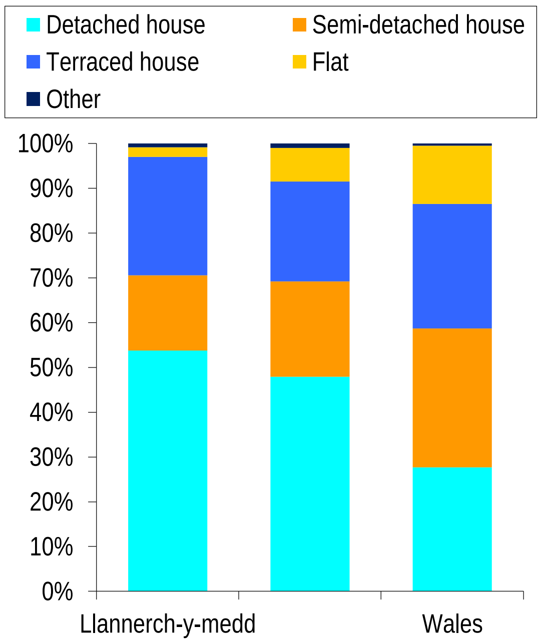
Size of dwelling stock, 2011*

Property size	Llannerch-y-medd	the Isle of Anglesey	Wales
No bedrooms	0.1%	0.1%	0.2%
1 bedroom	4.5%	5.4%	7.6%
2 bedrooms	20.8%	24.0%	24.2%
3 bedrooms	50.6%	49.4%	48.9%
4 bedrooms	17.7%	16.4%	15.0%
5 or more bedrooms	6.2%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Llannerch-y-medd	2.9%	80.9%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*



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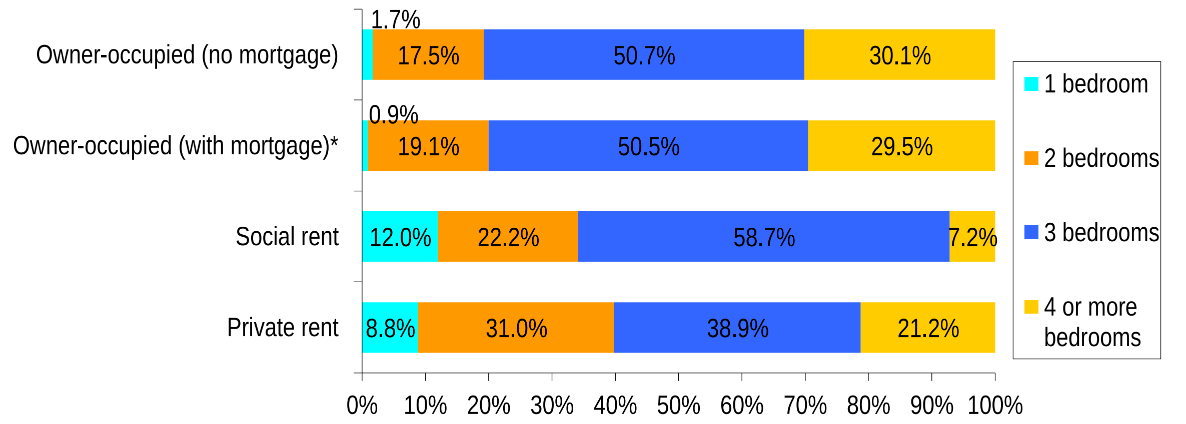
Dwelling size within each tenure in Llannerch-y-medd, 2011*



Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Llannerch-y-medd

Tenure of new accommodation required in Llannerch-y-medd over the next 18 years

Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	640	771	131	83.7%
Shared ownership/help-to-buy	1	2	1	0.6%
Intermediate rent/social rented	166	190	24	15.6%
Total	807	963	157	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Llannerch-y-medd over the next 18 years

Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	17	21	4	3.1%
Two bedrooms	133	170	38	28.9%
Three bedrooms	306	345	38	29.3%
Four or more bedrooms	184	235	51	38.8%
Total	640	771	131	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Llannerch-y-medd over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	0	0	0.0%
Two bedrooms	1	1	0	0.0%
Three bedrooms	0	1	1	100.0%
Four or more bedrooms	0	0	0	0.0%
Total	1	2	1	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

.Size of new intermediate rented/social rented accommodation required in Llannerch-y-medd over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	20	23	3	12.7%
Two bedrooms	37	54	17	70.0%
Three bedrooms	97	100	2	9.2%
Four or more bedrooms	12	14	2	8.1%
Total	166	190	24	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Report 2: Impact on Northern wards of Anglesey

Mechell

April 2016

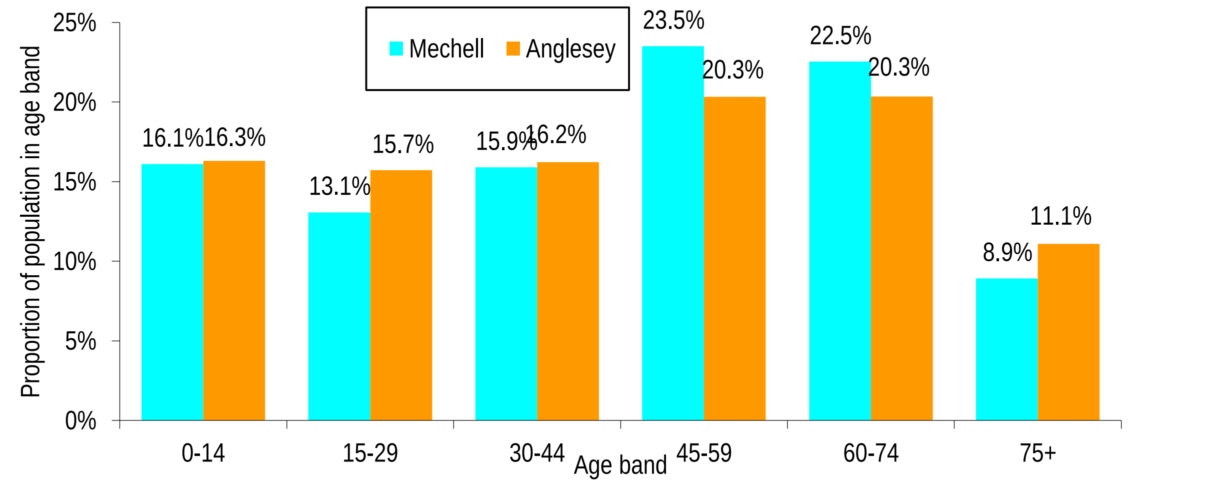
Demographic profile, Mechell	
Population, 2015**: 1,564	Total households, 2015**: 674

Average household size 2015**		Change in total households, 2001-11*	
Mechell	2.32	Mechell	5.6%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

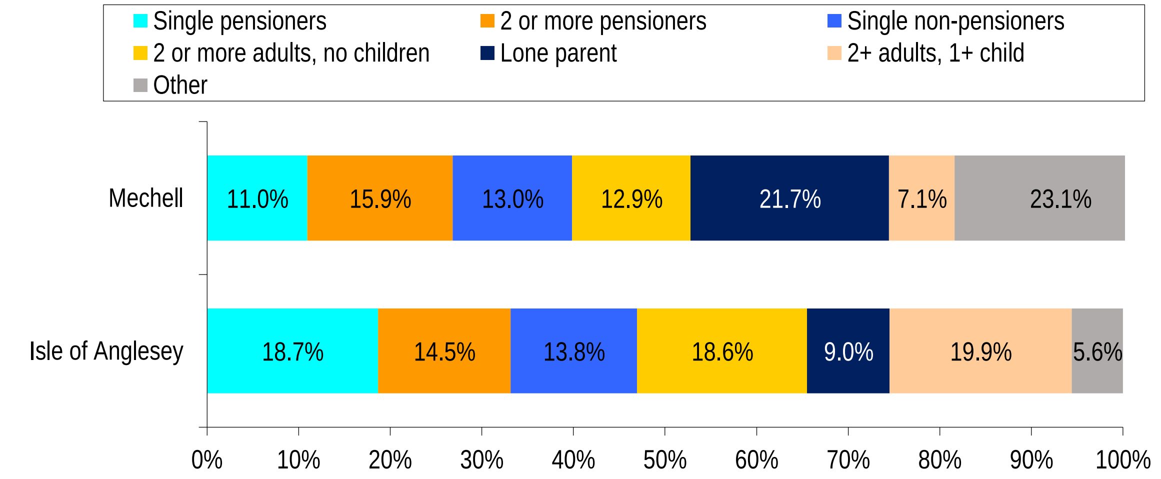
Population density* (persons per hectare)		Proportion BME*		Resident in UK* Over 5 years (includes born in UK)	
Mechell	0.4	Mechell	0.6%	Mechell	100.0%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		Health problem* (day-to-day activities limited a lot)		Can speak, read or write Welsh*	
Mechell	23.9%	Mechell	11.8%	Mechell	61.7%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



Household composition, 2015**

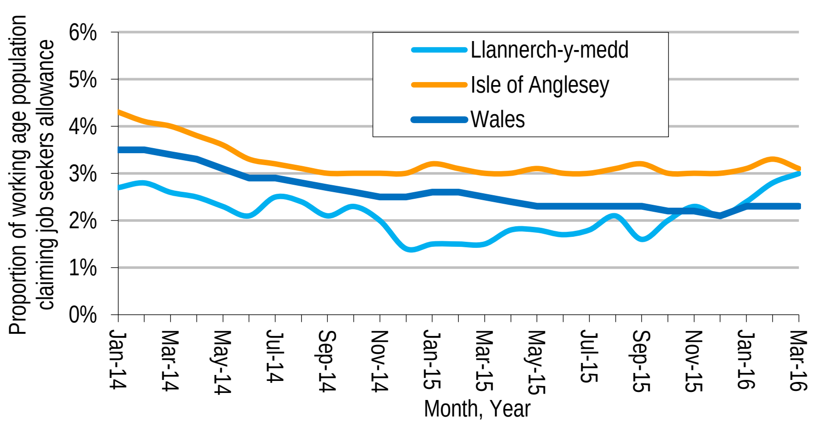


Socio-economic profile, Mechell

Unemployment, March 2016***

Mechell	3.0%
Isle of Anglesey	3.1%
Wales	2.3%

Level of unemployment (2014-2016)***



Proportion of workforce economically inactive, 2011*

(Of all persons aged 16 to 74)

Mechell	37.3%
Isle of Anglesey	35.0%
Wales	33.5%

Occupation structure, 2011*

*Occupation Groups*** **	Mechell	the Isle of Anglesey	Wales
Group 1-3	33.6%	35.2%	35.8%
Group 4-5	34.9%	26.6%	24.5%
Group 6-7	15.0%	19.5%	19.6%
Group 8-9	16.5%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Mechell	the Isle of Anglesey	Wales
Employed full-time	55.6%	58.7%	65.6%
Employed part-time	19.4%	23.6%	20.5%
Self-employed	25.0%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

Mechell	The Isle of Anglesey	Wales	
			Level 4 or above
			Level 3
			Level 2
			Level 1

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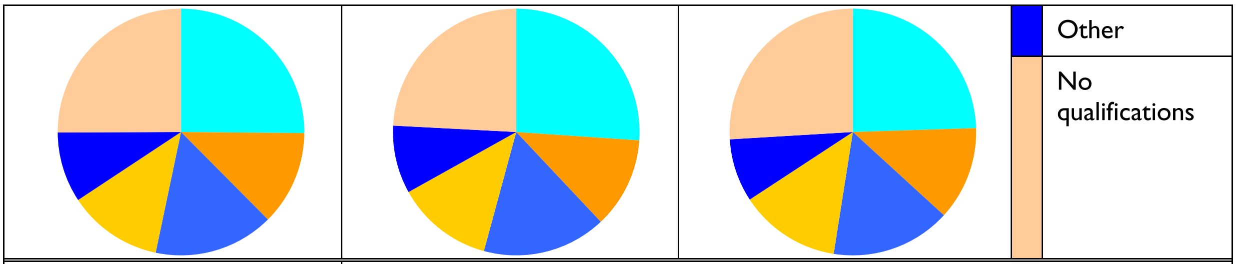
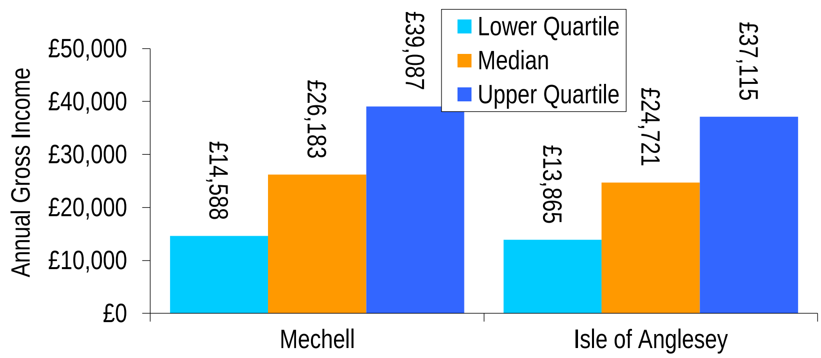


Median household savings, 2015**	
Mechell	£3,269
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**	
Mechell	£175,074
Isle of Anglesey	£155,953

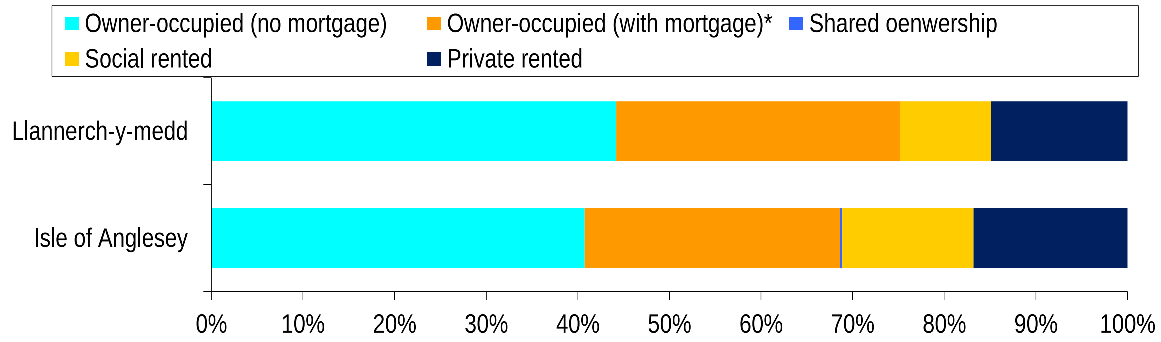
Household income, 2015**



Accommodation profile, Mechell

Number of household spaces, 2011*: 732	Proportion vacant, 2011*:12.0%

Tenure profile, 2015**



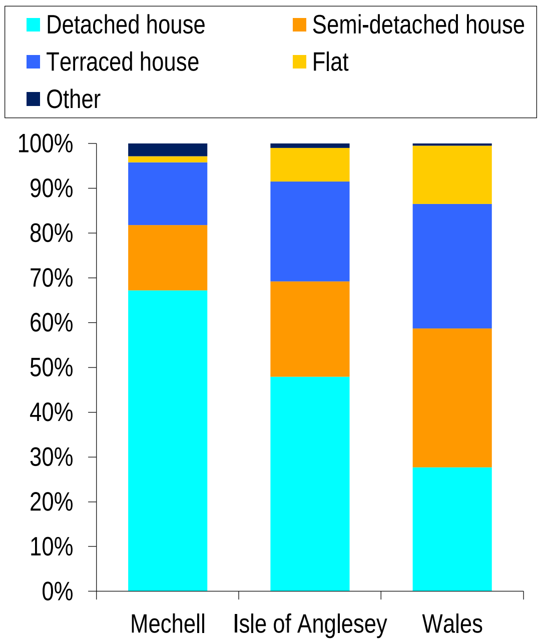
Size of dwelling stock, 2011*

Property size	Mechell	the Isle of Anglesey	Wales
No bedrooms	0.2%	0.1%	0.2%
1 bedroom	2.6%	5.4%	7.6%
2 bedrooms	21.1%	24.0%	24.2%
3 bedrooms	56.1%	49.4%	48.9%
4 bedrooms	15.5%	16.4%	15.0%
5 or more bedrooms	4.6%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Mechell	2.1%	82.2%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*



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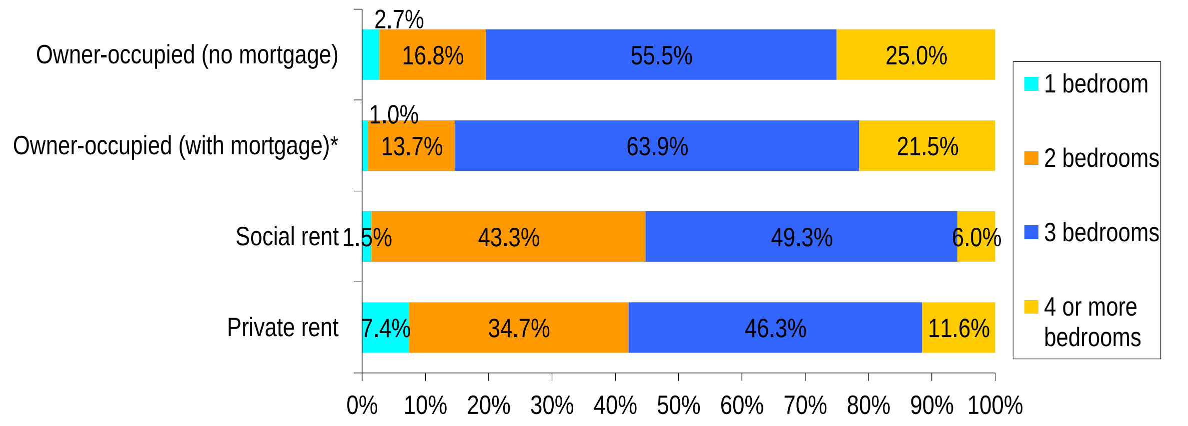
Dwelling size within each tenure in Mechell, 2011*



Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Mechell

Tenure of new accommodation required in Mechell over the next 18 years				
Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	606	639	33	63.1%
Shared ownership/help-to-buy	0	3	3	5.7%
Intermediate rent/social rented	67	83	16	31.2%
Total	673	725	52	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Mechell over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	17	20	2	7.2%
Two bedrooms	112	123	10	31.7%
Three bedrooms	346	357	11	33.8%
Four or more bedrooms	131	140	9	27.4%
Total	606	639	33	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Mechell over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	0	0	0.0%
Two bedrooms	0	1	1	50.0%
Three bedrooms	0	1	1	50.0%
Four or more bedrooms	0	0	0	0.0%
Total	0	2	2	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

.Size of new intermediate rented/social rented accommodation required in Mechell over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	1	6	5	28.7%
Two bedrooms	29	32	3	20.7%
Three bedrooms	33	40	7	40.9%
Four or more bedrooms	4	6	2	9.6%
Total	67	83	16	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Report 2: Impact on Northern wards of Anglesey

Moelfre

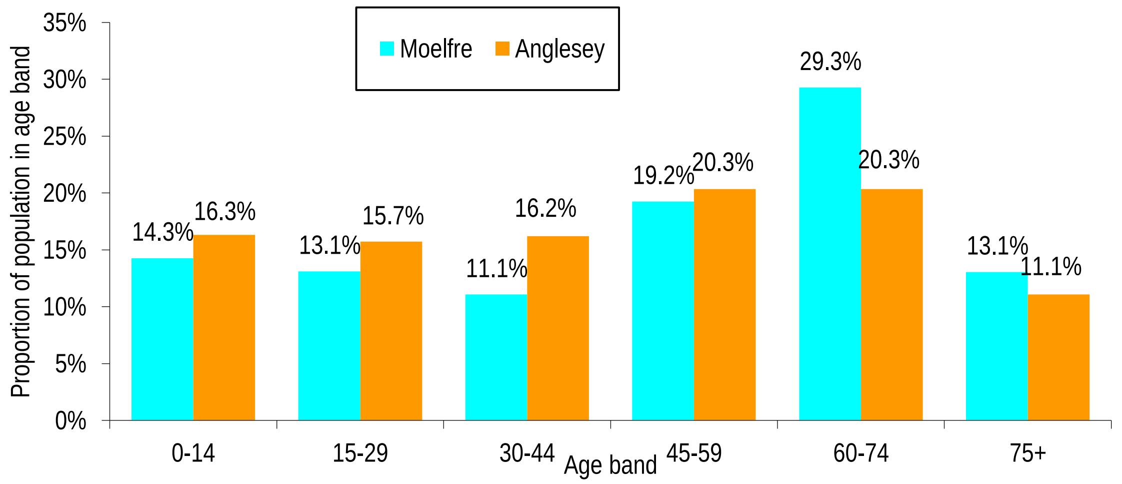
April 2016

Demographic profile, Moelfre			
Population, 2015: 1,089**		**Total households, 2015**: 498**	
Average household size 2015**		**Change in total households, 2001-11***	
Moelfre	2.19	Moelfre	-2.0%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

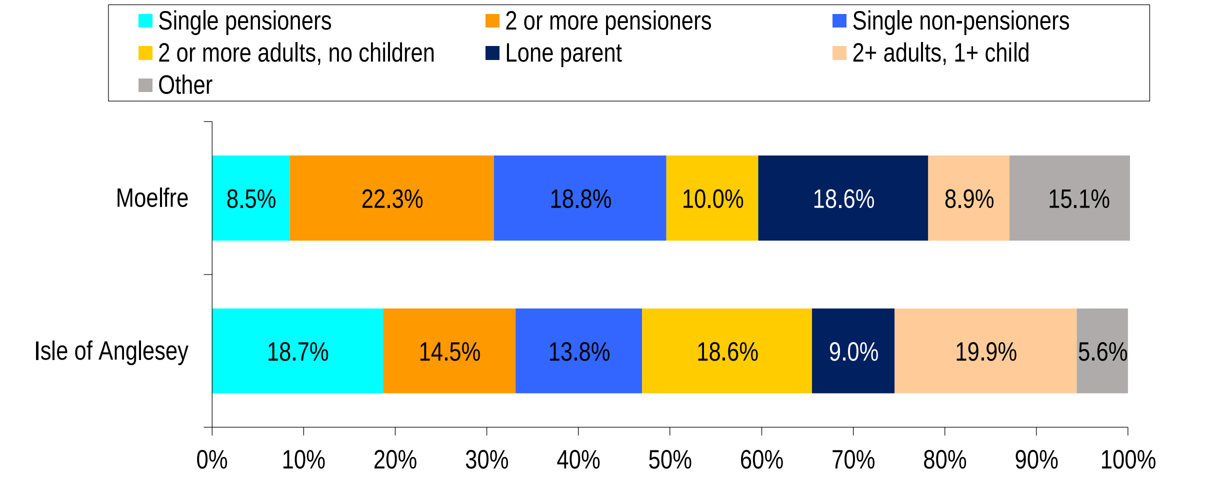
Population density* (persons per hectare)		**Proportion BME***		**Resident in UK*** Over 5 years (includes born in UK)	
Moelfre	0.8	Moelfre	0.9%	Moelfre	99.2%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		**Health problem*** (day-to-day activities limited a lot)		**Can speak, read or write Welsh***	
Moelfre	25.1%	Moelfre	11.7%	Moelfre	53.5%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



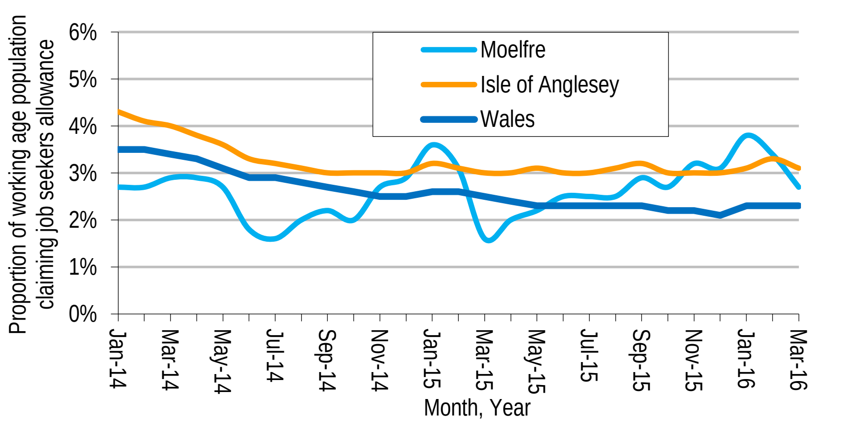
Household composition, 2015**



Socio-economic profile, Moelfre

Unemployment, March 2016***	
Moelfre	2.7%
Isle of Anglesey	3.1%
Wales	2.3%
Proportion of workforce economically inactive, 2011* (Of all persons aged 16 to 74)	
Moelfre	43.3%
Isle of Anglesey	35.0%
Wales	33.5%

Level of unemployment (2014-2016)***



Occupation structure, 2011*

*Occupation Groups*****	Moelfre	the Isle of Anglesey	Wales
Group 1-3	39.9%	35.2%	35.8%
Group 4-5	24.2%	26.6%	24.5%
Group 6-7	18.3%	19.5%	19.6%
Group 8-9	17.6%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Moelfre	the Isle of Anglesey	Wales
Employed full-time	51.7%	58.7%	65.6%
Employed part-time	26.6%	23.6%	20.5%
Self-employed	21.7%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

Moelfre	The Isle of Anglesey	Wales	
			Level 4 or above
			Level 3
			Level 2
			Level 1

Planning & Development

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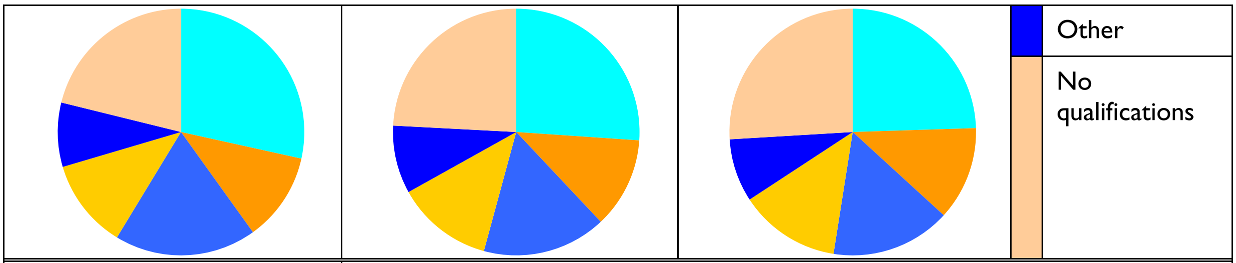
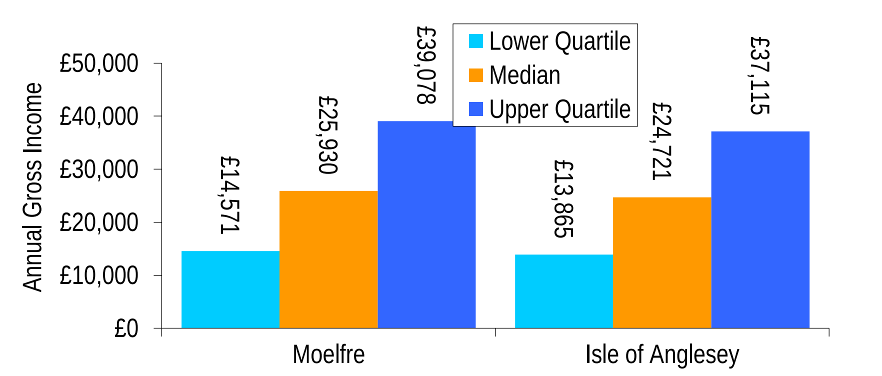
AECOM



Median household savings, 2015**	
Moelfre	£3,651
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**	
Moelfre	£175,074
Isle of Anglesey	£155,953

Household income, 2015**

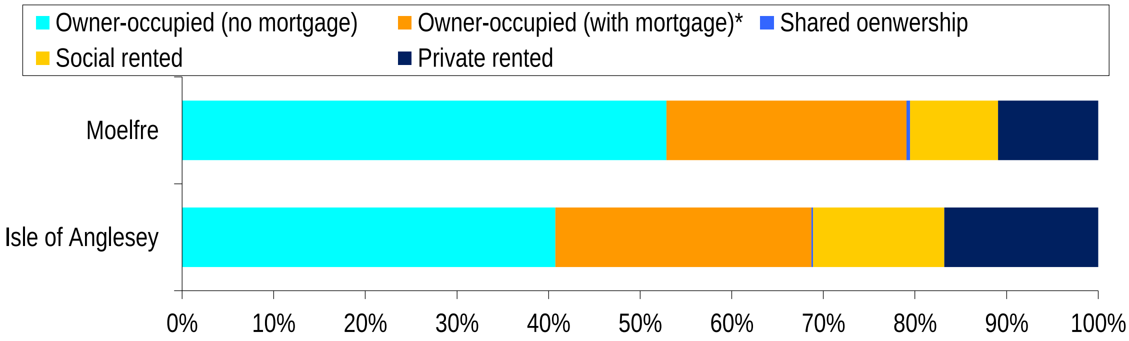


Accommodation profile, Moelfre

Number of household spaces, 2011*: 662

Proportion vacant, 2011*: 34.8%

Tenure profile, 2015**



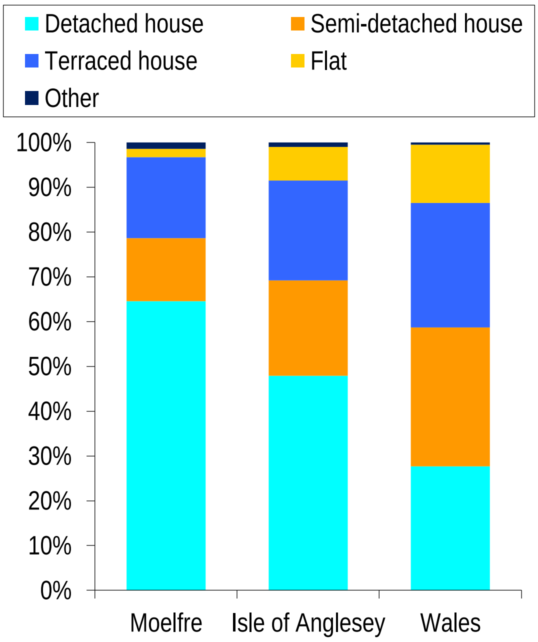
Size of dwelling stock, 2011*

Property size	Moelfre	the Isle of Anglesey	Wales
No bedrooms	0.0%	0.1%	0.2%
1 bedroom	1.6%	5.4%	7.6%
2 bedrooms	22.2%	24.0%	24.2%
3 bedrooms	56.0%	49.4%	48.9%
4 bedrooms	15.3%	16.4%	15.0%
5 or more bedrooms	4.9%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

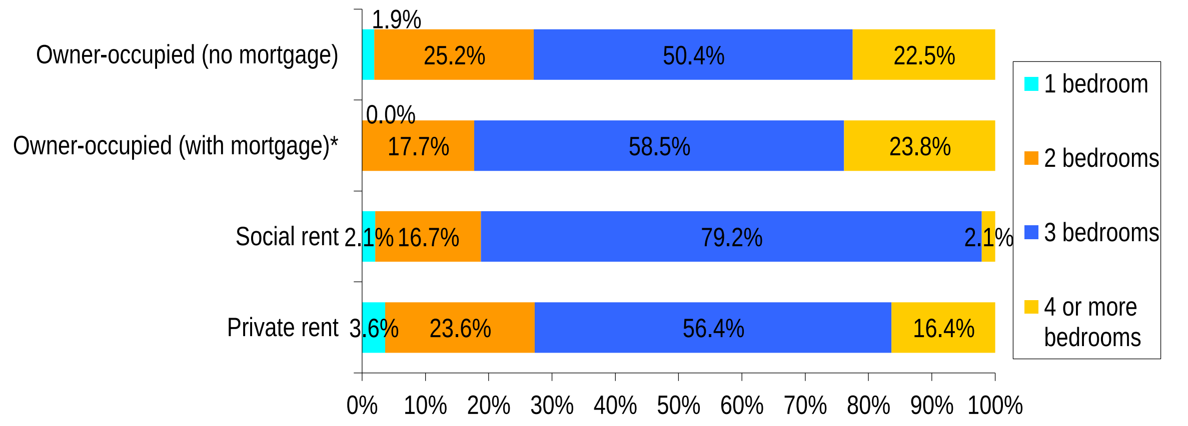
Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Moelfre	0.8%	86.2%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*



Dwelling size within each tenure in Moelfre, 2011*



Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Moelfre

Tenure of new accommodation required in Moelfre over the next 18 years

Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	450	495	45	71.1%
Shared ownership/help-to-buy	2	8	6	9.5%
Intermediate rent/social rented	48	60	12	19.4%
Total	500	563	64	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Moelfre over the next 18 years

Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	7	14	7	14.6%
Two bedrooms	103	125	23	50.0%
Three bedrooms	240	245	6	12.5%
Four or more bedrooms	100	110	10	22.8%
Total	450	495	45	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Moelfre over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	2	2	33.3%
Two bedrooms	1	3	2	33.3%
Three bedrooms	1	2	1	16.7%
Four or more bedrooms	0	1	1	16.7%
Total	2	8	6	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

.Size of new intermediate rented/social rented accommodation required in Moelfre over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	1	4	3	26.6%
Two bedrooms	8	15	7	60.0%
Three bedrooms	38	38	0	0.0%
Four or more bedrooms	1	3	2	15.1%
Total	48	60	12	101.6%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Report 2: Impact on Northern wards of Anglesey

Llanbadrig

April 2016

Demographic profile, Llanbadrig

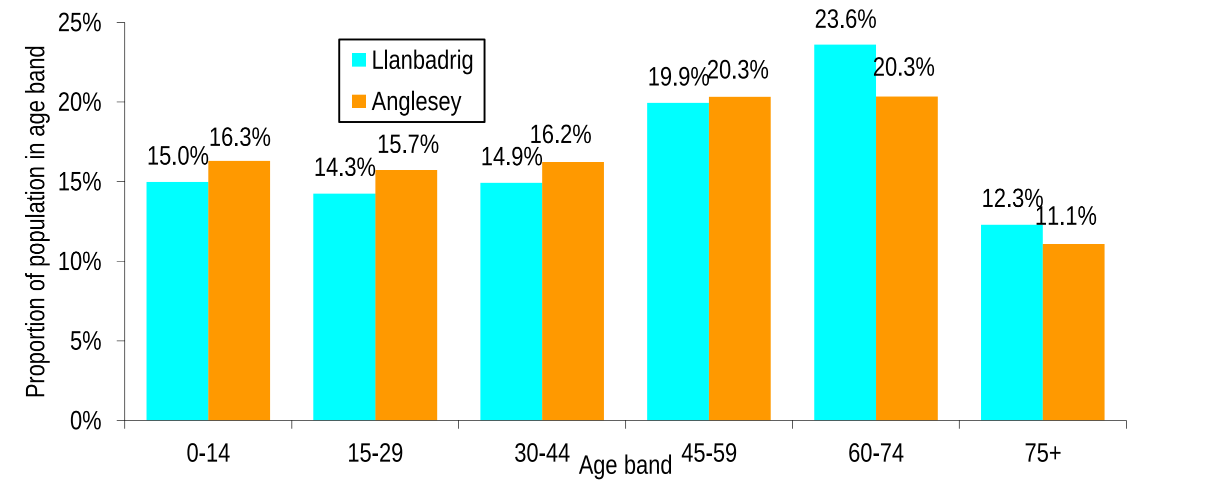
Population, 2015**: 1,385	Total households, 2015**: 666

