CYNGOR SIR YNYS MÔN
ISLE OF ANGLESEY COUNTY COUNCIL

Isle of Anglesey CC Construction Workers Accommodation. Evidence Base and Assumptions

ioacc

@angleseycouncil

May 2016

www.ynysmon.gov.uk

www.anglesey.gov.uk

CYNGOR SIR YNYS MÔN
ISLE OF ANGLESEY COUNTY COUNCIL

Document Version

No.	Details	Date
1	Draft for comment	31 May 2016
2		

Contents

1. Introduction

1.1 Requirement

1.1.1 The Isle of Anglesey County Council (IACC) prepared a Construction Workers Accommodation Statement in March 2011. The statement was based upon information available to the Council at that time with regard to the type and numbers of construction workers considered necessary to construct the proposed Nuclear New Build (NNB) at Wylfa as well as census and other information with regard to predicted population growth, dwelling numbers and economic profiles.

1.1.2 The proposed NNB has not come forward as quickly as thought in 2011 (the previous position statement anticipated a start of construction in 2013 and a peak in activity in 2017) to the extent that a number of the assumptions and predictions contained within the statement require reviewing and updating.

1.1.3 The position statement was informed by an evidence base and a process of optioneering, each stage being presented within a separate report. The final position of workers accommodated across a range of tenure types split 1/3, 1/3, 1/3 represented the 'preferred option'. Having this preferred option in mind has subsequently informed Council policy in the shape of the Wylfa Newydd SPG (2014) and the evolving Joint Local Development Plan (JLDP).

1.1.4 As noted above, the Council is aware that changes proposed by Horizon Nuclear Power with regard to the method and phasing of construction, the date for commencement, the associated development and the potential for other development to be taking place on Anglesey at the same time require an updated statement. The timing for the production of the update will be critical in that its conclusions will be used to inform the Council's response to PAC2 consultation and may also be used to amend policy guidance within the Wylfa Newydd SPG. The updated position statement may also influence wider Council policy.

1.2 Scope of Work

1.2.1 The County Council has instructed a consortium of consultants (Amec Foster Wheeler, HDH Planning Ltd and Aecom) to revisit the work previously undertaken in order to redefine the Council's position on construction worker accommodation. The resulting study involves a number of stages:

- Understand the existing housing market

- Understand the need for accommodation as a result of Wylfa Newydd and associated construction projects.
- Create a supply/demand model which is used to develop different accommodation scenarios
- Understand the infrastructure constraints and opportunities to accommodating construction workers across the Island
- Select a short-list of scenarios for assessment against a range of policy objectives
- Short-listed scenarios are assessed and a preferred scenario identified.
- Distribute spatially the preferred scenario seeking to reflect current infrastructure capacity and planning policy and identifying mitigation where appropriate.
- Propose the appropriate solution for the accommodation of construction workers that minimises negative effects upon infrastructure and local communities whilst maximising potential legacy benefits.

1.2.2 This document is the Evidence Base and Assumptions Report. It summarises the work undertaken to profile the current and projected housing market on the Island as well as the demand which may be expected to arise from the Wylfa Newydd project. Infrastructure capacity is also presented in order to inform future stages of the study.

2. The Local Housing Market

2.1.1 HDH Planning and Development Ltd has prepared an update of the Local Housing Market Assessment (LHMA) originally published for the Council in April 2013 based on data collected in June and July 2012.

2.1.2 An LHMA update report has been produced for two reasons, firstly because the Welsh Government require the LHMA outputs to be updated biannually and secondly to provide evidence to inform the Council's Housing Strategy. Essentially, the study also provides the baseline 'without Wylfa' scenario against which 'with Wylfa' scenarios are assessed.

2.2 Socio-economic Context

2.2.1 Two main drivers of the housing market are the resident population and the local labour market. They affect the nature of housing demand including household formation rates and households' investment in housing.

2.3 Resident Population

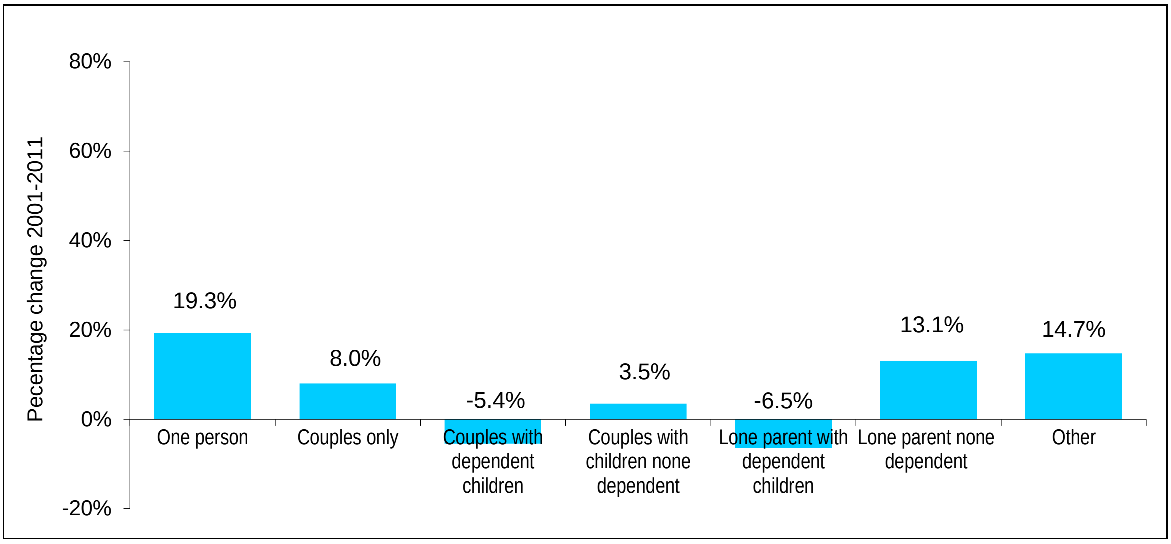
2.3.1 In 2011 the population of Anglesey was 69,751, representing an increase of 4.4% from 2001. Household growth has however risen faster than population growth showing a 7.7% rise in the same period.

2.3.2 The island's population is accommodated in 34,183 dwellings and the size of the housing stock has increased by 10.1% since 2001. The most common property type in the County is detached dwellings followed by terraced housing.

2.3.3 With regard to tenure, in 2011 68.8& of households in Anglesey were identified as being owner occupied with 14.6% residing in social rented accommodation and 14.1% renting in the private sector. The private sector has grown by over 60% between 2001 and 2011 and this substantial growth is similar to national trends.

2.3.4 With the number of households increasing at a faster rate than population growth it is not surprising that the average household size is falling. Figure 2.1 (overleaf) illustrates that there has been a 20% increase in the number of one person households between 2001 and 2011 with household types featuring dependent children reducing.

Figure 2.1 Change in household types resident in the Isle of Anglesey 2001 to 2011



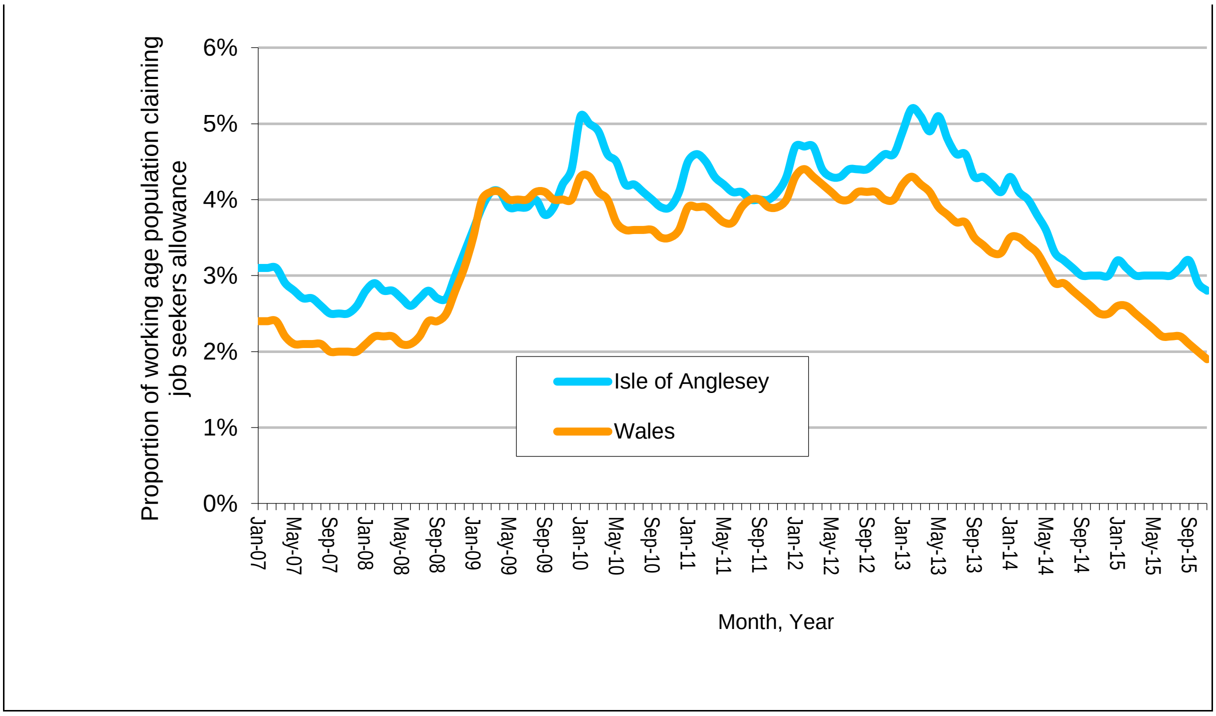
2.4 **Local Labour Market**

2.4.1 An understanding of the effect of the economy on the resident population is pertinent to this study.

2.4.2 The 2011 Census shows that of all residents in work in the Isle of Anglesey (excluding those who are also students), 17.7% are self-employed, with 58.7% full-time employees and 23.6% part-time employees. The level of self-employment is higher than the national average (14.9%). Since the 2001 Census the number of part-time employees in the Isle of Anglesey has increased by a third (29.3%), and the number of full-time employees has risen by 8.2%. The number of self-employed residents in the County has increased by 23.0%.

2.4.3 Figure 2.2 shows the change in the proportion of the working age population claiming Job Seekers Allowance in the County since January 2007. The figure indicates that the unemployment level, whilst fluctuating notably, has been consistently higher than the level for Wales. Currently 2.8% of the working age population are unemployed, higher than the national figure of 1.9%.

Figure 2.2 Level of unemployment in the Isle of Anglesey (2007-2015)



Source: ONS Claimant count

2.4.4 Unemployment therefore remains higher than the level recorded before the economic downturn (November 2007). This compares with a decrease in unemployment of 0.5% across Wales over the last eight years (November 2007 to November 2015).

2.4.5 Over the last twelve months unemployment has fallen notably in Anglesey (by 8.0%) and dramatically across Wales (by 22.0%).

2.4.6 Anglesey contains proportionally more residents working in professional or technical jobs than is found nationally, it also contains a lower than average level of working-age residents without any qualifications.

2.4.7 The Census presents a 'Standard Occupation Classification' which categorises all working people resident within an area into one of nine groups depending on the nature of the skills that they use. These nine groups are graded from managerial jobs (Groups 1-3) to unskilled jobs (Groups 8-9). As Table 2.1 illustrates below, some 35.2% of employed residents in the Isle of Anglesey work in Groups 1 to 3, and this is very similar to the figure for Wales as a whole. The Isle of Anglesey has a lower proportion of the workforce in occupation groups 8 to 9 than is found nationally with the reverse true for occupation groups 4 to 5. The table also shows that, since the 2001 Census, there has been a considerable increase in the number of people resident employed within Groups 6 to 7.

Table 2.1 Occupation structure

Occupation Groups	Isle of Anglesey 2011	Wales 2011	Change in % of people employed in the Isle of Anglesey since 2001
Group 1-3: Senior, Professional or Technical	35.2%	35.8%	18.9%
Group 4-5: Administrative, skilled trades	26.6%	24.5%	12.5%
Group 6-7: Personal service, Customer service and Sales	19.5%	19.6%	47.8%
Group 8-9: Machine operatives, Elementary occupations	18.7%	20.1%	-4.3%
Total	100.0%	100.0%	16.3%

Source: 2001 & 2011 Census

2.5 Income

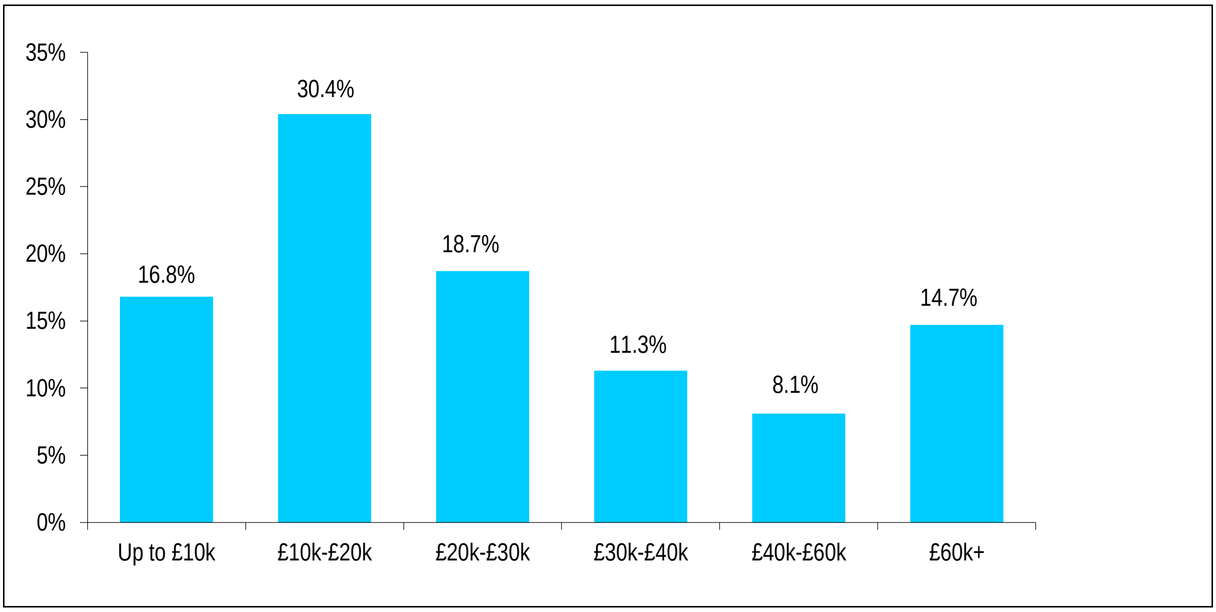
2.5.1 Income is a key determinant of household ability to afford accommodation.

2.5.2 The mean earned income for full-time employees resident in Anglesey in 2015 was £32,635, according to the ONS Annual Survey of Hours and Earnings, higher than the national average (£29,016).

2.5.3 The household survey dataset undertaken to inform the 2013 LHMA collected considerable information on the financial situation of households on Anglesey. The financial profile has been updated so that it reflects the situation in 2015 and the results suggest that the mean annual gross household income excluding housing benefits for the County is £32,684. The median household income is noticeably lower at £24,721.

2.5.4 Figure 2.3 shows the distribution of income. It is clear that there is a significant range of incomes, with 16.8% of households having an income of less than £10,000, and 14.7% of households having an income in excess of £60,000.

Figure 2.3 Distribution of annual gross household income (excluding housing benefits)



Source: Isle of Anglesey Local Housing Market Assessment update, 2015

2.5.5 The mean level of household savings is £23,267. The median figure for household savings is currently £3,008.

2.6 Current Dwelling Stock

2.6.1 As noted earlier in this section the Census indicates that there were 34,183 dwellings in Anglesey in 2011, and that since 2001 the number of dwellings has increased by 10.1%, over 3,100 properties. The Isle of Anglesey contains more detached houses and fewer flats than the national average with the most common property being detached houses followed by terraced dwellings.

2.6.2 Since 2001 the number of purpose built flats has increased markedly by 30.9%. The change in the number of houses has been less notable, although semi-detached properties have recorded the biggest rise (16.9%).

2.6.3 Table 2.2 compares the size of accommodation (in terms of bedrooms) in Anglesey and Wales. The table indicates that Anglesey has a larger proportion of large properties (four or more bedrooms) with fewer small homes (one or fewer bedrooms) than Wales as a whole. Overall, there is relatively little variety in the size of the housing stock with three bedroom homes accounting for almost half of all dwellings.

Table 2.2 Size of dwelling stock in the Isle of Anglesey and Wales, 2011

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

Source: 2011 Census

2.6.4 A comparison of property size between the 2001 and 2011 census suggests that the number of homes with 8 rooms or more (as opposed to bedrooms) has increased by 30%, 7 rooms by 16% whilst homes with five rooms have decreased by 2.8%. Overall the pattern appears to be an increase in large and smaller dwellings in Anglesey (properties with three rooms increasing by 27%).

2.7 Cost and Affordability

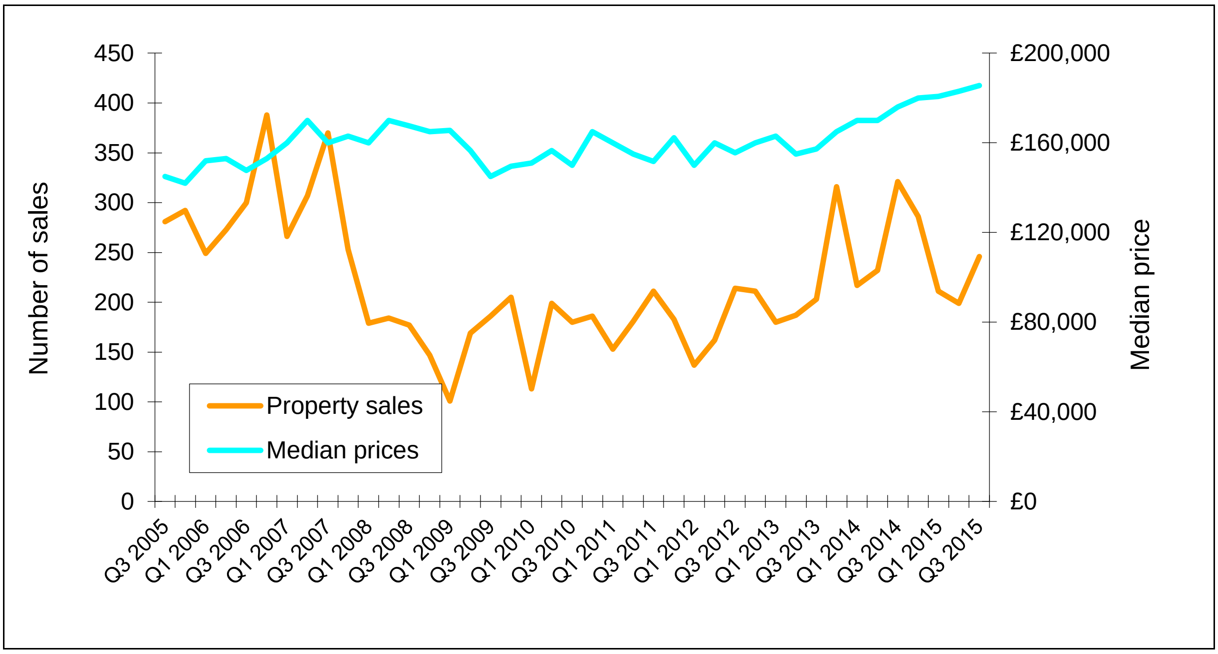
Owner-occupation

2.7.1 House prices have increased at a rate which is quicker than the national average. The mean price of dwellings on Anglesey is £186,229 which is higher than the national average £162,904. Prices have increased over the period 2011-2015 by 21.7% as opposed to a national average increase of just under 10%.

