

New Housing in Gwynedd Research

Results Report



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Contents

1 Introduction	1
2. Methodology.....	3
3. Statistics on responses from new housing residents (Stage 1).....	7
4. BANGOR area	11
5. CAERNARFON area	24
6. DOLGELLAU Area	38
7. DYFFRYN NANTLLE Area	51
8. DYFFRYN OGWEN Area	64
9. FFESTINIOG AREA	77
10. LLŶN area.....	86
11. PENLLYN Area.....	98
12. PORTHMADOG AREA	109
13. TYWYN area.....	121
14. Types of development	133
15. Main Conclusions	143
Annex – Questions asked.....	146

1 Introduction

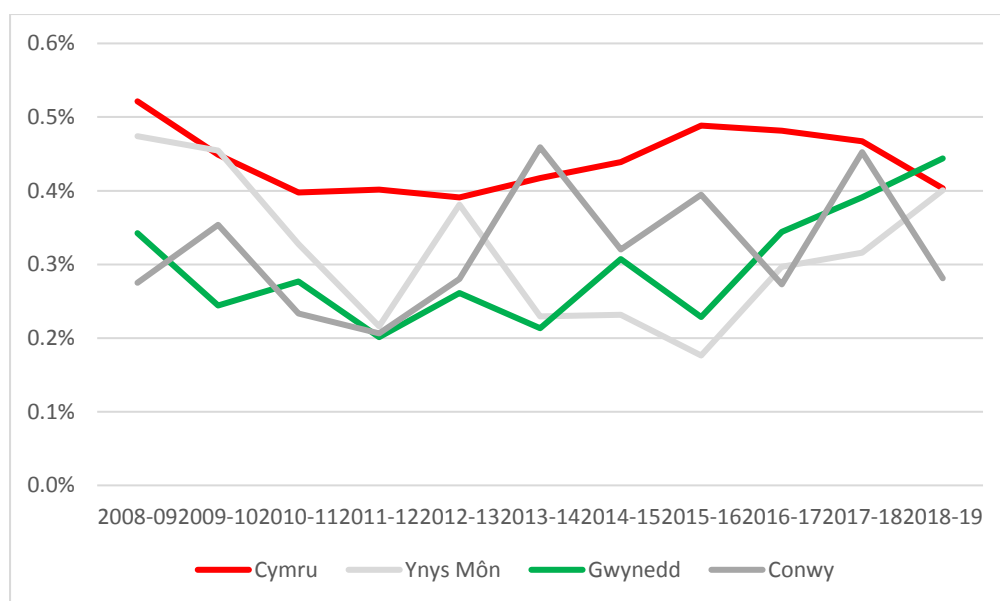
Between 100-300 new houses are built in Gwynedd each year, with numbers increasing slightly recently (see Table 1 below).

Table 1: New dwellings completed in Gwynedd (Source: Welsh Government)

Year	Number of new dwellings
2008/09	206
2009/10	148
2010/11	169
2011/12	123
2012/13	160
2013/14	131
2014/15	189
2015/16	141
2016/17	213
2017/18	243
2018/19	277

Compared to the number of houses already here, overall the number of new houses in Gwynedd over the past decade has been lower than the general pattern in Wales and in other neighbouring councils, although there has been an increase in numbers over the past two or three years (**Figure 1**).

Figure 1: Number of new houses as a percentage of all housing stock, 2008/09 to 2018/19



(Source: Research and Analytics Team calculations based on New Housing data and Dwelling Stock Estimates; Welsh Government)

However, new housing, and their impact on the communities in which they are located, can be a contentious issue which divides opinion. One reason for this is that there is an “information gap” in respect of new housing (in Gwynedd and more widely) – there is no reliable information about which groups of people tend to move into new housing, where these people move from, and why they choose to move to a new house; the limited information available tends to be very fragmented and anecdotal. This is also an issue for the Council in drawing up housing and planning policies and in responding to statutory requirements, for example when preparing the Local Housing Market Assessment.

Therefore, our intention in this research was to fill in some of the “information gap” by interviewing residents of every house that has been erected recently in Gwynedd.

This research has also gone a step further, by trying to track the housing “chain” forward to the house that became vacant as people moved into the new house, then to the house that became empty as people moved into that one, and so on. Another key feature of this research was that we were going to talk to residents in order to get their “story”, their reasons for moving there, and so on, in as much detail as possible, rather than relying on sending an impersonal ‘tick box’ questionnaire.

This report presents the outcomes of this research. Although no piece of research of this kind can give the full picture (more about this in chapter 2 below), we are confident that what has been done helps to shed some light on an area where definitive information has been quite sparse.

We would not have been able to do this work without the help and support of a number of the Council’s other departments and services and we are very grateful to them for that; we are also grateful to the researchers who were actively involved in the questioning and recording process. And, above all, thanks to the residents of Gwynedd who have been willing to share their stories with us; every response has been valuable to us in putting the picture together.

2. Methodology

Areas

In order to identify any geographical differences within Gwynedd we have analysed all the results of the research according to 10 local areas (corresponding to the 8 wellbeing areas used by Gwynedd and Anglesey Local Services Board, but with the areas of Dyffryn Ogwen and Dyffryn Nantlle separated from the rest of the Bangor / Caernarfon areas).

The boundaries of these areas are shown below.

Figure 2: Local areas



New housing to be surveyed

In order to ensure that we have as accurate and complete a list of new housing developments in Gwynedd as possible, we verified / reconciled information from a number of different sources, namely:

- New housing completed following planning applications (from the Planning and Environment Service, and the National Park for the Park area)
- New housing valued for Council Tax (from the Tax and Benefits Service)
- Housing sold (from the Land Registry)
- New social housing units in Gwynedd (from Housing Service)

In order to accommodate the size of the task it was decided in the first instance that we would restrict research to new houses that had become occupied over the last 3 or 4 years (i.e. from the year 2015 onwards). However, in looking at the numbers by area it became apparent that there are

not many new houses at all in some southern parts of the county; therefore we went back further (houses that had become occupied from 2012 onwards) in some of the areas.

It was decided **not to include** certain types of new housing that were for specific groups of people (and therefore the buying / rental market would be different compared to the majority of new housing in Gwynedd), namely:

- holiday accommodation / chalets etc
- extra care housing
- purpose built student accommodation / halls of residence

But the list **included**:

- social and affordable housing, as well as houses sold on the open market
- housing subject to a 'local person condition', as well as those without a condition
- developments in the National Park
- non-residential buildings (shops, farm outbuildings, chapels etc) that had been converted into residential units
- houses divided into more residential units (although it is sometimes difficult to tell which are the 'new' houses in such cases)
- large estates, as well as small developments and some individual houses.

The final list included 1,015 new houses, with the distribution by area as follows:

Table 2: Number of new houses per local area

Area	Number of new houses (2015 onwards)	Houses from 2012-2014 added in some areas to increase sample	Total number of new houses for the research
Bangor	418	-	418
Caernarfon	129	-	129
Dolgellau	47	31	78
Dyffryn Nantlle	35	-	35
Dyffryn Ogwen	47	-	47
Ffestiniog	7	14	21
Llŷn	119	-	119
Penllyn	10	13	23
Porthmadog	50	32	82
Tywyn	35	28	63
	897	118	1015

Interview residents of new housing (Stage 1)

A letter was sent to residents of all the new houses on the list, explaining the purpose of the research and that a researcher from the Council would call shortly to ask a few questions. All elected members of the Council were also informed of the research.

The researchers went around the houses during the evenings in June-July 2018. They asked some standard questions about the house, the number and age of residents, the language of residents / the household, and where residents lived before moving into the new house. There were also more open-ended questions asking about the “story” of residents (questions such as why they chose to move to the area / house, and where they would probably have moved to if that house had not been available).

The questionnaire and questions had been tested in advance by questioning some Council staff; see **Annex A** for a copy of the questions.

Inevitably, in many houses the residents were not at home, or too busy to answer on the night; in those cases, a card was left with details of a website that residents could access to respond in their own time. ‘This was not ideal as the whole purpose of sending out researchers was to talk to people in order to explain the questions properly and get their “story” but it was a way of increasing the response and ensuring that everyone who had received a letter had the opportunity to participate.

The researchers succeeded in reaching **967 houses** (which is over 95% of those on the list – some were missed due to problems with the addresses or that the premises were not yet occupied). Of these, responses were received from **351 (36.3%)** houses, with the response rate differing by area as shown in the table below.

Table 3: Number of responses by area

Area	Number	Number reached	Number of respondents	% of those reached who responded
Bangor	418	408	136	33.3
Caernarfon	129	124	58	46.8
Dolgellau	78	73	23	31.5
Dyffryn Nantlle	35	33	21	63.6
Dyffryn Ogwen	47	47	19	40.4
Ffestiniog	21	21	4	19.0
Llŷn	119	109	28	25.7
Penllyn	23	18	8	44.4
Porthmadog	82	76	31	40.8
Tywyn	63	58	23	39.7
	1,015	967	351	36.3

Interview the residents of the houses that became vacant as people moved into the new houses (Stages 2, 3 and 4)

Where ‘Stage 1’ respondents above indicated that they had moved to the new house from elsewhere in Gwynedd, further fieldwork was then carried out whereby we visited that house to ask questions similar to ‘Stage 1’ (but excluding the questions specifically related to the reasons for moving to a new house). This is ‘Stage 2’ of the research.

If housing residents in ‘Stage 2’ had moved there from elsewhere in Gwynedd, that house was then visited as ‘Stage 3’, and so on.

This further fieldwork was undertaken in the evenings during September-October 2018, with a similar arrangement to 'Stage 1' as regards giving residents the opportunity to respond online if they were not home on the night in question.

The number of houses surveyed / from which responses were received in these further steps are shown below. (There were a number of cases where it was noted that someone had moved to a new house from elsewhere in Gwynedd but that no house had become vacant as a result of this – e.g. moving from a parents house, separation etc – clearly, we did not go to the previous house in these cases).

Table 4: Number of responses by research stage

Stage	Number	Number reached	Number of respondents	Number of these who were from Gwynedd previously, and gave a full address to facilitate further enquiry
1 (new housing)	1,015	967	351	136
2	136	136	44	22
3	22	22	10	4
4	4	4	0	-

Interpreting the results

By looking at the numbers above it can be seen that this has been a significant research exercise and that it probably provides a more comprehensive picture than ever before of new housing in Gwynedd and the migration patterns arising from them.

However, it is important not to be over-reliant on the outcomes of this research and assume that it tells us everything. This research was carried out at a particular point in time; it is difficult to assume that exactly the same patterns would be repeated in respect of any future developments when the numbers / types / exact locations of new housing, and the condition of the housing market locally / generally, may be different.

In addition, although a large number of responses were received in total, the numbers decrease when looking at some individual areas, and particularly when tracking the housing chain forward (Stages 2, 3 and 4). This is an additional reason for not assuming that all results are strictly accurate.

The remainder of this report

Chapter 3 provides some statistics on the responses from new housing (Stage 1) across Gwynedd, including the types of houses, the number of people in the houses, and the languages they speak.

In order to identify patterns at a local level **Chapters 4-13** then provide detailed results from the 10 areas separately, which includes tracking the housing 'chain' forward (Stages 2-4).

Chapter 14 considers whether the results are different for different types of development.

Chapter 15 then gives an overview of all the results, highlighting the main conclusions.

3. Statistics on responses from new housing residents (Stage 1)

Of the 351 new dwellings where a response was received, almost 34% were private rented or rented from a housing association.

Table 5: Stage 1 – House owner or renting the house

House owner or renting	Number	%
Owner	227	64.7
Part Ownership	3	0.9
Private rented	59	16.8
Social rented	60	17.1
No response	2	0.6
Total	351	100.0

The most common type of new house we received a response from was a “detached” house.

Table 6: Stage 1 – Type of house

Type of house	Number	%
Detached	150	42.7
Flat or maisonette	62	17.7
Semi	92	26.2
Terrace	33	9.4
Bungalow	6	1.7
Other	6	1.7
No response	2	0.6
Total	351	100.0

The majority of new houses we received a response from had 2 or 3 bedrooms.

Table 7: Stage 1 – Number of bedrooms

Number of bedrooms	Number	%
1	24	6.8
2	97	27.6
3	146	41.6
4	70	19.9
5	10	2.8
7	3	0.9
No response	1	0.3
Total	351	100.0

Of the 351 houses from which we received a response to the questionnaire, there were a total of 891 people living in them; approximately 2.5 people per house.

Table 8: Stage 1 – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	69	69
2	132	264
3	66	198
4	67	268
5	13	65
6	1	6
7	3	21
Total	351	891

The majority of people who have moved into a new house are in the 25-44 age group. From the sample we had, only one person over 85 had moved to a new house in Gwynedd.

Table 9: Stage 1 – Age of respondents

Age	Number	%
0-2	47	5.3
3-11	146	16.4
12-17	45	5.1
18-24	85	9.5
25-44	304	34.1
45-64	167	18.7
65-84	88	9.9
85+	1	0.1
No response	8	0.9
Total	891	100.0

The language of the individuals

Of the 891 people, 613 (69%) stated that they could speak Welsh.

Table 10: Stage –1 Number able to speak Welsh

	Able to speak Welsh	% able to speak Welsh
No	269	30.2
Yes	613	68.8
No response	9	1.0
Total	891	100.0

Of those aged 3 and over 68% could speak Welsh (577 out of 844), which is comparable to a proportion of 65% for Gwynedd in the 2011 Census. Therefore **the proportion of new housing residents able to speak Welsh was very similar to the proportion among the population of Gwynedd as a whole.**

The pattern by age group (table below) suggests that, of those people living in new houses, younger people are more likely to be able to speak Welsh than older residents.

Table 11: Stage1– age group

Age	Able to speak Welsh		Not able to speak Welsh		No response	
0-2	36	77%	9	19%	2	4%
3-11	133	91%	13	9%	0	0%
12-17	38	84%	7	16%	0	0%
18-24	56	66%	29	34%	0	0%
25-44	207	68%	93	31%	4	1%
45-64	97	58%	70	42%	0	0%
65-84	41	47%	46	52%	1	1%
85+	1	100%	0	0%	0	0%
No response	4	50%	2	25%	2	25%
Total	613	69%	269	30%	9	1%

Language of the home

For single-person households – we asked what their first language was.

Table 12: Stage 1 – Single-person households - First language

Language	Number of households	%
Welsh	22	31.9
English	39	56.5
Other	7	10.1
No response	1	1.5
Total	69	100.0

For households of more than one person – we asked which language was spoken most in the household.

Table 13: Stage 1 – Households of more than one person – Language spoken in the household

Language	Number of households	%
Welsh	120	42.6
English	140	49.6
Other	19	6.7
No response	3	1.1
Total	282	100.0

By combining the two sets of results above, it can be seen (below) that Welsh is the first language / language of the household in respect of about 40% of the new homes surveyed, and in approximately 50% of them, it is English. Unfortunately, there are no corresponding statistics for the pattern among the population of Gwynedd as a whole.

Table 14: Stage 1: Language of household / first language

Language	Number of homes	%
Welsh	142	40.5
English	179	51.0
Other	26	7.4
No response	4	1.1
Total	351	100.0

4. BANGOR area

Bangor area numbers

In total we had the address of 418 new houses completed in the Bangor area between 2015 and 2017. We received a response from 136 houses, which is around 33% of those reached.

Table 15: Bangor area – Number of houses surveyed

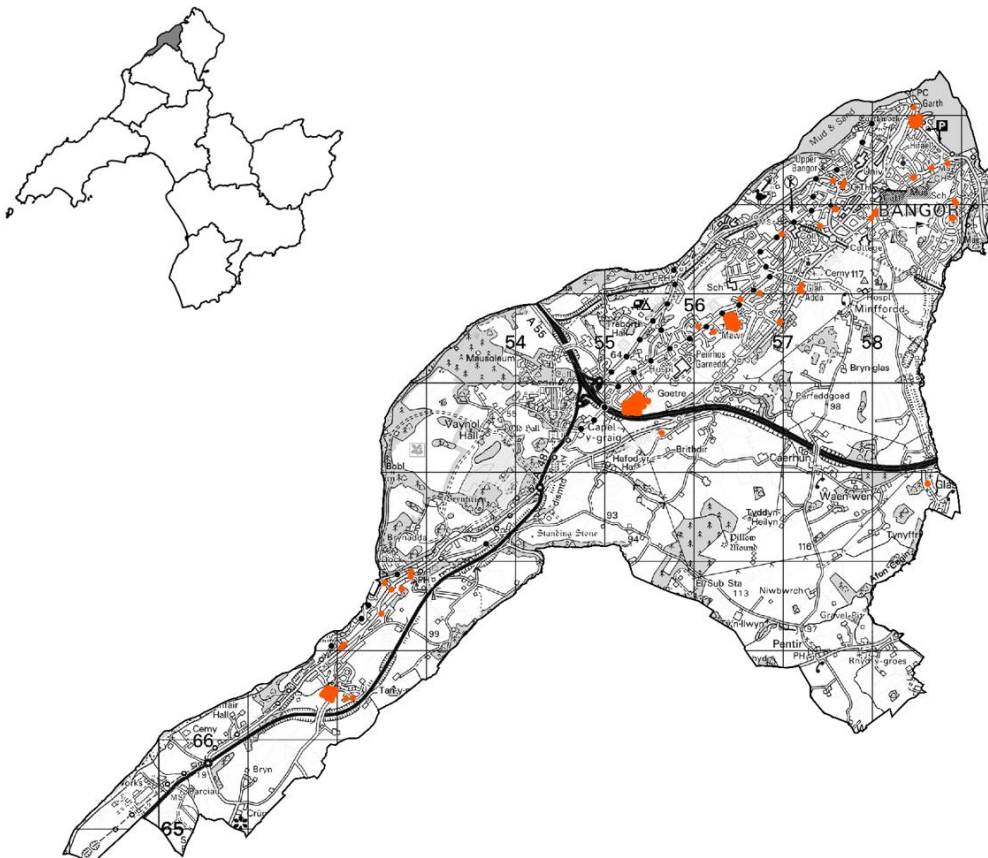
Number	Number reached	Number of respondents	% of those reached who responded
418	408	136	33.3%

These 418 include the development of:-

- 54 houses at Ger y Nant Estate, Y Felinheli
- 53 houses at Llys Adda Estate, Bangor
- 63 houses at Y Bae Estate, Bangor
- 127 houses at Goetre Uchaf Estate, Penrhosgarnedd

The map below of the Bangor area shows the location of the new housing.