Average household size 2015**		Change in total households, 2001-11*	
Llanbadrig	2.08	Llanbadrig	4.4%
Isle of Anglesey	2.24	Isle of Anglesey	7.9%

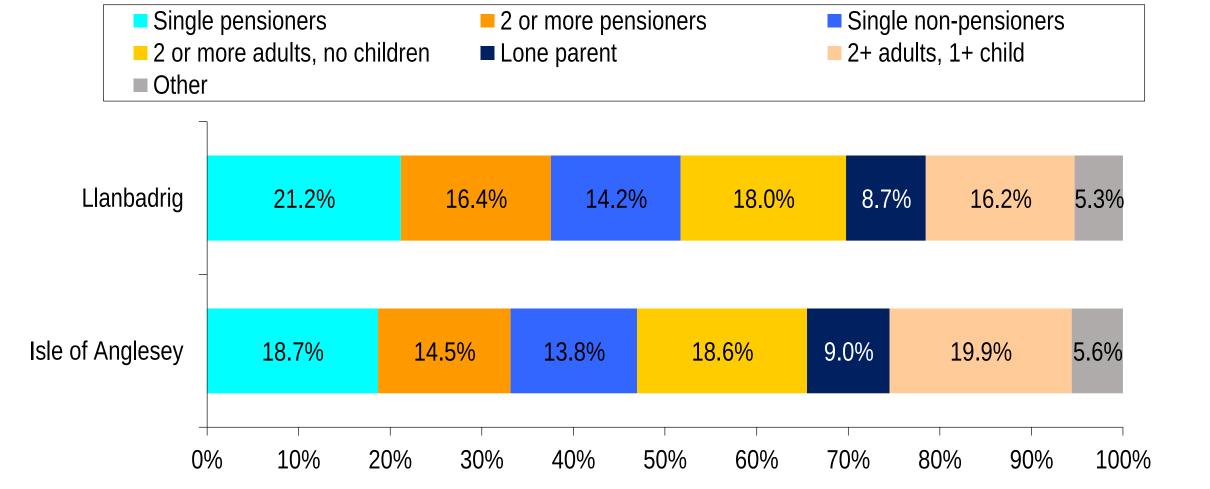
Population density* (persons per hectare)		Proportion BME*		Resident in UK* Over 5 years (includes born in UK)	
Llanbadrig	1.0	Llanbadrig	0.7%	Llanbadrig	99.6%
Isle of Anglesey	1.0	Isle of Anglesey	1.8%	Isle of Anglesey	99.3%
Wales	1.5	Wales	4.4%	Wales	98.1%

Health problem* (day-to-day activities limited)		Health problem* (day-to-day activities limited a lot)		Can speak, read or write Welsh*	
Llanbadrig	25.1%	Llanbadrig	13.2%	Llanbadrig	70.9%
Isle of Anglesey	23.1%	Isle of Anglesey	11.4%	Isle of Anglesey	58.8%
Wales	22.7%	Wales	11.9%	Wales	21.3%

Age profile, 2015**



Household composition, 2015**



Socio-economic profile, Llanbadrig

Unemployment, March 2016***

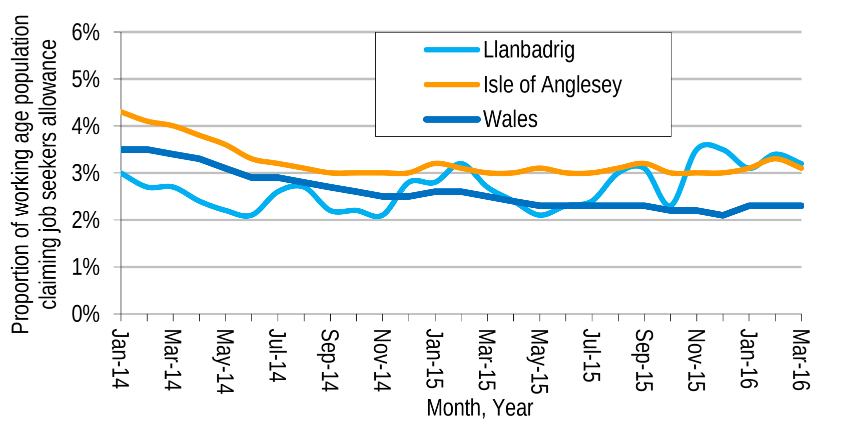
Llanbadrig	3.2%
Isle of Anglesey	3.1%
Wales	2.3%

Proportion of workforce economically inactive, 2011*

(Of all persons aged 16 to 74)

Llanbadrig	38.5%
Isle of Anglesey	35.0%
Wales	33.5%

Level of unemployment (2014-2016)***



Occupation structure, 2011*

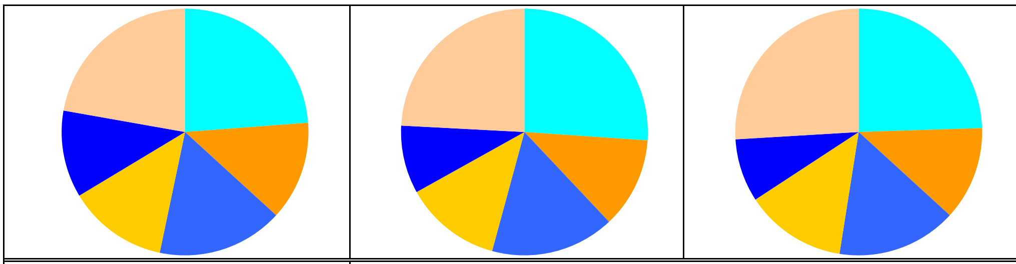
*Occupation Groups*** **	Llanbadrig	the Isle of Anglesey	Wales
Group 1-3	32.0%	35.2%	35.8%
Group 4-5	27.8%	26.6%	24.5%
Group 6-7	22.1%	19.5%	19.6%
Group 8-9	18.1%	18.7%	20.1%
Total	100.0%	100.0%	100.0%

Employment situation, 2011*

	Llanbadrig	the Isle of Anglesey	Wales
Employed full-time	55.4%	58.7%	65.6%
Employed part-time	23.4%	23.6%	20.5%
Self-employed	21.3%	17.7%	13.9%
Total	100.0%	100.0%	100.0%

Highest qualification achieved, 2011*

Llanbadrig	The Isle of Anglesey	Wales	
			Level 4 or above
			Level 3
			Level 2
			Level 1

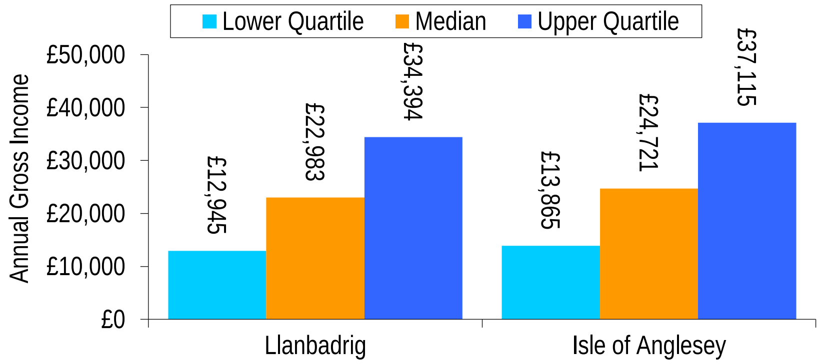


	Other
	No qualifications

Median household savings, 2015**	
Llanbradig	£3,108
Isle of Anglesey	£3,008

Median equity of owner-occupiers, 2015**	
Llanbradig	£168,263
Isle of Anglesey	£155,953

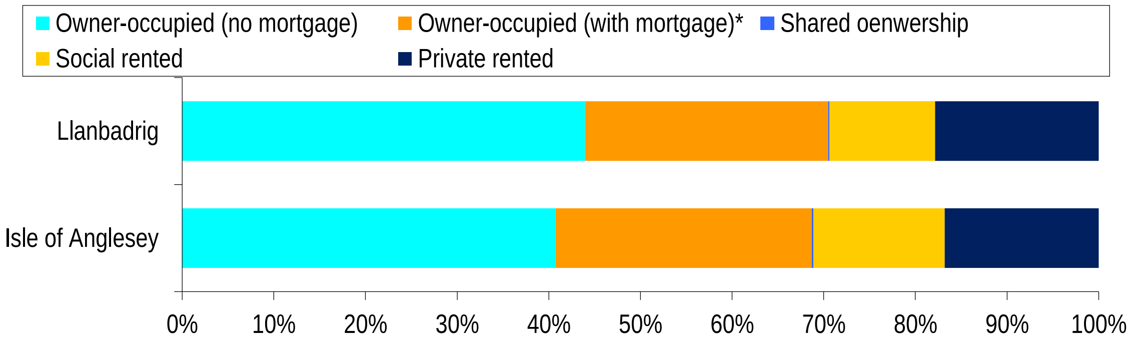
Household income, 2015**



Accommodation profile, Llanbadrig

Number of household spaces, 2011*: 752	Proportion vacant, 2011*: 16.4%

Tenure profile, 2015**



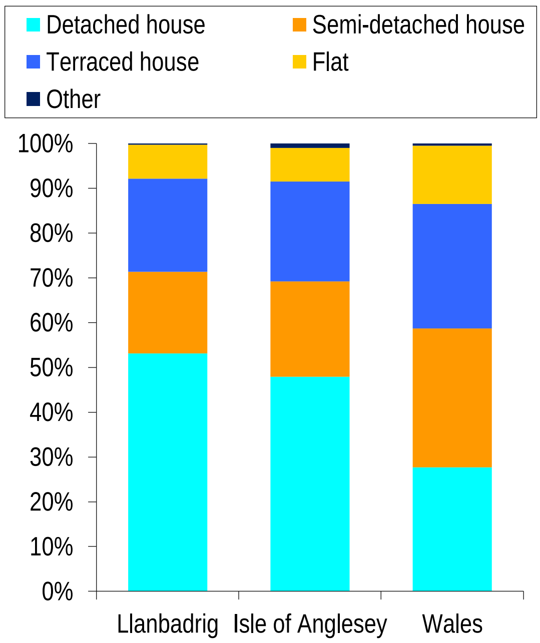
Size of dwelling stock, 2011*

Property size	Llanbadrig	the Isle of Anglesey	Wales
No bedrooms	0.0%	0.1%	0.2%
1 bedroom	3.3%	5.4%	7.6%
2 bedrooms	24.9%	24.0%	24.2%
3 bedrooms	51.9%	49.4%	48.9%
4 bedrooms	13.9%	16.4%	15.0%
5 or more bedrooms	6.0%	4.7%	4.0%
Total	100.0%	100.0%	100.0%

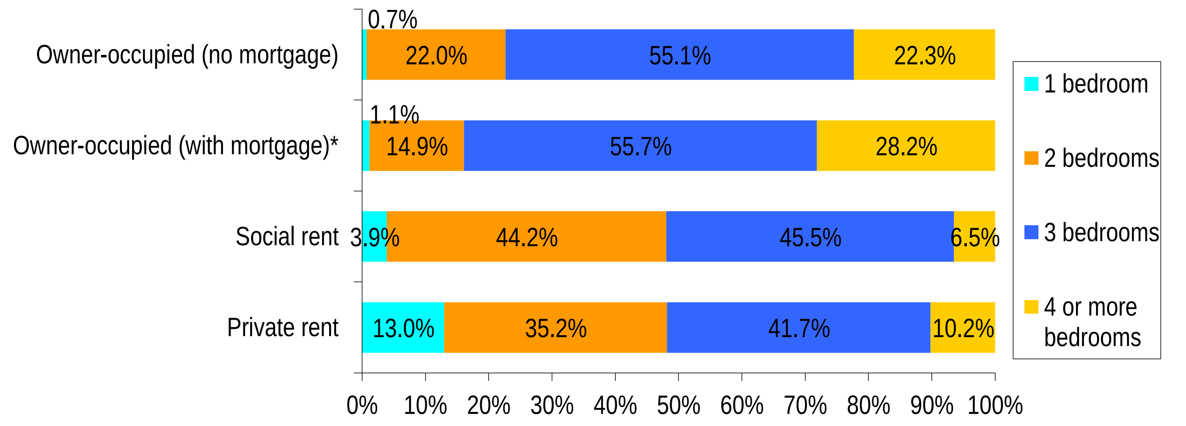
Occupation level (bedrooms), 2011*

	Overcrowded	Under-occupied
Llanbadrig	1.1%	85.8%
Isle of Anglesey	2.2%	79.8%
Wales	2.9%	75.3%

Dwelling type, 2011*



Dwelling size within each tenure in Llanbadrig, 2011*



Data sources for the tables above: *2011 Census, **Isle of Anglesey Local Housing Market Assessment Update, 2016, ***ONS Claimant count

LTBHM Outputs: Llanbadrig

Tenure of new accommodation required in Llanbadrig over the next 18 years

Tenure	Current tenure profile	Tenure profile 2033	Change required	% of change required
Market	589	638	50	70.8%
Shared ownership/help-to-buy	1	3	2	2.9%
Intermediate rent/social rented	77	95	18	26.3%
Total	667	737	70	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new market accommodation required in Llanbadrig over the next 18 years

Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	18	22	4	7.6%
Two bedrooms	138	154	17	33.8%
Three bedrooms	306	326	20	41.1%
Four or more bedrooms	126	135	9	17.5%
Total	589	638	50	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

Size of new shared ownership/help-to-buy accommodation required in Llanbadrig over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	0	1	1	50.0%
Two bedrooms	0	1	1	50.0%
Three bedrooms	1	1	0	0.0%
Four or more bedrooms	0	0	0	0.0%
Total	1	3	2	100.0%

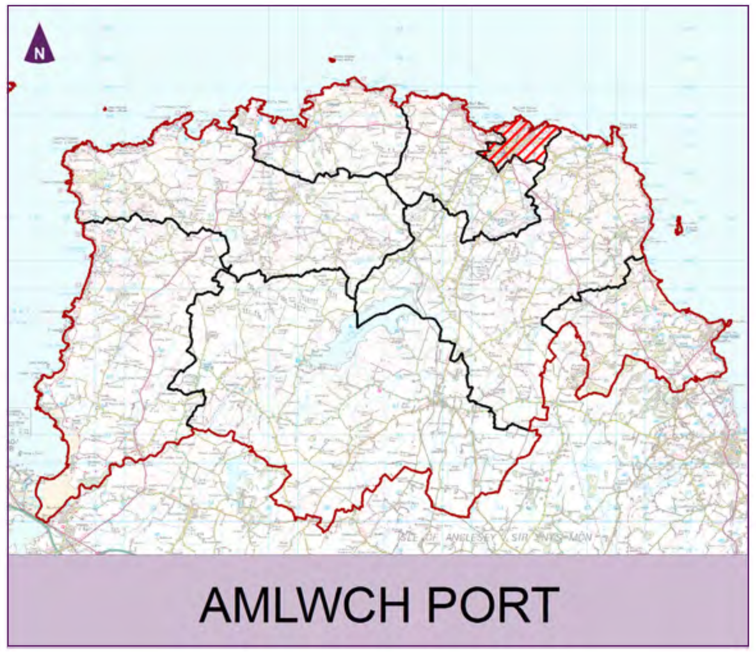
Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

.Size of new intermediate rented/social rented accommodation required in Llanbadrig over the next 18 years				
Dwelling size	Current size profile	Size profile 2033	Change required	% of change required
One bedroom	3	8	5	25.3%
Two bedrooms	34	38	4	19.0%
Three bedrooms	35	44	9	46.8%
Four or more bedrooms	5	7	2	8.9%
Total	77	95	18	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2016

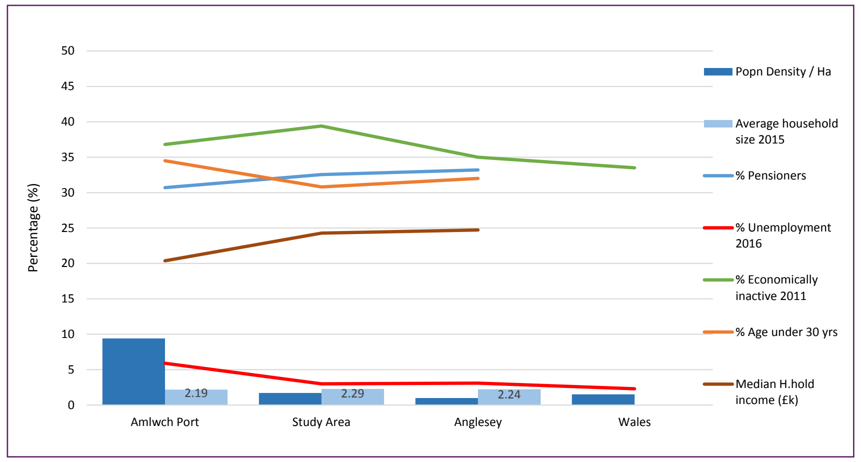
Appendix B
Settlement and Site Analyses

Current



Socio-Economic Characteristics

- Most populous aggregation area in the study area with the densest population including the greater majority of the Urban Service Centre of Amlwch
- Household size (2.19pph) is slightly below island average although well below the rural hinterland to the town
- The highest unemployment in the study area and significantly higher than Anglesey
- Relatively low proportion of pensioners and economically inactive population
- A low average age and the lowest household income in the study area – just 80% of the island average
- A high proportion are Welsh speakers (66%) relative to the Study Area (62%) and the island (59%).