2.7.2 Table 2.3 indicates that the mean price of dwellings in quarter 3 2015, at £186,229, was notably higher than the national average. The table shows that between 2011 and 2015 average prices have increased at a faster rate in the Isle of Anglesey than they have nationally.

2.7.3 Overall, data suggests that property prices on Anglesey have remained fairly stable since 2005 despite property sales declining dramatically for part of that period (summer 2007 to summer 2009).

Table 2.3 Changes in prices and sales levels in the Isle of Anglesey over the past 10 years

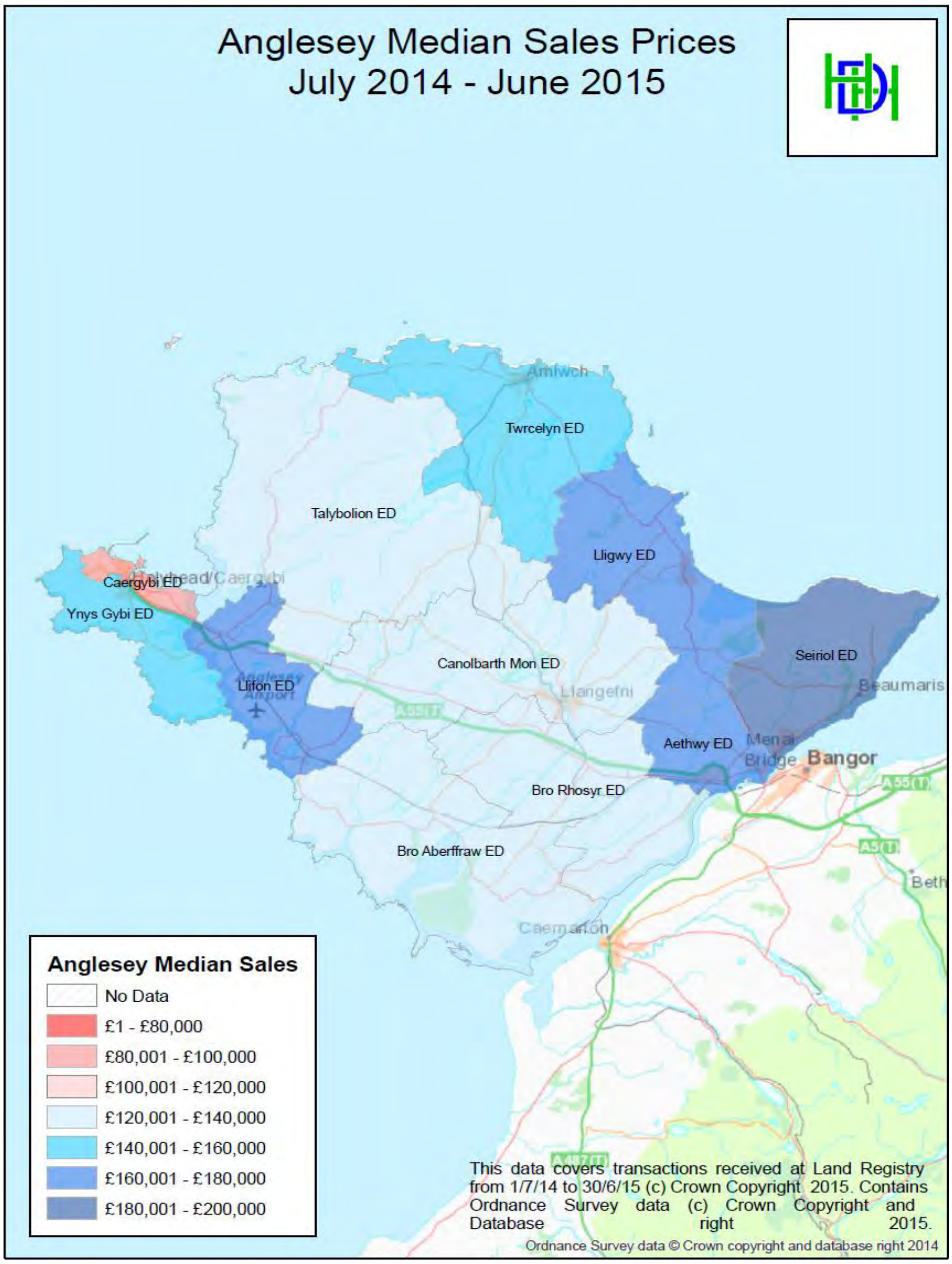


Source: Land Registry

2.7.4 To fully understand the affordability of housing within an area, it is necessary to collect data on the cost of housing by number of bedrooms. This ensures that it is possible to assess the ability of households to afford market housing of the size required by that particular household. However, no secondary data contains this information. Therefore a price survey has been undertaken to assess the current cost of market (owner-occupied and private rented) and affordable housing on Anglesey.

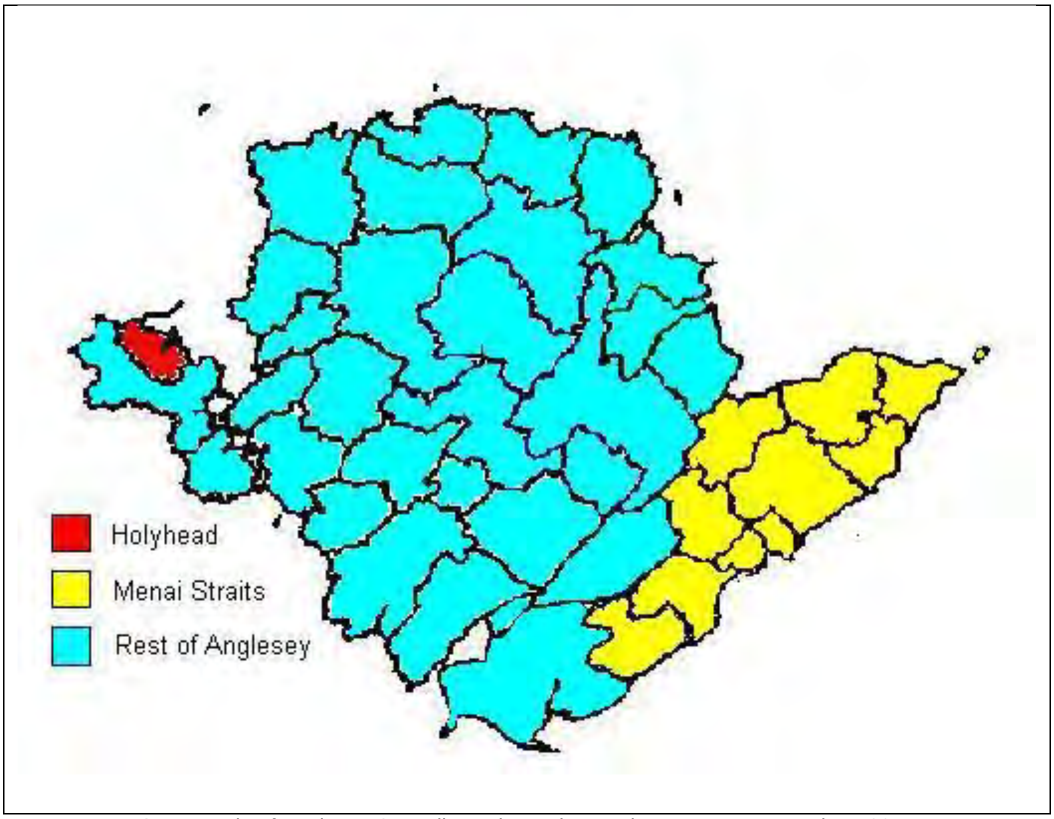
2.7.5 Prices across the island were examined using data from the Land Registry and the variation in the median price recorded in each part of the County is presented in Figure 2.4. It shows that homes in Holyhead are the cheapest with properties in the south east around Beaumaris the most expensive.

Figure2.4 Median Sales Prices 2014-2015



2.7.6 Overall the three broad price areas identified in the original LHMA report were still found to be in operation currently. The boundaries for the three areas identified are based on clear distinctions between the housing markets and the existing movement patterns of households within Anglesey These three price areas are set out in Figure 2.5.

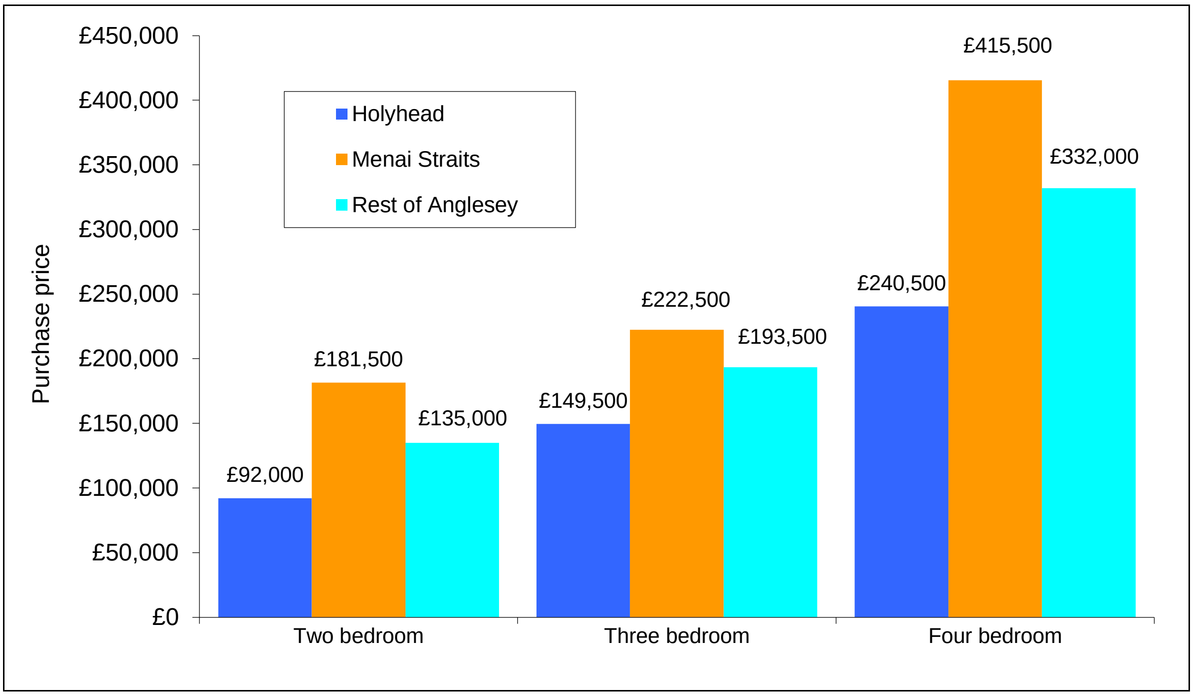
Figure 2.5 Price areas in the Isle of Anglesey



Source: Isle of Anglesey Council Local Housing Market Assessment Update, 2015

2.7.7 Median property prices by number of bedrooms were obtained in each of the three price markets via an online search of properties advertised for sale during December 2015. The results of this online price survey are presented in Figure 2.6. The prices recorded include a discount to reflect that the full asking price is not usually achieved (with sales values typically 5% lower). As one bedroom properties for purchase were found to be in relatively short supply across the County, two bedroom dwellings are considered to be the smallest property found to be widely available and form the market entry point for owner-occupation.

Figure 2.6 Median property prices by size and price market



Source: Online estate agents survey December 2015

2.7.8 The figure shows that in all price markets the difference between two and three bedroom homes is noticeably smaller than the difference between three and four bedroom homes. In terms of market availability the analysis showed that three bedroom properties are most commonly available to purchase in all price markets, followed by four bedroom homes, with two bedroom homes cost scarce.

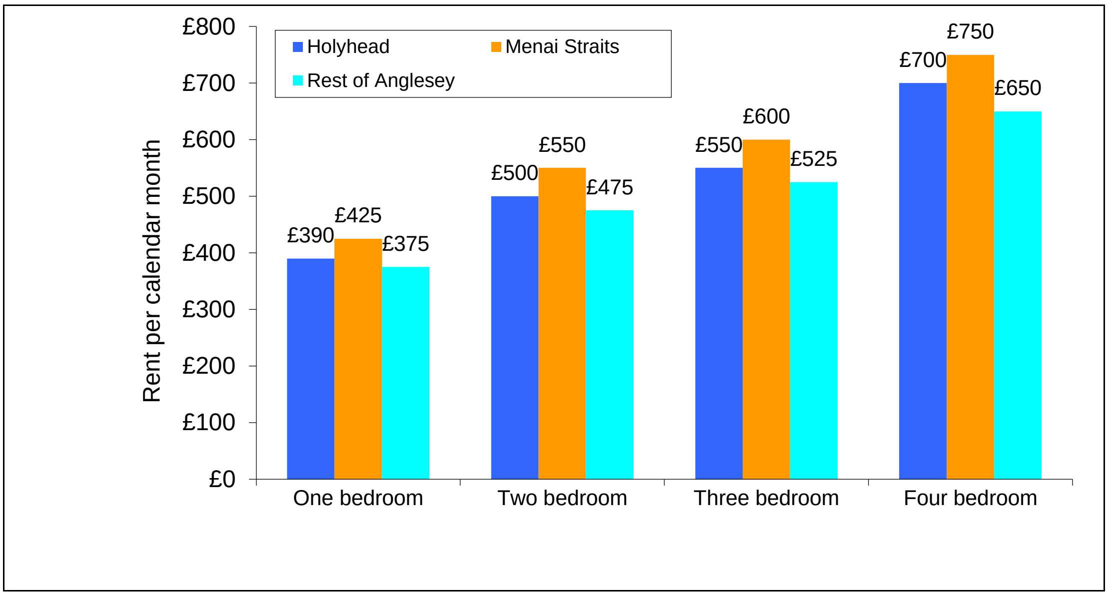
2.7.9 Entry-level prices (based on lower quartile prices) range from £80,000 for a two bedroom home in Holyhead, up to £312,500 for a four bedroom property in the Menai Straits. Entry-level prices have risen consistently across all dwelling sizes in Holyhead between 2012 and 2015 with four bedroom homes in the Menai Straits price market have recorded the largest increase.

2.8 Private Rents

2.8.1 The private renting market provides another opportunity to gain access to housing. The LHMA study found that whilst private rent levels vary by price market across Anglesey, the distinction between the areas is less marked than with owner-occupation, reflecting that location is not as important a determinant in rent levels as condition and situation of the property.

2.8.2 The figure shows that, as with owner-occupation, the smallest difference is between the cost of a two and three bedroom dwelling in all price markets. The difference between the cost of three and four bedroom accommodation is less marked in the private rented sector than for owner-occupation. In addition, the profile of properties available is somewhat different to that for purchase with a greater proportion of two bedroom homes available to rent in all price markets.

Figure 2.7 Median private rents by size and price market

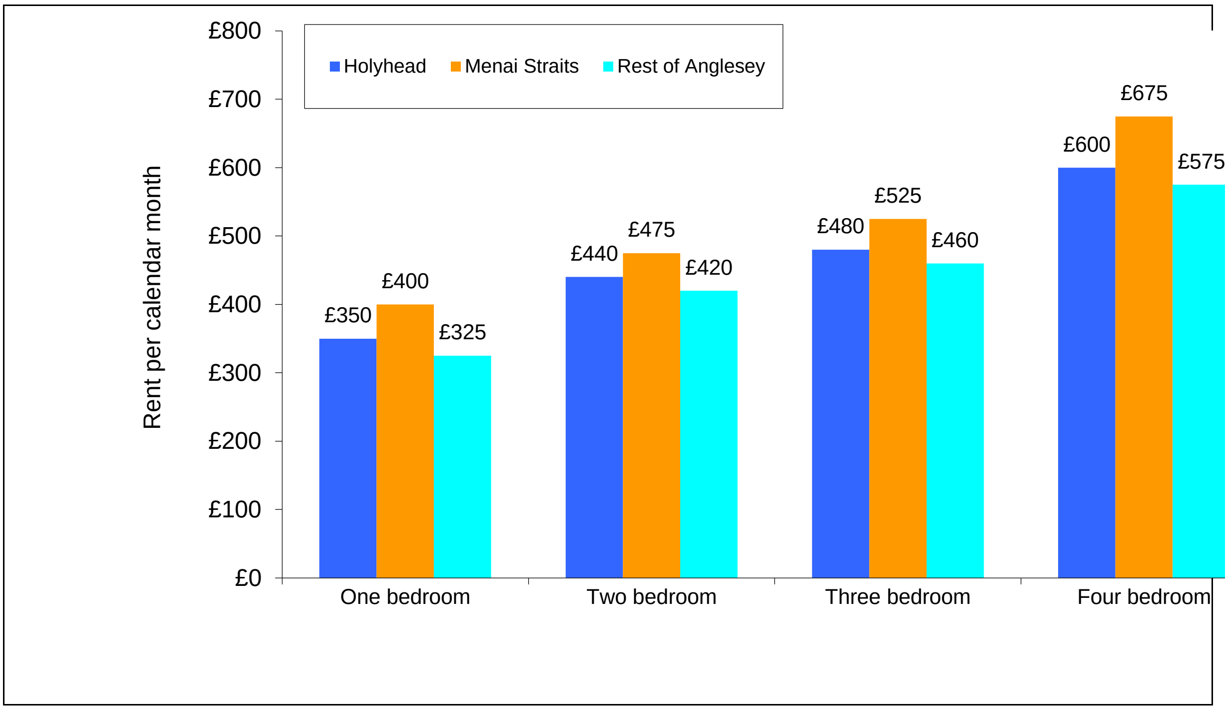


Source: Online letting agents survey December 2015

2.8.3 Entry-level private rents for each price market are presented in Figure 2.8. The figure indicates that entry-level rents range from £350 per month for a one bedroom home in Holyhead up to £675 per month for a four bedroom property in the Menai Straits.

2.8.4 An understanding of this number is important as it can be susceptible to demand. For example, the greater the level of demand influenced by construction workers, may increase prices to an extent that existing local communities begin to be displaced from the private rented sector.

Figure 2.8 Entry-level private rents by size and price market



Source: Online letting agents survey December 2015

2.8.5 Entry-level prices have fallen in all cases other than three bedroom homes in the Menai Straits, which have not changed over the last three years. Overall rents have decreased the most in the Rest of Anglesey price market.

2.8.6 In addition to the private rented market, the social market is important for this tenure. The cost of social rented accommodation by dwelling size can be obtained from the Welsh Government's StatsWales service. Table 2.4 below illustrates the cost of current social rented lettings. The costs are significantly below those for private rented housing, particularly for larger houses, indicating a significant potential gap between the social rented and market sectors.