Figure 3: Bangor area – Location of new housing



Population of Bangor area

The population of the area concerned is **21,757** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Bangor area (sample of 136)

Of the 136 new dwellings from which a response was received, 38% were either private rented or rented from a housing association.

Table 16: Bangor Area – House owner or renting the house

House owner or renting	Number	%
Owner	82	60.3%
Private rented	28	20.6%
Social rented	23	16.9%
Part Ownership	2	1.5%
No response	1	0.7%
Total	136	100.0%

The most common type of new house we received a response from was a detached house.

Table 17: Bangor area – House types

Type of house	Number	%
Detached	43	31.6%
Flat or maisonette	37	27.2%
Semi	34	25.0%
Terrace	15	11.0%
Other	6	4.4%
No response	1	0.7%
Total	136	100.0%

The most common number of bedrooms in the new houses we received a response from was three.

Table 18: Bangor area – Number of bedrooms

Number of bedrooms	Number	%
1	11	8.1%
2	40	29.4%
3	49	36.0%
4	33	24.3%
5	1	0.7%
7	1	0.7%
No response	1	0.7%
Total	136	100.0%

A total of 346 people were living in the 136 houses from which we received a response to the questionnaire; approximately 2.5 people per house.

Table 19: Bangor Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	29	29
2	41	82
3	35	105
4	27	108
5	3	15
6	0	0
7	1	7
Total	136	346

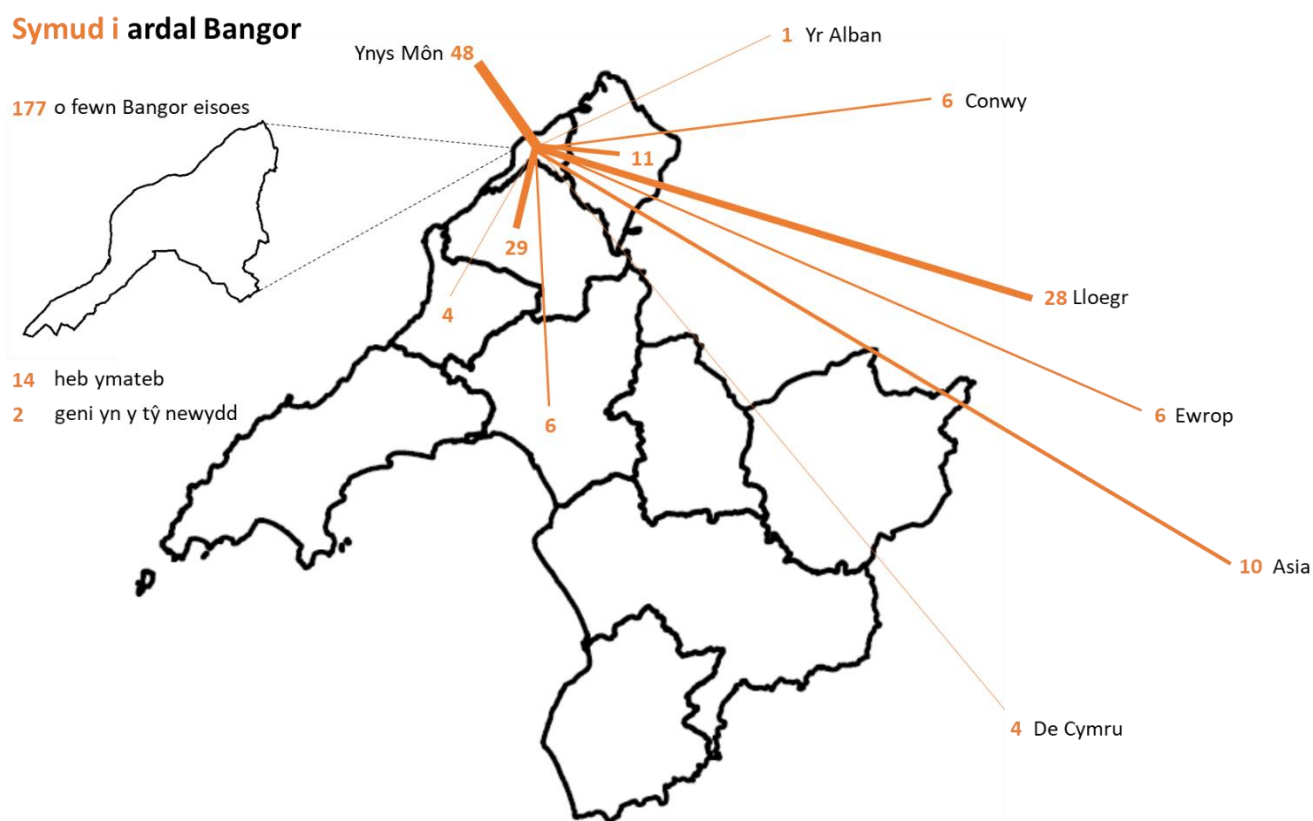
Table 20: Bangor area – Number of Bedrooms for number of people living there

Number of bedrooms↓	Number of people living there→							Total Number of Homes
	1	2	3	4	5	6	7	
1	9	2						11
2	11	13	10	6				40
3	5	18	13	13				49
4	4	7	12	7	3			33
5				1				1
7							1	1
No response		1						1
Total	29	41	35	27	3	0	1	136

The people who moved into the new houses

The map below shows where the 346 people who moved to the 136 new dwellings came from.

Figure 4: Bangor area – Moving to Bangor area



It can be seen, for example, that over half the individuals in the sample (177/346; 51%) had moved to the new house from elsewhere in the Bangor area. Several had also moved from Anglesey (48/346; 14%). 13% had moved there from other areas in Gwynedd (mainly the Caernarfon area) and 8% had moved from England.

A great majority of those who have moved into a new house are in the 25-44 age group, with several children also living in the houses.

Table 21: Bangor Area - Age

Age	Number	%
0-2	19	5.5%
3-11	55	15.9%
12-17	17	4.9%
18-24	43	12.4%
25-44	136	39.3%
45-64	55	15.9%
65-84	19	5.5%
85+	0	0.0%
No response	2	0.6%
Total	346	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Bangor area according to the proportion in each age group.

Table 22: Bangor area – Age and areas (moved to Bangor)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Bangor	5%	17%	6%	14%	36%	17%	4%		1%	177
Caernarfon	10%	21%	10%	8%	45%	3%	3%			29
Dyffryn Nantlle		25%		25%	25%	25%				4
Dyffryn Ogwen	9%	9%			36%	46%				11
Porthmadog		33%			50%	17%				6
Born in the new house	100%									2
Isle of Anglesey	4%	13%	8%	4%	52%	15%	4%			48
Conwy	17%				33%	33%	17%			6
Rest of Wales				50%		50%				4
England		8%		14%	32%	21%	25%			28
Scotland					100%					1
Europe				50%	50%					6
Asia		20%		20%	60%					10
No response	7%	36%		14%	43%					14
										346

Language of the people who moved into the new houses

Of the 346 people, 205 (59.2%) stated that they could speak Welsh.

The language of the individuals

Table 23: Bangor Area – Able to speak Welsh

	Able to speak Welsh	%
No response	4	1.2%
No	137	39.6%
Yes	205	59.2%
Total	346	100.0%

Of those aged 3 and over **58%** could speak Welsh. (191/327)

According to the 2011 Census, **42%** of those over the age of 3 years living in the Bangor area were able to speak Welsh.

Table 24: Bangor Area – Ability to speak Welsh and age

Age	Able to speak Welsh		Not able to speak Welsh		No response	
0-2	14	74%	4	21%	1	5%
3-11	43	78%	12	22%	0	0%
12-17	13	76%	4	24%	0	0%
18-24	20	47%	23	53%	0	0%
25-44	69	51%	64	47%	3	2%
45-64	34	62%	21	38%	0	0%
65-84	11	58%	8	42%	0	0%
85+	0	0%	0	0%	0	0%
No response	1	50%	1	50%	0	0%
Total	205	59%	137	40%	4	1%

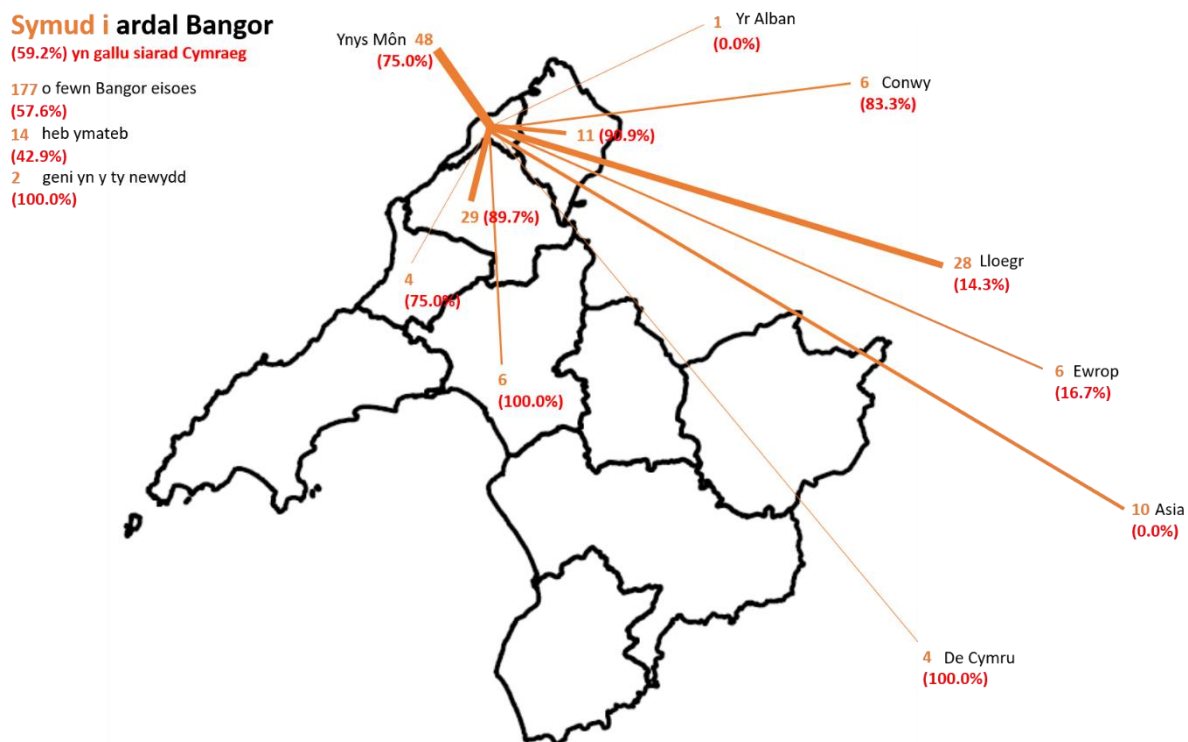
We see that the lowest % of Welsh speakers is in the 18-24 age group and that the highest % of those who are able to speak Welsh is in the 3-11 age group, at 78%. (43/55)

The map below shows the number of individuals who have moved to the Bangor area and the percentage of these who can speak Welsh.

Of those who have moved within the Bangor area 58% (102/177) said that they could speak Welsh.

We see that 14% (4/28) of those who have moved from England can speak Welsh.

Figure 5: Bangor area – moving to the area and ability to speak Welsh



Language of the home

For single-person households – we asked what their first language was.

Table 25: Bangor area – First language (single-person households)

Language	Number of Households	%
Welsh	9	31.0%
English	13	44.8%
Other	7	24.1%
Total	29	100.0%

For households of more than one person – we asked which language was mostly spoken in the household.

Table 26: Bangor area – Language of the home (households of more than one person)

Language	Number of homes	%
Welsh	26	24.3%
English	67	62.6%
Other	14	13.1%
Total	107	100.0%

Households from the two tables above combined

Table 27: Bangor area – Language of the home / first language (total)

Language	Number of homes	%
Welsh	35	25.7%
English	80	58.8%
Other	21	15.4%
Total	136	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

40% of respondents noted that the location of the new house was the reason for moving, with around 10% stating that they wanted a larger house, 8% thought that a new house was of a high standard and offered value for money, a further 8% wanted a smaller property and about 6% wanted to buy their first home.

Table 28: Bangor Area – Reasons for moving

	Number	%
House location	62	39.7%
Larger property needed	16	10.3%
High standard / value for money	13	8.3%
Smaller property needed	12	7.7%
Wanted his/her/their own property	10	6.4%
Did not like where we were living e.g. crime and noise levels	8	5.1%
The suitability of the house to personal needs	5	3.2%
Change in life circumstances – a fresh start	5	3.2%
For our retirement	5	3.2%
Views / Natural environment / Countryside	5	3.2%
Affordable rent/prices	4	2.6%
More parking space/garage needed	3	1.9%
Liked the house	3	1.9%
Forced to leave our previous house	2	1.3%
Knew the person who was renting out the house	1	0.6%
Wanted a second home	1	0.6%
Don't want to say	1	0.6%
	156	

*out of 136 responses (some gave more than one reason)

Why move to this area?

Of the 136 new houses 67 were where the family (or some members of the family) were already living in the Bangor area. 22% of respondents noted that they had moved in order to be closer to work. 12% were moving due to their choice of school for their children, 11% due to the facilities/ transport links in the area and 10% to attend University/continue as postgraduates.

Table 29: Bangor Area – Why move to this area?

	Number	%
Already living in the Bangor area – staying within the area	67	32.7%
Work location / closer to work	44	21.5%
School for the children – standard of teaching / before school and after school clubs	24	11.7%
Facilities / links in the area	22	10.7%
To attend university	21	10.2%
To be closer to family / close friends	12	5.8%
For a quieter life / less populated area / a nicer life	6	2.9%
Somewhere where he/she/they could afford the rent	3	1.5%
No response	2	1.0%
Less crime in the area	2	1.0%
Used to rent - now able to buy a house	1	0.5%
Welsh Area	1	0.5%
	205	

**out of 136 responses (some gave more than one reason)*

Why choose a new house?

The most common answer was because there is no work on a new house and the new house warranty that comes with a new house – that was the response of 42% of respondents. 16% noted that they had been located in the area by a Housing Association and 12% noted that the cost of the rent was the reason and not necessarily that it was a new house. 10% noted that they had chosen a new house because they had been able to buy through the Help to Buy Scheme.

Table 30: Bangor area – Why choose a new house

	Number	%
No work on a new house / reduced running costs / New Home Warranty	60	42.3%
Obtained from Council / Housing Association	22	15.5%
The cost of the rent was the reason and not because it was a new house	17	12.0%
Help to Buy Wales Scheme	14	9.9%
The reason was the location, not that it was a new house	11	7.7%
No response	9	6.3%
House we could afford	4	2.8%
Managed to acquire a plot to build on	3	2.1%
Converted building – i.e. not a brand-new house	2	1.4%
	142	

**out of 136 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Bangor area, 54 noted that they would have looked for another house within the same area. 3 of them would have moved out of the area to an area outside Gwynedd and 1 would have moved to the Caernarfon area. 2 respondents believed that they would not have moved at all.

Table 31: Bangor Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Bangor area)

Those already living in the Bangor area	Number	%
Still would have moved to somewhere within a reasonable distance of the Bangor area	54	80.7%
No response	6	9.0%
Llandudno	2	2.9%
Would not have moved and would have stayed in the Bangor area	2	2.9%
Not sure	1	1.5%
Anglesey	1	1.5%
Still would have moved, but it would have been to somewhere within a reasonable distance of the Caernarfon area	1	1.5%
	67	

**out of 67 responses*

Of those who were not living in the Bangor area before, around half noted that they would have looked for another house in the Bangor area if the new house had not been available. 7 noted that they would not have moved had new housing not been available. A further 4 would have moved to areas outside Gwynedd.

Table 32: Bangor Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those not already living in the Bangor area)

Those <u>NOT</u> already living in the Bangor area	Number	%
They would still have moved to the Bangor area	34	49.2%
No response	15	21.7%
Would have looked for a suitable house to rent in the Bangor area	5	7.2%
Would not have moved and would have stayed in the Caernarfon area	3	4.3%
Anglesey	3	4.3%
Not sure	2	2.9%
Would not have moved and would have stayed in Conwy	2	2.9%
Would have moved to the Porthmadog area	1	1.5%
Would not have moved and would have stayed in England	1	1.5%
Would not have moved and would have stayed in the Porthmadog area	1	1.5%
Llandudno	1	1.5%
Would have moved to the Caernarfon area	1	1.5%
	69	

**out of 69 responses*

Previous connection with the area?

As noted above 67 of the respondents stated that the family (or some members of the family) were already living in the Bangor area; 11 of these 67 were because they had been students at the University. 13% of families who moved into the area had no previous connection with the area. 10% had close friends or family living in the area.