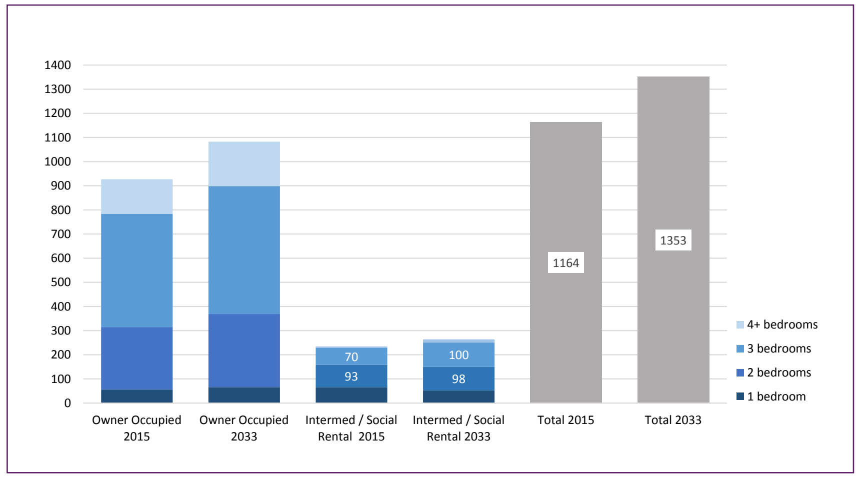
Housing Stock Characteristics

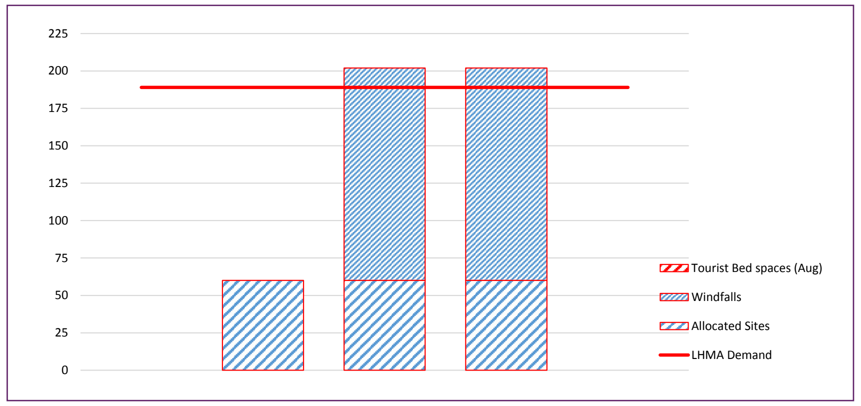
- Historical pattern of growth – comparatively high levels of smaller terraced housing
- Higher proportion of rented accommodation
- Some overcrowding (3.5% of households)
- Significantly lower under-occupation (69.5% of households) than across the study area and Anglesey.

Growth

Housing Growth & Supply

- An additional 189 dwellings are specified by the LHMA.
- The majority of demand is for market dwellings (emphasis on 2 and 3 bedrooms)
- Some intermediate tenure (emphasis on 3 bedrooms)
- A third of this demand is allocated although further allocations in Amlwch Rural
- High level of windfalls in draft JLDP will more than meet demand





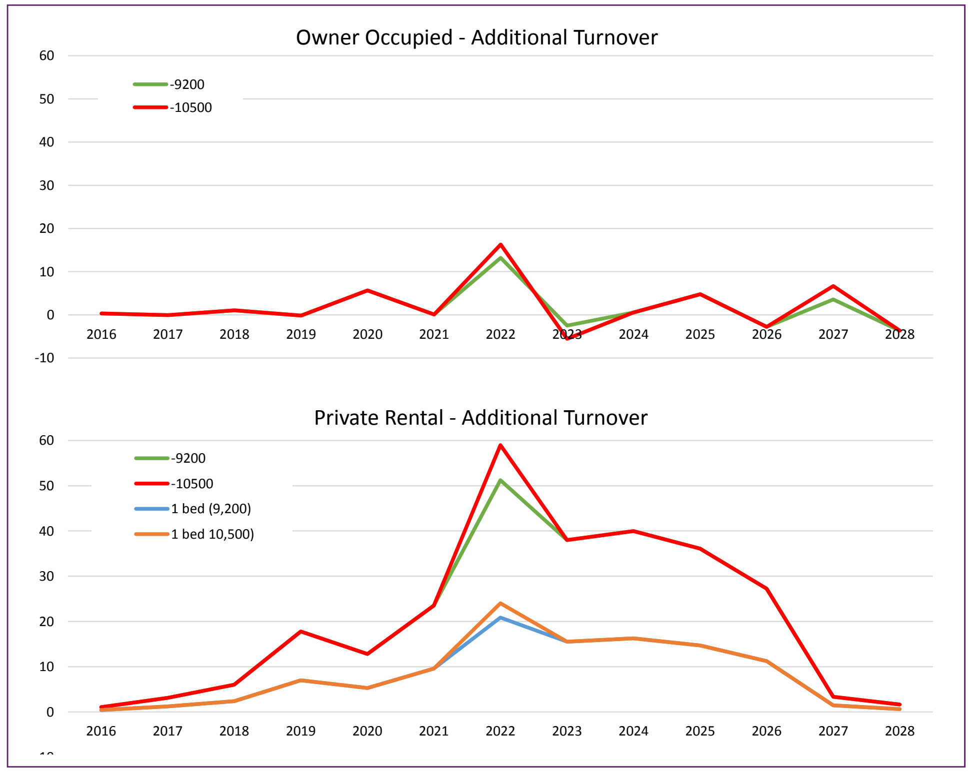
Infrastructure Issues

- Good range of services in the town.
- Nursery provision is presently at capacity.
- Primary provision is currently operating within capacity but birth rates are expected to generate a requirement for another 72 places in the town by 2021 before any impact from the Energy Island Projects.
- Secondary provision (in Amlwch Rural) is significantly under capacity and is expected to remain so.
- Primary care services are under pressure. Glanarfon surgery is operating close to NHS benchmarks whilst there is a 3 month waiting time for new dental patients.
- Sports centre (in Amlwch Rural) currently working well.

Potential Impacts of Construction Workers

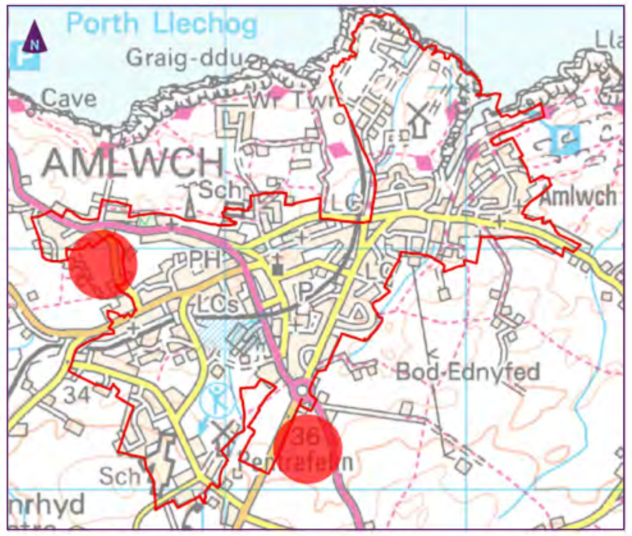
Housing Impacts

- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for between 13 to 16 dwellings by 2022.
- Significant pressure expected on the private rental market from 2018 to 2026 peaking with a requirement for 50 to 60 units in 2022 of which just less than half are for one bedroomed accommodation.
- There is very little tourist accommodation in the town and no capacity from the tourist industry can be assumed.
- Low under-occupation levels and few empty houses offer little scope.



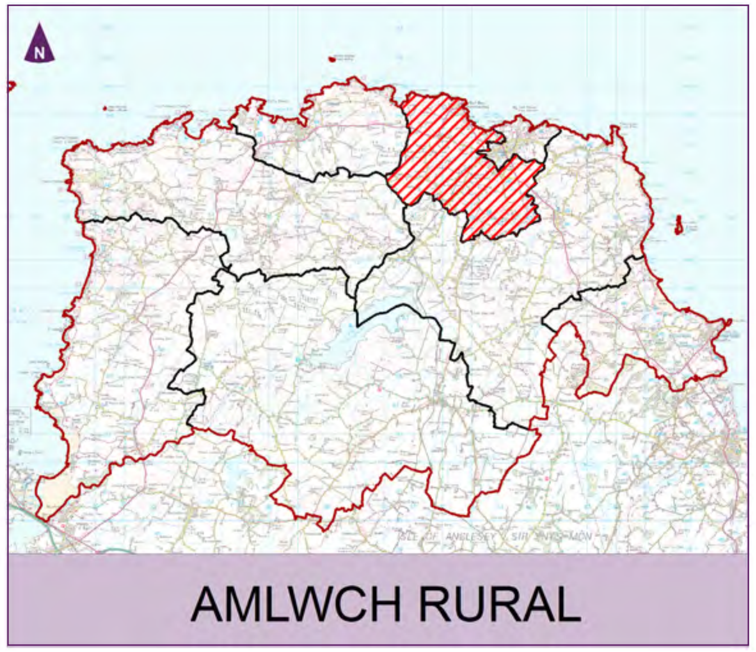
Mitigations and Legacy

- The town is an Urban Service Centre in the JDLP and the most sustainable settlement in the study area
- Amlwch Rural adjoins an Urban Service Centre in the JDLP and the most sustainable settlement in the study area
- Promotion / taking forward of allocations or windfall sites for the town. These may take the form of specified sites that provide a more assured approach to delivery. These sites could either fall within the boundaries of Amlwch Port or form extensions in Amlwch Rural. A focus on public sector land could also serve to assure delivery
- There is particular potential for affordable housing to support the Welsh language given the high proportion of speakers in the town
- Additional nursery and primary school capacity is required in the Amlwch area before 2021.
- Additional GP capacity may also be required before 2021.



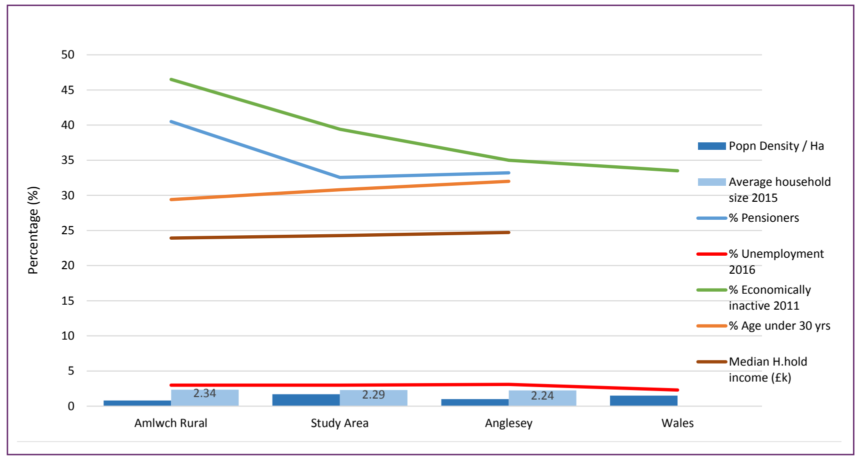
37681 AmlwchPort.indd

Current



Socio-Economic Characteristics

- Extensive rural area with very low density population. However also contains some of the proposed allocations to extend the Urban Service Centre of Amlwch
- Higher household size than the study area and Anglesey
- Lower unemployment than Amlwch Port but closely comparable to the study area and Anglesey
- Has a lower proportion of under 30 yo population than the study area and Anglesey
- Has the highest level of economically inactive population (46%) and the highest proportion of pensioner households (40%) in the study area
- Household income is comparable to the study area and Anglesey but significantly above those for Amlwch Port
- A relatively low proportion are Welsh speakers (55%) relative to the Study Area (62%) and the island (59%).



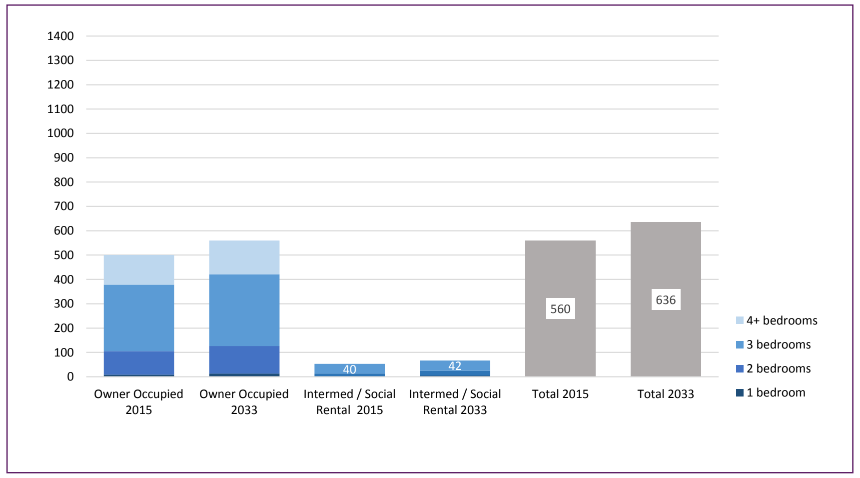
Housing Stock Characteristics

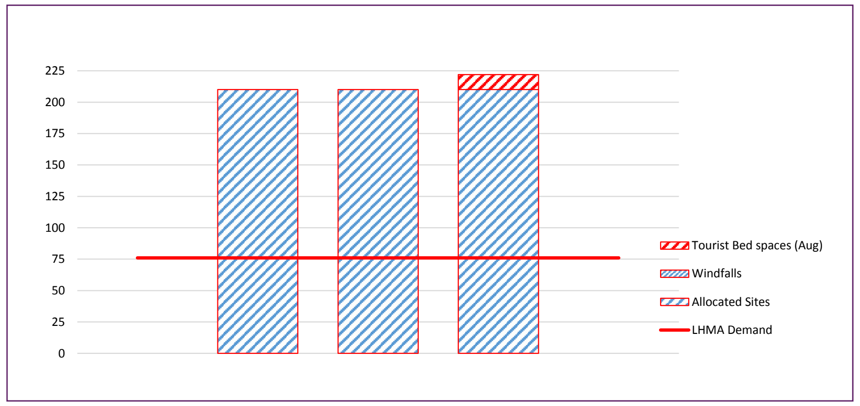
- Amlwch Rural is very different from Amlwch Port.
- It possesses the highest proportion of detached and semi-detached (close to 90%) with the highest proportions of stock with three or more bedrooms
- Owner occupation and the average age of the population are close to the highest in the study area
- There is a very high level of under-occupation of stock (86%).

Growth

Housing Growth & Supply

- An additional 76 dwellings are specified by the LHMA
- The majority of demand is for market dwellings (split almost equally between two, three and four bedrooms)
- Some intermediate tenure (half of which is for two bedroom stock)
- This demand is met almost three times by allocations for 210 dwellings to deal with the needs of the town
- High level of windfalls in draft JLDP in Amlwch Port will more than meet demand





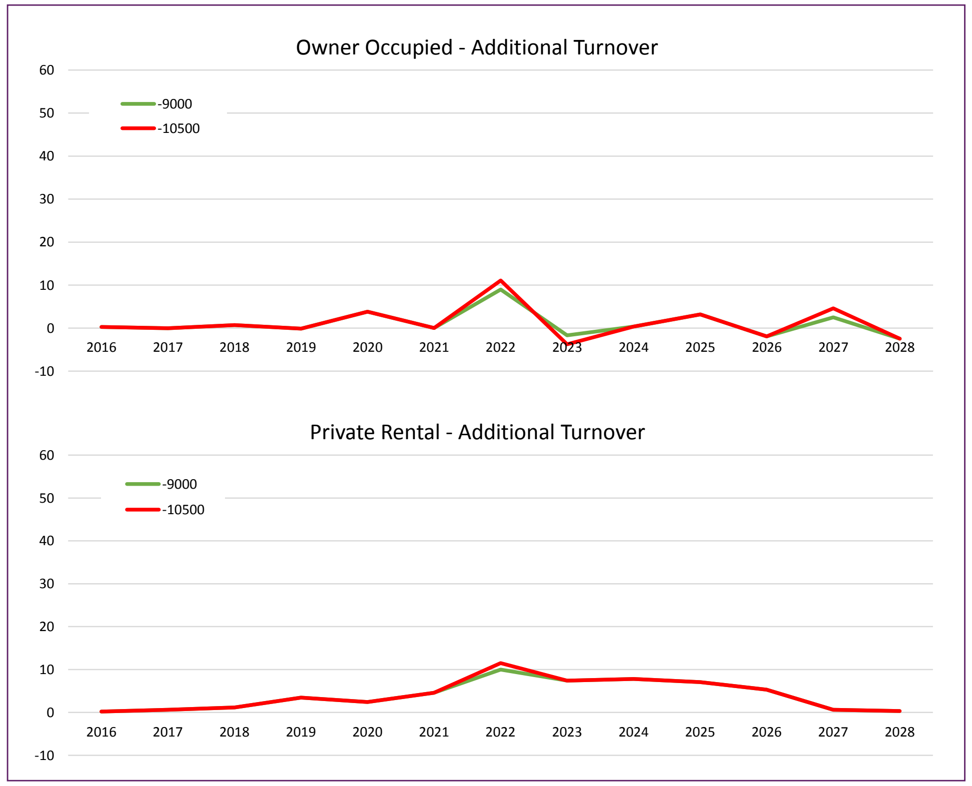
Infrastructure Issues

- Good range of services in the town
- Nursery provision is presently at capacity
- Primary provision is currently operating within capacity but birth rates are expected to generate a requirement for another 72 places in the town by 2021 before any impact from the Energy Island Projects
- Secondary provision (in Amlwch Rural) is significantly under capacity and is expected to remain so
- Primary care services are under pressure. Glanarfon surgery is operating close to NHS benchmarks whilst there is a 3 month waiting time for new dental patients
- Sports centre (in Amlwch Rural) currently working well.