Table 2.4 Social rent costs (per month)

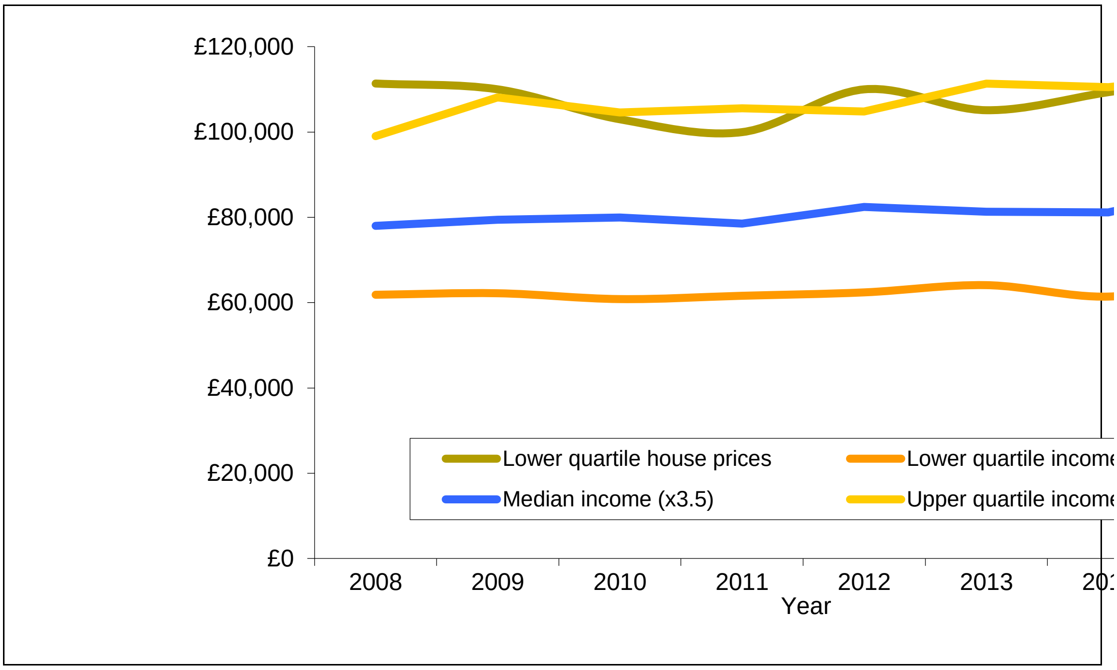
Bedrooms	Isle of Anglesey
One bedroom	£288
Two bedrooms	£311
Three bedrooms	£344
Four bedrooms	£389

2.8.7 Assessing the affordability of market housing in an area is crucial to understanding the sustainability of the housing market. The affordability of housing in an area is measured by the ratio of market housing costs to income in that area.

2.8.8 Figure 2.9 shows the lower quartile, median and upper quartile income of full-time workers multiplied by 3.5 (the income multiple typically used by mortgage lenders) compared to lower quartile prices in the County (set out in Figure 2.1). Although this analysis is based on individual incomes rather than household incomes, it is useful to consider as it is the affordability comparison that the government monitor.

2.8.9 The figures show that full-time workers with earnings at the upper-quartile level would just be able to purchase an entry-level property in Anglesey. However full-time workers with earnings at the lower quartile or median level would require substantial additional income or a capital sum to deduct from the purchase price to be able to afford a lower quartile property in the County. It is clear that affordability theoretically improved immediately after the economic downturn (discounting the greater difficulty of acquiring a mortgage) and the affordability gap has reduced slightly since. Whilst in 2008, lower quartile prices were 5.0 times higher than median full-time incomes in the Isle of Anglesey, in 2015 they were 4.5 times higher.

Figure 2.9 Individual earnings compared with lower quartile prices in the Isle of Anglesey



Source: Land Registry via CLG; Annual Survey of Hours and EarningsSpecific Theoretical Affordability

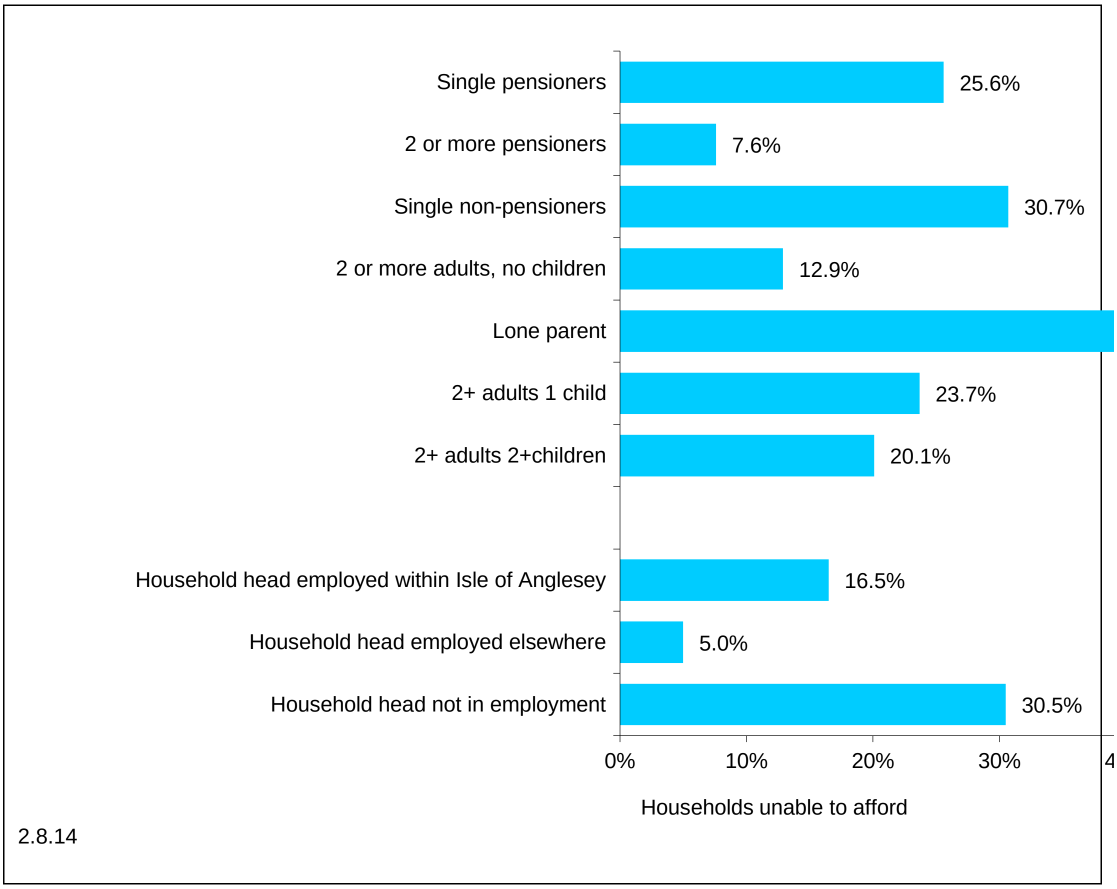
2.8.10 The information on the financial profile of households contained within the updated household survey dataset alongside data on the cost of entry-level housing in their specific price market can be used to examine the ability of households to afford housing locally, (based on the affordability criteria set out in LHMA Guide).

2.8.11 Figure 2.10 shows the current affordability of households by household type and location of employment of household head. This is theoretical affordability of households as the analysis considers all households and does not take into account their intention of moving.

2.8.12 The data indicates that 42.4% of lone parent households would be unable to afford market housing (if they were to move home now). Single person households are also relatively unlikely to be able to afford. Households that contain two or more pensioners, are most likely to be able to afford market housing.

2.8.13 Some 16.5% of households headed by someone employed in the County would be unable to afford market housing on Anglesey (if they were to move now) compared to only 5.0% of households headed by someone employed outside of the island.

Figure 2.10 Theoretical affordability of market housing in the Isle of Anglesey



Source: Isle of Anglesey Council 2015 Local Housing Market Assessment Update

3. The Future Housing Market

3.1 Introduction

3.1.1 This chapter presents the demographic projections for the Isle of Anglesey and describes the predicted changes in both the population size and composition that can be anticipated up to 2026 (the JLDP plan period). These projections are then modified and extended to include the anticipated demand from construction workers as a result of the proposed Wylfa Newydd generating station (this latter exercise is reported in Chapter 4).

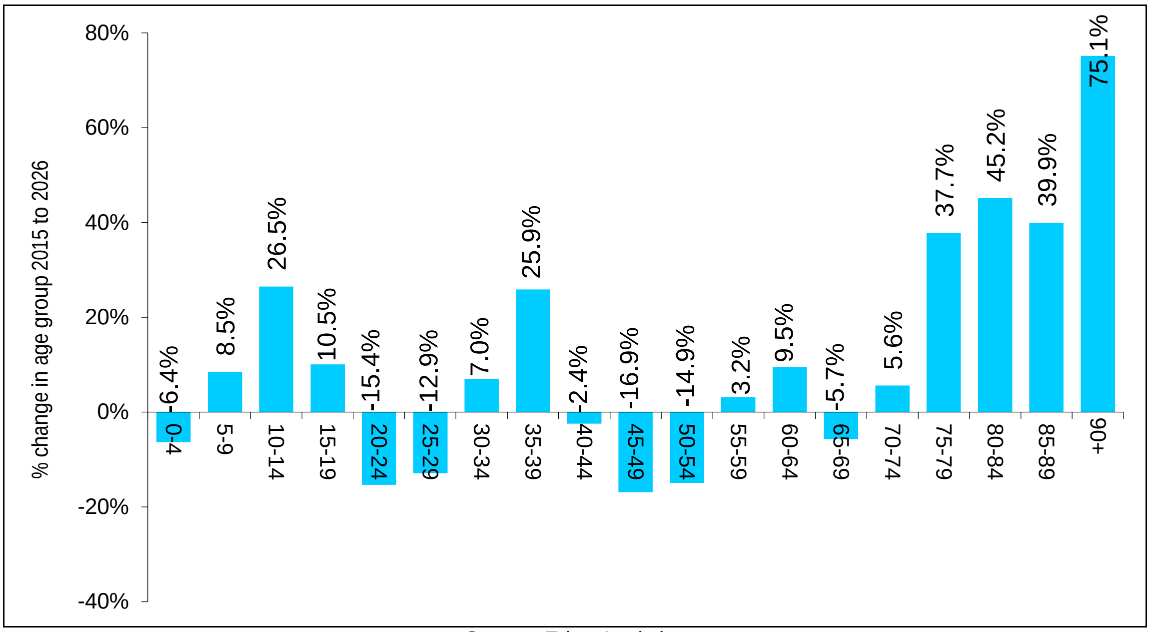
3.2 Demographic Projections

3.2.1 Edge Analytics have produced population and household growth forecasts for both the Isle of Anglesey and Gwynedd1. These use the data contained within the recent demographic projections published by the Welsh Government to produce a range of scenarios for future growth in the area dependent on different conditions. The most appropriate scenario for the Isle of Anglesey used to inform the JLDP is the dwelling led (preferred) scenario. This indicates that between 2015 and 2026 the household population in the County is going to increase by 2,420, which equates to 220 households per year.

3.2.2 The population projections can be disaggregated into each five year age cohort. Figure 3.1 shows the projected change within each age cohort between 2015 and 2026. The population projection data indicates that there will be reductions in a large number of age groups (including the 15-34 and 40-54 age ranges) but some cohorts are predicted to grow dramatically. The largest growth is projected to be in the number of people aged between 90 or over.

[1] Edge Analytics *Gwynedd & Anglesey Population & Household Forecasts Assumptions, Methodology & Scenario Results* (September 2014)

Figure 3.1 Forecast population change by age group in the Isle of Anglesey, 2015 – 2026



Source: Edge Analytics

3.2.3 The projections suggest that the number of households is set to increase at a faster rate to the population, therefore it is anticipated that the average household size will decrease from 2.28 to 2.23 persons over the next 11 years.

Table 3.1 Change in population, households and household size, 2015 – 2026

	2015	*2026*	*% change*
Population in households	71,015	74,931	+5.5%
Households	31,165	33,585	+7.8%
Average household size	2.28	2.23	

Source: Edge Analytics

3.2.4 The LHMA study applies these population and household projections to the household survey dataset to provide an estimated household profile in the Isle of Anglesey in 2026. This profile is informed by a consideration of the inadequacy of housing stock which is defined as a household indicating that they need to move home now because of current, inadequate accommodation.

3.3 Tenure of Housing Required

3.3.1 Table 3.2 shows the ideal tenure profile in Isle of Anglesey in 2026 (if all households are to be adequately housed). The data shows that in 2026 the housing market should comprise 84.4% of market dwellings, 0.4% shared ownership or help-to-buy 1.3% intermediate rent and 14.0% social rented.

Table 3.2 Ideal tenure profile in 2026

Tenure	*Number of households*	*Percentage of households*
Market	28,342	84.4%
Shared ownership/help-to-buy	128	0.4%
Intermediate rent	427	1.3%
Social rented	4,688	14.0%
Total	33,585	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2015

3.3.2 Table 3.3 shows the tenure profile required by households resident in the Isle of Anglesey in 11 years' time in comparison to the tenure profile recorded currently. The difference between these two distributions is the change required to the housing stock over this period. The results show that 70.5% of new housing should be market accommodation, 2.8% shared ownership/help-to-buy, 16.9% intermediate rent and 9.8% social rent.

Table 3.3 Tenure of new accommodation required in the Isle of Anglesey over the next 11 years

Tenure	Current tenure profile	Tenure profile 2026	Change required	% of change required
Market	26,636	28,342	1,706	70.5%
Shared ownership/help-to-buy	60	128	68	2.8%
Intermediate rent	18	427	409	16.9%
Social rented	4,451	4,688	237	9.8%
Total	31,165	33,585	2,420	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2015

3.3.3 The LHMA model is able to also provide detail on the size of new dwellings required within the market tenures, as is set out in the section below.

3.4 Size of Housing Required Within Each Market Tenure

3.4.1 Table 3.5 presents the size of market accommodation required in the Isle of Anglesey in 2026 in comparison to the size profile recorded in the sector currently. The implied change to the housing stock is also presented. The table shows that some 43.1% of new market dwellings should be three bedroom properties, with 31.1% containing two bedrooms, 23.0% having four or more bedrooms and 2.8% having one bedroom.

Table 3.5 Size of new market accommodation required in the Isle of Anglesey over the next 11 years

Dwelling size	Current size profile	Size profile 2026	Change required	% of change required
One bedroom	904	952	48	2.8%
Two bedrooms	5,925	6,456	531	31.1%
Three bedrooms	13,452	14,187	735	43.1%
Four or more bedrooms	6,355	6,747	392	23.0%
Total	26,636	28,342	1,706	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2015

3.4.2 This analysis can be repeated for shared ownership/help-to-buy housing and is presented in Table 3.6. The data indicates that of the 68 shared ownership/help-to-buy dwellings required within the County, 35.4% should be two bedroom properties with a further 35.4% one bedroom accommodation. Some 25.1% should have three bedrooms and 4.1% should be four bedroom accommodation.

Table 3.6 Size of new shared ownership/help-to-buy accommodation required in the Isle of Anglesey over the next 11 years

Dwelling size	Current size profile	Size profile 2026	Change required	% of change required
One bedroom	4	28	24	35.4%
Two bedrooms	21	45	24	35.4%
Three bedrooms	26	43	17	25.1%
Four or more bedrooms	9	12	3	4.1%
Total	60	128	68	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2015

3.4.3 The results for intermediate rented housing are presented in Table 3.7. The data indicates that of the 409 additional intermediate rented dwellings required within the Isle of Anglesey, some 38.6% should be three bedroom properties with a 33.3% two bedroom accommodation. Some 21.3% should contain four or more bedrooms and 6.8% a single bedroom.

Table 3.7 Size of new intermediate rented accommodation required in Isle of Anglesey over the next 11 years

Dwelling size	*Current size profile*	*Size profile 2026*	*Change required*	*% of change required*
One bedroom	0	28	28	6.8%
Two bedrooms	11	147	136	33.3%
Three bedrooms	5	163	158	38.6%
Four or more bedrooms	2	89	87	21.3%
Total	18	427	409	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2015

3.4.4 Table 3.8 shows the equivalent results for the social rented sector. The Table shows that of the 237 additional social rented units required within Isle of Anglesey over the next 11 years, 43.8% should be four bedroom accommodation, 28.9% one bedroom dwellings, 16.3% two bedroom properties and 11.1% three bedroom units.

Table 3.8 Size of new social rented accommodation required in Isle of Anglesey over the next 11 years

Dwelling size	*Current size profile*	*Size profile 2026*	*Change required*	*% of change required*
One bedroom	507	575	68	28.9%
Two bedrooms	1,609	1,648	39	16.3%
Three bedrooms	2,215	2,241	26	11.1%
Four or more bedrooms	120	224	104	43.8%
Total	4,451	4,688	237	100.0%

Source: Isle of Anglesey Local Housing Market Assessment Update, 2015

4. Demand from Wylfa Newydd

4.1 Introduction

4.1.1 The previous chapter sets out the amount and size of accommodation and type of tenure required to accommodate the resident population of Anglesey in 2026 based upon population projections. This section introduces the anticipated demand that may arise as a result of the construction of the proposed Wylfa Newydd Generating Station (Wylfa Newydd) and its associated developments. It sets out the type and number of workers, their respective income groups and anticipated lengths of stay during the construction process.

4.1.2 Having developed an understanding of the above, Chapter 5 will then consider opportunities for supply, to house both the current and projected resident population and the construction workers associated with Wylfa Newydd.