Table 33: Bangor Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person was already living in the Bangor area	56	41.2%
No previous connection	17	12.5%
No response	14	10.3%
Close friends / family in the area	14	10.3%
In the area because had been studying at the University	11	8.1%
At least one person was already living in a neighbouring area	10	7.4%
Working in the area	7	5.1%
Returning after being away in University/working away	5	3.7%
Have been coming on holiday to the area over the years	1	0.7%
Born in Gwynedd, but have always lived in England	1	0.7%
	136	

*out of 136 responses

The houses where the residents of the new houses were living before

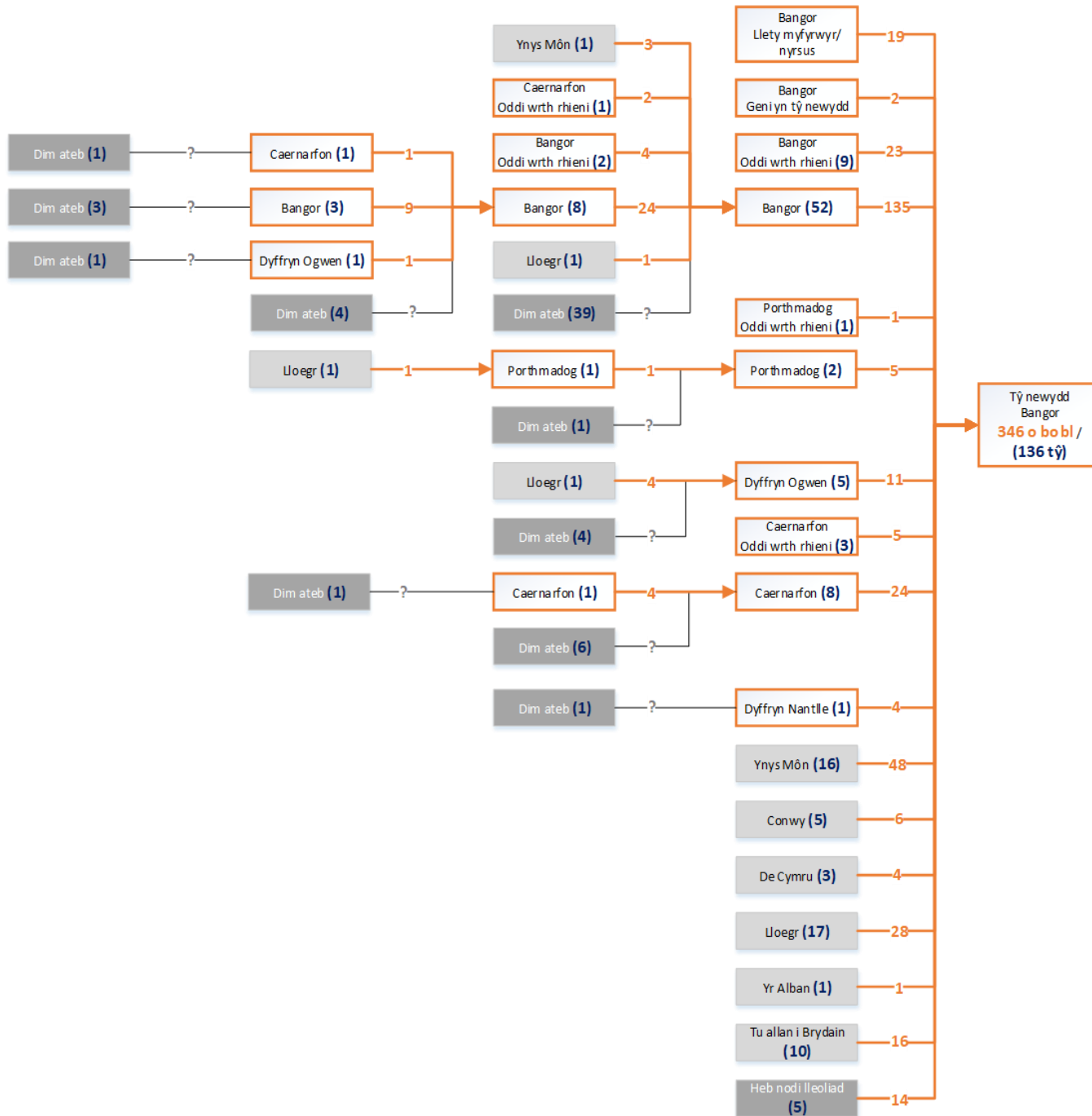
Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house in order to track the housing 'chain' back.

The diagram **on the next page** summarises the results, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

Generally, it can be seen that other movements in the 'chain' within Gwynedd tend to be within the same areas.

For example, in respect of the significant number of respondents who had moved to the new houses from the Bangor area itself – it appears that, based on our sample, the houses where they were living previously, in turn, had been bought / rented by other people from the Bangor area itself. And this is also true of the next stage of the 'chain'.

Figure 6: Bangor Area – Stages 2, 3 and 4



Main conclusions about the Bangor area

- Around 40% of the residents of the new houses were aged between 25 and 44 years old.
- Over half the residents of the new houses had moved there from another house within the Bangor area itself.
- The other main areas which people were moving from were Anglesey (14%), other areas of Gwynedd (13%) – mainly the Caernarfon area, and England (8%).
- Approximately 60% of the residents of the new houses spoke Welsh, which is higher than the proportion in the Bangor area as a whole. The majority of those moving there from within the Bangor area itself, from other areas in Gwynedd, and from other counties in Wales, spoke Welsh.
- The location (including proximity to a work location) was the main reason people chose to move to a new house in the area. The desire to live in the Bangor area was strong among those already living in the area and among those who had moved from other areas.
- A significant proportion (40%) of respondents chose to live in the Bangor area because they were already in the area (or forming a new “household” and one / some of those were already living in the Bangor area (e.g. a couple moving in together).
- A high proportion (40%) identified a lack of costs / maintenance, and the new house warranty, as a reason for specifically choosing a new house.
- It appears (although numbers are too small to reach a definite conclusion) that the majority of other movements in the housing “chain” in Gwynedd have been within the same areas. For example, where people had moved into the new houses from the Bangor area itself, the majority of the houses they were living in previously had been bought / rented by people who were also living in the Bangor area previously.

5. CAERNARFON area

Caernarfon area numbers

In total we had the address of 129 new houses completed in the Caernarfon area between 2015 and 2017. We received a response from 58 houses, which is around 47% of those reached.

Table 34: Caernarfon area – Number of houses surveyed

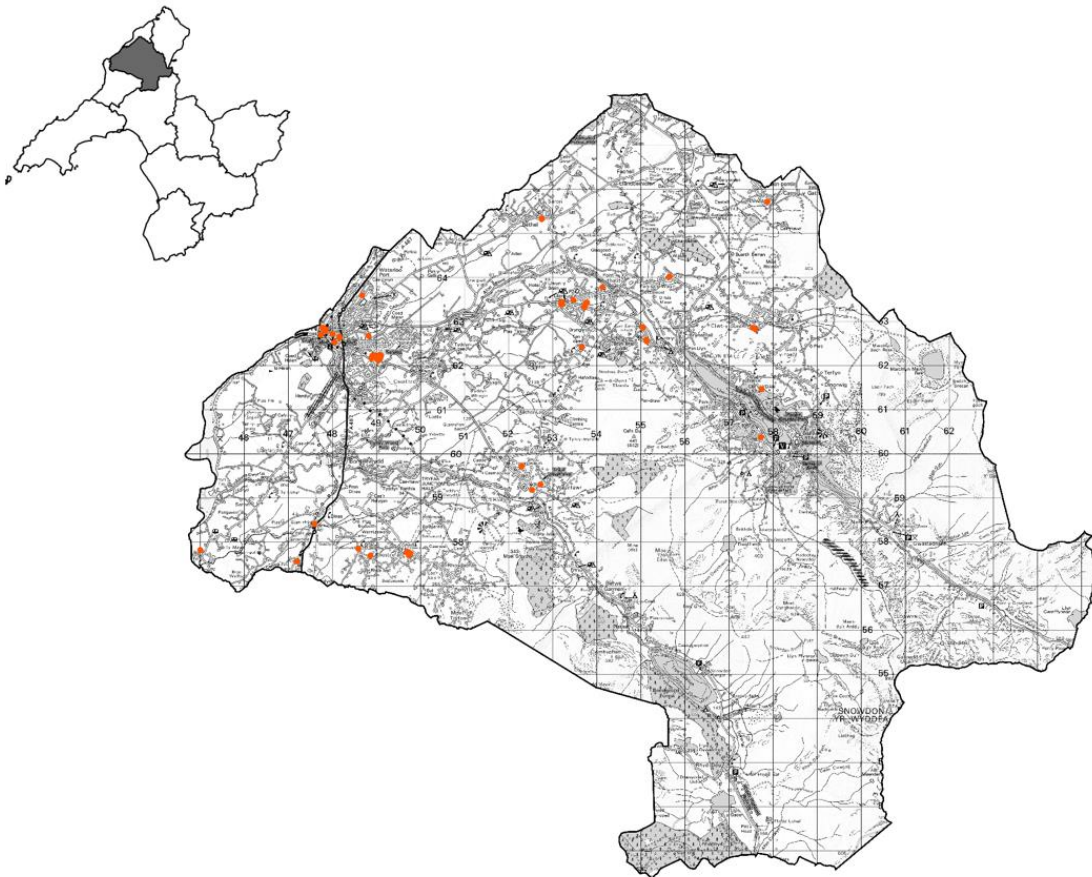
Number	Number reached	Number of respondents	% of those reached who responded
129	124	58	46.8%

These 129 include the development of:-

- 46 new houses at Gwêl y Llan estate, Caernarfon

The map below of the Caernarfon area shows the location of the new housing.

Figure 7: Caernarfon area – New housing location



Population of Caernarfon area

The population of the area concerned is **25,246** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Caernarfon area (sample of 58)

Of the 58 new dwellings from which a response was received, 26% were either private rented or rented from a housing association.

Table 35: Caernarfon Area – House owner or renting the house

House owner or renting	Number	%
Owner	43	74.1%
Private rented	8	13.8%
Social rented	7	12.1%
Total	58	100.0%

The most common type of new house we received a response from was a detached house.

Table 36: Caernarfon area – House types

Type of house	Number	%
Detached	27	46.6%
Flat or maisonette	7	12.1%
Semi	18	31.0%
Terrace	5	8.6%
Bungalow	1	1.7%
Total	58	100.0%

Three bedrooms were the most common number in the new houses we received a response from.

Table 37: Caernarfon area – Number of bedrooms

Number of bedrooms	Number	%
1	4	6.9%
2	13	22.4%
3	34	58.6%
4	7	12.1%
Total	58	100.0%

Of the 58 houses which responded to the questionnaire, there were a total of 128 people living in them; approximately 2.2 people per house.

Table 38: Caernarfon Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	11	11
2	32	64
3	7	21
4	8	32
Total	58	128

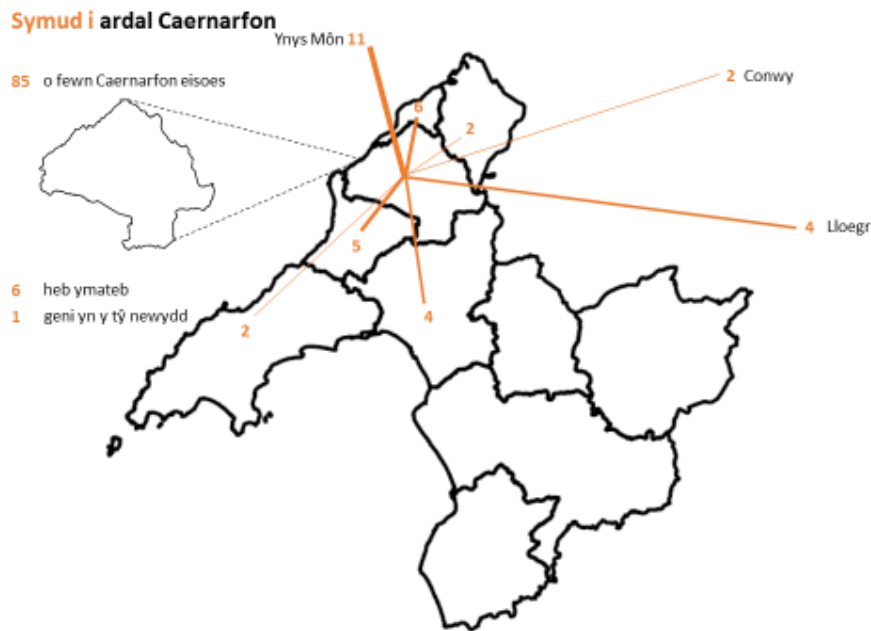
Table 39: Caernarfon area – Number of Bedrooms for number of people living there

Number of bedrooms↓	Number of people living there→				Total Number of Homes
	1	2	3	4	
1	4				4
2	3	10			13
3	3	20	4	7	34
4	1	2	3	1	7
Total	11	64	21	32	58

The people who moved into the new houses

The map below shows where the 128 people who moved to the 58 new dwellings came from.

Figure 8: Caernarfon area – Moving to Caernarfon area



The vast majority (85/128; 66%) of new housing residents have moved there from another house in the Caernarfon area. Approximately 15% had moved from neighbouring areas in Gwynedd and around 9% from Anglesey. There were very few moves from areas further afield.

A great majority of those who have moved into a new house are in the 25-44 age group, with a significant number also between 45 and 64 years.

Table 40: Caernarfon Area - Age

Age	Number	%
0-2	7	5.5%
3-11	15	11.7%
12-17	4	3.1%
18-24	15	11.7%
25-44	47	36.7%
45-64	26	20.3%
65-84	13	10.2%
85+	0	0.0%
No response	1	0.8%
Total	128	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Caernarfon area by the proportion in each age group.

Table 41: Caernarfon area – Age and areas (moved to Caernarfon)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Bangor	17%				66%		17%			6
Caernarfon	6%	15%	5%	12%	33%	21%	8%			85
Dyffryn Nantlle					40%	60%				5
Dyffryn Ogwen		50%			50%					2
Llŷn						100%				2
Porthmadog				25%	75%					4
Born in the new house	100%									1
Isle of Anglesey		9%			45%	18%	18%			11
Conwy					50%	50%				2
England				25%			75%			4
No response				50%	50%					6
										128

Language of the people who moved into the new houses

Of the 128 people, 116 (91%) stated that they could speak Welsh.

The language of the individuals

Table 42: Caernarfon Area – Able to speak Welsh

	Able to speak Welsh	%
No response	1	1%
No	11	8%
Yes	116	91%
Total	128	100%

Of those aged 3 and over **91%** could speak Welsh. (110/121)

According to the 2011 Census, **81%** of those over the age of 3 years living in the Caernarfon area were able to speak Welsh.

Table 43: Caernarfon Area – Ability to speak Welsh and age

Age	Able to speak Welsh		Not able to speak Welsh		No response	
0-2	6	86%	1	14%	0	0%
3-11	15	100%	0	0%	0	0%
12-17	4	100%	0	0%	0	0%
18-24	15	100%	0	0%	0	0%
25-44	42	89%	5	11%	0	0%
45-64	23	88%	3	12%	0	0%
65-84	11	84%	1	8%	1	8%
85+	0	0%	0	0%	0	0%
No response	0	0%	1	100%	0	0%
Total	116	91%	11	8%	1	1%

We see that the lowest % of Welsh speakers is in the 65-84 age group and that all in the 3-11, 12-17 and 18-24 age groups are able to speak Welsh.

The map below shows the number of individuals who have moved to the Caernarfon area and the percentage of these who can speak Welsh.

Of those who have moved within the Caernarfon area 94% (80/85) said that they could speak Welsh.

We see that 75% (3/4) of those who have moved from England can speak Welsh.

Figure : Caernarfon area – moved to the area and able to speak Welsh

Symud i ardal Caernarfon

(91%) yn gallu siarad Cymraeg

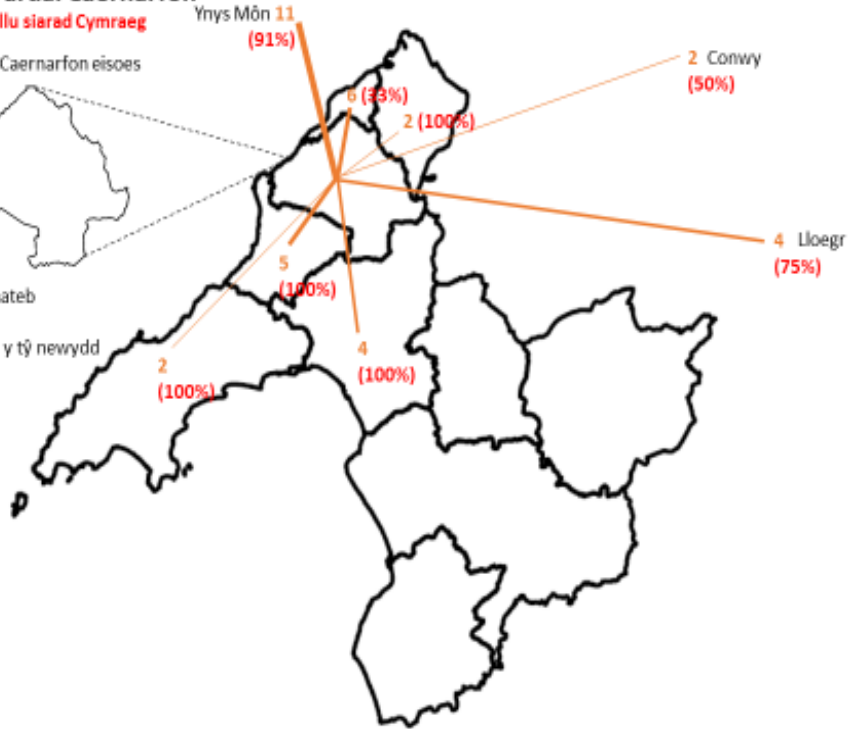
Ynys Môn 11
(91%)

85 o fewn Caernarfon eisoes
(94%)



6 heb ymateb
(100%)

1 geni yn y tŷ newydd
(100%)



Language of the home

For one-person households– we asked what their first language was.

Table 44: Caernarfon area – First language (one-person households)

Language	Number of households	%
Welsh	8	72.7%
English	3	27.3%
Other	0	0.0%
No response	0	0.0%
Total	11	100.0%

For multi person households – we asked which language was spoken most in the household.