Potential Impacts of Construction Workers

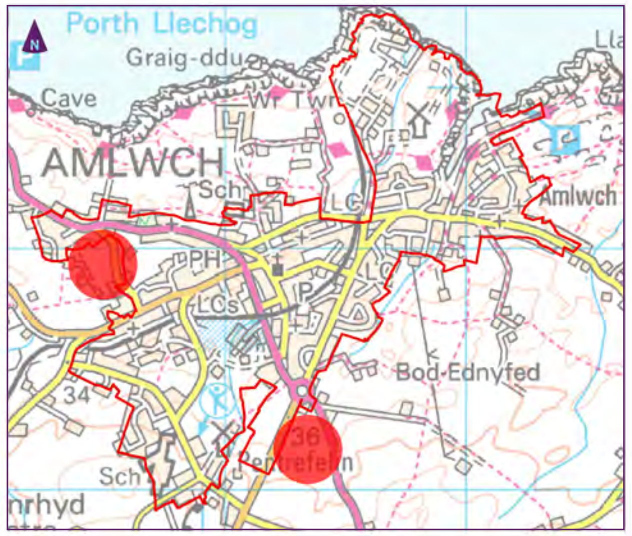
Housing Impacts

- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for around 10 dwellings by 2022
- Some additional pressure expected on the private rental market from 2018 to 2026 with a peak requirement for 10 units in 2022 of which just less than half are for one bedroomed accommodation
- There is available capacity of around 12 bedspaces from the tourist industry
- High under-occupation levels offer some scope.



Mitigations and Legacy

- Amlwch Rural adjoins an Urban Service Centre in the JDLP and the most sustainable settlement in the study area
- Promotion / taking forward of allocations or windfall sites for the town. These may take the form of specified sites that provide a more assured approach to delivery. These sites could either fall within the boundaries of Amlwch Port or form extensions in Amlwch Rural. A focus on public sector land could also serve to assure delivery
- There is particular potential for affordable housing to support the Welsh language given the high proportion of speakers in the town
- Additional nursery and primary school capacity is required in the Amlwch area before 2021. Additional GP capacity may also be required before 2021.



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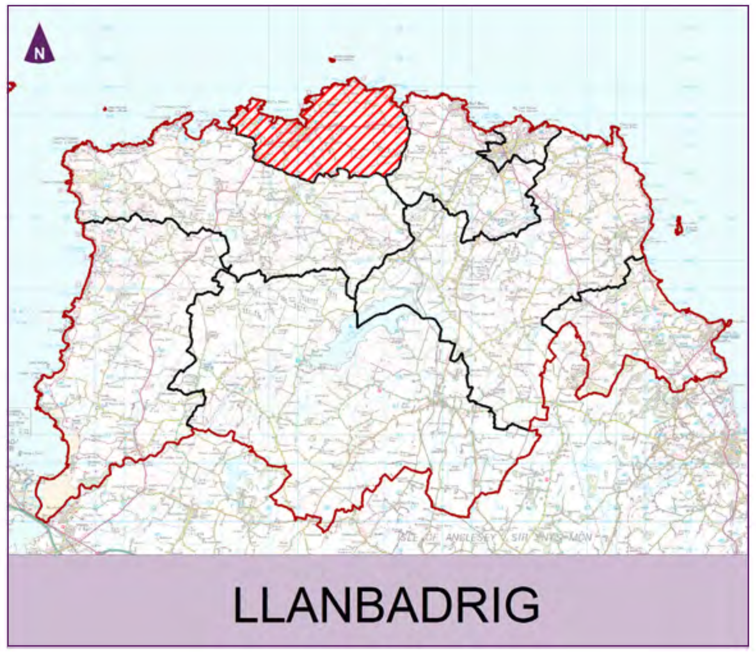
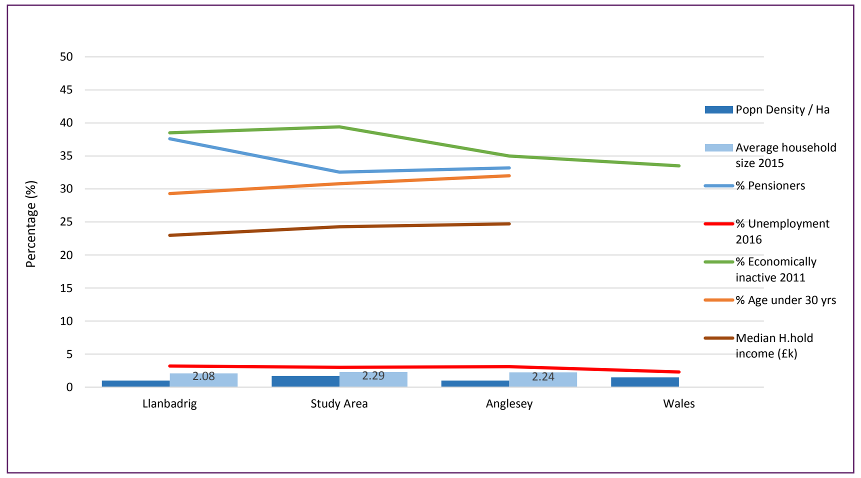


Socio-Economic Characteristics

- Includes the Local Service Centre of Cemaes
- A relatively populous aggregation area in the study area but with a low density population due to the rural hinterland
- The lowest household size (2.08pph) in the study area;
- Unemployment comparable to the study area and to Anglesey
- The highest percentage – by a significant margin – of pensioners and economically inactive population
- The lowest household income in the study area after Amlwch Port
- The joint highest proportion of Welsh speakers (71%) relative to the Study Area (62%).



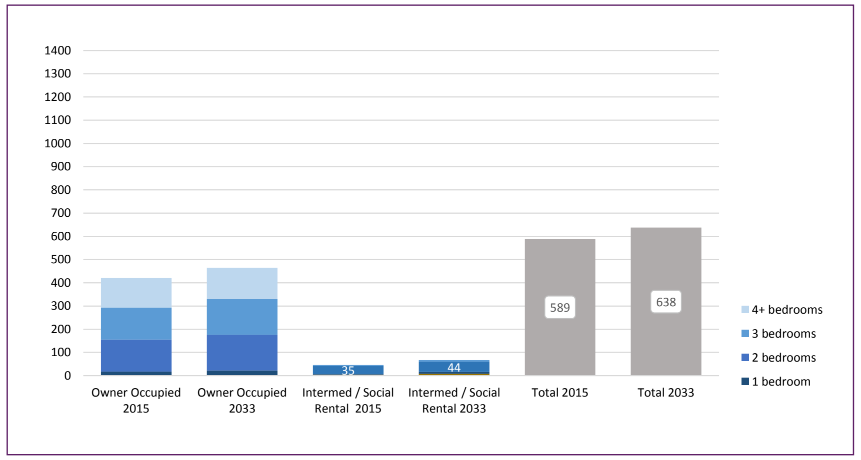
Housing Stock Characteristics

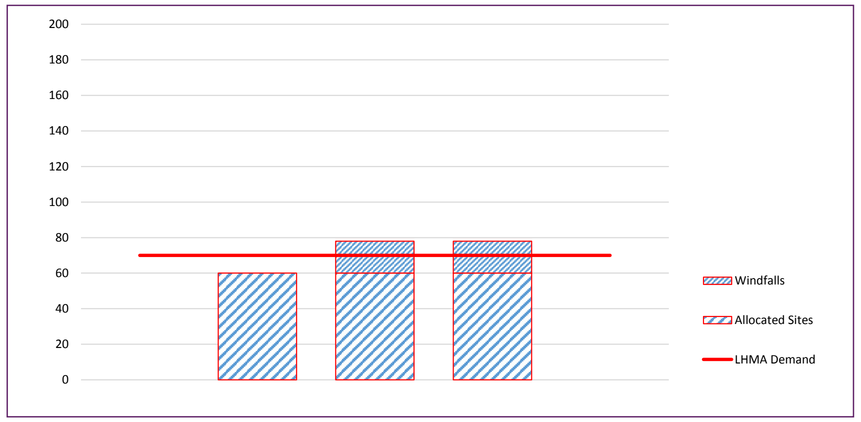
- Historical pattern of growth – comparatively high levels of smaller terraced housing with comparatively fewer bedrooms
- Lesser proportions of rented accommodation against the study area and the island
- The highest level of under-occupation (86% of households) in the study area
- Very low overcrowding (1.1 % of households) reflecting under occupancy and low household size.

Growth

Housing Growth & Supply

- An additional 70 dwellings are specified by the LHMA
- The majority of demand is for market dwellings (emphasis on 2 and 3 bedrooms)
- Some intermediate tenure (emphasis on 3 bedrooms)
- Most of this demand (60 dwellings) is allocated on a single site
- The proposed level of windfalls in draft JLDP will more than meet demand.





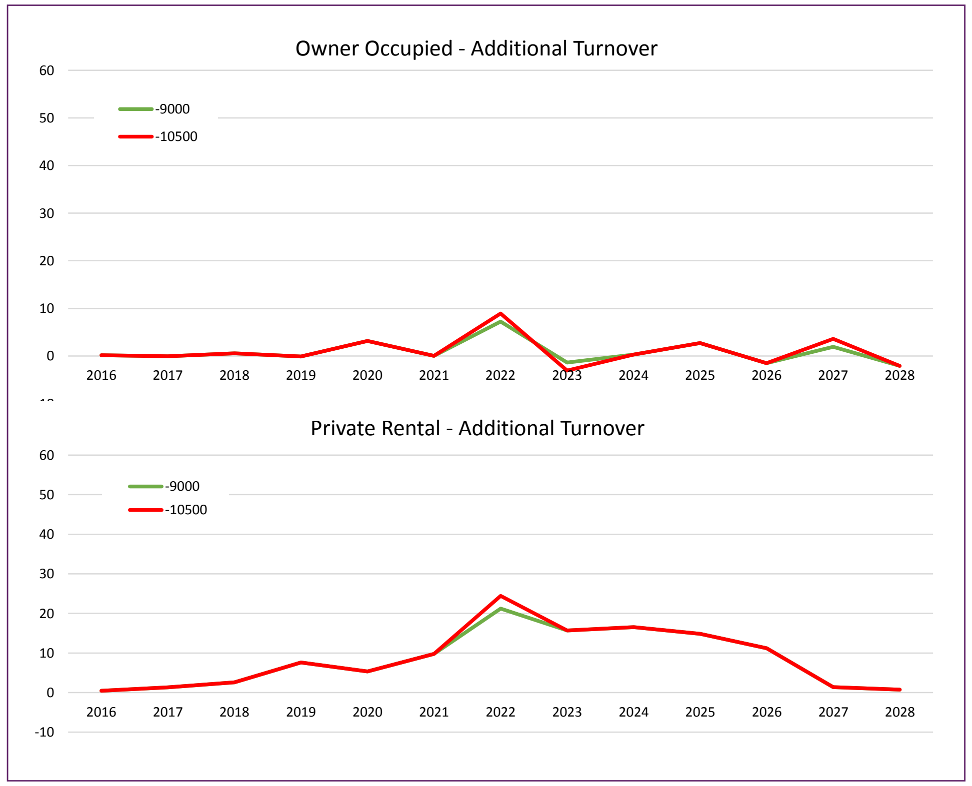
Infrastructure Issues

- There is a good range of services in the town
- Nursery provision is presently at capacity
- Primary provision is currently under pressure and birth rates are expected to generate a requirement for another 21 places by 2021 before any impact from the Energy Island Projects
- Primary care services are under pressure. A branch of the Glanarfon medical practice is operating close to NHS benchmarks whilst there is a two year waiting time for new dental patients.

Potential Impacts of Construction Workers

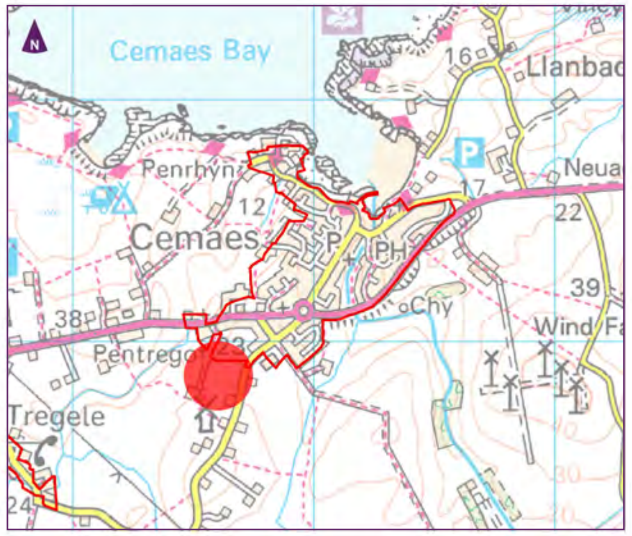
Housing Impacts

- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for up to ten dwellings by 2022
- Significant pressure expected on the private rental market from 2018 to 2026 peaking with a requirement for 24 units in 2022 of which just less than half are for one bedroomed accommodation.



Mitigations and Legacy

- Cemaes is a Local Service Centre in the JDLP and is a sustainable settlement in the study area
- Promotion / taking forward of allocations or windfall sites for the town. There would appear to be relatively few options in the town so further development is likely to take the form of an urban extension.
- There is particular potential for affordable housing to support the Welsh language given the high proportion of speakers
- Additional nursery and primary school capacity is required in Llanbadrig area before 2021. Additional GP capacity may also be required before 2021
- An initiative to encourage the apparent potential of the tourism sector
- An initiative to encourage the latent potential presented by high under-occupation levels .



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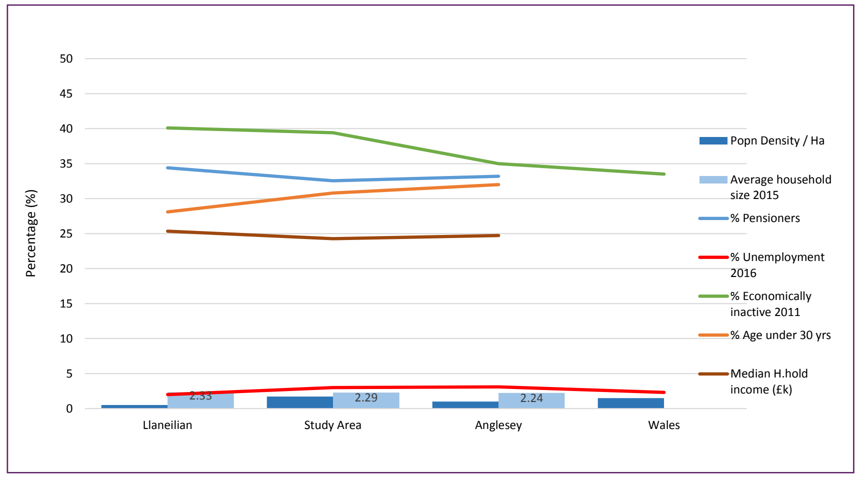
Current

Socio-Economic Characteristics

- A sparsely populated ward with the Local Villages of Penysarn and Rhosybol
- Household size is average for the rural area and for Anglesey
- Unemployment is amongst the lowest in the study area but only marginally lower than for Anglesey
- A high percentage of pensioners and economically inactive population which is typical for the rural area
- Average household income for the study area and Anglesey
- 60% of the population Welsh speakers relative to the Study Area (62%) and the island (59%).