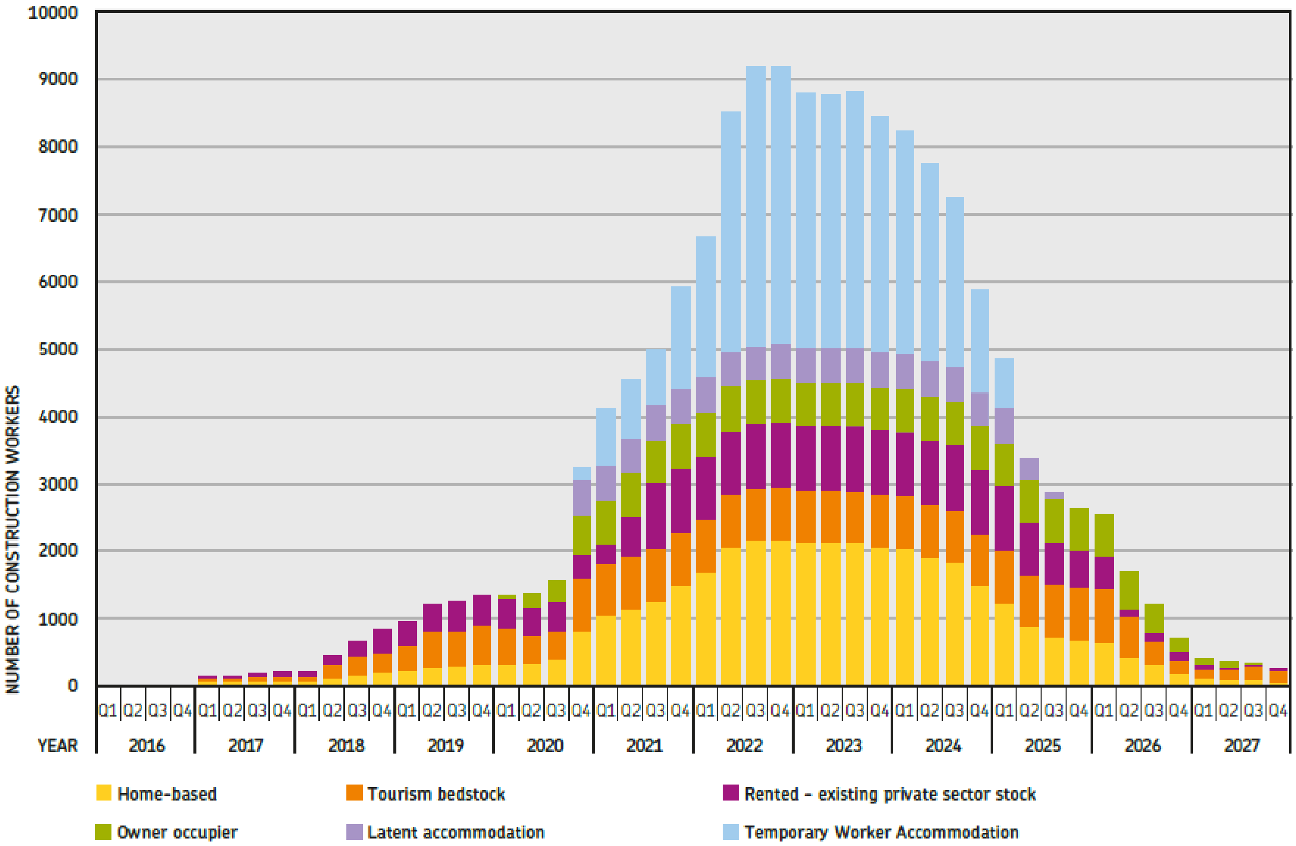
4.2 Projected Worker Profile

4.2.1 It is understood that Horizon Nuclear Power (HNP or Horizon) has undertaken a number of studies, and consulted with potential contractors to understand both the likely number of workers required to construct the generating station, the type of workers, length of stay and location of stay (some will already be based in North Wales (termed home-based by Horizon) whilst others will move to North Wales (termed non-home-based)). Horizon's current position is set out within the Construction Worker Accommodation Strategy 2016. This establishes the currently understood, total peak number of construction workers of 9,200. It sets out a number of assumptions which have been used to develop the Accommodation Strategy namely that:

- 25% or 2,300 construction workers would already be living within commuting distance of the generating station
- 670 construction workers are likely to purchase property within commuting distance of the generating station
- 6,230 construction workers are expected to require some form of temporary accommodation which could include up to 3,000 beds identified in existing private rented accommodation and tourism provision as well as new beds coming to market, known as 'latent' accommodation

4.2.2 Based on the above, the Strategy estimates that around 4,000 workers will require purpose built temporary accommodation. Horizon's accommodation strategy then estimates demand across the temporary accommodation types and the figure below is taken from the Accommodation Strategy.

Figure 4.1 Worker numbers and accommodation type. Horizon.



4.2.3 Horizon uses the following description for each accommodation type, and for consistent the same definitions have been used for this study.

- New stock:
  - New build permanent housing
  - Renovation and re-use of empty homes
  - Specially provided ‘Temporary Workers’ Accommodation’
- Market accommodation (both private rented and owner-occupied)
  - Existing housing
  - New bedspaces coming to the market – latent demand
- Existing tourism accommodation

4.3 Worker Profile – Demand Modelling

4.3.1 The Wylfa demand modelling is based upon information contained within the Horizon Accommodation Strategy and the supporting data which sits behind the strategy. The approach to modelling demand was undertaken in several stages:

- Stage 1a. The total anticipated construction workforce demand broken down into four broad occupation groups was reviewed;
- Stage 1b. The 'local-labour' participation rate was deducted from the total workforce demand. This is the proportion of workers that already live in Anglesey or North Wales and therefore will not be seeking new accommodation;
- Stage 1c. The duration of stay for worker occupation groups was determined based upon the monthly changes in demand (up to 6 months, 7 to 42 months and 43 or more months);
- Stage 1d. The annual demand for worker occupation groups split by the duration of stay was calculated for each category. This was based upon the monthly peak demand within a calendar year;
- Stage 1e. UK mean gross annual earnings were applied to the four broad occupation groups to understand the difference in incomes compared to the mean resident annual earnings in Anglesey;
- Stage 2a. Assumptions were made on the broad accommodation preferences of each construction worker group for each duration of stay period.
- Stage 2b. The peak bedspace requirement arising from the presumed accommodation distributions were generated.
- Stage 2c: To model the likely demand within the housing market in more detail (in terms of size and locations sought) the household typology of construction workers moving into this accommodation was assumed based on evidence from other equivalent projects.
- Stage 2d: The assumed dwelling requirement arising from construction workers not forming their own household, but merging with others to become part of a larger household was modelled.
- Stage 2e: The likely size and location of homes required to accommodate construction worker households within both the owner-occupied and private rented sectors were determined using the updated household survey dataset.

4.3.2 Following these steps a demand profile was generated for construction workers detailing, the amount and location of each accommodation required within every year of the construction period. The demand profile for the owner-occupied and private rented sectors also detailed the size of home required within these tenures.

4.3.3 Stage 1a analysed the total workforce across four different worker occupation groups. The peak demand in October 2022 is shown below in Table 4.1.

Table 4.1 Wylfa Newydd Peak Construction Workforce – All workers

Employment category	*Peak number employed*	*Peak percentage*
Professional	2,599	28.25%
Mechanical & Electrical operatives	1,732	18.83%
Civil operatives	4,000	43.48%
Site services, Security, Clerical and Facilities Management.	869	9.45%
Total	9,200	100%

Source: Jacobs, 2015; Initial TWA Gravity Model Rev 1

4.3.4 Stage 1b removed home-based workers from the total construction workforce following the proportions specified in Jacobs' Gravity Model. This produces an estimate of the non home-based workforce that will move into Anglesey or North Wales. Horizon's current plans are to secure a Local Labour Participation Rate of 15% to 25%, with 25% being the preferred target. This total participation rate varies across the different occupation groups as set out below:

- 9.0% - Civil Operatives;
- 2.7% - Mechanical and Electrical Operatives;
- 2.1% - Professional Staff (Management, supervisors etc.); and
- 11.3% - Site services, Security, Clerical and Facilities Management.

4.3.5 The local labour participation rate was applied to the total workforce to determine the non home-based workforce in each month of construction. The peak month of October 2022 the hon home-based workforce is summarised in Table 4.2 below. Note that this does not necessarily reflect the 25% Local Labour Participation Rate or the rate for occupation groups as these are targets across the whole build period. In the peak month of October 2022 Horizon plan to use all local labour to fill the 869 positions required for site services, security, clerical and facilities management.

Table 4.2 Wylfa Newydd Peak Construction Workforce – Non home-based

Employment category	*Peak number employed*	*Peak percentage*
Professional	2,406	34.1%
Mechanical & Electircal operatives	1,484	21.0%
Civil operatives	3,172	44.9%
Site services, Security, Clerical and Facilities Management.	0	0.0%
Total	7,061	100%

Source: Jacobs, 2015; Initial TWA Gravity Model Rev 1

4.3.6 Stage 1c analysed the duration that non-home based workers are expected to stay for. This was determined by looking at the changing profile of demand over the build programme for each occupation group of non-home based workers and categorising demand into the following durations:

- Short term up to 6 months;
- Medium term 7 to 42 months; and
- Long term 43 or more months.

4.3.7 For example in October 2022 it is expected that there is a demand for 3,000 non home-based civils operatives. Of these, 155 are estimated to be needed for up to 6 months, 1,460 are estimated to be needed for between 7 and 42 months, and 1,385 are estimated to be needed for more than 43 months.

4.3.8 In practice more workers may stay for short and medium term durations than predicted from this methodology. However without knowing the in and out flows of workers this cannot be quantified. This information is not expected until the main contractors are appointed and they develop their plans in more detail.

4.3.9 Stage 1d annualised the monthly worker demand. This meant that the monthly peak demand for occupation groups and duration of stay categories was used for the calendar year. The monthly peak within the calendar year was selected because this reflects the worst case position. But it means that the totals for worker occupations and duration of stay do not always sum. Table 4.1a and Table 4.2a in the Appendix show the annualised peak demand for workers. Table 4.2a shows the annual peak demand for non home-based workers which was used in the model.

4.3.10 Stage 1e applied earnings data to the different occupation groups of non home-based workers. This is an important step because the earnings and duration of stay of non home-based workers will influence their accommodation choices. For example it is assumed that higher earning workers who stay for the length of the project are more likely to seek permanent accommodation, as opposed to those on lower earnings and short-term contracts. The earnings of non home-based workers may also be higher than the earnings of local residents in Anglesey and North Wales.

4.3.11 UK mean gross annual earnings for full-time employees were sourced from the Office for National Statistics' 2015 Annual Survey of Hours and Earnings. This data set provides earnings for different Standard Occupational Classification 2010 (SOC2010) groups which reflect the variety of occupations across the labour market. These SOC2010 groups align with the occupation groups specified in the Gravity Model and in Stage 1a. This is presented below in Table 4.3.

Table 4.3 Non Home-Based Workforce Earnings

Occupation group	*SOC2010 group*	*UK mean gross annual earnings*
Professional	2 – Professional occupations	£41,796
Mechanical & Electrical operatives	52 – Skilled metal, electrical and electronic trades	£30,350
Civil operatives	53 – Skilled construction and building trades	£27,180
Site services, Security, Clerical and Facilities Management.	92 – Elementary administration and service occupations	£19,118

Source: ONS, 2015; Annual Survey of Hours and Earnings Table 14.7a Annual Pay Gross

Stage 2a. To profile the potential requirement from construction workers for each accommodation type within a demand-led approach (rather than the supply-led approach used in the Gravity model) it was necessary to make assumptions about the likely distribution of workers across the accommodation type options. The distributions derived were dependent on the occupation group (and associated income) and the expected duration of stay of the construction workers. The distribution profiles produced were determined by information from equivalent projects elsewhere and previous experience in planning for the Wylfa development in Anglesey. They were however also framed by the potential total supply of these accommodation types (to ensure they corresponded to the reality of the housing options available). The resultant assumed distributions for each group are set out in the table below

Table 4.4 Presumed accommodation distribution of construction workers by type and duration of stay

Construction worker type	*Duration of stay*	*Temporary worker accommodation*	*owner-occupied*	*private rented*	*Tourist accommodation*	*Latent accommodation*
Civil operatives	Up to 6 months	75.0%	0.0%	0.0%	15.0%	10.0%
	7 to 42 months	75.0%	0.0%	10.0%	15.0%	0.0%
	43+ months	55.0%	10.0%	25.0%	10.0%	0.0%
Mechanical and Electrical Operatives	Up to 6 months	70.0%	0.0%	0.0%	25.0%	5.0%
	7 to 42 months	60.0%	5.0%	20.0%	15.0%	0.0%
	43+ months	47.5%	10.0%	35.0%	7.5%	0.0%
Professional Staff	Up to 6 months	60.0%	0.0%	0.0%	15.0%	25.0%
	7 to 42 months	42.5%	10.0%	30.0%	7.5%	10.0%
	43+ months	27.5%	30.0%	30.0%	7.5%	5.0%
Site services, security and facilities management	Up to 6 months	95.0%	0.0%	0.0%	5.0%	0.0%
	7 to 42 months	75.0%	0.0%	5.0%	20.0%	0.0%
	43+ months	70.0%	5.0%	5.0%	20.0%	0.0%

4.3.12 Stage 2b calculated the annual bedspace requirement within this demand-led model. The peak bedspace requirement for each accommodation type was generated by applying the total number of each construction worker type within each duration of stay period to the proportion assumed to be resident within each accommodation category and summing the totals.

4.3.13 Stage 2c applied household type assumptions to the profile of construction workers moving into both the private rented and owner-occupied sectors based on their occupation group alongside information provided by Horizon and evidence from other major construction projects. The household type profiles were crucial assumptions for enabling the likely demand of those construction workers to be housed in the market to be derived, which would allow a much more detailed understanding of the potential impact on the housing market for the existing household population in the Isle of Anglesey. The assumptions for the construction workers moving to owner-occupation and a private rented home are set out in the following two tables.

Table 4.5 Household type assumptions for construction workers entering owner-occupation

Household type	Civils Operatives	Mechanical and Electrical Operatives	Professional Staff	Site services, security and facilities management
Single person	85.0%	85.0%	40.0%	85.0%
Multi-adult no children	10.0%	10.0%	30.0%	10.0%
Households with children*	5.0%	5.0%	30.0%	5.0%
Total	100.0%	100.0%	100.0%	100.0%

*5% of civil operatives, mechanical and electrical operatives and site services, security and facilities management are assumed to be households with children. This allows for an additional 1% of sensitivity on top of the 4% of Sizewell B operatives reported to be non-single households with dependents (paragraph 13.200 of the Socio-Economics Chapter in the Progress Report). 30% of professional staff are assumed to be households with children. This is based upon 25% of the Sizewell B professional staff being non-single households with dependents. An additional 5% is added on the assumption that professional households seeking owner occupied accommodation are more likely to be families than professional households seeking private rented accommodation.

Table 4.6 Household type assumptions for construction workers entering private rented accommodation

Household type	Civils Operatives	Mechanical and Electrical Operatives	Professional Staff	Site services, security and facilities management
Joining with existing private rented household (shared house)	10.0%	10.0%	5.0%	15.0%
Forming households with other workers at site*	65.0%	65.0%	35.0%	70.0%
Single person	10.0%	10.0%	20.0%	5.0%
Multi-adult no children	10.0%	10.0%	20.0%	5.0%
Households with children**	5.0%	5.0%	20.0%	5.0%
Total	100.0%	100.0%	100.0%	100.0%

* Monitoring information on the use of the private rented sector accommodation during the construction of Sizewell B showed that two thirds of the workforce using such accommodation were sharing with other Sizewell B non-home-based workers.
**5% of civil operatives, mechanical and electrical operatives and Site services, security and facilities management are assumed to be households with children as set out in the table footnote above. 20% of professional staff are assumed to be households with children to account for a greater proportion of professional households with families likely to be seeking owner occupied accommodation having families.

4.3.14 Stage 2d derived the assumed dwelling requirement arising from construction workers not forming their own household, but merging with others to become part of a larger household. There are two different demand types within this group.

4.3.15 The first are construction workers joining an existing shared household within the private rented sector. These workers do not require an additional dwelling but will be acquiring a bedspace within a home already part occupied. The assumed geographic distribution of these construction workers are presented in the table below. It is based upon the demand for private rented sector accommodation estimated by Jacobs' Gravity Model (Tables 5.5 and 5.6 of the Technical Report).

4.3.16 The second group are construction workers that will form part of a shared household, but only with other construction workers moving to the area. This group do result in an additional dwelling requirement, however the dwelling provides more than one bedspace for the construction workers. The profile of the size of home required (and therefore the number of construction workers that will share within the household) is based on the broad size profile of the current private rented stock in the area as detailed below.

- Two bedroom home 15%
- Three bedroom homes 50%
- Four bedroom home 35%

4.3.17 The locational requirement is based on the demand distribution estimated by Jacob's Gravity Model as above. The profile of private rented homes required from this group is set out in the table below. The demand for private rented dwellings arising from this group as calculated in the model accounts for the fact that several construction workers will share (it is lower than the bedspace requirement).

Table 4.7 Profile of accommodation required by construction workers merging with others hared households in the private rented sector

		Anglesey northern wards	Holyhead	Rest of Anglesey	Mainland	Total
Joining with existing private rented household (shared house)		26.0%	16.8%	31.2%	26.0%	100.0%
Forming households with other workers at	2 bedroom	3.9%	2.5%	4.7%	3.9%	100.0%
	3 bedroom	13.0%	8.4%	15.6%	13.0%	
	4 bedroom	9.1%	5.9%	10.9%	9.1%	

4.3.18 Stage 2e modelled the likely demand for both private rented and owner-occupied accommodation by size and location from construction workers. This was obtained from the household survey undertaken by Amec FW/HDH Planning in 2013, which had been updated and reweighted to reflect the situation in the Isle of Anglesey in winter 2015 to inform the Council's updated Local Housing Market Assessment. The size and location of accommodation acquired or demanded by equivalent households on Anglesey (in terms of household type and income level) was presumed to represent the nature of housing that will be sought by the construction worker households. Housing demand is always framed by the stock of housing potentially available to be inhabited and this approach reflects this. Analysis of the household survey dataset provided profiles equivalent to the example below for each household type in each construction worker category for both the private rented and owner-occupied sector.

Table 4.8 Example profile: Location and size of owner-occupied homes to be sought by professional staff construction workers moving into owner-occupation as a household with children

Accommodation size	Northern wards	Holyhead	Rest of Anglesey	Mainland	Total
1 bed	0.0%	0.0%	0.0%	0.0%	100.0%
2 bed	16.1%	11.4%	25.0%	0.1%	
3 bed	12.0%	8.9%	17.9%	0.3%	
4+ bed	2.5%	2.1%	3.5%	0.2%	

4.3.19 Whilst construction workers will be expected to pay for their place of residence within the accommodation allowance provided rather than their salary, the cost of rented housing on the Isle of Anglesey was compared to the proposed accommodation allowance and all rents were found to be affordable. Households choosing to purchase a home are likely to do so based on a decision more than the affordability of the housing. It was therefore felt that occupational patterns of equivalent households in the Isle of Anglesey are the best indication of the type of demand likely to occur.