Table 45: Caernarfon area – Language of the home (multi person households)

Language	Number of households	%
Welsh	35	74.5%
English	10	21.3%
Other	1	2.1%
No response	1	2.1%
Total	47	100.0%

Households from the two tables above combined

Table 46: Caernarfon area – Language of the home / first language (total)

Language	Number of households	%
Welsh	43	74.2%
English	13	22.4%
Other	1	1.7%
No response	1	1.7%
Total	58	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses in order to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

15% of respondents stated that they had liked the new house, with around 14% stating that the location of the house was their reason for moving, 9% wanted to buy their first home. 12% of respondents gave no reason whatsoever.

Table 47: Caernarfon Area – Reasons for moving

Why did you move here?	Number	%
Liked the house	13	14.9%
House location	12	13.8%
No response	10	11.5%
Wanted his/her/their own property	8	9.2%
High standard / value for money	6	6.9%
Smaller property needed	6	6.9%
Did not like where we were living e.g. crime and noise levels	5	5.7%
Change in life circumstances – a fresh start	5	5.7%
This was the property that was available at the time	5	5.7%
Larger property needed	3	3.4%
Knew the person who was renting the house	2	2.3%
Affordable rent/prices	2	2.3%
More parking space/garage needed	2	2.3%
The suitability of the house to personal needs	2	2.3%
Forced to leave our previous house	2	2.3%
Views / Natural environment / Countryside	2	2.3%
Wanted a second home	1	1.1%
For our retirement	1	1.1%
	87	

**out of 58 responses (some gave more than one reason)*

Why move to this area?

Of the 58 new houses 36 were where the family (or some of them) were already living within the Caernarfon area. 16% were moving to be closer to family / close friends. 14% of respondents noted that they had moved in order to be closer to work.

Table 48: Caernarfon Area – Why move to this area?

Why move to this area?	Number	%
A member already living in the area	36	40.0%
To be closer to family / close friends	14	15.6%
Work location / closer to work	13	14.4%
No response	9	10.0%
Facilities / links in the area	6	6.7%
School for the children – standard of teaching / before school and after school clubs	5	5.6%
Welsh Area	3	3.3%
Somewhere he/she/they could afford	2	2.2%
For a quieter life / less populated area / a nicer life	2	2.2%
	90	

**out of 58 responses (some gave more than one reason)*

Why choose a new house?

The most common answer was because there is no work on a new house warranty that comes with a new house – that was the response of 36% of respondents. 12% noted that they had been located in the area by a Housing Association and 11% noted that the reason was the location of the house and not necessarily the fact that it was a new house. 9% noted that they had chosen a new house because they had been able to buy through the Help to Buy Scheme.

Table 49: Caernarfon area – Why choose a new house?

Why choose a new house?	Number	%
Convenience - No work on a new house / reduced running costs / new home warranty	24	36.4%
Obtained from Council / Housing Association	8	12.1%
The main reason was the location, not that it was a new house	7	10.6%
Help to Buy Wales Scheme	6	9.1%
No response	6	9.1%
House we could afford	5	7.6%
Converted building – i.e. not a brand-new house	5	7.6%
Managed to acquire a plot to build on	4	6.1%
The cost of the rent was the reason and not because it was a new house	1	1.5%
	66	

**out of 58 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Caernarfon area, 19 noted that they would have looked for another house within the same area.

Table 50: Caernarfon Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Caernarfon area)

Those already living in the Caernarfon area	Number	%
Somewhere within reasonable distance of the Caernarfon area	19	52.8%
No response	10	27.8%
Would not have moved and would have stayed in the Caernarfon area	4	11.1%
Would have moved to Anglesey	1	2.8%
Not sure	1	2.8%
Would have looked for a suitable house to rent in the Caernarfon area	1	2.8%
	36	

*out of 36 responses

Of those who were not living within the Caernarfon area previously we did not receive a response from 10 of them. 6 noted that they would have looked for another house within the same area and 1 stated that he/she would not have moved had the new house not been available. A further 3 would have moved to the Bangor area if new housing had not been available.

Table 51: Caernarfon Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those not already living in the Caernarfon area)

Those NOT already living in the Caernarfon area	Number	%
No response	10	45.5%
Would still have moved to the Caernarfon area	6	27.3%
Would have moved to the Bangor area instead	3	13.6%
Not sure	2	9.1%
Somewhere in North Wales	1	4.5%
	22	

*out of 22 responses

Previous connection with the area?

As noted above, in the case of 36 of the respondents, at least one family member already lived in the Caernarfon area. A further 11 were already living in neighbouring areas. 7% of the families who moved to the area had no previous connection with the area. 5% did not answer this question.

Table 52: Caernarfon Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person was already living in the area	36	62.1%
At least one person was already living in the neighbouring area	11	19.0%
No previous connection	4	6.9%
No response	3	5.2%
Born in Gwynedd, but have always lived in England	2	3.4%
Close friends / family in the area	2	3.4%
	58	

*out of 58 responses

The houses where the residents of the new houses were living before

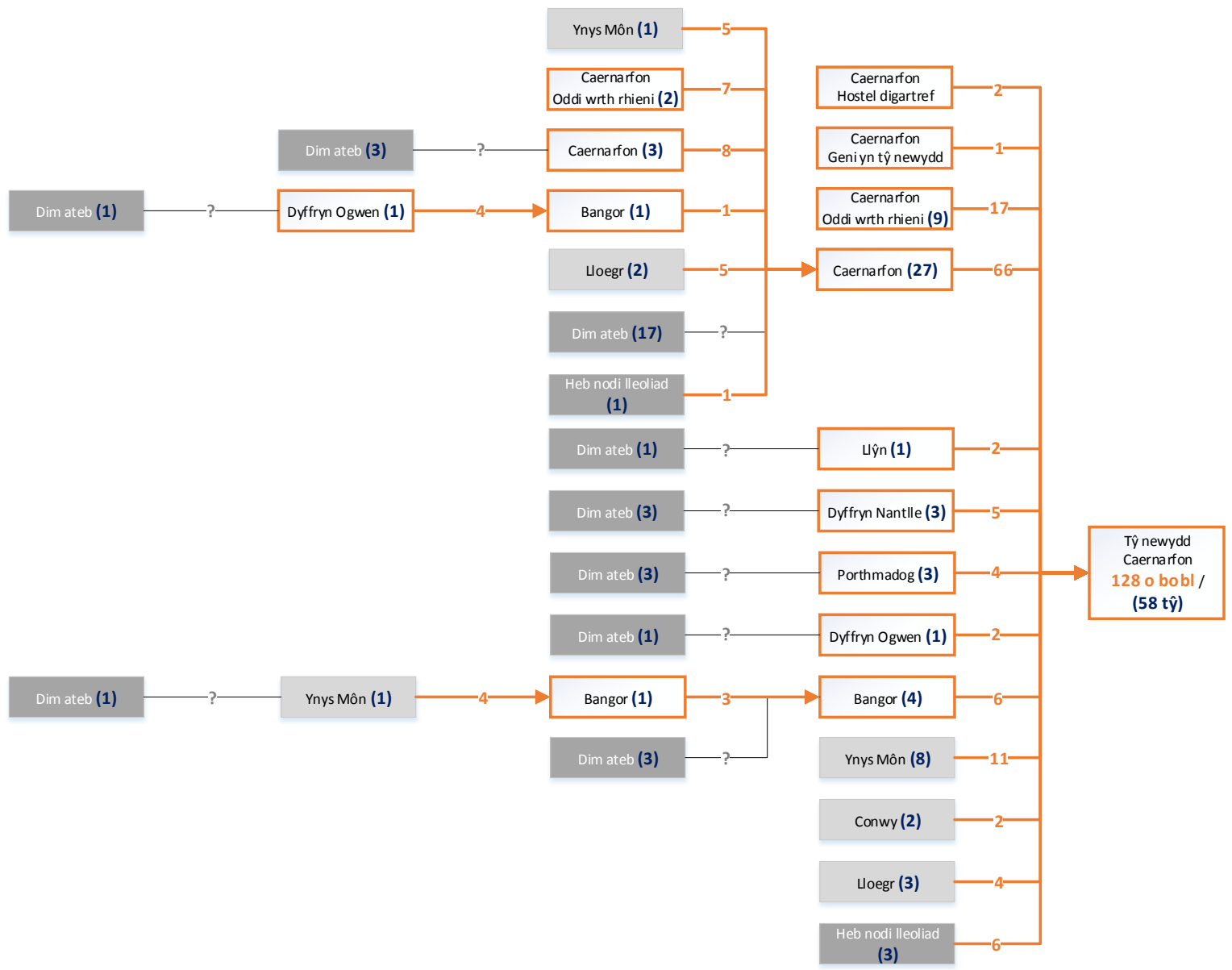
Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the results, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

As we have seen, a significant proportion of the people who moved to a new house moved there from elsewhere in the Caernarfon area; of these a proportion (17/85; 20%) moved from their parents' house (and therefore no house became vacant).

Where a house in the Caernarfon area became vacant, the majority of the new residents of those houses (15 out of 26 in the responses we received, namely 58%) came from the Caernarfon area itself. Around 20% came from Anglesey and around 20% from England.

Figure 9: Caernarfon Area – Stages 2, 3 and 4



Main conclusions about the Caernarfon area

- Around 35% of the residents of the new houses were aged between 25 and 44 years old and approximately 20% were aged between 45 and 64 years old.
- Two thirds of the residents of the new houses had moved there from another house within the Caernarfon area itself.
- The other main areas from which people were moving were neighbouring areas in Gwynedd (15%) and Anglesey (9%). There were few moves from other areas.
- Over 90% of the residents of the new houses spoke Welsh, which is higher than the proportion in the Caernarfon area as a whole. Apart from those who moved from the Bangor area, the majority of those moving from all other areas (including those moving from England) spoke Welsh.
- The reasons for moving to a new house in the area were fairly mixed, with many stating that they “liked the house” or moved due to the location. The desire to live in the Caernarfon area was strong among those already living in the area, and quite important among those who had moved from other areas as well although some had indicated that they would have moved to the Bangor area if the new house had not been available.
- The vast majority (60%) were already living in the Caernarfon area with over a further 19% reporting that they were already living in an area near Caernarfon.
- A high proportion (36%) identified a lack of costs / maintenance, and the new home warranty, as a reason for specifically choosing a new house.
- Although numbers were too small to reach a definite conclusion it appears that, where a house in the Caernarfon area became vacant because people moved into the new houses, a majority (around 60%) of the new residents of those houses in turn moved within the Caernarfon area itself. Around 20% came from Anglesey and approximately 20% from England.

6. DOLGELLAU Area

Dolgellau area numbers

In total we had the address of 78 new houses completed in the Dolgellau area between 2012 and 2017. We received a response from 23 houses, which is about 32% of those reached.

Table 53: Dolgellau area – Number of houses surveyed

Number	Number reached	Number of respondents	% of those reached who responded
78	73	23	31.5%

These 78 include the development of:-

- 12 new houses at Wenallt Uchaf estate, Dolgellau
- 11 new houses at Sŵn y Dail estate, Barmouth

The map below of the Dolgellau area shows the location of the new housing.

Figure 10: Dolgellau area – New housing location



Population of Dolgellau area

The population of the area concerned is **10,488** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Dolgellau area (sample of 23)

Of the 23 new dwellings from which a response was received, 17% were either private rented or rented by a housing association.

Table 54: Dolgellau Area – House owner or renting the house

House owner or renting	Number	%
Owner	18	78.4%
Part Ownership	1	4.3%
Private rented	1	4.3%
Social rented	3	13.0%
Total	23	100.0%

The most common type of new housing we received a response from was a detached house.

Table 55: Dolgellau area – House types

Type of house	Number	%
Detached	13	56.5%
Flat or maisonette	3	13.0%
Semi	4	17.4%
Terrace	2	8.7%
No response	1	4.4%
Total	23	100.0%

Three bedrooms were the most common number in the new houses we received a response from.

Table 56: Dolgellau area – Number of bedrooms

Number of bedrooms	Number	%
1	1	4.4%
2	5	21.7%
3	9	39.1%
4	5	21.7%
5	2	8.7%
7	1	4.4%
Total	23	100.0%

In the 23 houses which responded to the questionnaire, there were a total of 53 people living in them; approximately 2.3 people per house.

Table 57: Dolgellau Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	4	4
2	13	26
3	2	6
4	3	12
5	1	5
Total	23	53

Table 58: Dolgellau area – Number of bedrooms for number of people living there

Number of bedrooms↓	Number of people living there→					Total Number of Homes
	1	2	3	4	5	
1		1				1
2	2	2	1			5
3	1	6		2		9
4		3		1	1	5
5	1		1			2
7		1				1
Total	4	13	2	3	1	23

The people who moved into the new houses

The map below shows where the 53 people who moved to the 23 new dwellings came from.

Figure 11: Dolgellau area – Moving to Dolgellau area

Symud i ardal Dolgellau

18 o fewn Dolgellau eisoes

5 heb ymateb



Therefore, we see that nearly half (25/53; 47%) of the individuals in the sample moved into the new house from England. A third (18/53; 34%) had moved from another house in the Dolgellau area and 5% had moved from the adjoining Tywyn area.

The majority of people who have moved into a new house are in the 45-64 and 65-84 age groups. And yet, approximately 20% of the residents of the new houses were children under 11 years old.

Table 59: Dolgellau Area - Age

Age	Number	%
0-2	1	1.9%
3-11	10	18.9%
12-17	0	0.0%
18-24	2	3.8%
25-44	11	20.8%
45-64	14	26.4%
65-84	15	28.3%
85+	0	0.0%
No response	0	0.0%
Total	53	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Dolgellau area by the proportion in each age group.

Table 60: Dolgellau area – Age and areas (moved to Dolgellau)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Dolgellau		44%		6%	33%	17%				18
Tywyn							100%			3
England		8%			8%	40%	44%			25
Europe					50%	50%				2
No response	20%			20%	40%		20%			5
										53

Language of the people who moved into the new houses

Of the 53 people, 27 (51%) stated that they could speak Welsh.

The language of the individuals

Table 61: Dolgellau Area – Able to speak Welsh

	Able to speak Welsh	%
No	26	49%
Yes	27	51%
Total	53	100%

Of those aged 3 and over **52%** could speak Welsh. (27/52)

According to the 2011 Census, **54%** of those over the age of 3 years living in the Dolgellau area were able to speak Welsh.

Table 62: Dolgellau Area – Ability to speak Welsh and age

Age	Able to speak Welsh		Not able to speak Welsh	
0-2	0	0%	1	100%
3-11	10	100%	0	0%
12-17	0	0%	0	0%
18-24	2	100%	0	0%
25-44	7	64%	4	36%
45-64	2	14%	12	86%
65-84	6	40%	9	60%
85+	0	0%	0	0%
No response	0	0%	0	0%
Total	27	51%	26	49%

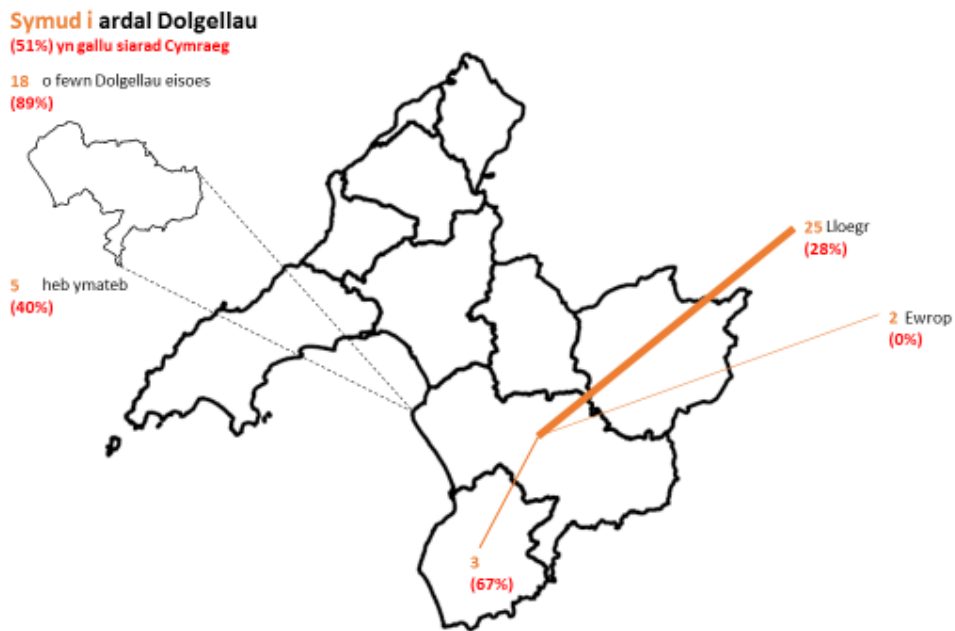
We see that the lowest % of Welsh speakers is in the 45-64 age group and that all in the 3-11 and 18-24 age groups are able to speak Welsh.

The map below shows the number of individuals who have moved to the Dolgellau area and the percentage of these who can speak Welsh.

Of those who have moved within the Dolgellau area 89% (16/18) said that they could speak Welsh.

We see that 28% (7/25) of those who have moved from England can speak Welsh.

Figure 12: Dolgellau area – moved to the area and able to speak Welsh



Language of the home

For one-person households – we asked what their first language was.

Table 63: Dolgellau area – First language (one-person households)

Language	Number of households	%
Welsh	1	25.0%
English	3	75.0%
Other	0	0.0%
No response	0	0.0%
Total	4	100.0%

For multi person households – we asked which language was spoken most in the household.

Table 64: Dolgellau area – Language of the home (multi person households)

Language	Number of Households	%
Welsh	2	10.5%
English	15	78.9%
Other	1	5.3%
No response	1	5.3%
Total	19	100.0%

Households from the two tables above combined

Table 65: Dolgellau area – Language of the home / first language (total)

Language	Number of households	%
Welsh	3	13.0%
English	18	78.4%
Other	1	4.3%
No response	1	4.3%
Total	23	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses in order to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

22% of respondents stated that they had moved for their retirement, with 9% stating that they moved because they liked the house, 9% moving due to changes in their life circumstances and wanting a fresh start and a further 9% due to the natural environment and scenery. 13% of respondents gave no reason whatsoever.