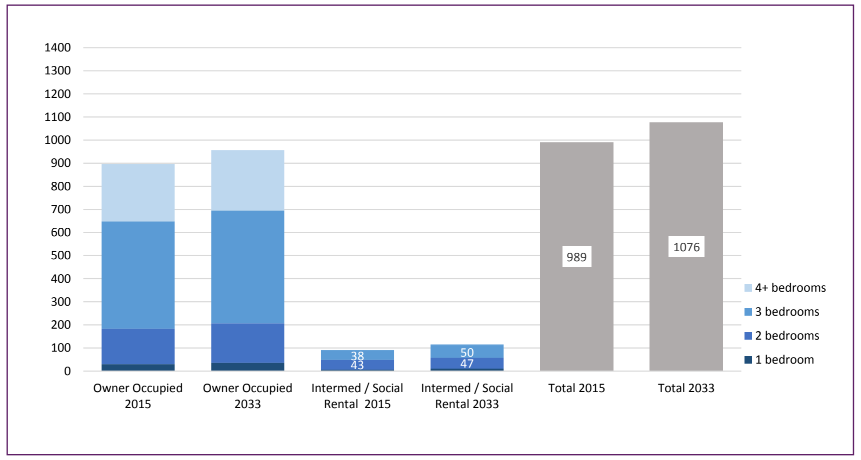
Housing Stock Characteristics

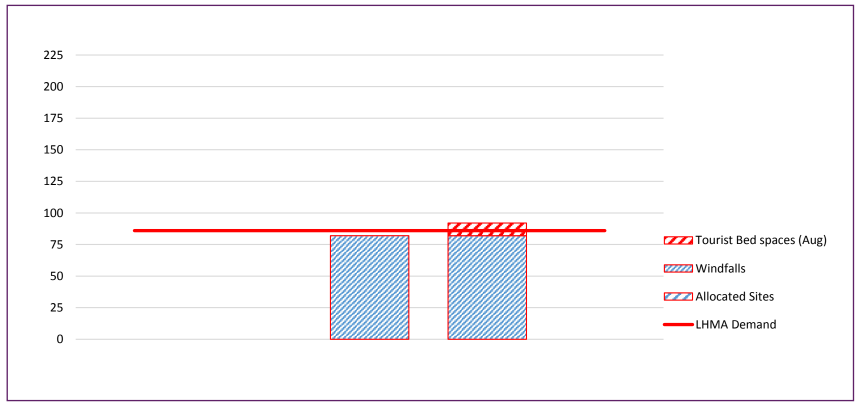
- Possesses close to the highest proportion of detached and semi detached accommodation although this tends to be small. 25% of the stock has no more than two bedrooms perhaps reflecting the building pattern of a traditional rural community
- The proportion of rented accommodation (24%) is unexceptional for the rural area
- Has a high level of under-occupation (83% of households) but this is unexceptional for the rural area.
- Very low overcrowding (1.5 % of households) reflecting under occupancy and low household size

Growth

Housing Growth & Supply

- An additional 86 dwellings are specified by the LHMA
- The majority of demand is for market dwellings (emphasis on 2 and 3 bedrooms)
- Some intermediate tenure (emphasis on 3 bedrooms)
- There are no housing allocations in Llaneilian
- The proposed level of windfalls in draft JLDP meet this demand.





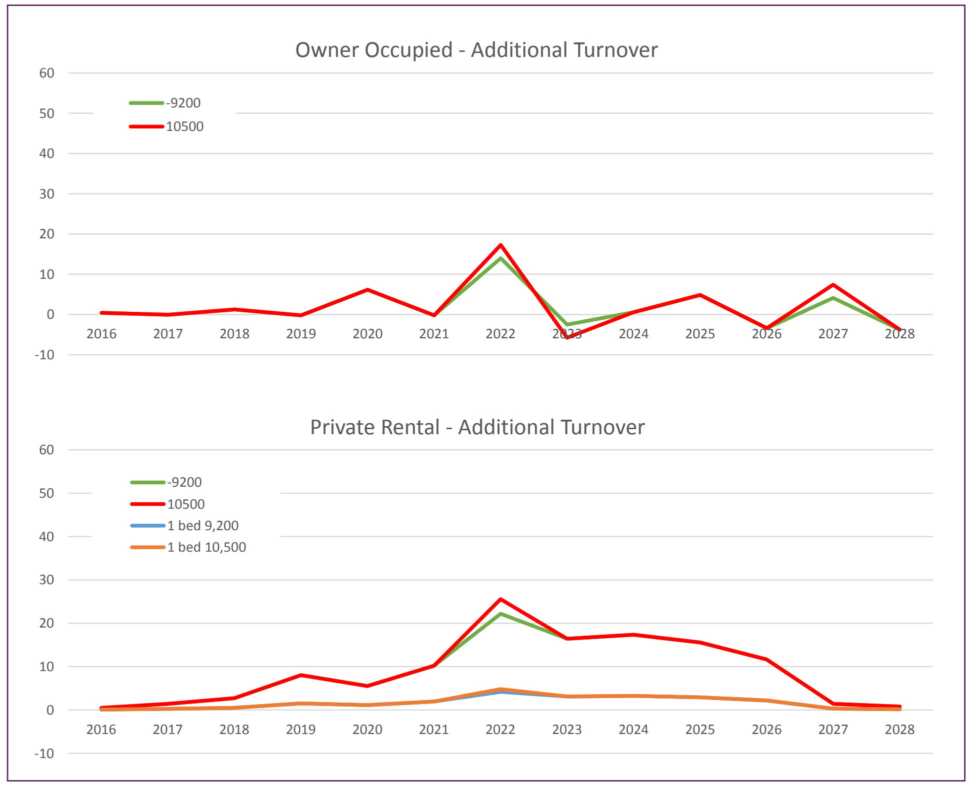
Infrastructure Issues

- There are few services in Llaneilian. There are post offices and primary schools in Penysarn and Rhosybol
- Nursery provision is presently at capacity
- There is currently some primary school capacity across the two schools however birth rates are expected to generate a requirement than will fill both schools by 2021 before any impact from the Energy Island Projects.

Potential Impacts of Construction Workers

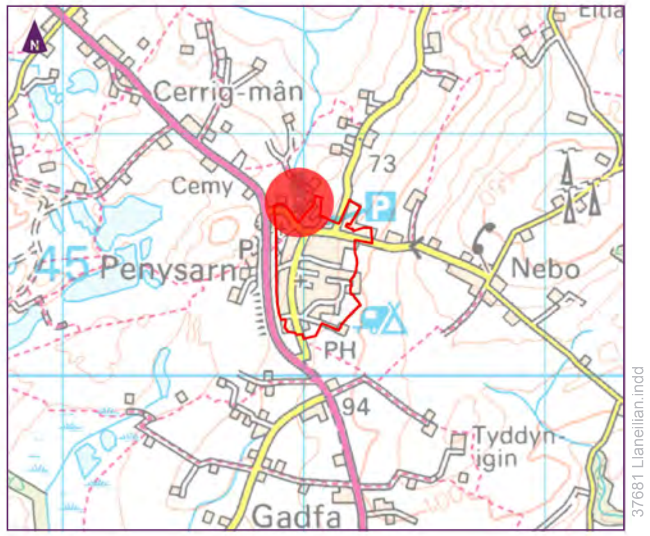
Housing Impacts

- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for up to seventeen dwellings by 2022
- Significant pressure expected on the private rental market from 2018 to 2026 peaking with a requirement for 27 units in 2022 of which a third are for one bedroomed accommodation
- Based upon the tourism bed space survey, there is thought to be approximately ten spaces available to serve the demands of the Energy Island Projects.



Mitigations and Legacy

- Identification of windfall sites. As these should be well related to existing services, Penysarn is the suggested location
- There is good potential for affordable housing to support the Welsh language given the high proportion of speakers
- Additional nursery and primary school capacity is required in Llaneilian area before 2021.
- An initiative to encourage the apparent but limited potential of the tourism sector
- An initiative to encourage the latent potential presented by high under-occupation levels.



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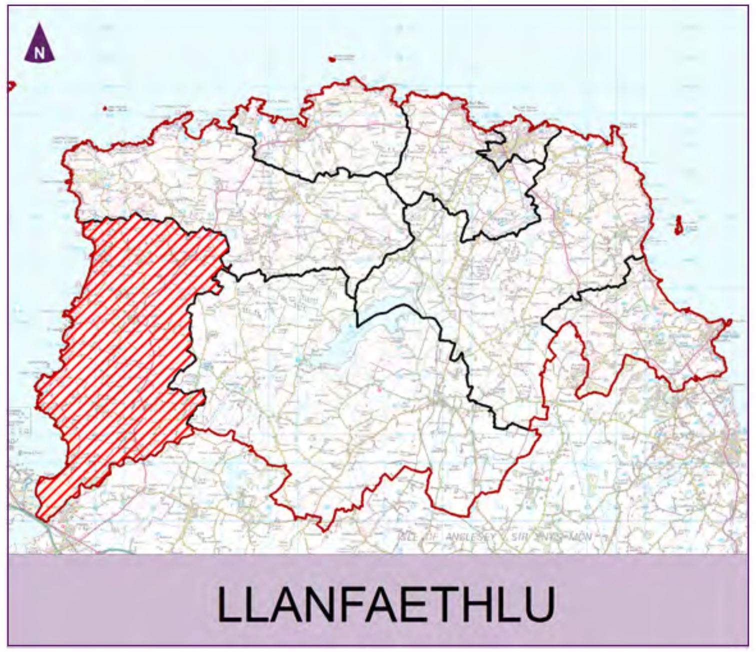
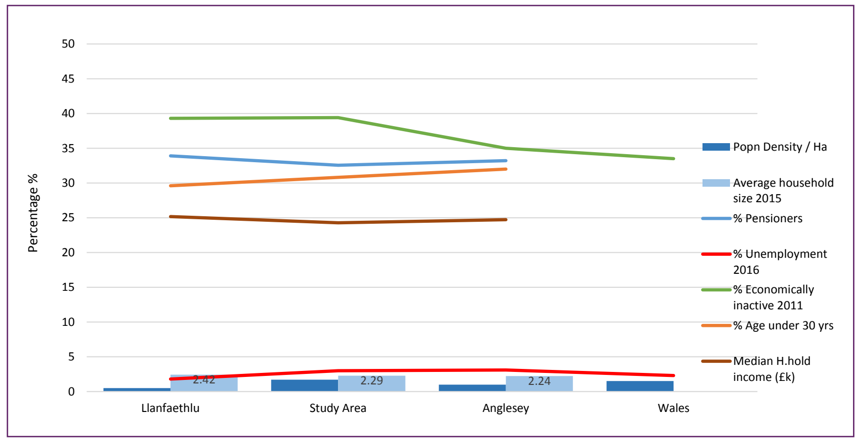


Socio-Economic Characteristics

- A sparsely populated ward with the three Local Villages of Llanfaethlu, Llanfachraeth and Llanrhyddiad
- Household size is above average for the rural area and above that for Anglesey
- Unemployment is amongst the lowest in the study area but only marginally lower than for Anglesey
- A high percentage of pensioners and economically inactive population which is typical for the rural area
- Average household income for the study area and Anglesey
- A high proportion are Welsh speakers (66%) relative to the Study Area (62%) and the island (59%).



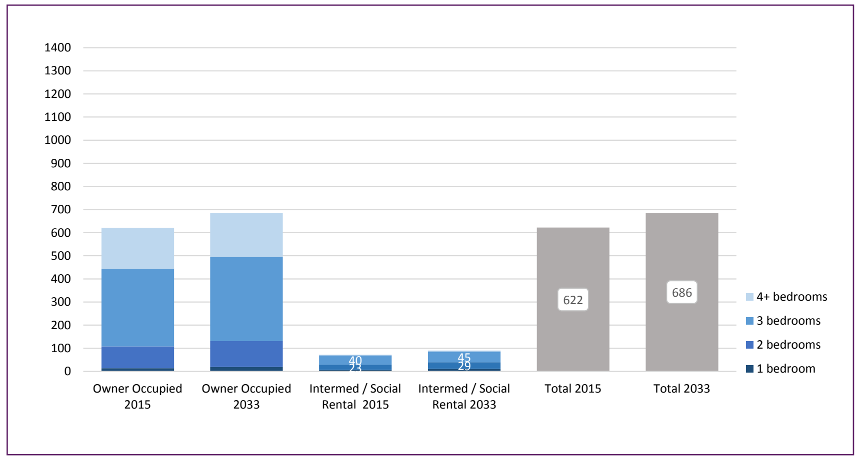
Housing Stock Characteristics

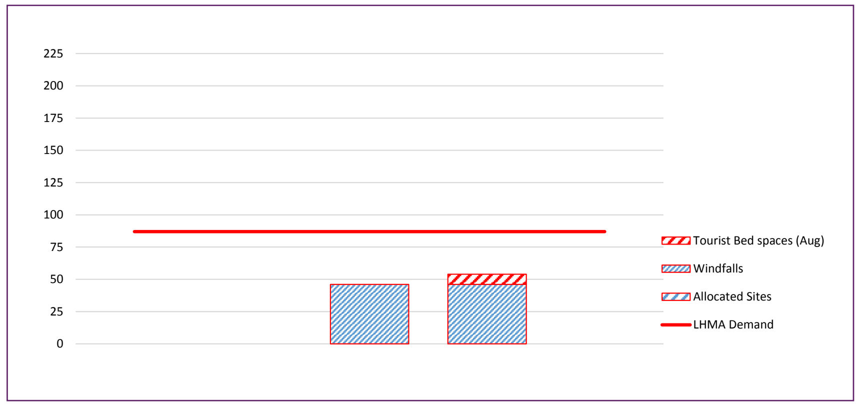
- Possesses a high proportion of detached and semi detached accommodation which reflects a generally large stock where 80% possess three bedrooms or more
- The proportion of rented accommodation (26%) is unexceptional for the rural area although private rental makes up a larger proportion than elsewhere
- Has a high level of under-occupation (84% of households) but this is unexceptional for the rural area
- Overcrowding at 3.8 % of households is slightly high for the rural area which may reflect a slightly higher than average proportion of private rental

Growth

Housing Growth & Supply

- An additional 87 dwellings are specified by the LHMA
- The majority of demand is for market dwellings with a particular emphasis on 3 bedroom dwellings
- Some intermediate tenure (again with an emphasis on 3 bedrooms)
- There are no housing allocations in Llanfaethlu
- The proposed level of windfalls in draft JLDP will meet approximately half the demand.





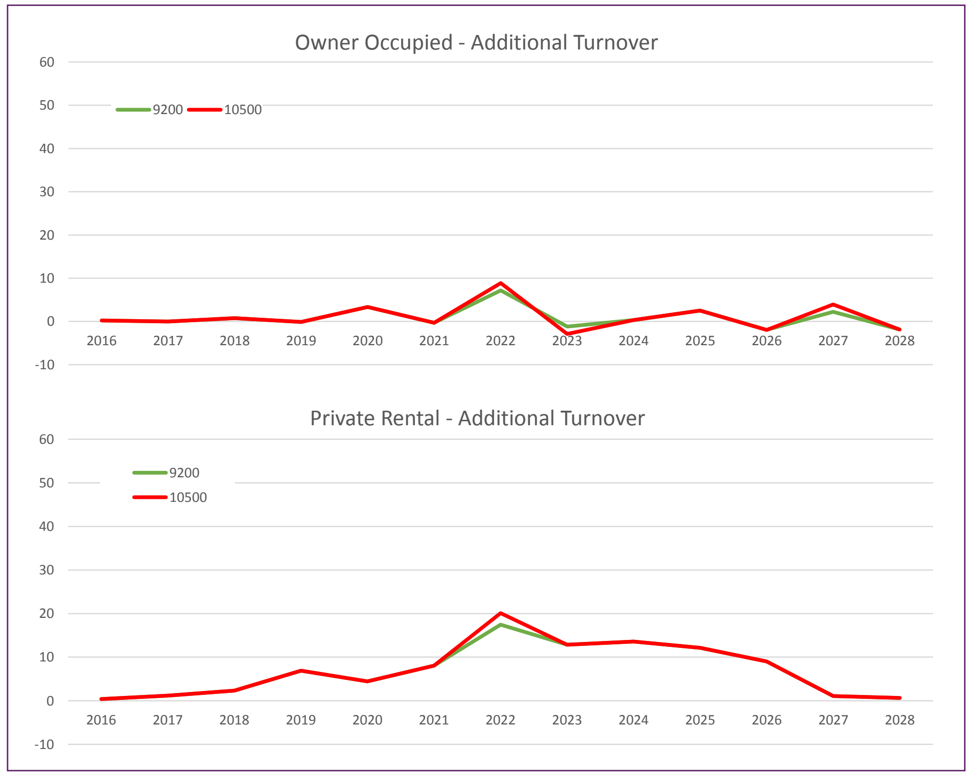
Infrastructure Issues

- Services are focused on Llanfachraeth where there is post office and a large shop. These are more restricted in Llanfaethlu and Llanrhyddiad. There is a post office and primary school in in Llanfaethlu. The primary schools in Llanfachraeth and Llanrhyddiad are due to close with replace provision in Llanfaethlu
- Nursery provision across three sites is presently under capacity. The new nursery at Llanfaethlu will meet current demand but will be at capacity into the future.
- The three primary schools currently run at only 60% capacity. The replacement school at Llanfaethlu has been future proofed and birth rates are expected to generate a requirement than will fill about half of the new school at 2021 before any impact from the Energy Island Projects
- Primary care services are under pressure. A branch of the Glanarfon medical practice is operating close to NHS benchmarks whilst there is a two year waiting time for new dental patients.

Potential Impacts of Construction Workers

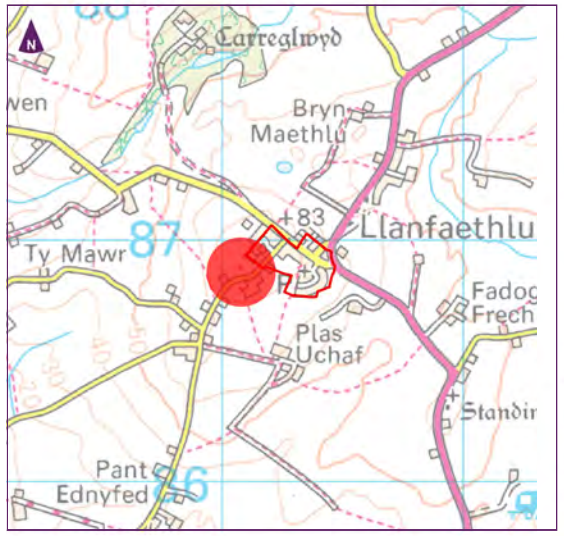
Housing Impacts

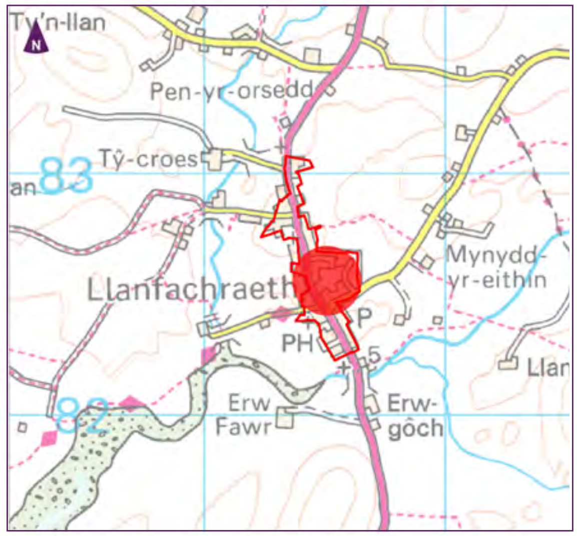
- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for up to nine dwellings by 2022
- Significant pressure expected on the private rental market from 2018 to 2026 peaking with a requirement for 20 units in 2022 of which few are for one bedroomed accommodation
- Based upon the tourism bed space survey, there is thought to be approximately eight spaces available to serve the demands of the Energy Island Projects.