5. Supply

5.1 Introduction

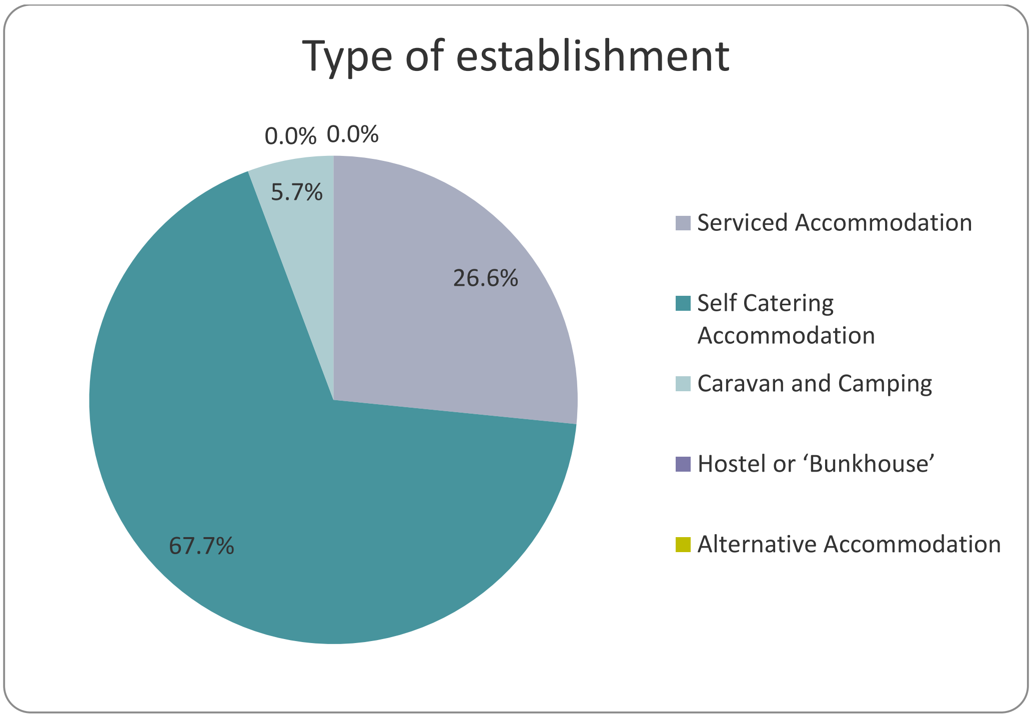
5.1.1 Having establish housing demand both as a result of predicted growth in the current Anglesey population, and the additional growth presented by the construction of the Wylfa Newydd Generating Station it is necessary to consider the housing supply available to meet that demand. This chapter analyses the potential of the existing tourism accommodation, the current stock turnover in both the private rented and owner-occupied sectors, the additional supply likely to arise from new build homes and properties currently empty. Finally the scale of the potential latent supply is documented.

5.2 Tourism Accommodation

5.2.1 In 2015 the County Council commissioned a bedstock survey. Questionnaires were sent to a 50% sample of the 350 known sources of tourist accommodation on the Isle of Anglesey. The questionnaires sought to understand current and proposed bedstock levels, the type and size of accommodation available, current occupancy rates, future plans and attitudes to accommodating construction workers.

5.2.2 The survey identified the present tourist accommodation mix which is dominated predominantly by self-catering accommodation.

Figure 5.1 Type of Tourist Establishment

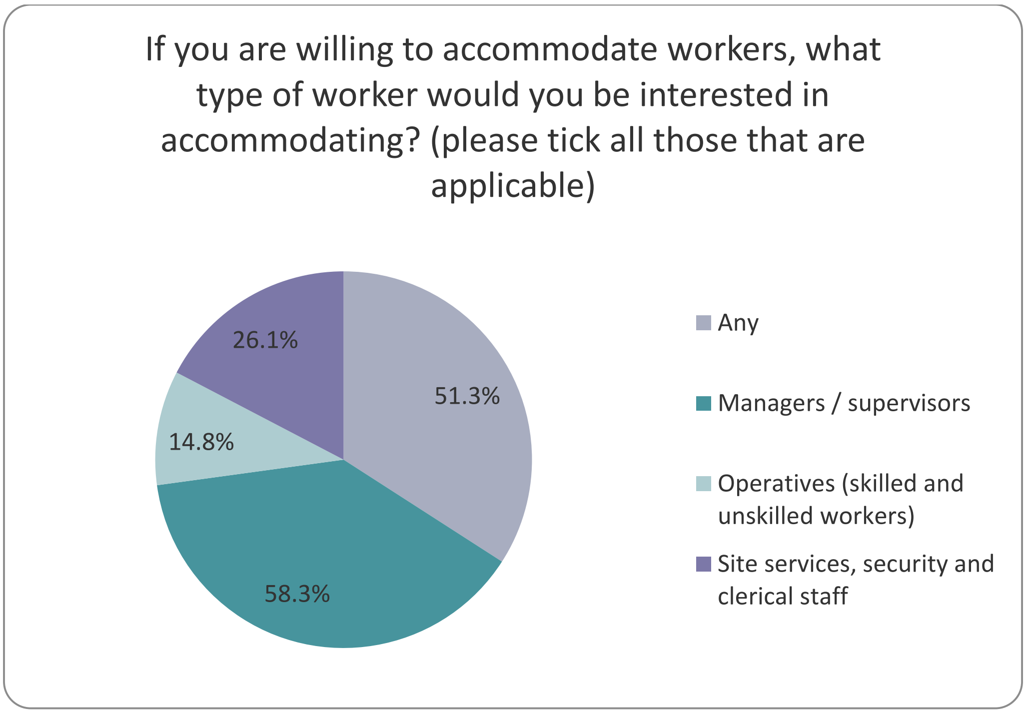


5.2.3 The questionnaire asked a specific question which sought to ascertain the level of interest in accommodating Wylfa Newydd construction workers. Over 64% of accommodation providers who responded (153 out of the 172 questioned) stated that they would be interested in accommodating construction workers. This represents 266 bedspaces across the 50% sample extrapolated to 532 for all tourism accommodation providers on Anglesey.

5.2.4 The survey then sought to understand the drivers behind a willingness to accommodate construction workers, with the highest ranked response being that the workers would represent a year-long income stream, followed by an acceptance of the fact that they could raise the profitability of existing tourism businesses during the quieter periods of the year.

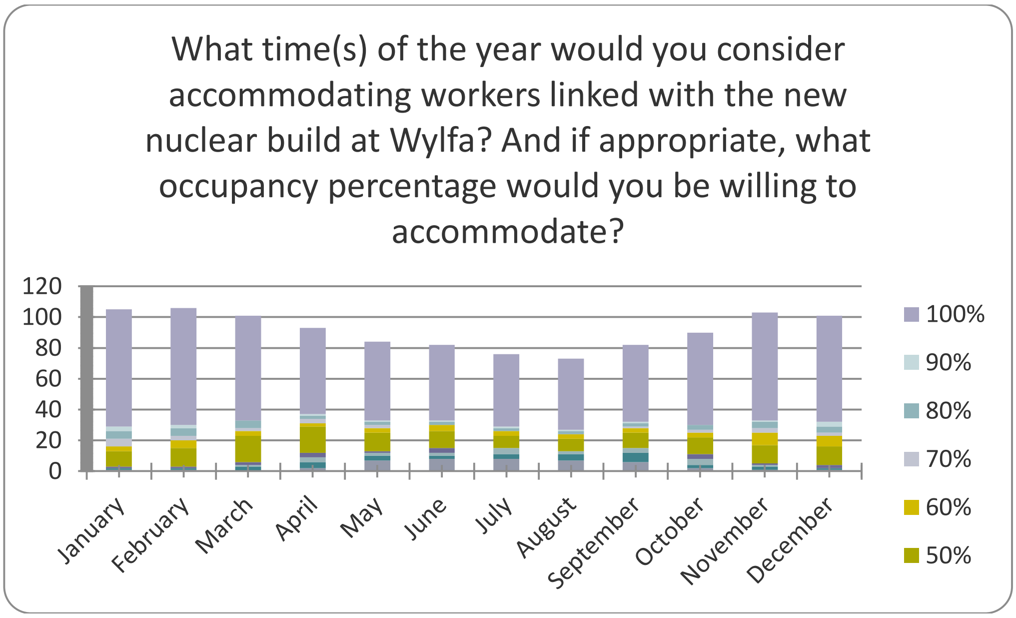
5.2.5 Of those willing to accommodate workers, there was an even split on the preference for particular worker types. The majority of respondents indicating either no preference and/or a preference for managers/supervisors.

Figure 5.2 Willingness to Accommodate Worker Types.



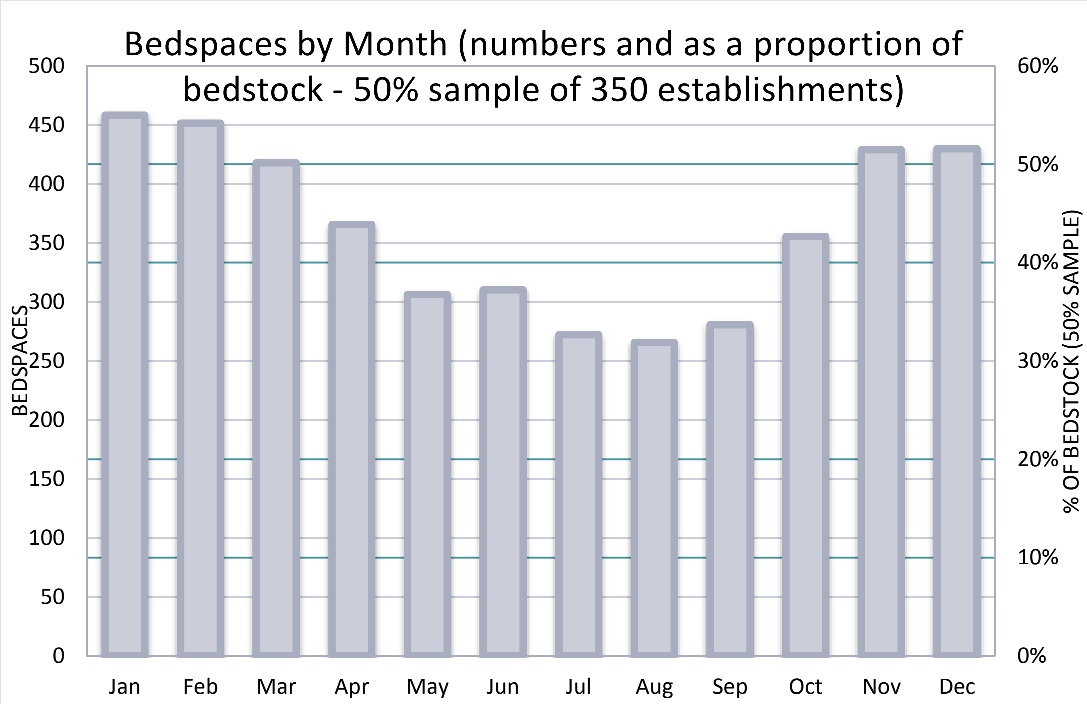
5.2.6 Respondents were asked the occupancy percentage that they would consider with the majority willing to consider 100% occupancy by construction workers throughout the year peaking in the off season.

Figure 5.3 Preferable time and percentage of workers to be accommodated.



5.2.7 Through further analysis it is then possible to understand the number of bedspaces that may be available year round (i.e. the spaces available even during peak season), together with the increased availability in the low season.

Figure 5.4 Bedspaces by Month



5.2.8 Potential supply within the existing tourism sector is therefore estimated to be 266 bedspaces across the year (based upon a 50% survey) which extrapolated provides an Island-wide figure of 532 units. This is considered to represent a conservative estimate given that this figure is based upon interest expressed by accommodation providers in the peak summer month.

5.2.9 The figure of 532 is used to inform the demand/supply modelling with regard to the issue of what may constitute capacity in the sector.

5.3 Private Rented Homes

5.3.1 This sector was profiled not as an additional source of housing but to understand current usage in the Isle of Anglesey from the existing resident population. This could then be compared to the additional demand likely to occur from the influx of construction workers to understand the capacity of the sector to meet this extra demand.

Current stock profile

5.3.2 The current stock profile in the tenure was initially established. This was obtained from the household survey undertaken by Amec Foster Wheeler/HDH Planning in 2013, which had been updated and reweighted to reflect the situation in the Isle of Anglesey in winter 2015 to inform the Council's updated Local Housing Market Assessment. The household survey dataset identified the size profile of private rented homes on the Isle of Anglesey currently in three different areas of the County; the northern wards, Holyhead and the rest of Anglesey[2]. The current size profile of private rented homes in the County is set out in the table below.

Table 5.1 Profile of Private Rented Accommodation (2015)

Profile of private rented accommodation (2015)			
Accommodation size	**Northern wards**	**Holyhead**	**Rest of Anglesey**
Households sharing accommodation (bedrooms let individually)	70	54	263
One bedroom	96	78	435
Two bedrooms	314	250	1,196
Three bedrooms	380	338	1,298
Four or more bedrooms	87	39	334
TOTAL	**947**	**759**	**3,525**

To allow the situation within the northern wards to be understood in more detail the data was further disaggregated to provide equivalent information for each of the eight wards that comprise the northern area. As the sample of private rented homes within the household survey dataset was small in some of these wards, the results produced were cross-checked against the profile of private rented accommodation in the ward according to the Census to ensure an accurate starting point.

5.3.3 Supply in the private rented market may also include the mainland housing market. As there was no up-to-date detailed household survey dataset across Gwynedd and Conwy from which to derive the profile of the private rented sector, information on the stock at the time of the Census was used. This was modelled to a 2015 base date using the information on the current household population indicated within the Edge Projections and the latest trend data for the area recorded by Welsh Statistics.

[2] The northern wards are Amlwch Port, Amlwch Rural, Llanbadrig. Llaneilian, Llanfaethlu, Llannerch-y-medd, Mechell and Moelfre. For the purpose of this model Holyhead, which was separated out due to the distinct housing stock profile in the town, is the wards of Kingsland, London Road, Maeshyfryd, Morawelon, Parc a'r Mynydd and Porthyfelin. The rest of Anglesey were all other wards across the County.

Current turnover patterns

5.3.4 The turnover of the stock that currently occurs in the Isle of Anglesey was also derived from the updated household survey dataset. This was determined by looking at the number of private rented households that had moved to their home in the last two years. The two-year turnover recorded was annualised and divided by the total number of private rented households to provide an annual turnover rate. This was undertaken for each dwelling size within each of three areas of Anglesey and resulted in the turnover rates set out in the table below.

Table 5.2 Annual Turnover Rates in the Private Rented Sector

Annual turnover rates in the private rented sector			
Accommodation size	**Northern wards**	**Holyhead**	**Rest of Anglesey**
Households sharing accommodation (bedrooms let individually)	47.8%	56.1%	51.4%
One bedroom	24.9%	26.3%	22.0%
Two bedrooms	27.3%	28.7%	24.4%
Three bedrooms	23.3%	24.9%	20.4%
Four or more bedrooms	18.3%	19.9%	15.7%

Due to the limited number of private rented households that had moved over the last year in individual wards within the northern area, the turnover rates recorded for the whole area were presumed to apply to each specific ward.

5.3.5 For the mainland, the annual turnover recorded in the private rented sector by the Census, was compared to that recorded across the Isle of Anglesey from the same source. This enabled the overall equivalent turnover rate to be generated, with the differentiation by dwelling size for the mainland obtained by modelling the differences between the dwelling size turnover rates for the whole of Anglesey against the size of the occupied private rented stock in the mainland.

Existing supply

5.3.6 The annual supply of private rented homes arising in the housing market currently (to meet the requirements of the existing Anglesey population) was obtained by applying the turnover rate to the stock of homes. The figures derived are not singular, but change marginally each year to account for the increase to the stock profile that will occur as a consequence of both the delivery of new accommodation to meet the requirements of the local population and the reintroduction to the market of homes that were previously empty (which will offer supply both when first delivered and later on when they turnover in accordance with the rest of the private rented market). The private rented supply figures are disaggregated by both location and dwelling size.

5.4 Owner-occupied Homes

5.4.1 As with the private rented sector, owner-occupation was profiled not as an additional source of housing but to understand its' current usage in the Isle of Anglesey from the existing resident population. This could then be compared to the additional demand likely to occur from the influx of construction workers to understand the capacity of the sector to meet this extra demand.

Current stock profile

5.4.2 The current stock profile in the tenure was initially established. This was obtained from the updated household survey dataset, which identified the size profile of owner-occupied homes on the Isle of Anglesey currently in the three different areas of the County; the northern wards, Holyhead and the rest of Anglesey. The current size profile of owner-occupied homes in the County is set out in the table below.

Table 5.3 Profile of Owner-Occupied Accommodation (2015)

Profile of owner-occupied accommodation (2015)			
Accommodation size	**Northern wards**	**Holyhead**	**Rest of Anglesey**
One bedroom	75	21	201
Two bedrooms	764	459	2,883
Three bedrooms	2,337	1,686	7,278
Four or more bedrooms	1,110	452	4,140
TOTAL	**4,284**	**2,619**	**14,503**

To allow the situation within the northern wards to be understood in more detail the data was further disaggregated to provide equivalent information for each of the eight wards that comprise the northern area. As the sample of owner-occupied homes within the household survey dataset was small in a few of these wards, the results produced were cross-checked against the profile of owner-occupied accommodation in the ward according to the Census to ensure an accurate starting point.

5.4.3 For the mainland, as there was no up-to-date detailed household survey dataset across Gwynedd and Conwy from which to derive the profile of the owner-occupied sector, information on the stock at the time of the Census was used.

Current turnover patterns

5.4.4 The turnover of the stock that currently occurs in the Isle of Anglesey was also derived from the updated household survey dataset. This was determined by looking at the number of owner-occupiers that had moved to their home in the last two years. The two-year turnover recorded was annualised and divided by the total number of owner-occupied households to provide an annual turnover rate. This was undertaken for each dwelling size within each of three areas of Anglesey and resulted in the turnover rates set out in the table below.

Table 5.4 Annual Turnover Rates in the Owner-Occupied Sector

Annual turnover rates in the owner-occupied sector			
Accommodation size	**Northern wards**	**Holyhead**	**Rest of Anglesey**
One bedroom	10.6%	7.5%	9.4%
Two bedrooms	7.7%	5.8%	6.8%
Three bedrooms	4.3%	3.7%	3.5%
Four or more bedrooms	4.1%	3.1%	3.4%

5.4.5 Due to the limited number of owner-occupied households that had moved over the last year in individual wards within the northern area, the turnover rates recorded for the whole area were presumed to apply to each specific ward.

5.4.6 For the mainland, the annual turnover recorded in the owner-occupied sector by the Census, was compared to that recorded across the Isle of Anglesey from the same source. This enabled the overall equivalent turnover rate to be generated, with the differentiation by dwelling size for the mainland obtained by modelling the differences between the dwelling size turnover rates for the whole of Anglesey against the size of the occupied private rented stock in the mainland.

Existing supply

5.4.7 The annual supply of owner-occupied homes arising in the housing market currently (to meet the requirements of the existing Anglesey population) was obtained by applying the turnover rate to the stock of homes. The figures derived are not singular, but change marginally each year to account for the increase to the stock profile that will occur as a consequence of both the delivery of new accommodation to meet the requirements of the local population and the reintroduction to the market of homes that were previously empty (which will offer supply both when first delivered and later on when they turnover in accordance with the rest of the owner-occupied market). The owner-occupied supply figures are disaggregated by both location and dwelling size.

5.5 New Build dwellings

5.5.1 The Council, in partnership with Gwynedd County Council has prepared the Joint Local Development Plan. This document sets out the land use planning policy framework over a 15 years period (2011 - 2026). It covers both the Anglesey and the Gwynedd Local Planning Authority areas (the Plan area). The Plan sets out how the Councils will provide for homes, jobs, the environment, and infrastructure over the plan period.

5.5.2 The Spatial Strategy which is presented by the Plan sets out where development should or should not go. It establishes five broad categories of settlements within the Plan area. These are:

- Sub regional Centre
- Urban Service Centres
- Local Service Centres
- Villages
- Clusters.