Table 66: Dolgellau Area – Reasons for moving

Why did you move here?	Number	%
For our retirement	7	21.9%
No response	4	12.5%
Liked the house	3	9.4%
Change in life circumstances – a fresh start	3	9.4%
Views / Natural environment / Countryside	3	9.4%
High standard / value for money	2	6.3%
House location	2	6.3%
Larger property needed	2	6.3%
Did not like where we were living e.g. crime and noise levels	2	6.3%
More parking space/garage needed	1	3.1%
The suitability of the house to personal needs	1	3.1%
Smaller property needed	1	3.1%
This was the property that was available at the time	1	3.1%
	32	

*out of 23 responses (some gave more than one reason)

Why move to this area?

Of the 23 new houses 5 were where the family (or some family members) were already living within the Dolgellau area. 20% were moving to be closer to family / close friends. 12% of respondents noted that they had moved because they wanted a quieter life.

Table 67: Dolgellau Area – Why move to this area?

Why move to this area?	Number	%
No response	6	24.0%
One member already living in the area	5	20.0%
To be closer to family / close friends	5	20.0%
For a quieter life / less populated area / a nicer life	3	12.0%
Facilities / links in the area	2	8.0%
Somewhere he/she/they could afford	2	8.0%
Less crime in the area	1	4.0%
Work location / closer to work	1	4.0%
	25	

**out of 23 responses (some gave more than one reason)*

Why choose a new house?

The most common answer was that the reason was the location and not necessarily a new house. 14% noted the convenience of a new house as a reason – no work on a new house or the new home warranty. 14% reported that they had been able to convert an existing building. A further 11% had been able to obtain a plot for themselves on which to build and a further 11% had obtained the house from the Council/Housing Association.

Table 68: Dolgellau area – Why choose a new house

Why choose a new house?	Number	%
The main reason was the location, not that it was a new house	8	28.6%
Convenience - No work on a new house / reduced running costs / new home warranty	4	14.3%
Converted building – i.e. not a brand-new house	4	14.3%
No response	4	14.3%
Managed to acquire a plot to build on	3	10.7%
Obtained from Council / Housing Association	3	10.7%
House we could afford	2	7.1%
	28	

**out of 23 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Dolgellau area, 4 out of the 5 reported that they would have remained in the Dolgellau area with 3 saying that they would continue to search for another house and one thinking that he/she would not have moved.

Table 69: Dolgellau Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Dolgellau area)

Those already living in the Dolgellau area	Number	%
Somewhere within reasonable distance of the Dolgellau area	3	60.0%
Would not have moved and would have stayed in the Dolgellau area	1	20.0%
No response	1	20.0%
	5	

**out of 5 responses*

Of those who were not living in the Dolgellau area previously, 9 noted that they would have looked for another house within the same area. 2 noted that they would not have moved had the new house not been available and would have remained in England. A further 1 would have moved to the Llŷn area if the new house had not been available.

Table 70: Dolgellau Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those not already living in the Dolgellau area)

Those <u>NOT</u> already living in the Dolgellau area	Number	%
Would still have moved to the Dolgellau area	9	50.0%
No response	4	22.2%
Would not have moved and would have stayed in England	2	11.1%
Not sure	2	11.1%
Would still have moved but to the Llŷn area	1	5.6%
	18	

**out of 18 responses*

Previous connection with the area?

As noted above, in the case of 5 of the respondents, at least one family member already lived in the Dolgellau area. A further 2 respondents were already living in neighbouring areas. 35% noted that they had been coming on holiday to the area over the years.

Table 71: Dolgellau Area – Previous connection with the area

Previous connection with the area?	Number	%
Have been coming on holiday to the area over the years	8	34.8%
At least one person was already living in the area	5	21.7%
No response	4	17.4%
At least one person already living in the neighbouring area	2	8.7%
Close friends / family in the area	2	8.7%
Born in Gwynedd, but have always lived in England	1	4.3%
No previous connection	1	4.3%
	23	

**out of 23 responses*

The houses where the residents of the new houses were living before

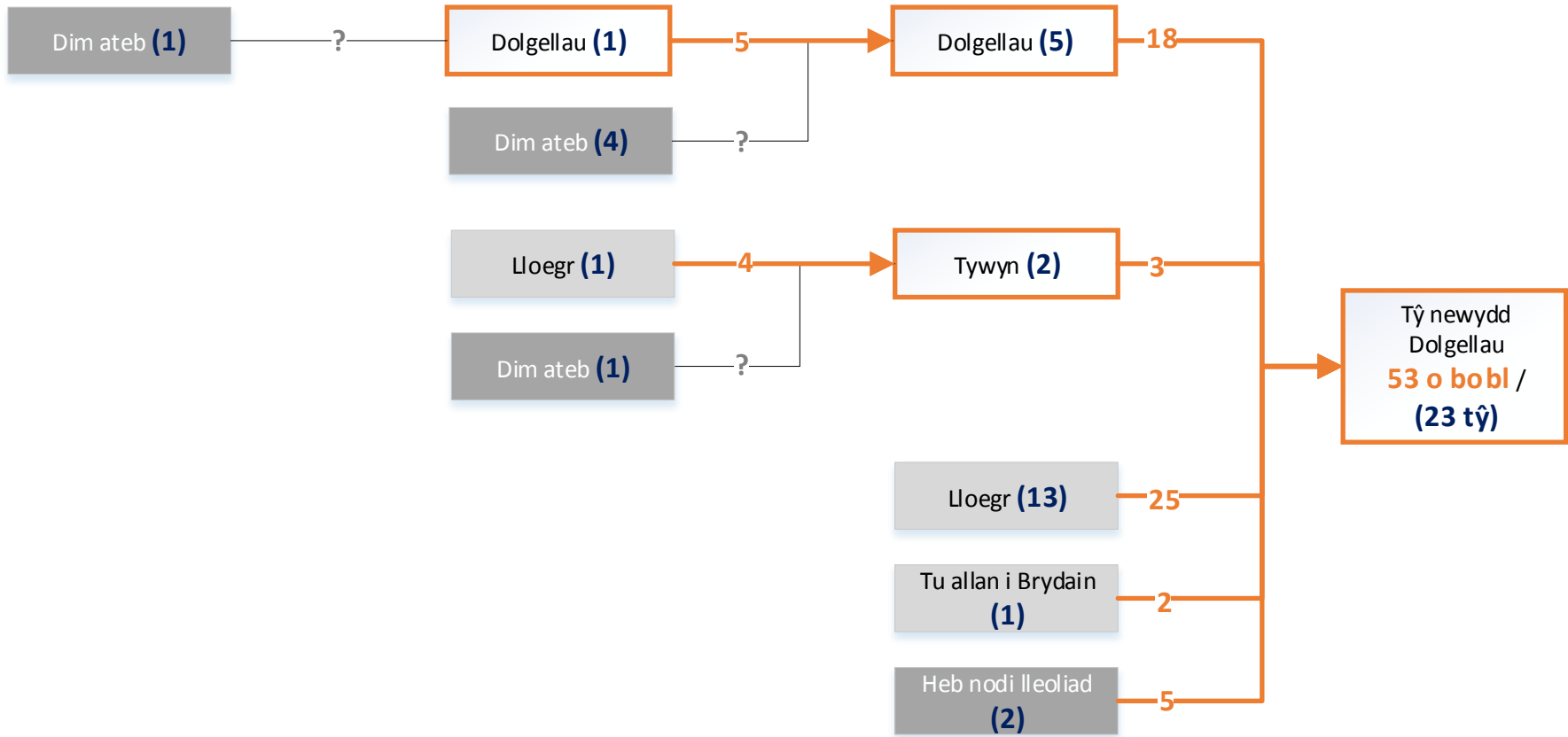
Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the results, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

As noted above approximately half the residents of the new houses had moved there from England; there was therefore no knock-on effect on other areas of Gwynedd in these cases. This means that the number of possible responses for tracking the 'chain' throughout the Gwynedd areas is small.

The sample we have suggests that, where people had moved to a new house from another property in the Dolgellau area, those houses had then been bought / rented by other people from the Dolgellau area. Whilst if people had moved from the Tywyn area, their former property in Tywyn had then gone to people moving from England. However, the sample for this aspect is very small and it would be rash to assume that it is fully representative.

Figure 13: Dolgellau Area – Stages 2, 3 and 4



Main conclusions about the Dolgellau area

- Over a quarter of the residents of the new houses were over 65 years old with a further quarter aged 45-64 years.
- Nearly half the residents of the new houses had moved there from England and about a third had moved there from other properties within the Dolgellau area itself.
- There is a significant difference between the age profile of those moving from England (who were nearly all aged over 45 and almost half of them were over 65) and those moving there from other properties in the Dolgellau area (over 80% under the age of 44, and almost half were children).
- Approximately half the residents of the new houses spoke Welsh, which is similar to the proportion in the Dolgellau area as a whole.
- There is a significant difference between age groups in respect of the ability of the residents of the new houses to speak Welsh – especially between children (who could all speak Welsh) and 45-64 year olds (over 85% of whom did not speak Welsh).
- There were also significant differences between those moving from different areas, with 90% of those moving from another property in the Dolgellau area speaking Welsh, compared to around a quarter of those moving from England.
- The reasons for moving to a new house in the area were fairly mixed, with many stating that they were moving there for their retirement, because they “liked the house” or because they wanted a “fresh start” in a rural / different area. Nearly all of the people already living in the Dolgellau area indicated that they wanted to stay in the area, and around half of those who had moved from other areas also indicated that they would have moved to another property in the Dolgellau area if the new house had not been available.
- Around a third of respondents had been coming to the area on holiday over the years.
- The reasons for choosing a new house were quite varied but over a quarter of the sample stated that it was the location that had made them choose to live there rather than that they were looking for a new house as such.

7. DYFFRYN NANTLLE Area

Dyffryn Nantlle area numbers

In total we had the address of 35 new houses completed in the Dyffryn Nantlle area between 2015 and 2017. We received a response from 21 houses, which is about 64% of those reached.

Table 72: Dyffryn Nantlle area – Number of houses surveyed

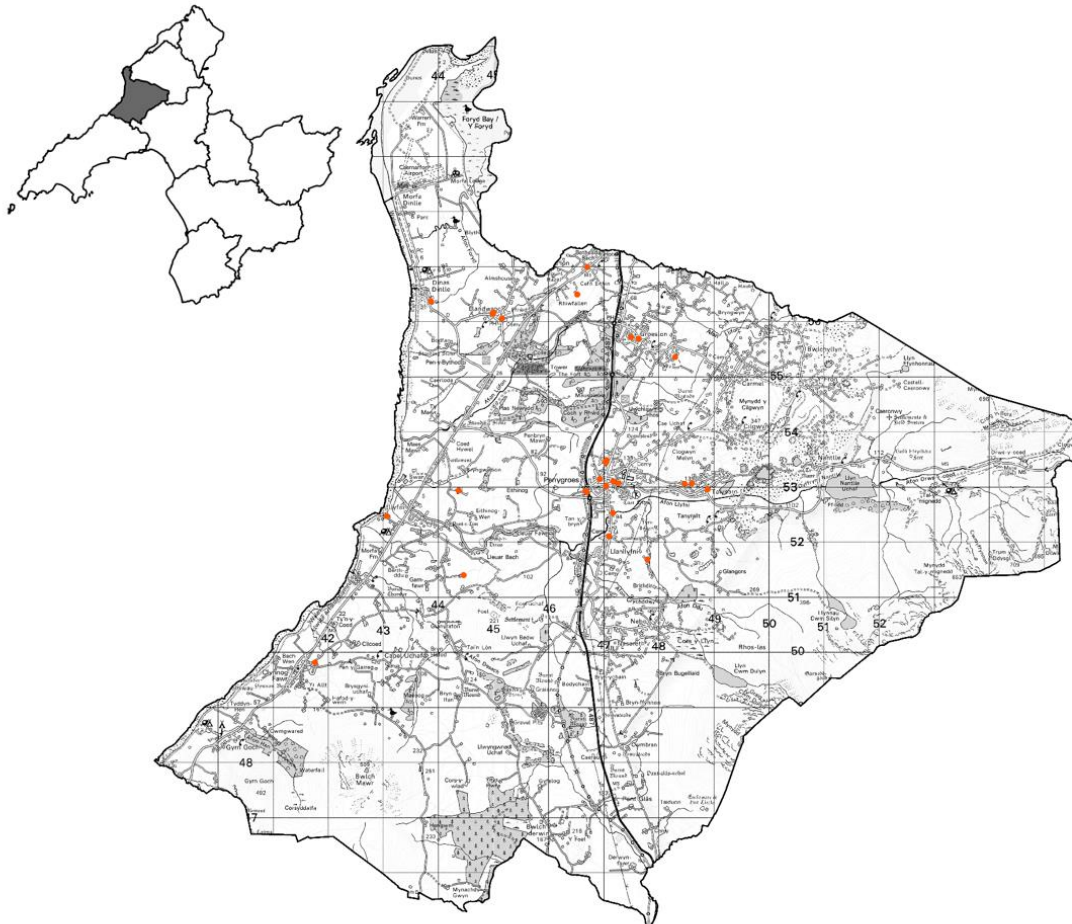
Number	Number reached	Number of respondents	% of those reached who responded
35	33	21	63.6%

These 35 include the development of:-

- 5 new houses at Cae Capel Bach estate, Penygroes

The map below of the Dyffryn Nantlle area shows the location of the new housing.

Figure 14: Dyffryn Nantlle Area – Location of new housing



Dyffryn Nantlle area population

The population of the area concerned is **7,847** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Dyffryn Nantlle area (sample of 21)

Of the 21 new dwellings from which a response was received, 19% were private rented.

Table 73: Dyffryn Nantlle Area – House owner or renting the house

House owner or renting	Number	%
Owner	16	76.2%
Private rented	4	19.0%
No response	1	4.8%
Total	21	100.0%

The most common type of new housing we received a response from was a detached house.

Table 74: Dyffryn Nantlle Area – House types

Type of house	Number	%
Detached	16	76.2%
Flat or maisonette	4	19.0%
Semi	1	4.8%
Total	21	100.0%

Table 75: Dyffryn Nantlle Area - Number of bedrooms

Number of bedrooms	Number	%
2	7	33.3%
3	6	28.6%
4	7	33.3%
5	1	4.8%
Total	21	100.0%

Of the 21 houses which responded to the questionnaire, a total of 58 people were living in them; approximately 2.8 people per house.

Table 76: Dyffryn Nantlle Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	3	3
2	8	16
3	4	12
4	4	16
5	1	5
6	1	6
Total	21	58

Table 77: Dyffryn Nantlle area – Number of bedrooms for number of people living there

Number of bedrooms↓	Number of people living there→						Total Number of Homes
	1	2	3	4	5	6	
2	2	4	1				7
3	1	1	1	3			6
4		3	2	1	1		7
5						1	1
Total	3	8	4	4	1	1	21

The people who moved into the new houses

The map below shows where the 58 people who moved to the 21 new dwellings came from.

Figure 15: Dyffryn Nantlle Area – Moving to Dyffryn Nantlle area

Symud i ardal Dyffryn Nantlle



A significant proportion (21/58; 36%) of individuals have moved to the new houses from another property in the Dyffryn Nantlle area. Several had also moved from the nearby Caernarfon area (18/58; 31%). Otherwise, the areas which people moved from were varied with approximately 7% moving from the nearby area of Porthmadog and around a further 7% from Europe, outside the UK.

The ages of the people who moved into a new house were also quite varied with around a quarter in the 25-44 age group, around a quarter aged over 45 and around a quarter being children.

Table 78: Dyffryn Nantlle Area - Age

Age	Number	%
0-2	2	3.4%
3-11	9	15.5%
12-17	4	6.9%
18-24	7	12.1%
25-44	16	27.6%
45-64	7	12.1%
65-84	8	13.8%
85+	1	1.7%
No response	4	6.9%
Total	58	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Dyffryn Nantlle area according to the proportion in each age group.

Table 79: Dyffryn Nantlle Area – Age and areas (moved to Dyffryn Nantlle)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Caernarfon		17%	11%	17%	33%	17%	6%			18
Dyffryn Nantlle	10%	19%	10%	5%	33%	10%	10%		5%	21
Porthmadog		25%			50%			25%		4
Born in the new house		100%								1
Anglesey				33%	33%				33%	3
Conwy				100%						2
England						100%				2
Europe							100%			4
Asia							100%			1
No response									100%	2
										58

Language of the people who moved into the new houses

Of the 58 people, 48 (83%) stated that they could speak Welsh.

The language of the individuals

Table 80: Dyffryn Nantlle Area – Able to speak Welsh

	Able to speak Welsh	%
No response	3	5.2%
No	7	12.1%
Yes	48	82.8%
Total	58	100%

Of those aged 3 and over 82% could speak Welsh. (46/56)

According to the 2011 Census, 78% of those over the age of 3 years living in the Dyffryn Nantlle area were able to speak Welsh.