Mitigations and Legacy

- IIdentification of windfall sites. As these should be well related to existing services, Llanfachraeth and Llanfaethlu are the suggested locations
- There is particular potential for affordable housing to support the Welsh language given the high proportion of speakers
- An initiative to encourage the apparent but limited potential of the tourism sector
- An initiative to encourage the latent potential presented by high under-occupation levels.





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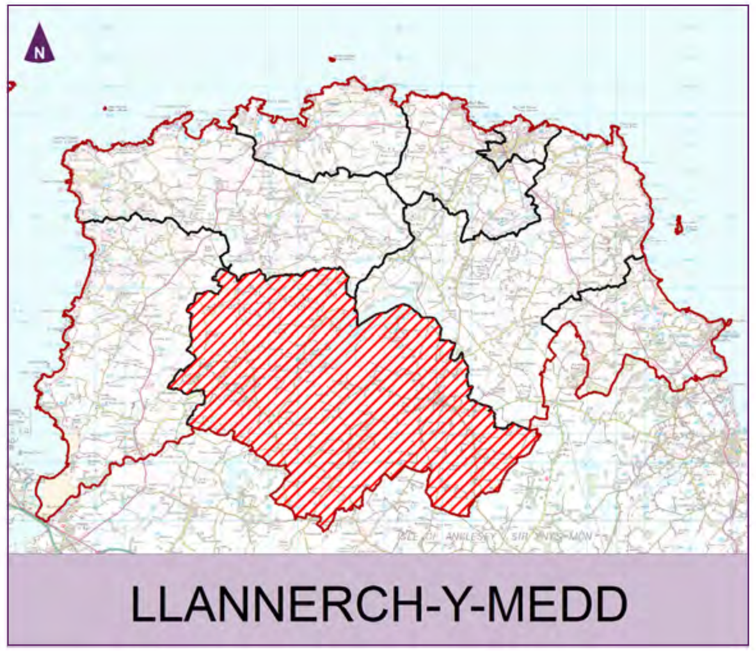
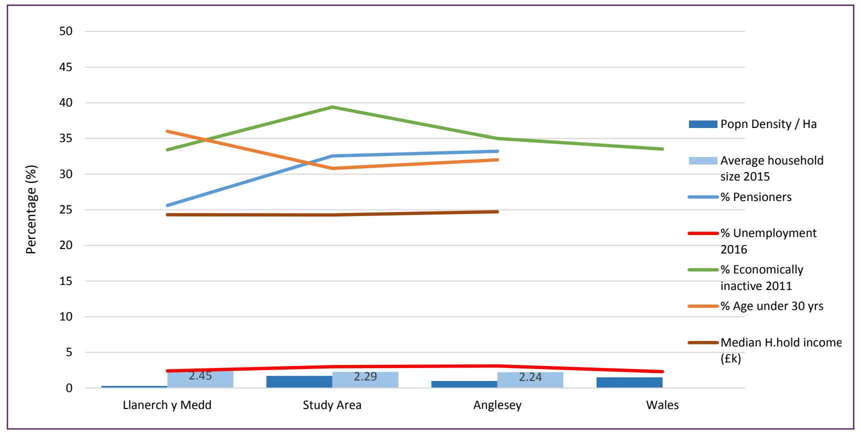


Socio-Economic Characteristics

- The most sparsely populated area of the rural area with the Local Service Village of Llannerch y Medd centrally located
- Household size (2.45 pph) is the highest in the study area and well above that for Anglesey
- Unemployment is relatively high for the study area but comparable to the study area and for Anglesey
- The youngest population profile with the lowest proportion of pensioners – both vary significantly from the Anglesey averages
- Average household income for the study area and for Anglesey
- The joint highest proportion of Welsh speakers (71%) relative to the Study Area (62%)



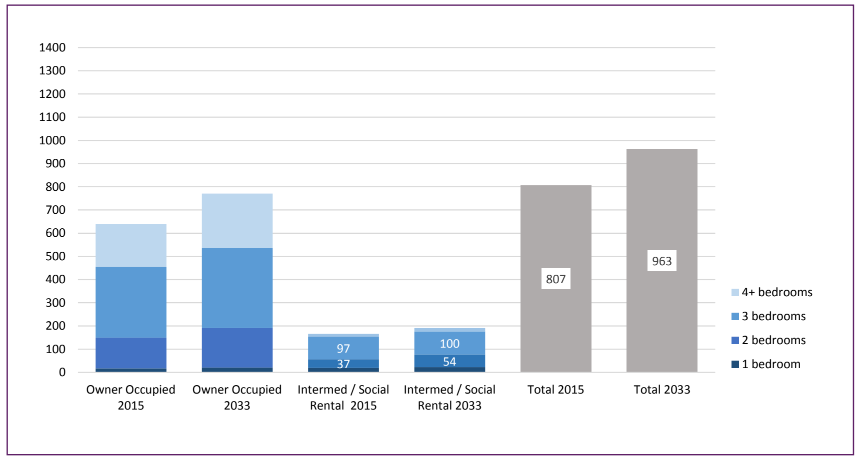
Housing Stock Characteristics

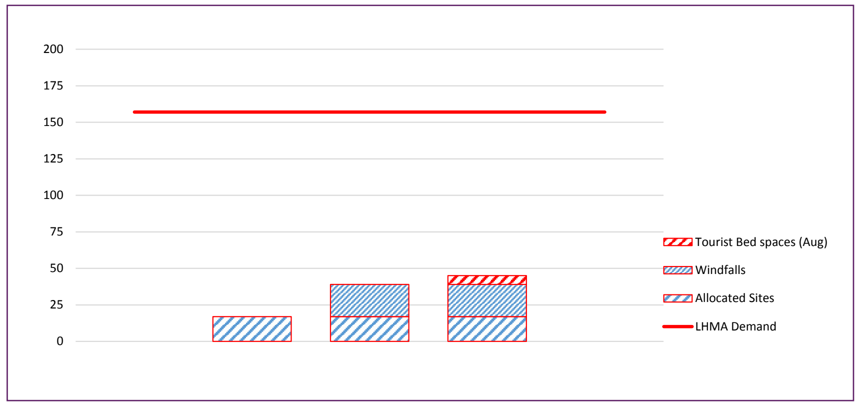
- Possesses a very different profile from the rest of the rural area
- A low proportion of detached and semi detached accommodation which reflects the historic growth of the main settlement. The stock tends therefore to be smaller on average
- The proportion of rented accommodation (32%) is the highest in the study area with the exception of Amlwch Port
- Levels of under-occupation (81% of households) are somewhat lower than average for the study area with the exception of Amlwch Port
- Overcrowding at 2.9 % of households is higher than for the study area and for Anglesey.

Growth

Housing Growth & Supply

- An additional 157 dwellings are specified by the LHMA
- The majority of demand is for market dwellings with a particular emphasis on 2, 3 and particularly 4 bedroom dwellings
- Some intermediate tenure (with an emphasis on 2 and 3 bedrooms)
- There is a single housing allocations in Llannerch y Medd for 17 houses
- Together with the proposed level of windfalls in draft JLDP a quarter of the demand will be met.





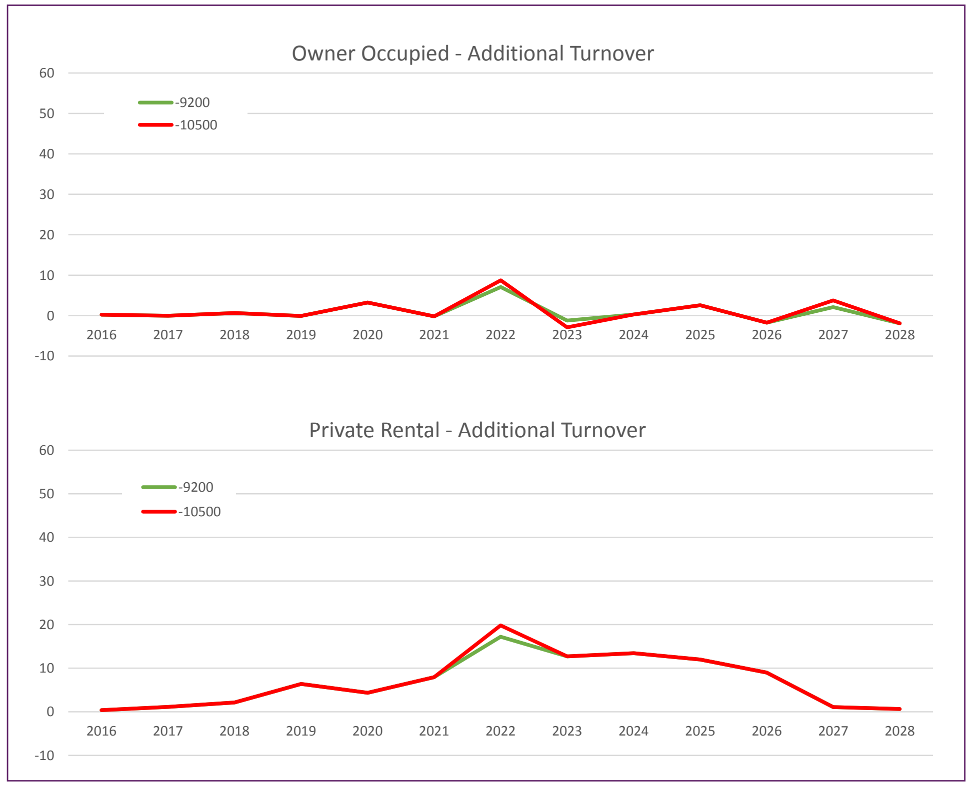
Infrastructure Issues

- There are no services outside of the main settlement of Llannerch y Medd
- Nursery provision is currently 50% over capacity
- The primary school is currently at capacity. The birth rates are expected to generate a requirement than exceed capacity by over 25% at 2021 before any impact from the Energy Island Projects
- Primary care services appear adequate. A branch of the Coed-y-Glyn practice in Llangefni appears to be operating well within NHS benchmarks.

Potential Impacts of Construction Workers

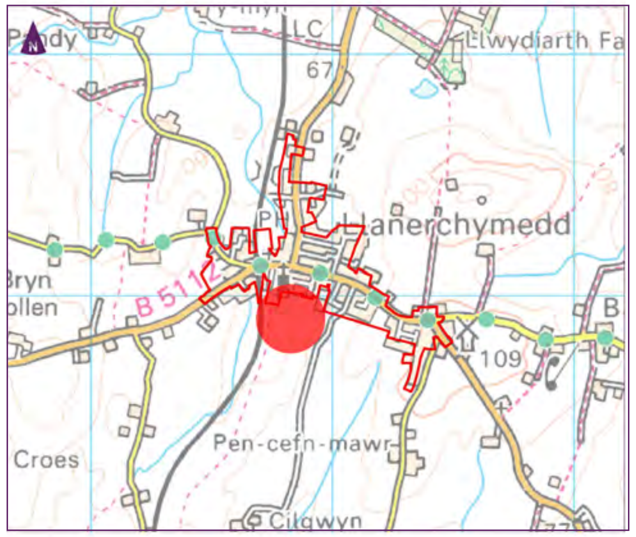
Housing Impacts

- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for up to nine dwellings by 2022
- Significant pressure expected on the private rental market from 2018 to 2026 peaking with a requirement for 20 units in 2022 of which a quarter would be one bedroomed accommodation
- Based upon the tourism bed space survey, there is thought to be approximately six spaces available to serve the demands of the Energy Island Projects.



Mitigations and Legacy

- Llannerch y Medd is a Local Service Centre in the JDLP and is a sustainable settlement in the study area
- Promotion / taking forward of the allocation and windfall sites for the town. Windfall sites may be more than the indicative levels in the JDLP and should be well related to the services in Llannerch y Medd
- There is particular potential for affordable housing to support the Welsh language given the high proportion of speakersAdditional nursery and primary school capacity is required in Llannerch y Medd before 2021.
- An initiative to encourage the apparent but limited potential of the tourism sector
- An initiative to encourage the latent potential presented by high under-occupation levels.



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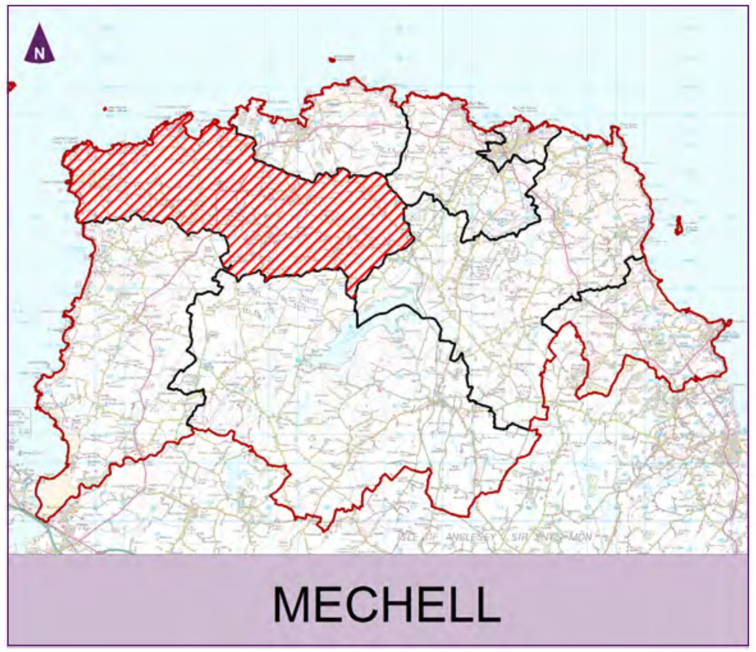
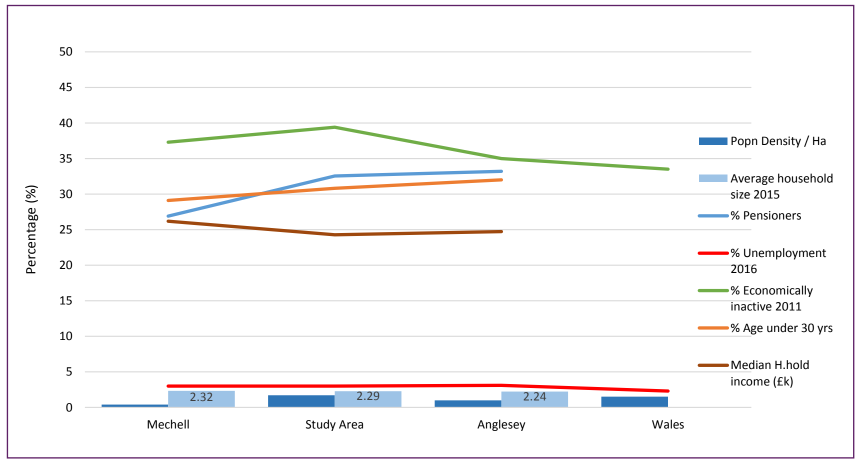


Socio-Economic Characteristics

- A sparsely populated ward with the Local Villages of Llanfechell and Carreglefn
- Household size (2.32 pph) is low for the rural area but above that for Anglesey
- Unemployment is average against the study area and for Anglesey
- A low proportion of pensioners and economically inactive population which distinguishes it within the rural area and Anglesey
- The highest average household income for the study area
- The proportion of Welsh speakers (61%) is comparable to the Study Area (62%) but above that for the island (59%).



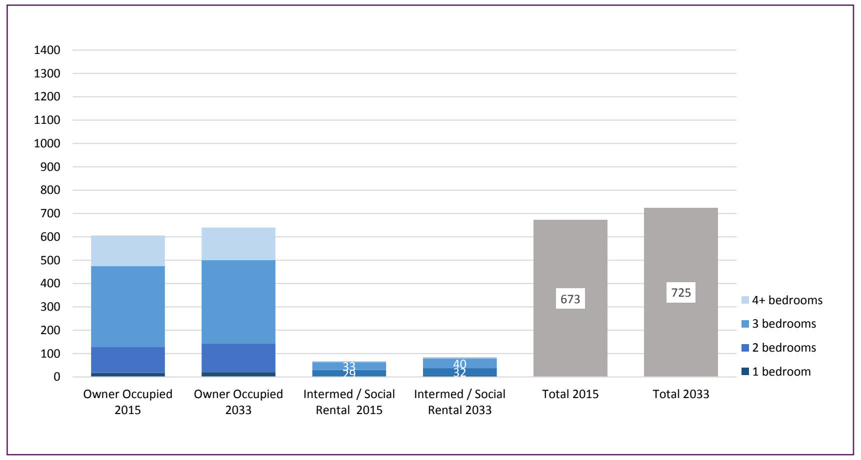
Housing Stock Characteristics

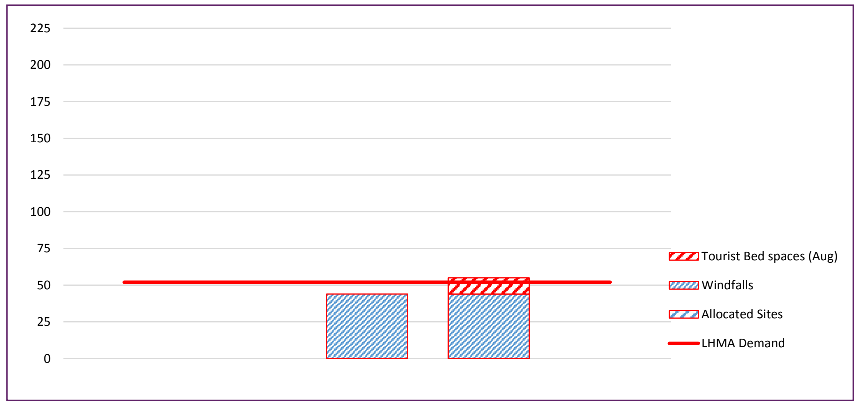
- Possesses a high proportion of detached and semi detached accommodation although the size of the stock is rather less marked
- The proportion of rented accommodation (27%) is unexceptional for the rural area
- Has a high level of under-occupation (82% of households) but this is unexceptional for the rural area
- Overcrowding at 2.2 % of households is average for the study area and for Anglesey.