5.5.3 The total number of dwellings for the Joint Plan area is distributed across the settlement hierarchy with the weight of numbers directed towards the settlements with the greater level of services and facilities. Within the Joint Plan area one Sub Regional Centre is identified at Bangor. On Anglesey the main settlements (defined as Urban Service centres) are Llangefni, Holyhead and Amlwch. The position of these towns in the settlement hierarchy is also recognised within the Wylfa Newydd SPG which identifies each as being appropriate for the full range of construction worker accommodation associated with Wylfa Newydd.

5.5.4 Across Gwynedd and Anglesey County Council's for the period 2011 to 2026 the JLDP identifies a need for 7,902 dwellings. Table 5.5 taken from the JLDP shows how the Anglesey sub-total of 3,817 will be distributed across the settlement types.

Table 5.5 JLDP Housing Allocations

Type of Settlement	Number of Settlement	Units Required	Units Completed	Units with Planning Permission[1]	Additional Number Required
Urban Service Centres	3	2,039	141	480	1,418
Local Service Centres	10	790	146	235	409
Service Villages	3	120	2	54	64
Villages	30	616	89	290	237
Clusters	51	102	39	106	-43
Open Countryside	-	150	86	205	-141
TOTAL	**97**	**3,817**	**503**	**1,370**	**1,944**

1. This figure does not include sites unlikely to be completed within the Plan Period. With 503 of the 3,817 dwelling constructed as of the end of 2014 the Plan assumes that the total number of dwellings required to be constructed on Anglesey (i.e. with planning permission, but not built, or without planning permission) will be 3,314.

5.5.5 JLDP Policy SP15 states that the numbers required – which inform the allocations above, exclude any units completed as of 2014. With the Plan period running up to 2026 this results in a 2015-2026 per annum figure of 301 dwellings.

5.5.6 For the purposes of this study, consideration has been also given to the geographical spread of the Plan's dwelling allowance. The number of dwellings identified for allocated sites within the plan and wind falls have therefore been placed within three categories, differences for the totalised figures within Table 5.5 and 5.6 are assumed to reflect a 10% contingency for annual slippage.

Table 5.6 Location of Dwellings: JLDP

Location of dwellings: JLDP deposit Draft			
Location	Allocation	Windfall	Total
North Anglesey	390	417	807
Holyhead	430	362	792
Rest of Anglesey	779	723	1502
Total	1599	1502	3101

5.5.7 The supply of all market accommodation available is adjusted within the model to reflect the addition of these dwellings. These form a supply both when they are first introduced to the housing market and then subsequently through their turnover as they become part of the wider stock. It is presumed that the size and tenure of new home delivered will correspond to the distribution of new accommodation required to best house the future local household population according to the results of the LTBHM model as set out in chapter 3.

5.6 Empty Homes

5.6.1 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. Detail on the location of these 784 homes across the Isle of Anglesey was also made available.

5.6.2 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, 70% of empty homes in Holyhead and 40% of empty homes in the rest of Anglesey 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, in Holyhead the same proportions will apply, whilst in the

rest of Anglesey 50% of returned empty homes will become available for private rent, with 50% available to purchase.

- Empty homes will be brought back into use over a period of five years from 2017.
- The size profile of the returned empty homes will match the profile of other dwellings in the tenure within the location.

5.6.3 This results in the following schedule of currently empty properties being brought back into the housing market.

Table 5.7 Location and Tenure of Empty Homes Assumed to be brought back into use.

Location and tenure of empty homes assumed to be brought back into use						
Location	**Tenure**	**2017**	**2018**	**2019**	**2020**	**2021**
Northern wards	Private rented	23	24	24	24	24
	Owner-occupied	2	2	3	3	3
Holyhead	Private rented	11	11	11	12	11
	Owner-occupied	1	1	2	1	1
Rest of Anglesey	Private rented	20	20	21	20	20
	Owner-occupied	20	20	21	20	20
TOTAL		**77**	**78**	**82**	**80**	**79**

The supply of all market accommodation available is adjusted within the model to reflect the addition of these dwellings. These form a supply both when they are first re-introduced to the housing market and then subsequently through their turnover as they become part of the wider stock.

5.7 Latent Supply

5.7.1 The supply of latent accommodation is the additional bedspace capacity within the existing used housing stock. The main source is households letting out spare bedrooms within their home to lodgers. The supply of this form of accommodation is derived from the updated household survey dataset.

5.7.2 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 743 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. The table below set out the size of the potential latent supply in the Isle of Anglesey alongside the absolute maximum capacity in this sector (which is all homes that have a spare bedroom regardless of their intention to make it available to construction workers). The figures are disaggregated for the three areas in the County.

Table 5.8 Supply of Latent Accommodation in Anglesey

Supply of latent accommodation in Anglesey		
Location	**Potential supply**	**Absolute maximum capacity**
Northern wards	153	3,730
Holyhead	105	2,230
Rest of Anglesey	485	12,761
TOTAL	743	18,721

6. Infrastructure Capacity

6.1 Introduction

6.1.1 Having established housing demand both as a result of predicted growth in the current Anglesey population, and the additional growth presented by the construction of the Wylfa Newydd it is necessary to consider the capacity of existing social infrastructure to meet the demands of the additional population on a temporary and ongoing basis. This chapter establishes the presence of existing infrastructure together with, where available, an assessment of the capacity of this infrastructure against current and expected demand. From such a baseline, it is possible to provide an indication of the need for additional capacity to serve both permanent and temporary accommodation demands in any particular location.

6.2 Sources and Methodology

6.2.1 This chapter considers and updates (wherever possible) the evidence and findings of a number of reports produced in recent years as follows:

- Topic Paper 13 Community Infrastructure produced during the preparation of the Joint Local Development Plan, February 2015
- Topic Paper 8 Infrastructure prepared in support of the New Nuclear Build at Wylfa: Supplementary Planning Guidance 2014;
- Social and Community Infrastructure Assessment – Baseline Report: AECOM on behalf of Isle of Anglesey County Council, updated December 2015.

6.3 General Coverage

6.3.1 The distribution of facilities is focused within the higher order settlements in the Joint LDP. Whilst there is no Sub-Regional Centre on the island (Bangor is the closest location) there are the second tier Urban Service Centres of Holyhead, Llangefni and Amlwch. These settlements all, or nearly all, of the following services:

- Primary School;
- Secondary School;
- GP Surgery;
- Dental Surgery;
- Pharmacy;

- Hospital;
- Leisure Centre;
- Fire / Police Station;
- Supermarket;
- Local Shop(s).

6.3.2 There is no supermarket in Amlwch, however the town does have a reasonably large town centre with a range of shops that collectively are considered to meet most of the 'offer' of a supermarket. There are hospitals located in Holyhead and Llangefni.

6.3.3 The ten third tier Local Service Centres also possess a good range of provision but commonly restricted to primary health facilities, local shops and a primary school. Provision in three fourth tier Service Villages is restricted to a primary school, local shops and a branch GP surgery (except Newborough).

6.3.4 A network of small primary schools and some shops are dispersed across the fourth tier Local Villages.

6.3.5 This level of provision is depicted graphically in Figure 6.1.

6.4 Updating the Evidence

6.4.1 Using the Baseline Assessment of Social and Community Infrastructure Assessment (Chapter 4 of the recent 2015 AECOM Report) as a starting point, the provision and capacity of facilities are re-considered.

Education – Nursery Provision

6.4.2 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, these are:

6.4.3 In Holyhead, the seven primary schools offering nursery provision are together oversubscribed by around 14 places.

6.4.4 More generally, "In Anglesey, the 39 primary schools offering nursery provision are oversubscribed by a total of 11 places. This ranges from 24 oversubscribed places in Y Graig primary school in Llangefni to 19 spare places in Y Fali primary school. Much of the spare capacity in Anglesey is in the north and east of the Island; Beaumaris primary school has 11 spare places for example. Whilst most of the primary schools on the Island have oversubscribed nursery provision, the worst affected areas are Holyhead, Llangefni, and Menai Bridge. This means there is currently limited capacity for nursery provision near the Wylfa NPS Site. In Cemaes primary school there are only two spare places and in Amlwch primary school it is oversubscribed by two places".

Education – Primary Schools

6.4.5 Updated information on current capacities, current rolls and school population projections have been obtained from the Education Authority. These current capacities are indicated in Table 6.1.

Table 6.1 Primary School Capacities 2015

Area / School	Surplus Places	Area / School	Surplus Places	Area / School	Surplus Places
Holyhead		**Anglesey Remainder**		**Anglesey Remainder**	
Parch Thomas Ellis[1]	17	Beaumaris	93	Y Borth	4
Llaingoch[1]	7	Caergeiliog	80	Llandegfan	3
Llanfawr	-1	Goronwy Owen	55	Rhoscolyn	3
Parc y Bont[1]	-5	Newborough	50	Talwrn	2
Morswyn	-7	Dwyran	39	Pencarnisiog	0
Kingsland	-17	Bodorgan	36	Bodedern	-1
Santes Fair	-28	Brynsiencyn	35	Corn Hir	-3
Total Holyhead	**-34**	Pentraeth	35	Llangaffo	-4
North Anglesey		Llanfechell	25	Henblas	-6
Ffrwd Win[2]	32	Y Tywyn	22	Y Graig	-7
Llanfachraeth[2]	27	Llanfairpwll	19	**Total Anglesey Remainder**	**607**
Moelfre	24	Esceifiog	18	**TOTAL ANGLESEY**	**727**
Cylch y Garn[2]	23	Llangoed	17		
Amlwch	20	Parc	17		
Rhosybol	15	Rhosneigr	17		
Penysarn	12	Bryngwran	14		
Carreglefn	5	Llanbedrgoch	13		
Llannerchymedd	0	Y Ffridd	12		
Cemaes	-4	Y Fali	11		
Total North Anglesey	**154**	Bodffordd	8		

[1] To be replaced by new build capacity of 510 [2] To be replaced by new build capacity of 210

6.4.6 Figure 6.2 depicts the location, capacity and coverage across the island as at 2015. All of the population centres Urban Service Centres, Local Centres, Service Villages and Local Villages are located within or close to a five minute drive time from a primary school with the whole island covered within a ten minute drive time.

6.4.7 The adequacy of primary school capacity varies according to location and can also be influenced by parental choice.

6.4.8 A number of primary schools are oversubscribed. In particular four of the primary schools in Holyhead are oversubscribed by 57 places.

6.4.9 With the exception of Bodedern, Cemaes, Corn Hir, Y Graig (both in Llangefni), Llangaffo, Rhoscolyn, and Henblas, all primary schools in Anglesey outside Holyhead have spare capacity.

6.4.10 There are seven primary schools in the North Anglesey area in close proximity to Wylfa Newydd which have a combined spare capacity of 154 places. The other primary schools have between 8 and 32 spare places. Ysgol Cemaes is full.

6.4.11 Primary provision in Holyhead is to be addressed through the construction of a new school with capacity for 510 children to replace the 394 places presently provided at Parc y Bont, Llaingoch and Thomas Ellis schools.

6.4.12 Primary provision in north west Anglesey and close to Wylfa Newydd is to be addressed through the construction of a new school with capacity for 210 children at Llanfaethlu to replace the places presently provided at Llanfachraeth, Fridd Win and Cylch y Garn.

6.4.13 Taking these changes into account, projection of the school rolls to 2021 suggests that capacity issues are still likely to be experienced in the three Urban Services Centres. The five schools in Holyhead are expected to be just slightly over capacity whilst Corn Hir and Graig in Llangefni are expected to be around 50 over capacity in aggregate. In particular Ysgol Amlwch is expected to be 72 over capacity by this time. Capacity issues are also expected largely in settlements along the A5 corridor but also close to the Wylfa NPS site at Cemaes, Penysarn and Llanerch-y-Medd. A graphical depiction of those schools expected to be under pressure is at Figure 6.3.

Education – Secondary Schools

6.4.14 Updated information on current capacities and current rolls have been obtained from the Education Authority. Current and future predicted capacities are at Table 6.2.

Table 6.2 Secondary School Capacities 2015 and 2021

School	2015 Capacity	2015 Roll	2015 Surplus	Proj 2021 Roll	2021 Surplus
Syr Thomas Jones, Amlwch	971	515	456	486	485
Holyhead High School	1170	863	307	1000	170
Llangefni	896	762	134	875	21
David Hughes, Menai Bridge	1283	1087	196	1026	257
Bodedern	851	613	238	324	527
TOTAL	**5171**	**3840**	**1331**	**3711**	**1460**

6.4.15 All five schools have significant available capacity ranging from 134 places at Llangefni to 456 places (nearly half its capacity) at Sir Thomas Jones, Amlwch.

6.4.16 As secondary populations are expected to fall marginally by 2021, this pattern will continue and there will remain significant available capacity in all schools other than Llangefni.

Health – General Practitioners

6.4.17 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. AECOM note that the number of registered patients is greater than the actual resident population in the study area which may indicate a number of trends such as some patients travelling to use these facilities and administrative differences between GP registrations and Census geography. It is however not possible to determine where GP registered patients are travelling from.

For Anglesey, the findings are:

6.4.18 There are 11 GP surgeries on Anglesey employing 48 GPs servicing 64,948 registered patients. The ratio of patients to GPs is 1,353 across all surgeries which is below the national benchmark of 1,800 patients per GP[3].

6.4.19 Individually, four surgeries are close to passing the benchmark. These surgeries are Cambria Surgery in Holyhead (1,767 patients per GP), Glanrafon Surgery in Amlwch

[3] Source: NHS England. A comparator figure for Wales could not be found.

(1,702 patients per GP), The Health Centre in Llanfairpwll (1,648 patients per GP), and Parc Glas Surgery in Bodorgan (1,601 patients per GP). The other two surgeries in Holyhead, Longford House Surgery and Meddygfa Victoria, have patient to GP ratios of 1,571 and 1,459 respectively.

6.4.20 There are also two surgeries which are well below the benchmark ratio of patients per GP. These are The Health Centre in Beaumaris (958 patients per GP), and Meddygfa Star Surgery in Gaerwen (621 patients per GP).

6.4.21 Given this position, increased population, coupled with the needs of an ageing population is likely to lead to increased pressure on GP services in Holyhead and, in particular, Amlwch.

6.4.22 The distribution and an expression of current capacity are graphically depicted in Figure 6.6.

Health – Dental Practitioners

6.4.23 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, these are:

6.4.24 There are 12 surgeries in Anglesey. These practices have a total of 19 dentists, and patient enrolment waiting lists are between three months and two years.

6.4.25 Figure 6.6 shows the location of dentist practices which are predominantly located in areas of higher population density, such as Holyhead, Llangefni, and Menai Bridge.

Health – Pharmacies

6.4.26 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, these are:

6.4.27 There are thirteen in Anglesey and 10 in Arfon. Similar to dentist practices, pharmacies are predominantly located in areas of higher population density, such as Holyhead, Llangefni and Menai Bridge as well as in Amlwch and Cemaes.

6.4.28 Figure 6.6 shows the location of dentist practices which are predominantly located in areas of higher population density, such as Holyhead, Llangefni, and Menai Bridge.

Health – Hospitals

6.4.29 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, these are:

6.4.30 Acute hospital services for Anglesey are mainly provided by Ysbyty Gwynedd in Bangor. Information provided by the Betsi Cadwaladr University Health Board summarises the number of hospital visits to Ysbyty Gwynedd by residents registered to GPs located with Anglesey together with the Arfon area of Gwynedd. No separate figure is available for the island itself.

6.4.31 In 2014, over 172,000 outpatient attendances were recorded accounting for an estimated 0.78 attendances per GP registration or 1,279 outpatient attendances per 1,000 GP registrations. Across Wales, a total of 1,011 outpatient attendances per head of population was recorded in 2011/12, much lower than the benchmark for Ysbyty Gwynedd although the slight difference in definitions should be noted (rate per GP registration compared to rate per head of population).

6.4.32 Approximately 34,000 A&E attendances were generated in 2014, representing a total of 0.25 attendances per GP registration or 252 A&E attendances per 1,000 GP appointments. Across Wales a total of 345 A&E attendances per 1,000 population were recorded across Wales in 2011/12.

6.4.33 The Health Board had a total of 2,305 beds available per year, the vast majority of which are in acute care. Bed occupancy is highest within geriatrics and acute (92% and 82% respectively) although average bed occupancy is lower than the Welsh average across all speciality groups.

6.4.34 Historical studies such as by Bagust (1999) concluded that when occupancy rates rise above 85% it can start to affect the quality of care provided to patients and the orderly running of the hospital[4]. More recent NHS guidance suggested that Trusts should not exceed a target of 82% average occupancy[5] which suggests that all speciality groups with the exception of maternity bed spaces are either at capacity or over capacity and that the is a shortage of bed spaces within the region.

6.4.35 On Anglesey itself, Ysbyty Penrhos Stanley in Holyhead has a minor injuries unit, 43 inpatient beds for the care of the elderly and GP medical beds. Consultant outpatient and community clinics are held and dental and X-ray services provided. A rehabilitation department provides outpatient and inpatient physiotherapy, occupational therapy, speech therapy and chiropody. The hospital's workload is included within the Health Board's overall figures.

---

[4] Source: Bagust (1999). Dynamics of bed use in accommodating emergency admissions: stochastic simulation model, British Medical Journal. www.bmj. com/content/319/7203/155

[5] DOH (2000) Shaping the future NHS: Long term planning for hospitals and related services. Consultation document on the Findings of the National Bed Inquiry – Supporting Analysis

6.4.36 In Llangenfi, cefni hospital provides a dedicated centre for the care of older people with memory problems, providing assessment, treatment and inpatient services. A community mental health team is also based on site.

Leisure and Community – Post Offices

6.4.37 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, these are:

6.4.38 Following a modernisation review over recent years to maintain the sustainability and accessibility of offices. The 2014 Post Office Network Report sets a benchmark of service accessibility whereby *'95% of the total rural population across the UK to be within three miles of their nearest Post Office outlet'.*

6.4.39 There are 30 post offices on Anglesey and these are largely dispersed across the island with an urban concentration of three in Holyhead (three). It is expected that the current level of service provision meets the accessibility criteria set out by the UK Government despite the small gaps in service provision exist close to the Brynteg and Newborough Forest areas.

6.4.40 The distribution of current services is depicted in Figure 6.1.

Leisure and Community – Libraries

6.4.41 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, these are:

6.4.42 There are 10 libraries on Anglesey and usage is low relative to the rest of Wales. Against the performance indicators of the Framework of Welsh Public Library Standards[6], Anglesey achieved six of the nine standards. Those that were not met were confined to expenditure in relation to overall resources and population.

Leisure and Community – Sports Centres

6.4.43 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, these are:

6.4.44 There are four local authority run leisure centres on Anglesey which are on Table 6.3. Three are located in the Urban Service Centres of Holyhead, Llangefni and

---

[6] Welsh Government, 2014; Isle of Anglesey Annual Report 2013-14

Amlwch each accounting for over 150,000 annual participant visits. The fourth facility at the Ysgol David Hughes in Menai Bridge provides evening use and has 33,000 annual participant visits. Whilst no data on capacity is available, the Council has provided details on the issues facing users of the facilities currently.