Table 81: Dyffryn Nantlle Area – Ability to speak Welsh and Age

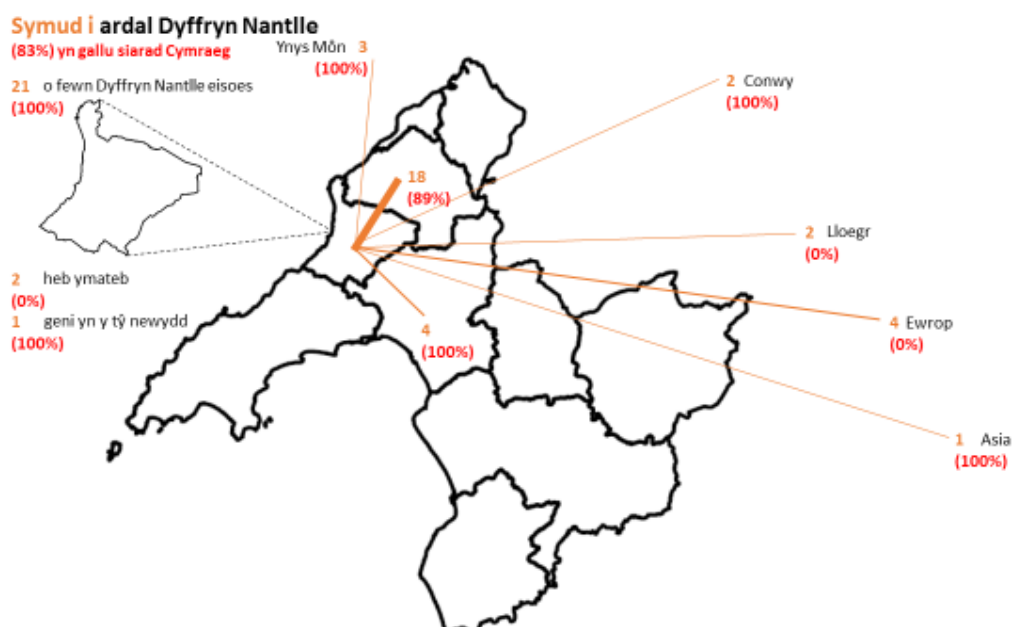
Age	Able to speak Welsh		Not able to speak Welsh		No response	
	Count	Percentage	Count	Percentage	Count	Percentage
0-2	2	100%	0	0%	0	0%
3-11	9	100%	0	0%	0	0%
12-17	4	100%	0	0%	0	0%
18-24	7	100%	0	0%	0	0%
25-44	14	88%	1	6%	1	6%
45-64	5	71%	2	29%	0	0%
65-84	4	50%	4	50%	0	0%
85+	1	100%	0	0%	0	0%
No response	2	50%	0	0%	2	50%
Total	48	83%	7	12%	3	5%

We see that the lowest % of Welsh speakers is in the 65-84 age group and that all in the 0-2, 3-11, 12-17 and 18-24 age groups are able to speak Welsh.

The map below shows the number of individuals who moved to the Dyffryn Nantlle area and the percentage of these who can speak Welsh.

Of those who moved within the Dyffryn Nantlle area 100% (21/21) said that they could speak Welsh.

Figure 16: Dyffryn Nantlle area – moved to the area and able to speak Welsh



Language of the home

For one-person households – we asked what their first language was.

Table 82: Dyffryn Nantlle area – First language (one-person households)

Language	Number of households	%
Welsh	1	33.0%
English	2	67.0%
Total	3	100.0%

For multi person households – we asked which language was spoken most in the household.

Table 83: Dyffryn Nantlle area – Language of the home (multi person households)

Language	Number of households	%
Welsh	14	77.8%
English	4	22.2%
Total	18	100.0%

Households from the two tables above combined

Table 84: Dyffryn Nantlle area – Language of the home / first language (total)

Language	Number of households	%
Welsh	15	71.4%
English	6	28.6%
Total	21	

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses in order to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

19% of respondents stated that they had moved in order to have their own property, with 14% stating that the fact that they liked the house was their reason for moving, 11% believed that a new house offered value for money/a house of high standard and a further 11% wanted a larger house.

Table 85: Dyffryn Nantlle area – Reasons for moving

Why did you move here?	Number	%
Wanted his/her/their own property	7	19.4%
Liked the house	5	13.9%
High standard / value for money	4	11.1%
Larger property needed	4	11.1%
The suitability of the house to personal needs	3	8.3%
Views / Natural environment / Countryside	3	8.3%
House location	2	5.6%
More parking space/garage needed	2	5.6%
No response	2	5.6%
Smaller property needed	1	2.8%
Did not like where we were living e.g. crime and noise levels	1	2.8%
Change in life circumstances – a fresh start	1	2.8%
This was the property that was available at the time	1	2.8%
	36	

**out of 21 responses (some gave more than one reason)*

Why move to this area?

Of the 21 new houses 5 were where the family (or some family members) were already living within the Dyffryn Nantlle area. 25% were moving in order to be closer to their work location. 21% of respondents noted that they had moved in order to be closer to close friends / family

Table 86: Dyffryn Nantlle area – Why move to this area?

Why move to this area?	Number	%
Work location / closer to work	6	25.0%
One member already living in the area	5	20.8%
To be closer to family / close friends	5	20.8%
No response	4	16.7%
School for the children – standard of teaching / before school and after school clubs	2	8.3%
A suitable place to bring up children	1	4.2%
Somewhere he/she/they could afford	1	4.2%
	24	

**out of 21 responses (some gave more than one reason)*

Why choose a new house?

41% noted the convenience of a new house as a reason – no work on a new house or the new home warranty. 22% reported that they had been able to convert an existing building. A further 11% had been able to obtain a plot for themselves on which to build. 11% noted that the reason for purchase was the location and not the fact that it was a new house.

Table 87: Dyffryn Nantlle area – Why choose a new house?

Why choose a new house?	Number	%
Convenience - No work on a new house / reduced running costs / new home warranty	11	40.7%
Converted building – i.e. not a brand new house	6	22.2%
Managed to acquire a plot to build on	3	11.1%
The main reason was the location, not that it was a new house	3	11.1%
House we could afford	2	7.4%
No response	1	3.7%
The cost of the rent was the reason and not because it was a new house	1	3.7%
	27	

**out of 21 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Dyffryn Nantlle area, half stated that they would have remained in the Dyffryn Nantlle area with 2 thinking they would have moved to the Caernarfon area and 1 that he/she would not have moved.

Table 88: Dyffryn Nantlle Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Dyffryn Nantlle area)

Those already living in the Dyffryn Nantlle area	Number	%
Somewhere within reasonable distance of the Dyffryn Nantlle area	4	50.0%
Somewhere within reasonable distance of the Caernarfon area	2	25.0%
Would not have moved and would have stayed in the Dyffryn Nantlle area	1	12.5%
No response	1	12.5%
	8	

**out of 8 responses*

Of those who were not living within the Dyffryn Nantlle area, 2 noted that they would have looked for another house within the same area. 2 noted that they would not have moved had the new house not been available. A further 3 would have looked for a new house within Gwynedd, 1 would have moved to Anglesey and another 1 would have moved to somewhere else in North Wales.

Table 89: Dyffryn Nantlle Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (Those not already living in the Dyffryn Nantlle area)

Those NOT already living in the Dyffryn Nantlle area	Number	%
Would still have moved to the Dyffryn Nantlle area	2	15.4%
Would have moved to the Caernarfon area instead	2	15.4%
Not sure	2	15.4%
No response	2	15.4%
Would have moved to the Bangor area instead	1	7.7%
Would have moved to Anglesey instead	1	7.7%
Would not have moved and would have stayed in the Porthmadog area	1	7.7%
Would not have moved and would have stayed in the Anglesey area	1	7.7%
Somewhere in North Wales	1	7.7%
	13	

*out of 13 responses

Previous connection with the area?

As noted above, in the case of 8 of the respondents, at least one family member already lived in the Dyffryn Nantlle area. A further 3 respondents were already living in nearby areas. 24% noted that they had no previous connection with the area.

Table 90: Dyffryn Nantlle Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person was already living in the area	8	38.1%
No previous connection	5	23.8%
At least one person was already living in the nearby area	3	14.3%
Have been coming on holiday to the area over the years	1	4.8%
Returning after being away in University/working away	1	4.8%
Close friends / family in the area	1	4.8%
Working in the area	1	4.8%
No response	1	4.8%
	21	

*out of 21 responses

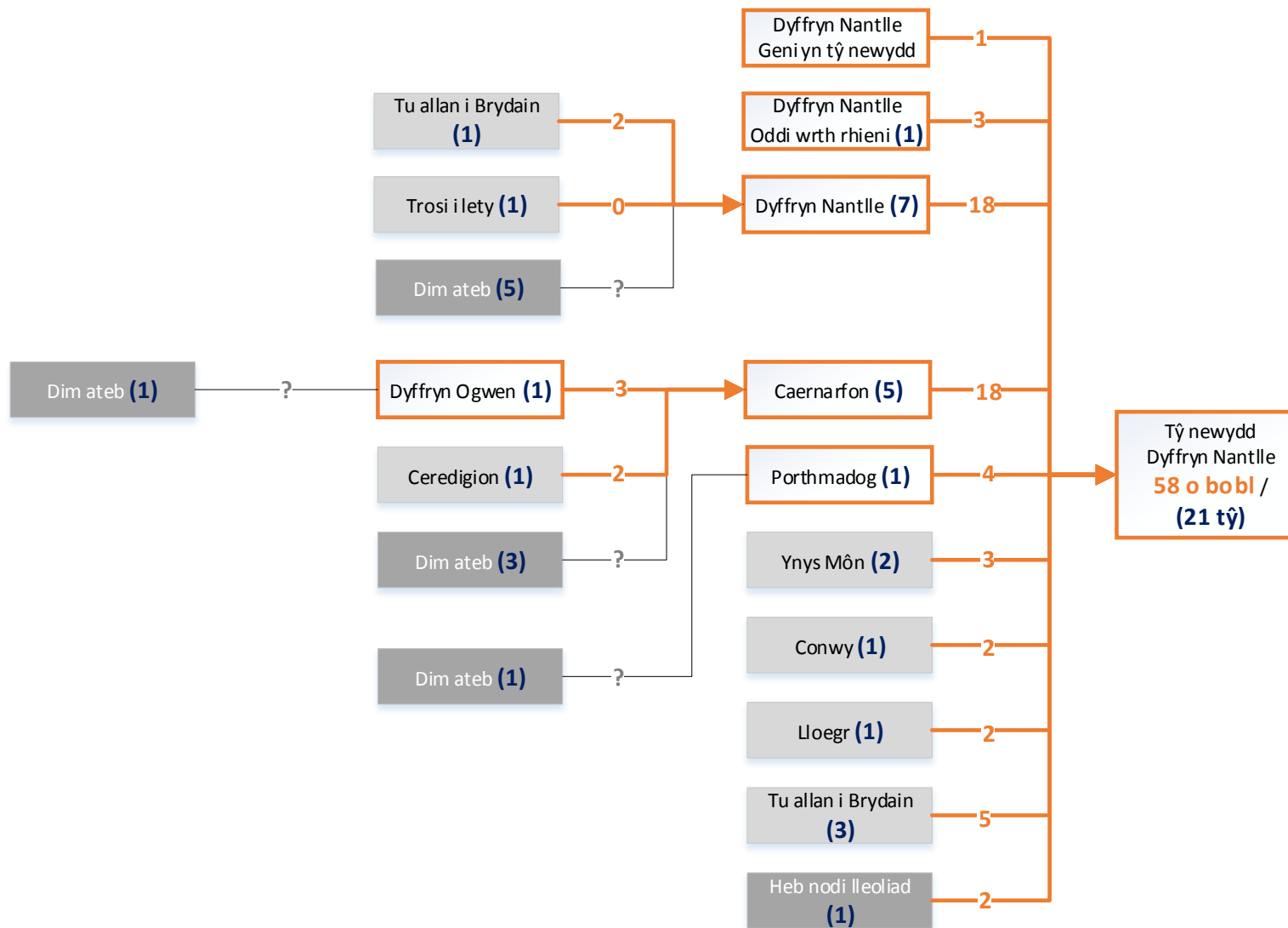
The houses where the residents of the new houses were living before

Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the results, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

Unfortunately the small number of responses received to these further stages make it difficult to reach any conclusions; where a house in the Dyffryn Nantlle area had become vacant, the residents of those houses had come from outside Britain or the house had been converted into accommodation. Where houses in the Caernarfon area had become vacant due to the residents moving to a new house in Dyffryn Nantlle, the new residents had come from other areas of Gwynedd / Wales. But it would be rash to place a great deal of emphasis on these results due to the fact that they are based on only one or two houses.

Figure 17: Dyffryn Nantlle Area – Stages 2, 3 and 4



Main conclusions about the Dyffryn Nantlle area

- The people who moved into the new houses were quite mixed in terms of age group.
- Two thirds of the residents of the new houses had moved there either from another house within the Dyffryn Nantlle area or from the adjacent Caernarfon area. Otherwise, the areas from which people moved were varied.
- Over 80% of the residents of the new houses spoke Welsh, which is fairly similar to the proportion in the Dyffryn Nantlle area as a whole.
- The reasons for moving to a new house in the area were fairly mixed, with many stating that they wanted “their own place”, “liked the house” or felt that the new house offered value for money / house of a high standard. Almost all of those already living in the area had wanted to have a property in the Dyffryn Nantlle or Caernarfon area, whilst this feeling was not so strong among those who had moved from other areas with a number stating that they would have moved to other areas of Gwynedd or neighbouring counties if the new house had not been available.
- Of those people who moved to the Dyffryn Nantlle area, around a quarter had no previous connection with the area.
- A high proportion (40%) identified a lack of costs / maintenance, and the new home warranty, as a reason for specifically choosing a new house.

8. DYFFRYN OGWEN Area

Dyffryn Ogwen area numbers

In total we had the address of 47 new houses completed in the Dyffryn Ogwen area between 2015 and 2017. We received a response from 19 houses, which is about 40% of the total.

Table 91: Dyffryn Ogwen area – Number of houses surveyed

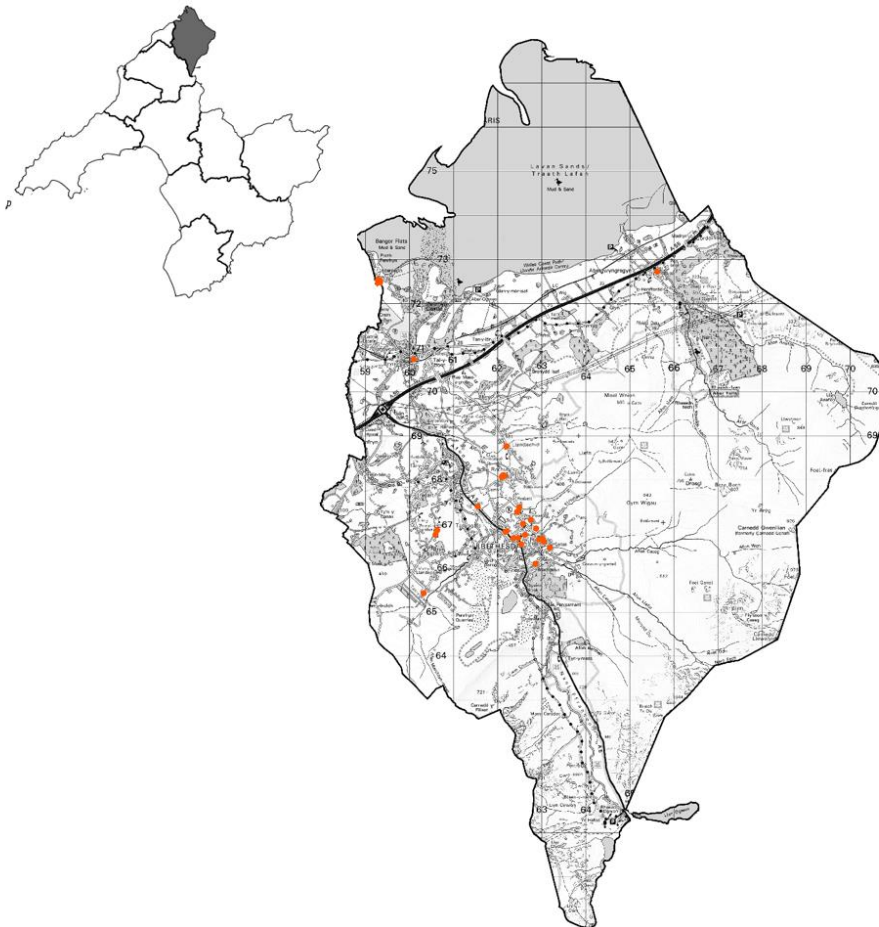
Number	Number reached	Number of respondents	% of those reached who responded
47	47	19	40.4%

These 47 include the development of:-

- 15 new houses at Plas y Coed estate, Porth Penrhyn

The map below of the Dyffryn Ogwen area shows the location of the new housing.

Figure 18: Dyffryn Ogwen Area – Location of new housing



Dyffryn Ogwen area population

The population of the area concerned is **8,436** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Dyffryn Ogwen area (sample of 19)

Of the 19 new dwellings from which a response was received, nearly 37% were either private rented or rented from a housing association.

Table 92: Dyffryn Ogwen Area – House owner or renting the house

House owner or renting	Number	%
Owner	12	63.2%
Private rented	4	21.1%
Social rented	3	15.8%
Total	19	100.0%

The most common type of new housing we received a response from was a detached house.

Table 93: Dyffryn Ogwen Area – Type of house

Type of house	Number	%
Detached	11	57.9%
Flat or maisonette	1	5.3%
Terrace	2	10.5%
Semi	5	26.3%
Total	19	100.0%

The most common number in the new houses we received a response from was three bedrooms.

Table 94: Dyffryn Ogwen Area - Number of bedrooms

Number of bedrooms	Number	%
2	5	26.3%
3	10	52.6%
4	4	21.1%
Total	19	100.0%

A total of 65 people were living in the 19 houses from which we received a response to the questionnaire; approximately 3.4 people per house.