Growth

Housing Growth & Supply

- An additional 52 dwellings are specified by the LHMA.
- The majority of demand is for market dwellings with a particular emphasis on 2 and 3 bedroom dwellings
- Some intermediate tenure (with an emphasis on 3 bedrooms)
- There are no housing allocations in Mechell.
- The proposed level of windfalls in draft JLDP will meet approximately 90% of the demand.





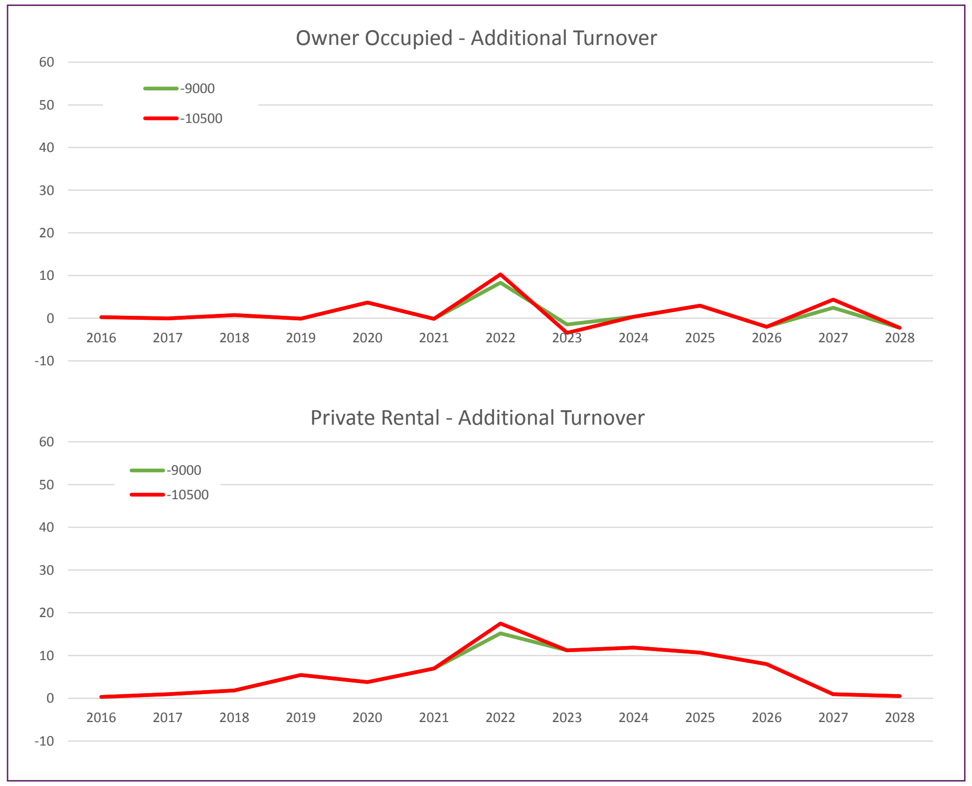
Infrastructure Issues

- Services are focused on Llanmechell where there is post office and primary school. There is a primary school in Carreglefn.
- Nursery provision across three sites is presently under capacity.
- The two primary schools currently run at 80% capacity. Birth rates are not expected to generate additional requirements and there will be a similar level of use at 2021 before any impact from the Energy Island Projects
- There are no primary care services.

Impacts of Energy Island Projects

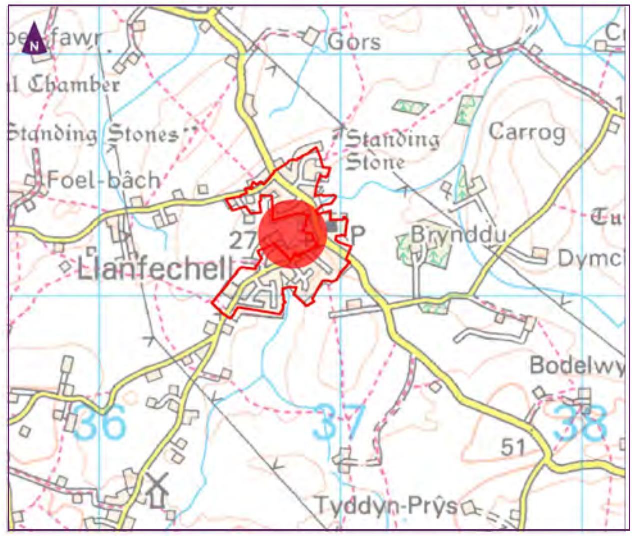
Housing Impacts

- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for up to ten dwellings by 2022
- Significant pressure expected on the private rental market from 2018 to 2026 peaking with a requirement for 17 units in 2022 of which few are for one bedroomed accommodation
- Based upon the tourism bed space survey, there is thought to be approximately eleven spaces available to serve the demands of the Energy Island Projects.



Mitigations and Legacy

- Identification of windfall sites. As these should be well related to existing services, Llanfechell is the suggested location
- There is good potential for affordable housing to support the Welsh language given the high proportion of speakers
- An initiative to encourage the apparent but limited potential of the tourism sector
- An initiative to encourage the latent potential presented by high under-occupation levels.



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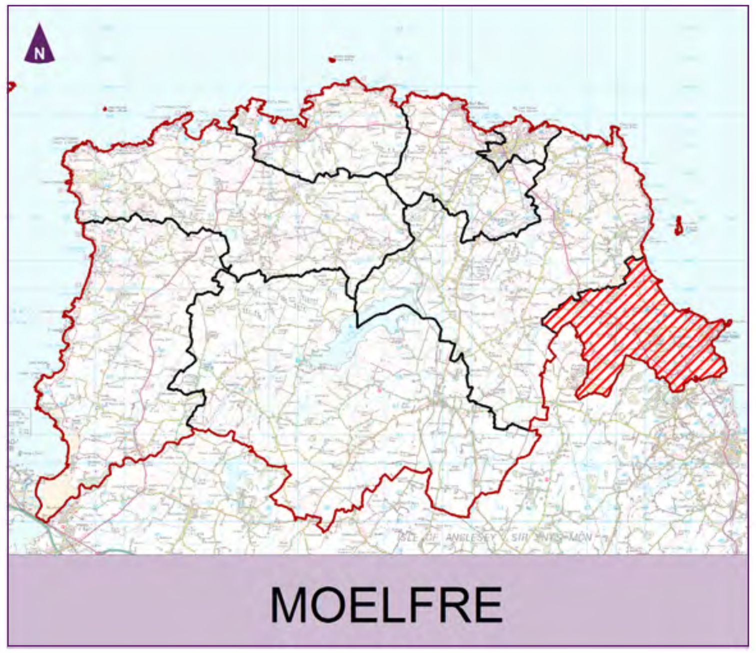
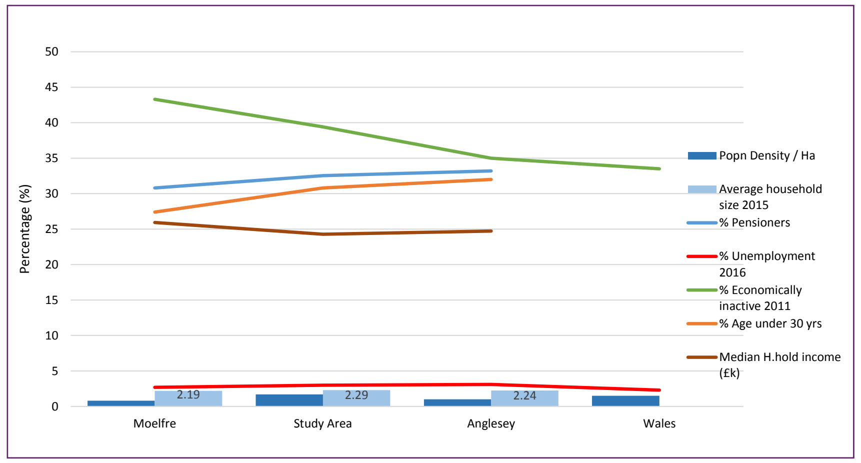


Socio-Economic Characteristics

- A coastal and rural ward with the Coastal Village of Moelfre within it.
- Household size (2.19 pph) is the lowest in the study area with the exception of Llanbadrig and below the Anglesey average
- A very high economically inactive population which is also the most aged in the study area. A rather lower level of pensioners suggests an incidence of economically inactive of non pensionable age
- Close to the highest average household income for the study area and higher than Anglesey
- A relatively low proportion are Welsh speakers (53%) relative to the Study Area (62%) and the island (59%).



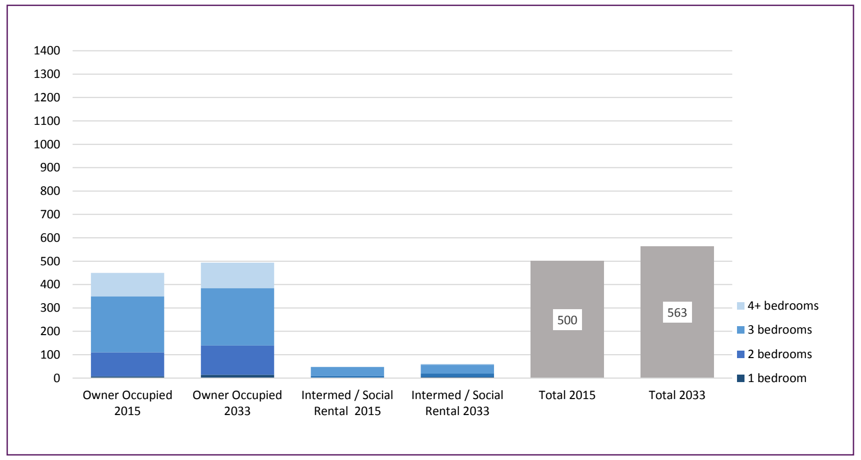
Housing Stock Characteristics

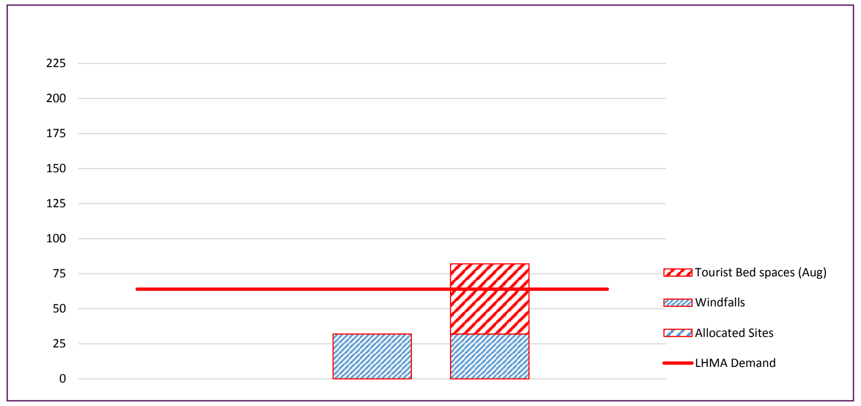
- Possesses high proportions of good sized detached and semi detached accommodation and is typical for the rural area
- The highest level of owner occupation (78%) in the study area
- The highest level of under-occupation (87% of households)
- The lowest incidence of overcrowding (0.8%).

Growth

Housing Growth & Supply

- An additional 64 dwellings are specified by the LHMA
- The majority of demand is for market dwellings with a particular emphasis on 2 bedroom dwellings
- Some intermediate tenure but with an emphasis on 3 bedrooms dwellings
- There are no housing allocations in Moelfre
- The proposed level of windfalls in draft JLDP will meet half the demand.
- The lowest proportion are Welsh speakers (53%) in the Study Area (62%).





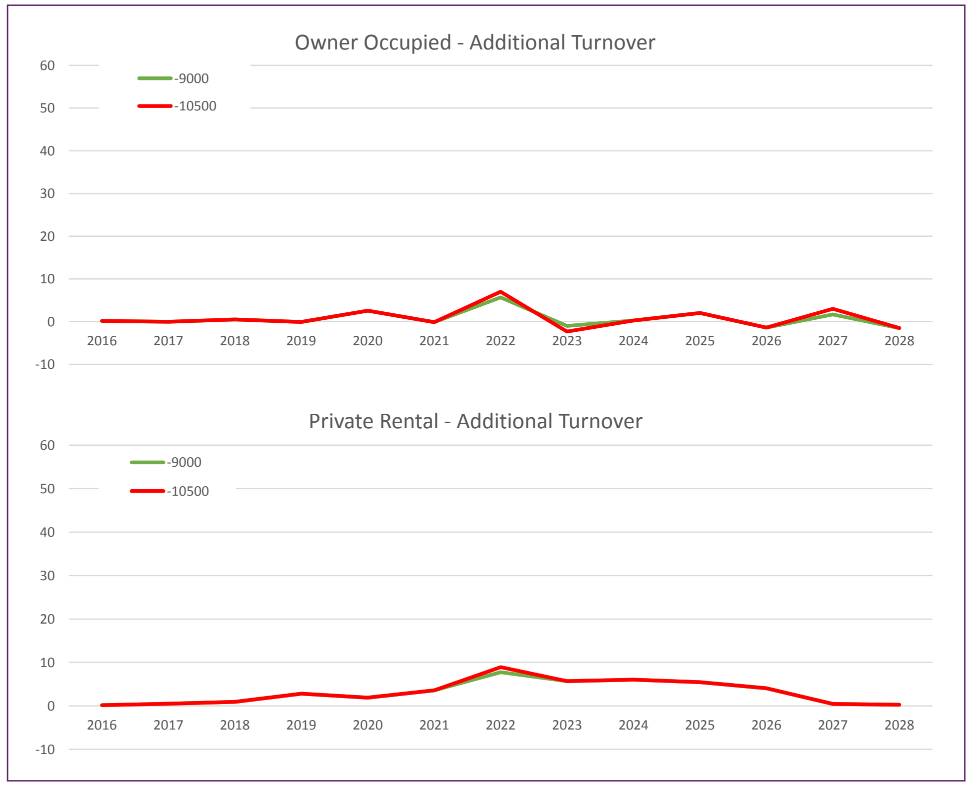
Infrastructure Issues

- Services are focused to Moelfre where there is post office and primary school
- Nursery provision across three sites is presently at capacity
- The primary school currently runs at 70% capacity. Birth rates are expected to generate additional requirements towards close to capacity at 2021 before any impact from the Energy Island Projects
- There are no primary care services.

Potential Impacts of Construction Workers

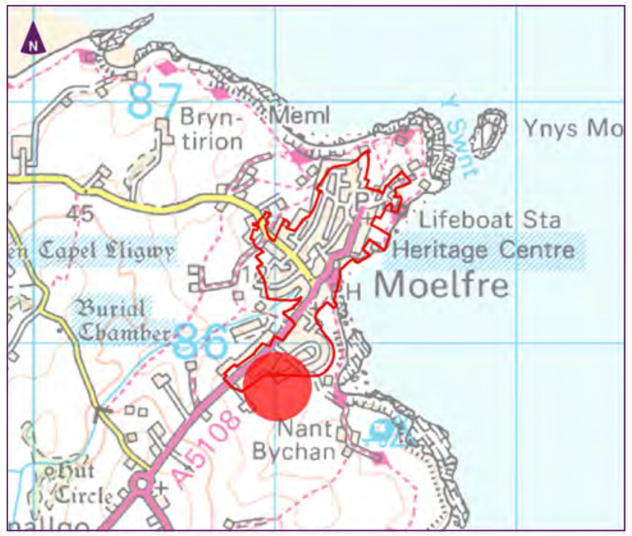
Housing Impacts

- Additional pressure on market dwellings expected to come from 2020 to 2022. This is expected to generate a demand for a site for up to seven dwellings by 2022
- Significant pressure expected on the private rental market from 2018 to 2026 peaking with a requirement for nine units in 2022 of which few are for one bedroomed accommodation
- Based upon the tourism bed space survey, there is thought to be approximately fifty spaces available to serve the demands of the Energy Island Projects.



Mitigations and Legacy

- Identification of windfall sites. As these should be well related to existing services, Moelfre is the suggested location
- There is potential for affordable housing to support the Welsh language given the proportion of speakers
- Additional nursery and primary school capacity maybe required in Moelfre before 2021.
- An initiative to encourage the apparent but limited potential of the tourism sector
- An initiative to encourage the latent potential presented by high under-occupation levels.



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