Table 6.3 Leisure and Community – Sports Centre Usage 2014

Centre	Facilities	Participants	Current User Issues
Amlwch Leisure Centre	Fitness centre, 25m swimming pool, artificial sports pitch, 5 a side football, multi-purpose sports hall, tennis, badminton, basketball, netball, volleyball	158,821	To come
David Hughes Leisure Centre (Menai Bridge)	Fitness centre, 5 a side football, multi-purpose sports hall, tennis, badminton, basketball, netball, spinning, dance studio, cricket	33,173	To come
Holyhead Leisure Centre	Fitness centre, 25m swimming pool, multi-purpose sports hall, table tennis, badminton, basketball, netball, volleyball, squash	150,991	To come
Plas Arthur (Llangefni) Leisure Centre	Fitness centre, 25m swimming pool, sports pitch, artificial pitch, 7 a side football, hockey pitch, multi-purpose sports hall, badminton, basketball, netball, squash, skate park	210,754	To come
TOTAL		553, 739	

6.4.45 The distribution of current services is depicted in Figure 6.7. Although the size and nature of the 'offer' varies, the majority of the island's population has access to a centre with the potential to meet their needs within a ten minute drive time. The whole island has access within a twenty minute drive time.

Leisure and Community – Other Sports Facilities

6.4.46 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, the following community and privately run facilities are in Table 6.4 and depicted graphically on Figure 6.7.

Table 6.4 Leisure and Community – Sports Centre Usage 2014

Centre	Facilities	Sector
Beaumaris Leisure Centre	Multiuse sports hall, fitness centre	Community
Millbank Playing Fields,	Multiuse sports pitches, athletics track	Community
Penrhyn Caravan Park	25m swimming pool	Private

Emergency Services

6.4.47 No further information is available and there are no changed circumstances since the AECOM report and hence the previous findings in Section 4 of that report still apply. For Anglesey, the following community and privately run facilities are in Table 6.4 and depicted graphically on Figure 6.7.

6.5 Conclusions

6.5.1 The key messages from the social and community infrastructure baseline and population baseline are summarised below.

- Education – nursery provision has very limited capacity. Capacity varies however the worst affected areas are Holyhead, Llangefni, and Menai Bridge and there will be limited capacity for nursery provision near Wylfa where current provision both modest and at or around capacity. In Holyhead, Llangefni and Cemaes and Bangor schools are currently over-subscribed although the construction of a new school in Holyhead will return some balance to provision. Over-subscription is expected to continue in Llangefni and Cemaes whilst significant growth in demand in Amlwch will place the school under significant pressure before 2021 hence provision near Wylfa will not be available. Spare capacity will be available in Beaumaris and Caergeiliog primary schools and in all secondary schools;

- Health – in general the provision of GP surgeries and the ratio of GPs to patients is good and better than the national average, though four surgeries are nearing capacity. Use of A&E per head of population and bed hospital occupancy is lower in the study area than the rest of Wales;

- Community – use of libraries is lower than the rest of Wales but current satisfaction levels are better. Information on provision and use for other community services was limited or unavailable;

- Leisure – there are currently a range of sport and leisure facilities on the island. Information on their condition, use and capacity has been difficult to obtain. It is expected that demand for these facilities will increase as a result of Wylfa and other developments;

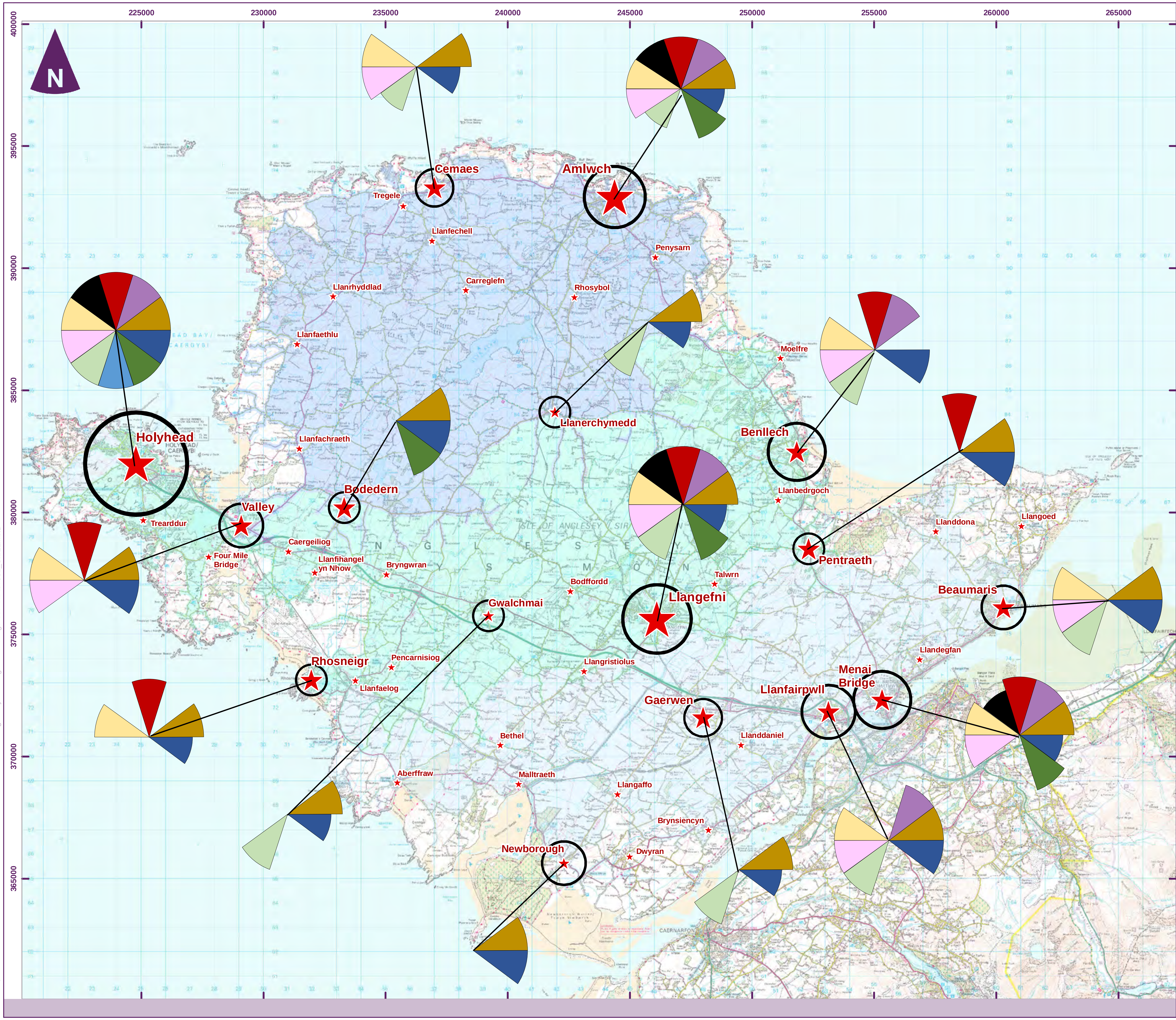
- Emergency Services – the use and catchment area of these services is far more complicated than the study area used in this report. Continued collaboration will be needed to ensure that any additional demands are identified and prepared for in advance of the developments;

    - Police – staffing levels have risen in recent years to respond to slight increases in the number of incidents, but Anglesey has fewer incidents then the rest of North Wales;

  - Fire Service – incident numbers have been stable in recent years though there has been a big drop after 2011/12;

  - Ambulance Service – the number of emergency calls has increased gradually over recent years;

- Population – whilst net population growth on Anglesey is projected to reduce slightly, it is aging significantly faster than the rest of Wales which means the population dependent upon social and community infrastructure is increasing.



Key

Urban Service Centre

Local Service Centre

Service Village

Local Village

Population (Census 2011)

11,000 (Holyhead)
10,000
5,000
1,000

Service Provision

Fire/ Police Station
Supermarket
Post Office/ Local Shop
Primary School
Secondary School
Hospital
GP Surgery
Dentist
Pharmacy
Leisure Centre

Service with Capacity

Service at or near Capacity

Drive time from Wylfa Power Station

20 Minute Catchment
30 Minute Catchment
40 Minute Catchment

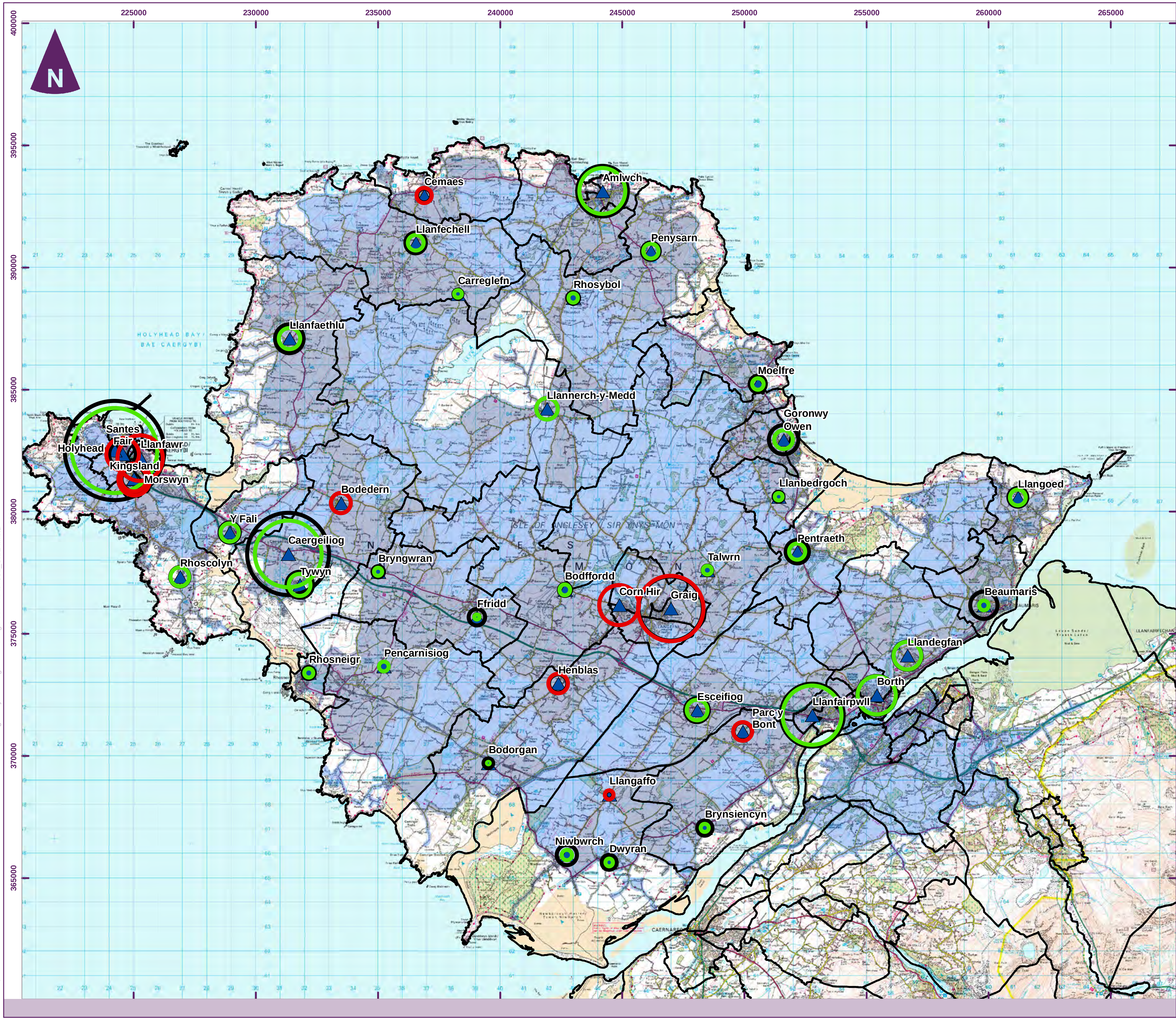
0 2 4 6 8 km
Scale at A3: 1:150,000

37681 North Anglesey Housing Study

amec foster wheeler

Figure 6.1
Anglesey Service Provision

May 2016 37681_Shr21.mxd capad



Key

Welsh Census Wards (2011)

Primary School

Primary School Drive Time Catchment

5 Minute Catchment

10 Minute Catchment

Current Primary School Capacity (2015)

Capacity | Under Capacity | Over Capacity

Primary School Pupil Numbers

510 (Holyhead)
500
375
250
100
50

0 2 4 6 8 km

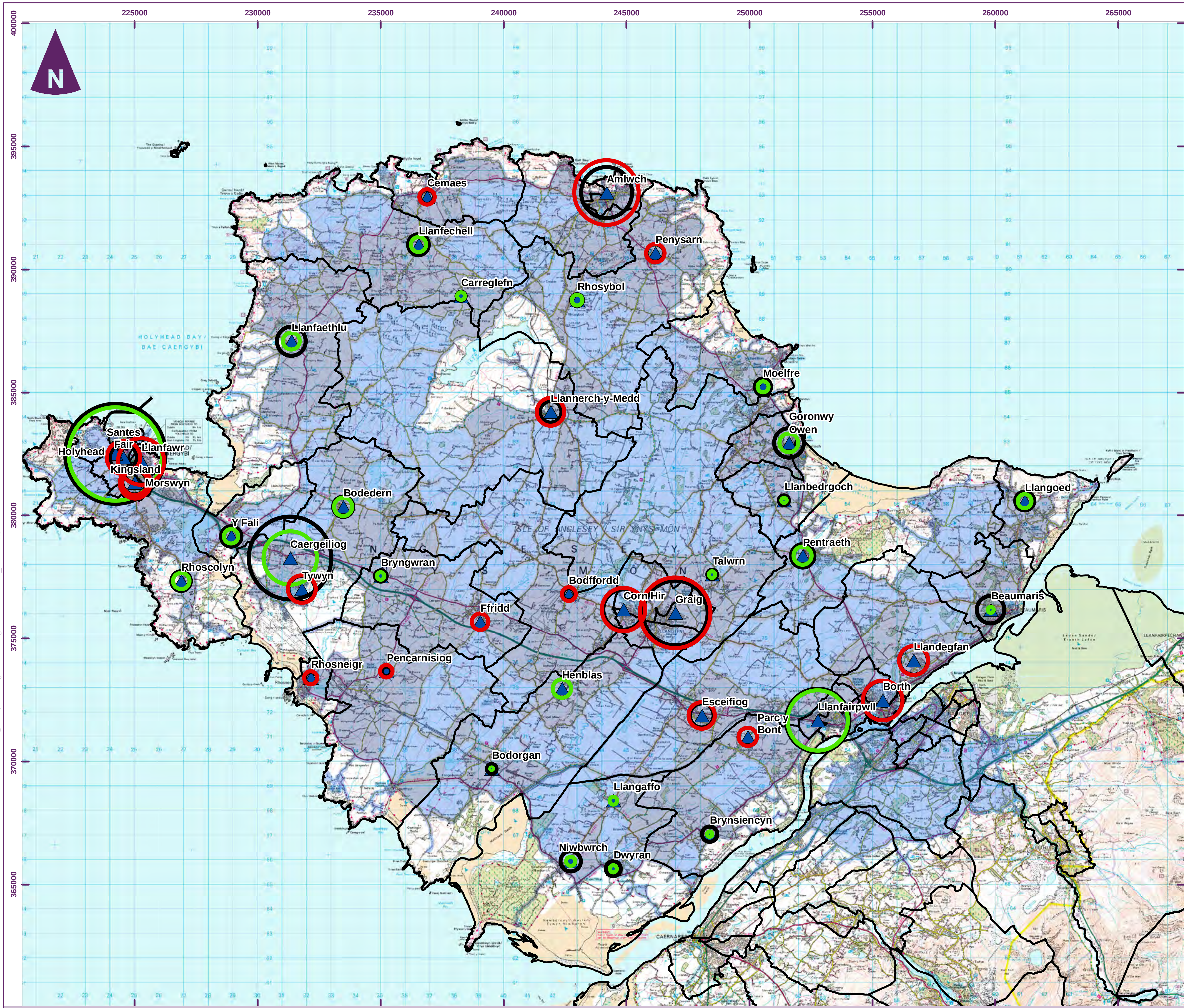
Scale at A3: 1:150,000

37681 North Anglesey Housing Study

amec foster wheeler

Figure 6.2
Anglesey Current Primary School Capacity (2015)

May 2016 37681_Shr24.mxd capad



Key

Welsh Census Wards (2011)

Primary School

Primary School Drive Time Catchment

5 Minute Catchment

10 Minute Catchment

Primary School Capacity for 2021 Projections

Capacity | Under Capacity | Over Capacity

Primary School Pupil Numbers

510 (Holyhead)
500
375
250
100
50

0 2 4 6 8 km

Scale at A3: 1:150,000

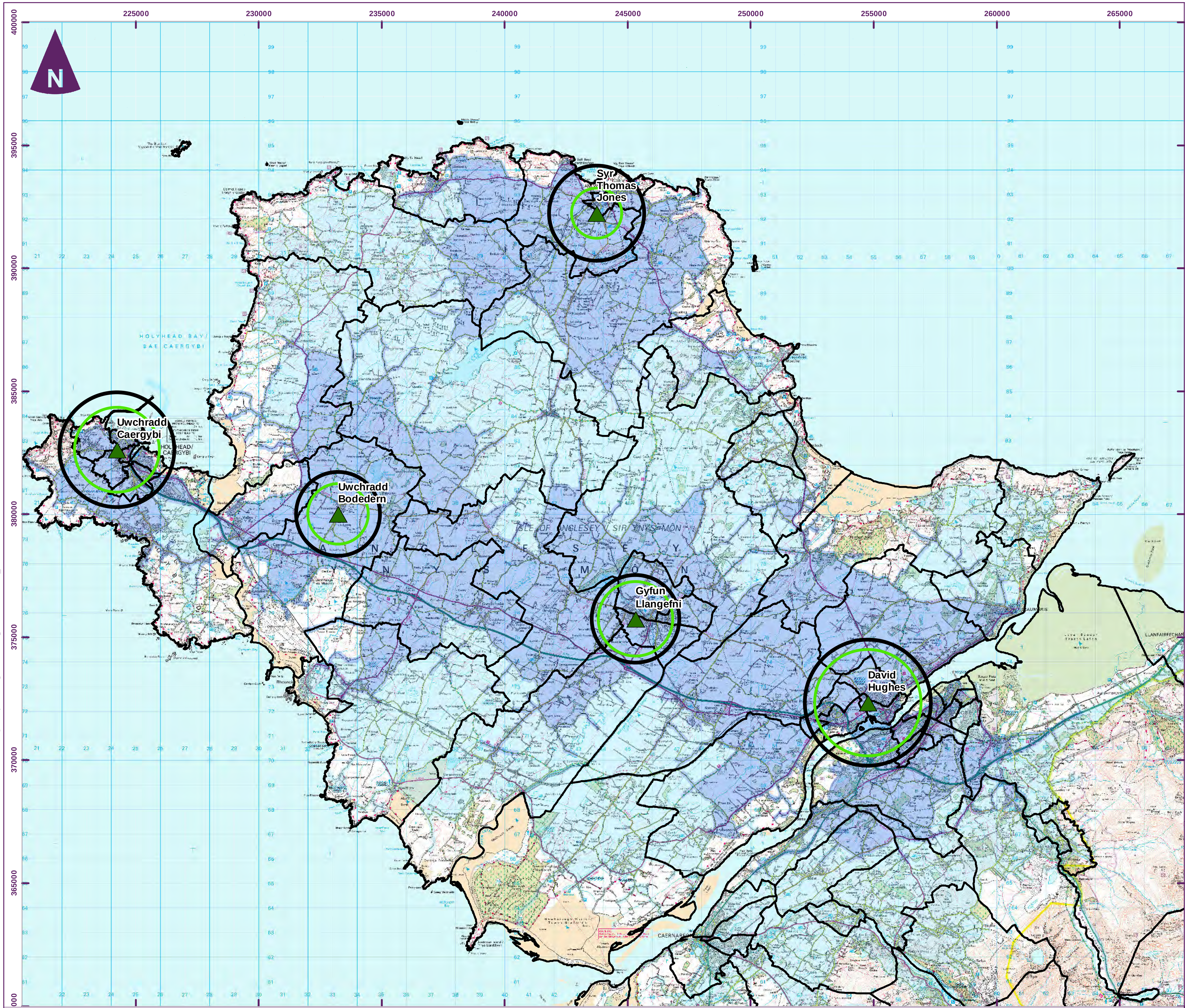
37681 North Anglesey Housing Study

amec foster wheeler

Figure 6.3
Anglesey Future Primary School Capacity (2021)