Table 95: Dyffryn Ogwen Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	2	2
2	2	4
3	3	9
4	10	40
5	2	10
Total	19	65

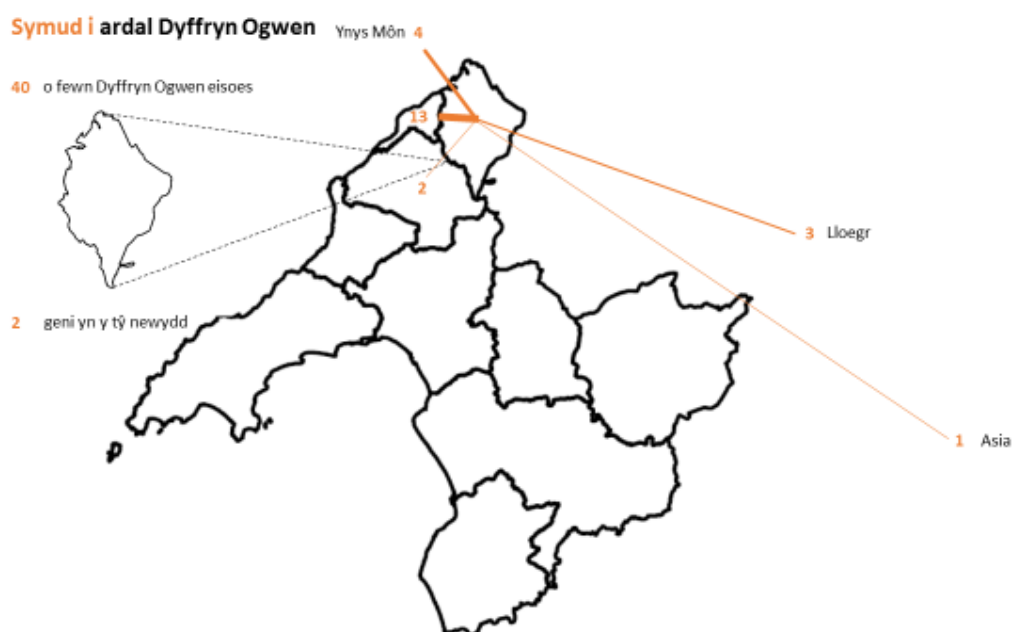
Table 96: Dyffryn Ogwen area – Number of bedrooms for number of people living there

Number of bedrooms↓	Number of people living there→					Total Number of Homes
	1	2	3	4	5	
2		2	1	2		5
3	2		2	5	1	10
4				3	1	4
Total	2	2	3	10	2	19

The people who moved into the new houses

The map below shows where the 65 people who moved to the 19 new dwellings came from.

Figure 19: Dyffryn Ogwen Area – Moving to Dyffryn Ogwen area



A significant proportion (40/65; 62%) of the individuals in the sample had moved to the new house from elsewhere in the Dyffryn Ogwen area. Several (13/65; 20%) had also moved from the nearby area of Bangor.

Otherwise, the areas from which people had moved were quite mixed, with hardly any moving from the rest of Gwynedd and approximately 6% moving from Anglesey.

The vast majority of people who moved into a new house were in the 25-44 age group, along with a significant proportion of children. Among those who responded, no-one over the age of 65 had moved to the Dyffryn Ogwen area.

Table 97: Dyffryn Ogwen Area - Age

Age	Number	%
0-2	9	13.8%
3-11	13	20.0%
12-17	2	3.1%
18-24	7	10.8%
25-44	25	38.5%
45-64	8	12.3%
65-84	0	0.0%
85+	0	0.0%
No response	1	1.5%
Total	65	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Dyffryn Ogwen area according to the proportion in each age group.

Table 98: Dyffryn Ogwen Area – Age and areas (moved to Dyffryn Ogwen)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Bangor	15%	8%		31%	31%	15%				13
Caernarfon		50%			50%					2
Dyffryn Ogwen	13%	20%	5%	8%	40%	13%			3%	40
Born in the new house	100%									2
Anglesey		50%			25%	25%				4
England		33%			67%					3
Asia					100%					1
										65

Language of the people who moved into the new houses

Of the 65 people, 56 (86%) stated that they could speak Welsh.

The language of the individuals

Table 99: Dyffryn Ogwen Area – Able to speak Welsh

	Able to speak Welsh	%
No response	1	1.5%
No	8	12.3%
Yes	56	86.2%
Total	65	100%

Of those aged 3 and over 89% could speak Welsh. (50/56)

According to the 2011 Census, 73% of those over the age of 3 years living in the Dyffryn Ogwen area were able to speak Welsh.

Table 100: Dyffryn Ogwen Area – Ability to speak Welsh and Age

Age	Able to speak Welsh		Not able to speak Welsh		No response	
0-2	6	67%	2	22%	1	11%
3-11	13	100%	0	0%	0	0%
12-17	2	100%	0	0%	0	0%
18-24	5	71%	2	29%	0	0%
25-44	23	92%	2	8%	0	0%
45-64	6	75%	2	25%	0	0%
65-84	0	0%	0	0%	0	0%
85+	0	0%	0	0%	0	0%
No response	1	100%	0	0%	0	0%
Total	56	86%	8	12%	1	2%

We see that all in the 3-11 and 12-17 age groups can speak Welsh.

The map below shows the number of individuals who have moved to the Dyffryn Ogwen area and the percentage of these who can speak Welsh.

Of those who have moved within the Dyffryn Ogwen area 98% (39/40) said that they could speak Welsh.

Figure 20: Dyffryn Ogwen area – moved to the area and able to speak Welsh

Symud i ardal Dyffryn Ogwen

(86% yn gallu siarad Cymraeg)

40 o fewn Dyffryn Ogwen eisoes (98%)

2 geni yn y tŷ newydd (50%)



Language of the home

For one-person households – we asked what their first language was.

Table 101: Dyffryn Ogwen area – First language (one-person households)

Language	Number of households	%
Welsh	0	0.0%
English	2	100.0%
Total	2	100.0%

For multi person households – we asked which language was spoken most in the household.

Table 102: Dyffryn Ogwen area – Language of the home (~multi person households)

Language	Number of households	%
Other	1	5.9%
Welsh	11	64.7%
English	4	23.5%
No response	1	5.9%
Total	17	100.0%

Households from the two tables above combined

Table 103: Dyffryn Ogwen area – Language of the home / first language (total)

Language	Number of households	%
Other	1	5.3%
Welsh	11	57.9%
English	6	31.5%
No response	1	5.3%
Total	19	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses in order to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

15% of respondents stated that they had moved there due to the location of the house and 15% also indicated that they wanted a larger house.

Table 104: Dyffryn Ogwen area – Reasons for moving

Why did you move here?	Number	%
House location	5	14.7%
Larger property needed	5	14.7%
High standard / value for money	3	8.8%
Wanted his/her/their own property	3	8.8%
Change in life circumstances – a fresh start	3	8.8%
No response	3	8.8%
Knew the person who was renting the house	2	5.9%
More parking space/garage needed	2	5.9%
The suitability of the house to personal needs	2	5.9%
Liked the house	2	5.9%
Views / Natural environment / Countryside	2	5.9%
Affordable rent/prices	1	2.9%
Smaller property needed	1	2.9%
	34	

**out of 19 responses (some gave more than one reason)*

Why move to this area?

Of the 19 new houses 10 were where the family (or some family members) were already living within the Dyffryn Ogwen area. 16% were moving due to the school they had chosen for their children. 12% of respondents noted that they had moved in order to be closer to close friends / family.

Table 105: Dyffryn Ogwen area – Why move to this area?

Why move to this area?	Number	%
One member already living in the area	10	40.0%
School for the children – standard of teaching / before school and after school clubs	4	16.0%
To be closer to family / close friends	3	12.0%
No response	3	12.0%
Somewhere he/she/they could afford	2	8.0%
A suitable place to bring up children	1	4.0%

Used to rent - now able to buy a house	1	4.0%
Work location / closer to work	1	4.0%
	25	

**out of 19 responses (some gave more than one reason)*

Why choose a new house?

30% had been able to obtain a plot for themselves on which to build. 19% noted the convenience of a new house as a reason – no work on a new house or the new home warranty. 19% reported that the reason was that it was a house they could afford.

Table 106: Dyffryn Ogwen area – Why choose a new house?

Why choose a new house?	Number	%
Managed to acquire a plot to build on	8	29.6%
No response	6	22.2%
Convenience - No work on a new house / reduced running costs / new home warranty	5	18.5%
House we could afford	5	18.5%
Converted building – i.e. not a brand-new house	2	7.4%
Obtained from Council / Housing Association	1	3.7%
	27	

**out of 19 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Dyffryn Ogwen area, half stated that they would have remained in the Dyffryn Ogwen area whilst 2 thought they would not have moved. A further 2 thought they would have moved but to other areas within Gwynedd.

Table 107: Dyffryn Ogwen Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Dyffryn Ogwen area)

Those already living in the Dyffryn Ogwen area	Number	%
Somewhere within reasonable distance of the Dyffryn Ogwen area	6	50.0%
Would not have moved and would have stayed in the Dyffryn Ogwen area	2	16.7%
Somewhere within reasonable distance of the Caernarfon area	1	8.3%
Somewhere within reasonable distance of the Bangor area	1	8.3%
Not sure	1	8.3%
No response	1	8.3%
	12	

**out of 12 responses*

The response from those who moved from outside the Dyffryn Ogwen area was mixed.

Table 108: Dyffryn Ogwen Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (Those not already living in the Dyffryn Ogwen area)

Those <u>NOT</u> already living in the Dyffryn Ogwen area	Number	%
Would still have moved to the Dyffryn Ogwen area	1	14.3%
Would have moved to the Bangor area instead	1	14.3%
Would have moved to Llandudno instead	1	14.3%
Would not have moved and would have stayed in the Bangor area	1	14.3%
Would not have moved and would have stayed in the Anglesey area	1	14.3%
Not sure	1	14.3%
No response	1	14.3%
	7	

**out of 7 responses*

Previous connection with the area?

As noted above, in the case of 12 of the respondents, at least one family member already lived in the Dyffryn Ogwen area. A further 5 respondents were already living in nearby areas.

Table 109: Dyffryn Ogwen Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person was already living in the area	12	63.2%
At least one person was already living in the nearby area	5	26.3%
Born in Gwynedd, but have always lived in England	1	5.3%
Close friends / family in the area	1	5.3%
	19	

**out of 19 responses*

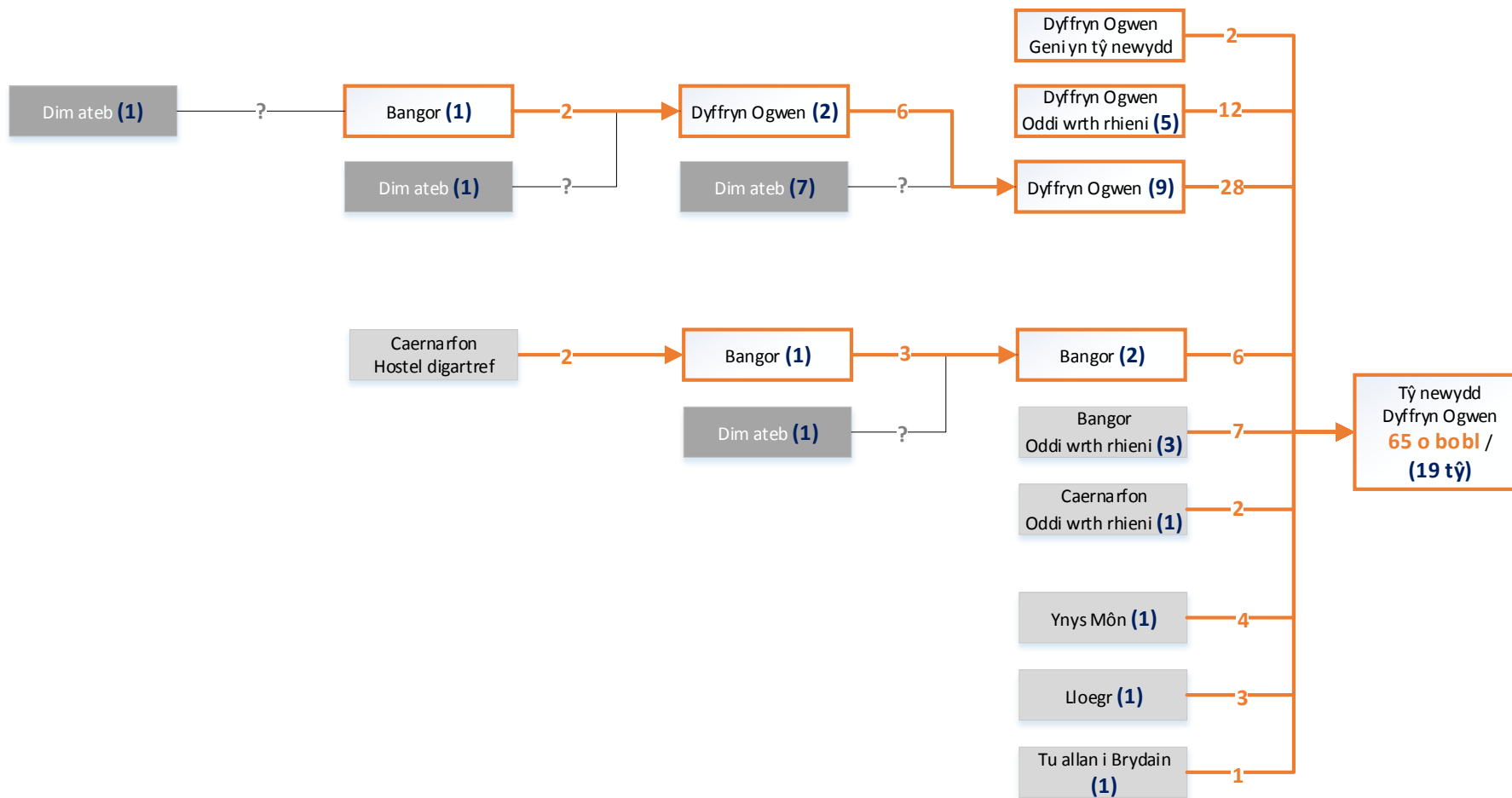
The houses where the residents of the new houses were living before

Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the results, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

Unfortunately, due to the small number of responses for these further stages, it is difficult to reach any conclusions, but there is a suggestion here that the movements further back in the 'chain' tend to be within the same local area or within surrounding areas. For example, where houses had become empty because the residents had moved to a new house in Dyffryn Ogwen, those houses had in turn been bought / rented by other people from Dyffryn Ogwen.

Figure 21: Dyffryn Ogwen Area – Stages 2, 3 and 4



Main conclusions about the Dyffryn Ogwen area

- Those people who moved into the new houses tended to be quite young: nearly 40% aged 25-44 and around 35% were children.
- Over 60% of the residents of the new houses had moved there from another property in Dyffryn Ogwen and a further 20% had moved from the adjacent area of Bangor. Otherwise, the areas from which people moved were varied.
- Approximately 90% of the residents of the new houses spoke Welsh, which is higher than the proportion in the Dyffryn Ogwen area as a whole.
- The reasons for moving to a new house in the area were fairly mixed, with many stating that they “liked the location of the house” or that they needed a larger property. The standard of schools / after school clubs in the area was also a reason given by many people.
- Half of those already living in the area indicated that they would have moved elsewhere in Dyffryn Ogwen had the new property not been available, while a further 17% indicated that they would not have moved at all. This feeling was not so strong among those who had moved from other areas with the majority stating that they would have moved to other areas of Gwynedd or neighbouring counties if the new house had not been available.
- All households had some previous connection with the area, whether they were already living in the area, living in a nearby area, returning to the area or that they had family living there.
- 30% of respondents had noted that the reason they chose a new house specifically was that sites were available to build on.

9. FFESTINIOG AREA

Ffestiniog area numbers

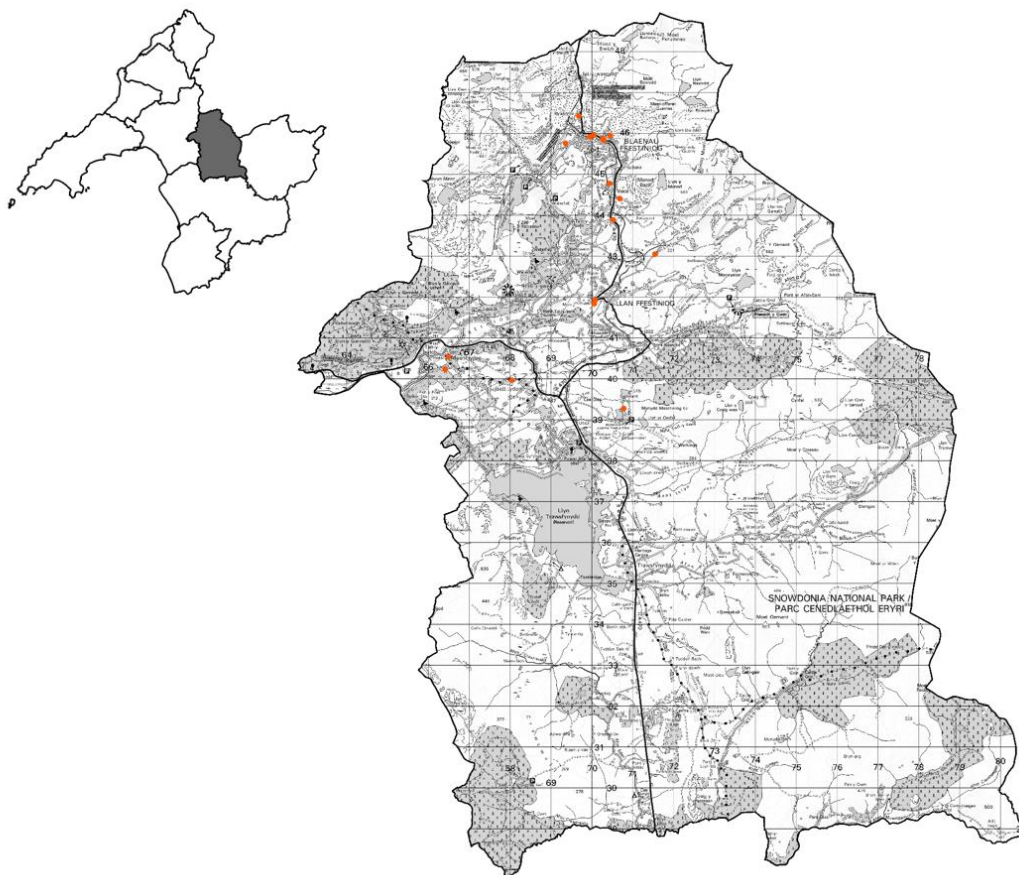
In total we had the address of 21 new houses completed in the Ffestiniog area between 2012 and 2017. We received a response from 4 houses, which is about 19% of the total.