May 2016 37681_Shr17.mxd capad

file: H:\Projects\31416 ANGLESEY FRAMEWORK - Restricted Access\37681 Housing Study\Drawings\ArcGIS\Figures\MXD\37681_Shr17.mxd



Key

Welsh Census Wards (2011)

Secondary School

Secondary School Drive Time Catchment

10 Minutes

20 Minutes

Current Secondary School Capacity (2015)

Capacity

Under Capacity

Primary School Pupil Numbers

1283 (David Hughes)

1000

750

500

0 2 4 6 8 km

Scale at A3: 1:150,000

37681 North Anglesey Housing Study

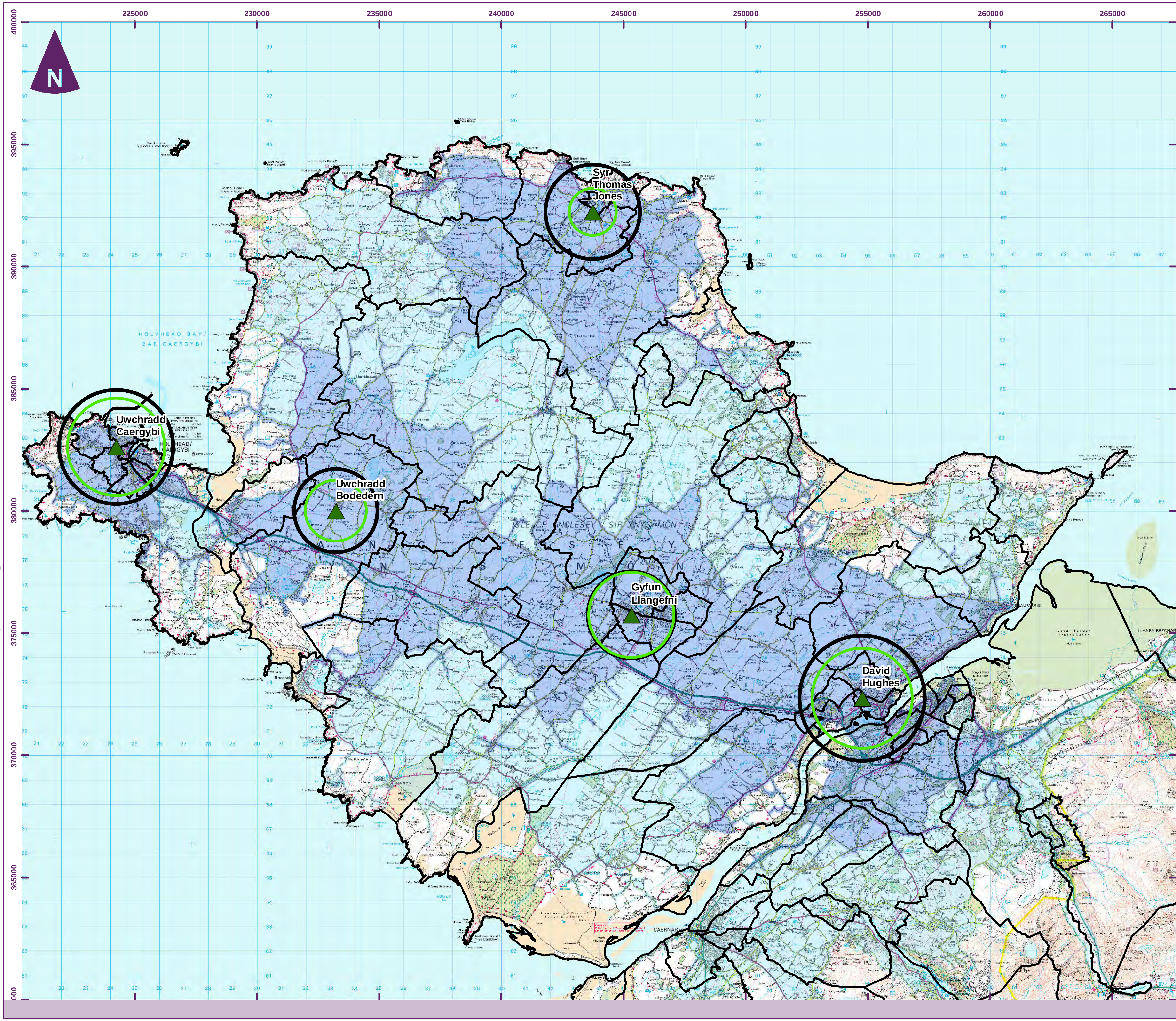
amec foster wheeler

Figure 6.4
Anglesey Current Secondary School Capacity (2015)

May 2016

37681_Shr25.mxd capad

file: H:\Projects\31416 ANGLESEY FRAMEWORK - Restricted Access\37681 Housing Study\Drawings\ArcGIS\Figures\MXD\37681_Shr25.mxd



Key

Welsh Census Wards (2011)

Secondary School

Secondary School Drive Time Catchment

10 Minutes

20 Minutes

Secondary School Capacity based on 2021 Projections

Capacity   Under Capacity

Primary School Pupil Numbers

1283 (David Hughes)
1000
750
500

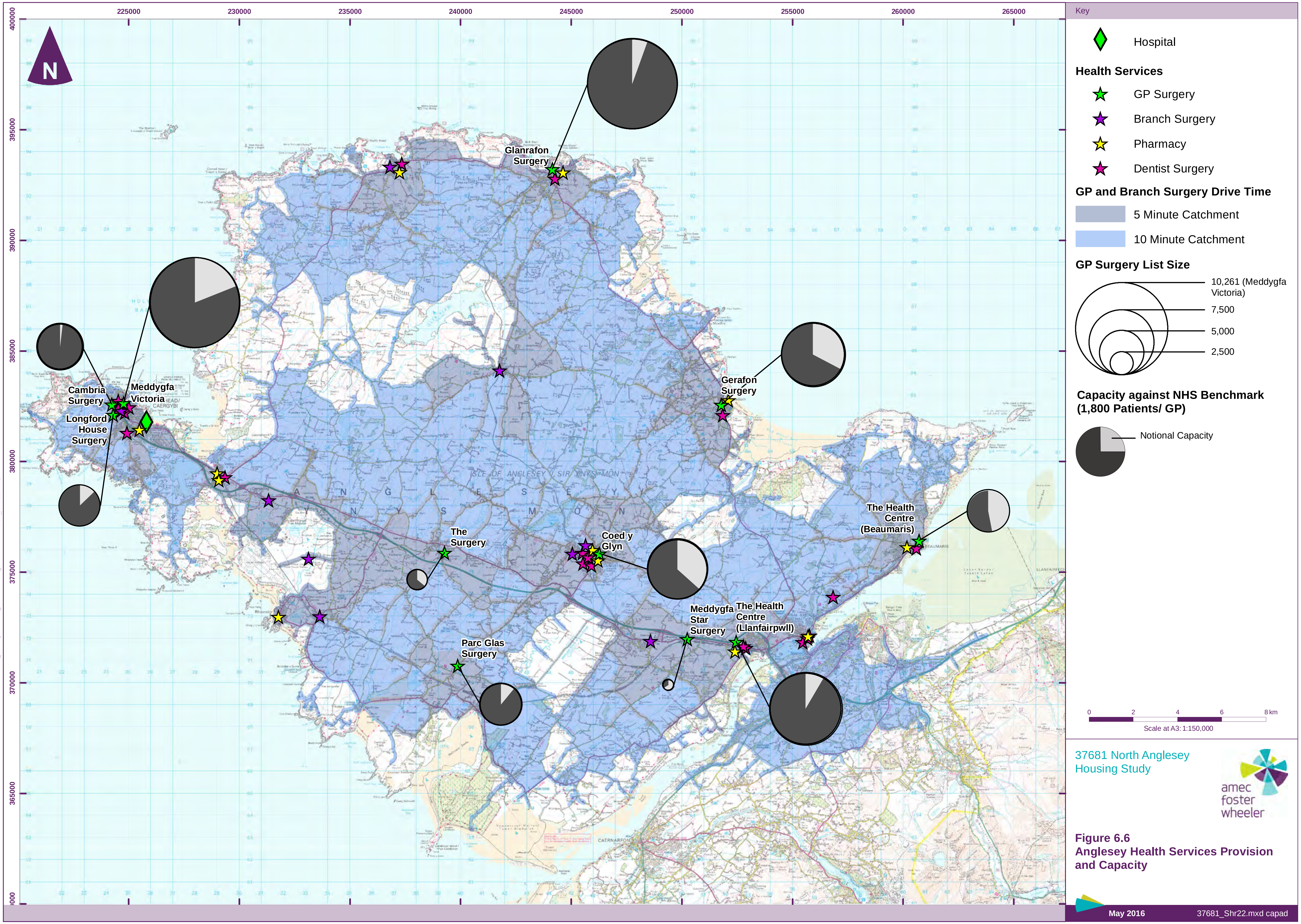
0 2 4 6 8 km

Scale at A3: 1:150,000

37681 North Anglesey Housing Study

amec foster wheeler

Figure 6.5
Anglesey Future Secondary School Capacity (2021)

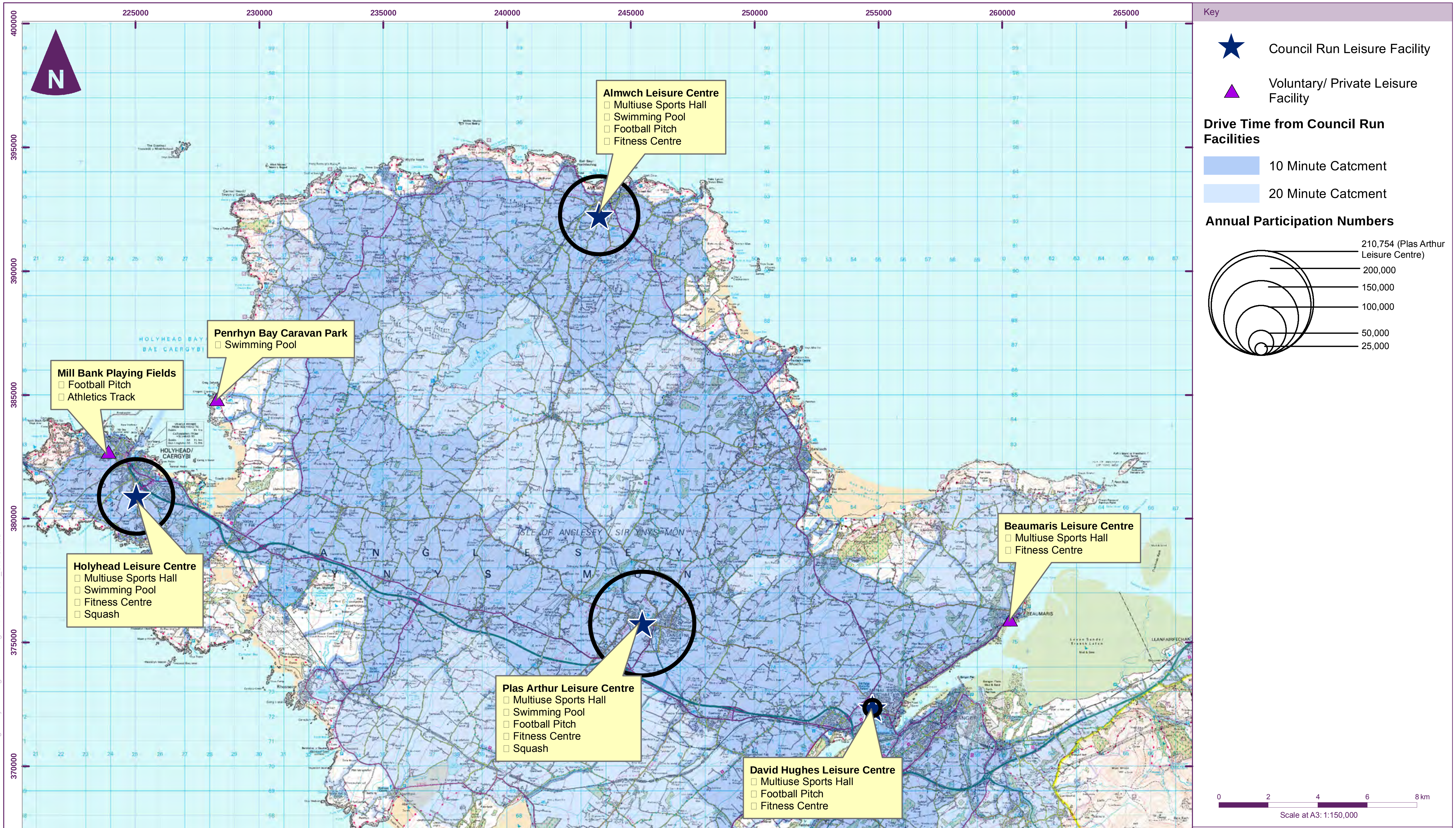


37681 North Anglesey Housing Study

amec foster wheeler

Figure 6.6
Anglesey Health Services Provision and Capacity

May 2016 37681_Shr22.mxd capad



37681 North Anglesey Housing Study

amec foster wheeler

Figure 6.7
Anglesey Leisure Centre Participation and Accessibility

May 2016 37681_Shr18.mxd capad

7. Conclusion

7.1.1 This document forms the evidence base which has been used to model a number of construction worker accommodation scenarios. These scenarios, together with a description of how the model used to generate them operates, are described within the Scenario Assessment report.

7.1.2 Evidence collected includes a socio-economic profile of Anglesey as well as a summary profile of the current and future predicted local housing market. Much of the information presented within the second and third chapters of this document is provided, in greater detail, within the Council's updated LHMA.

7.1.3 Chapter 4 sets out the assumptions used with regard to the predicted construction workforce. Applying the assumptions it provides a breakdown of the assumed workforce, its length of stay and income groups. This information is used within the model to understand the level and nature of future demand for accommodation.

7.1.4 The Council, through the JLDP has sought to plan for future increases in the number of households. It has allocated land for housing and included a windfall allowance within the plan up to 2026. The availability of these properties, together with the turnover of existing properties forms the supply. In addition to new build, supply may also be found in the return of empty homes to the market, through the use of latent and tourism accommodation. The predicted contribution of these accommodation types is also set out within this document.

7.1.5 The combination of a rising local population together with the arrival of a significant number of non-home based workers could lead to significant pressures upon local services and facilities. Studies recently undertaken for the Council, together with additional work undertaken as part of this commission have identified certain schools, services and facilities where future investment may be necessary to accommodate additional future demand.

Appendix: Annualised Workforce Demand

Table 4.1a Annualised workforce demand

Occupation Group	Duration of stay	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Civils Operatives	Total	85	95	376	720	1,670	2,280	4,076	3,203	2,550	993	490
	Up to 6 months	15	0	10	100	01	75	462	266	5	0	35
	7 to 42 months	0	15	10	220	220	313	662	251	73	0	1
	43+ months	80	80	376	00	70	52	1,952	1,952	1,952	993	490
Mechanical and Electrical Operatives	Total	0	0	0	0	187	1,015	,827	2,227	1,992	1,252	610
	Up to 6 months	0	0	0	0	8	3	6	400	150	0	0
	7 to 42 months	0	0	0	0	0	42	7	972	972	382	0
	43+ months	0	0	0	0	187	870	870	870	870	870	610
Professional Staff	Total	10	10	50	50	660	1,889	2,799	3,059	2,864	1,969	1,137
	Up to 6 months	0	0	0	0	0	0	0	180	0	0	0
	7 to 42 months	0	0	0	0	0	424	1,334	1,414	1,399	504	0
	43+ months	10	10	50	50	660	1,465	1,465	1,465	1,465	1,465	1,137
Site services, security and facilities management	Total	40	100	420	570	650	770	894	899	883	33	320
	Up to 6 months	0	0	0	0	0	0	4	50	50	0	0
	7 to 42 months	0	0	0	0	0	117	237	237	180	0	0
	43+ months	40	100	420	570	650	653	653	653	653	633	320

Table 4.2a Annualised non home-based workforce demand

Occupation Group	Duration of stay	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Civils Operatives	Total	74	82	300	599	1,385	1,918	3,248	2,410	1,817	557	260
	Up to 6 months	15	3	15	91	97	116	404	263	50	23	34
	7 to 42 months	6	17	8	210	210	417	1,460	1,025	383	27	49
	43+ months	62	62	298	298	1,385	1,385	1,385	1,385	1,385	557	205
Mechanical and Electrical Operatives	Total	0	0	0	0	113	855	1,579	1,990	1,769	1,121	549
	Up to 6 months	0	0	0	0	21	14	17	401	146	7	13
	7 to 42 months	0	0	0	0	0	53	791	834	843	333	0
	43+ months	0	0	0	0	101	788	788	788	788	788	536
Professional Staff	Total	9	7	35	31	593	1,764	2,606	2,883	2,693	1,867	1,083
	Up to 6 months	0	0	10	6	0	2	96	189	165	3	2
	7 to 42 months	7	5	3	3	0	381	1,223	1,311	1,145	484	0
	43+ months	2	2	22	22	593	1,383	1,383	1,383	1,383	1,383	1,081
Site services, security and facilities management	Total	27	78	328	431	443	199	59	0	70	191	130
	Up to 6 months	8	2	8	11	23	73	27	0	70	111	51
	7 to 42 months	0	0	224	325	325	104	0	0	65	80	78
	43+ months	24	78	95	95	95	95	32	0	0	0	0

CYNGOR SIR
YNYS MÔN
ISLE OF ANGLESEY
COUNTY COUNCIL

www.ynysmon.gov.uk

www.anglesey.gov.uk