Table 110: Ffestiniog area – Number of houses surveyed

Number	Number reached	Number of respondents	% of those reached who responded
21	21	4	19.0%

The map below of the Ffestiniog area shows the location of the new housing.

Figure 22: Ffestiniog area – New housing location



Population of Ffestiniog area

The population of the area concerned is **6,487** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Ffestiniog area (sample of 4)

The 4 houses concerned were detached houses and they were all owned by the relevant occupants.

Table 111: Ffestiniog Area – House owner or renting the house

House owner or renting	Number	%
Owner	4	100.0%
Total	4	100.0%

Type of house	Number	%
Detached	4	100.0%
Total	4	100.0%

Table 112: Ffestiniog area – Number of bedrooms

Number of bedrooms	Number	%
3	3	75.0%
4	1	25.0%
Total	4	100.0%

Of the 4 houses from which we received a response to the questionnaire, a total of 11 people were living in them; approximately 2.8 persons per house.

Table 113: Ffestiniog Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
2	2	4
3	1	3
4	1	4
Total	4	11

Table 114: Ffestiniog area – Number of bedrooms for number of people living there

Number of bedrooms↓	Number of people living there→			Total Number of Homes
	2	3	4	
3	1	1	1	3
4	1			1
Total	2	1	1	4

The people who moved into the new houses

The map below shows where the 11 people who moved to the 4 new dwellings came from.

Figure 23: Ffestiniog area – Moving to the Ffestiniog area



Virtually all the individuals in the sample had moved to the new house from another property in the Ffestiniog area itself.

A substantial proportion of those who had moved into a new house were in the 45-64 age group. No-one over 65 within our sample had moved to the Ffestiniog area.

Table 115: Ffestiniog Area - Age

Age	Number	%
0-2	0	0.0%
3-11	1	9.1%
12-17	1	9.1%
18-24	1	9.1%
25-44	3	27.3%
45-64	5	45.5%
65-84	0	0.0%
85+	0	0.0%
No response	0	0.0%
Total	11	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Ffestiniog area according to the proportion in each age group.

Table 116: Ffestiniog area – Age and areas (moved to Ffestiniog area)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Ffestiniog			11%	11%	22%	56%				9
Born in the new house		100%								1
Europe					100%					1
										11

Language of the people who moved into the new houses

Of the 11 people, 9 (82%) stated that they could speak Welsh.

The language of the individuals

Table 117: Ffestiniog Area – Able to speak Welsh

	Able to speak Welsh	%
No	2	18.2%
Yes	9	81.8%
Total	11	100%

No-one under the age of 3 had moved to the Ffestiniog area.

According to the 2011 Census, 77% of those over the age of 3 in the Ffestiniog area were able to speak Welsh.

Table 118: Ffestiniog Area – Ability to speak Welsh and age

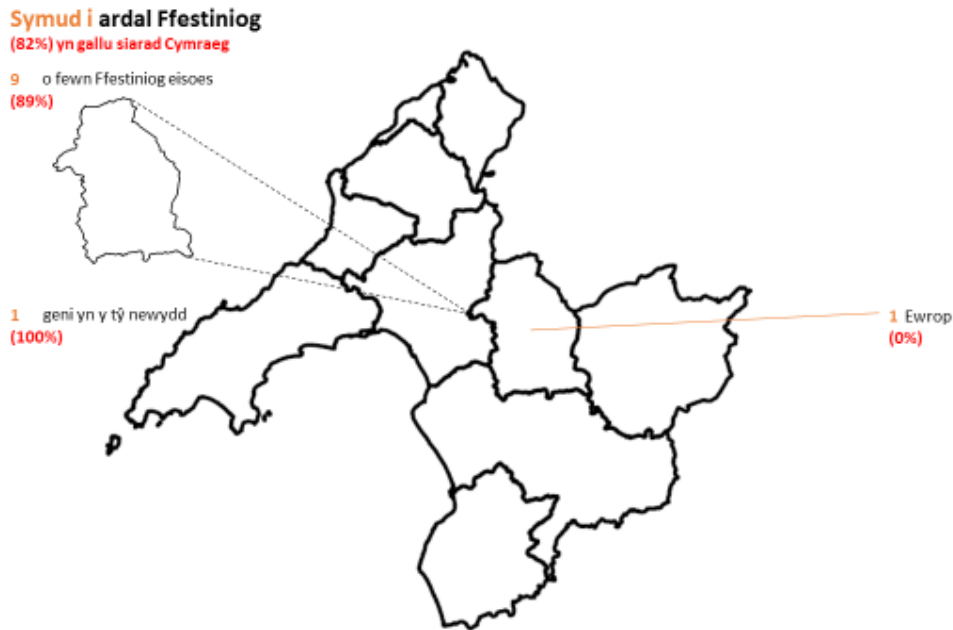
Age	Able to speak Welsh		Not able to speak Welsh	
	Count	%	Count	%
0-2	0	0%	0	0%
3-11	1	100%	0	0%
12-17	1	100%	0	0%
18-24	1	100%	0	0%
25-44	2	67%	1	33%
45-64	4	80%	1	20%
65-84	0	0%	0	0%
85+	0	0%	0	0%
No response	0	0%	0	0%
Total	9	82%	2	18%

We see that all in the 3-11, 12-17 and 18-24 age groups can speak Welsh.

The map below shows the number of individuals who have moved to the Ffestiniog area and the percentage of these who can speak Welsh.

Of those who have moved within the Ffestiniog area 89% (8/9) said that they could speak Welsh.

Figure 24: Ffestiniog area – moving to the area and ability to speak Welsh



Language of the home

Participants were asked which language was spoken most in the household (as there were no one-person households in the sample a different question was not required).

Table 119: Ffestiniog area – Language of the home

Language	Number of homes	%
Other	1	25.0%
Welsh	3	75.0%
Total	4	100.0%

Reasons for moving to a new house

The main responses to the more 'open ended' question which sought to get the "story" of the residents of the new houses to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

50% of respondents stated that they moved because they wanted a larger house.

Table 120: Ffestiniog Area – Reasons for moving

Why did you move here?	Number	%
Needed a larger house	2	50.0%
House location	1	25.0%
This house was available at the time	1	25.0%
	4	

**out of 4 responses*

Why move to this area?

Everyone already lived within the area.

Table 121: Ffestiniog Area – Why move to this area?

Why move to this area?	Number	%
One member already living in the area	4	100.0%
	4	

**out of 4 responses*

Why choose a new house?

50% had indicated that they had been able to obtain a plot of land for themselves on which to build.

Table 122: Ffestiniog area – Why choose a new house

Why choose a new house?	Number	%
Managed to get a plot to build on	2	50.0%
Converted building – i.e. not a brand-new house	1	25.0%
The reason was the location, not that it was a new house	1	25.0%
	4	

**out of 4 responses*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Everyone already lived within the Ffestiniog area.

Table 123: Ffestiniog Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Ffestiniog area)

Those already living in the Ffestiniog area	Number	%
Somewhere within reasonable distance of the Ffestiniog area	4	100.0%
	4	

*out of 4 responses

Previous connection with the area?

Everyone already lived within the Ffestiniog area.

Table 124: Ffestiniog Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person already living in the area	4	100.0%
	4	

*out of 4 responses

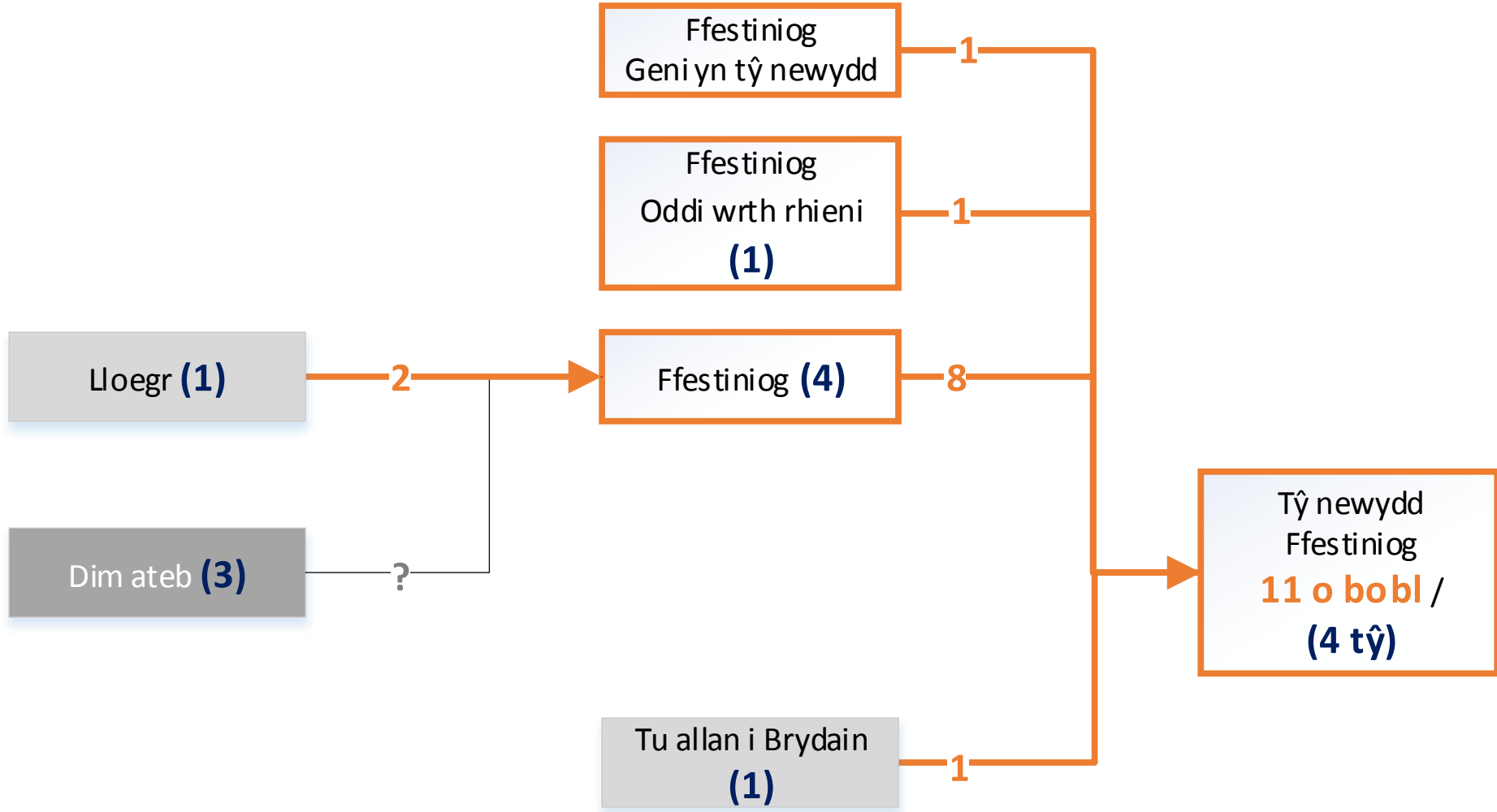
The houses where the residents of the new houses were living before

Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing ‘chain’ back.

The diagram **on the next page** summarises the outcomes, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

Unfortunately, the very small number of responses received for these further stages make it difficult to draw any conclusions. In the one case where we managed to track the ‘chain’ back the house that became vacant in the Ffestiniog area (because the former residents moved to a new house) had been bought / rented by people from England, but it would be rash to assume that this was representative of the overall pattern.

Figure 25: Ffestiniog Area – Stage 2



Main conclusions about the Ffestiniog area

- Nearly half the people who moved into the new houses were aged between 45 and 64; there was no-one over the age of 65 in the sample.
- Nearly all residents of the new houses had moved there from another property in the Ffestiniog area.
- Over 80% of new housing residents spoke Welsh, which is slightly higher than the proportion in the Ffestiniog area as a whole.
- Half the respondents indicated that they had moved house because they needed a larger property. All respondents had wanted to remain in the Ffestiniog area.
- Half the respondents noted that the fact that sites were available for building on was the reason why they chose a new house specifically.

10. LLŶN area

Llyn area numbers

In total we had the addresses of 119 new houses completed in the Llŷn area between 2015 and 2017. We received a response from 28 houses, which is about 26% of those reached.

Table 125: Llŷn area – Number of houses surveyed

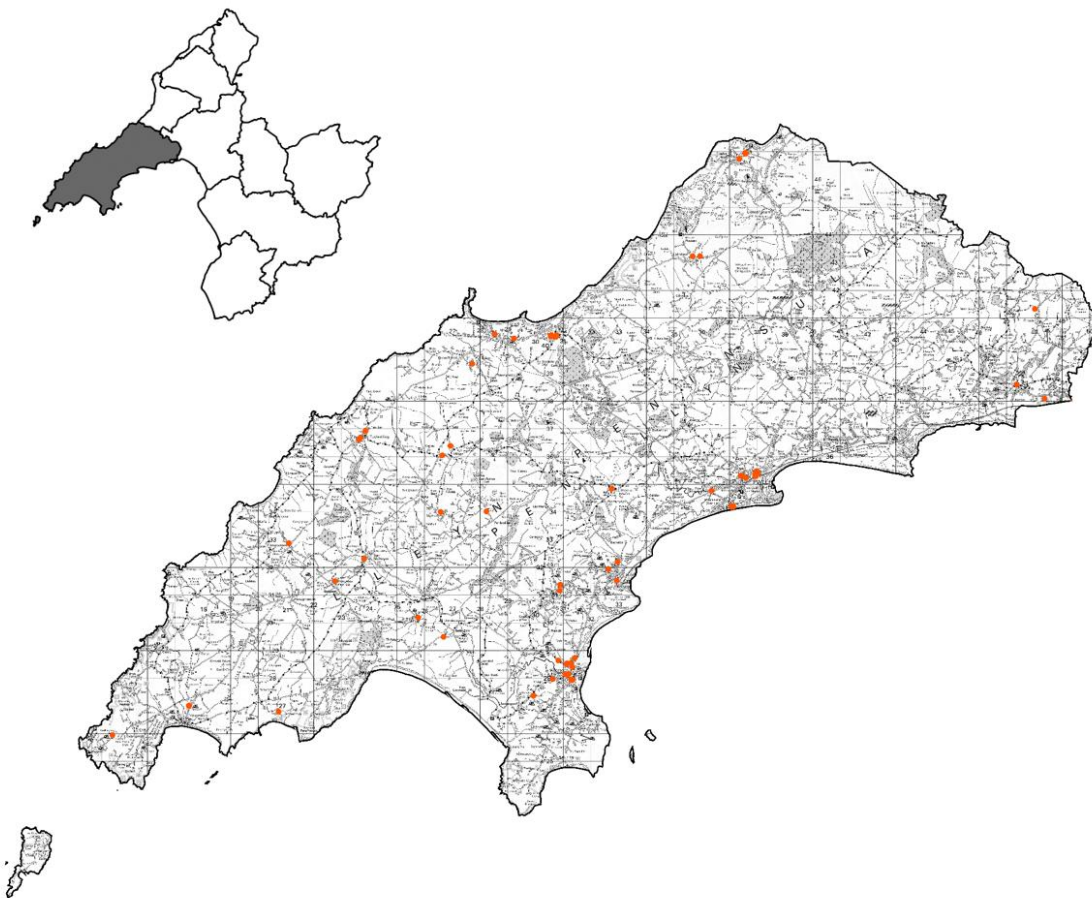
Number	Number reached	Number of responses received	% of those reached who responded
119	109	28	25.7%

These 119 include the development of:-

- 25 new houses at Awel y Môr estate, Pwllheli
- 9 new houses at Tai Dyffryn estate, Abersoch
- 9 new houses at Hafan yr Harbwr estate, Abersoch
- 7 new houses at Tir Tywod estate, Pwllheli

The map below of the Llŷn area shows the location of the new houses.

Figure 26: Llŷn area – Location of new housing



Population of Llyn area

The population of the area concerned is **19,358** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Llyn area (sample of 28)

Of the 28 new dwellings from which we received a response, 25% were either privately rented or rented from a housing association.

Table 126: Llyn Area – House owner or renting

House owner or renting	Number	%
Owner	21	75.0%
Private rented	1	3.6%
Social rented	6	21.4%
Total	28	100.0%

The most common type of new house we received a response from was a detached house.

Table 127: Llyn area – House type

Type of house	Number	%
Bungalow	2	7.1%
Semi	6	21.4%
Terrace	4	14.3%
Detached	15	53.6%
Flat or maisonette	1	3.6%
Total	28	100.0%

Table 128: Llyn area – Number of bedrooms

Number of bedrooms	Number	%
2	9	32.1%
3	9	32.1%
4	7	25.0%
5	2	7.1%
7	1	3.6%
Total	28	100.0%

In the 28 houses from which we received a response to the questionnaire, a total of 77 people were living in them; around 2.8 people per house.

Table 129: Llŷn Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	2	2
2	12	24
3	6	18
4	7	28
5	1	5
Total	28	77

Table 130: Llŷn area – Number of bedrooms for number of people living there

Number of bedrooms↓	Number of people living there→					Total Number of Homes
	1	2	3	4	5	
2		5	2	2		9
3	1	3	2	3		9
4	1	2	1	2	1	7
5		1	1			2
7		1				1
Total	2	12	6	7	1	28

The people who moved into the new houses

The map below shows where the 77 people who moved to the 28 new dwellings came from.

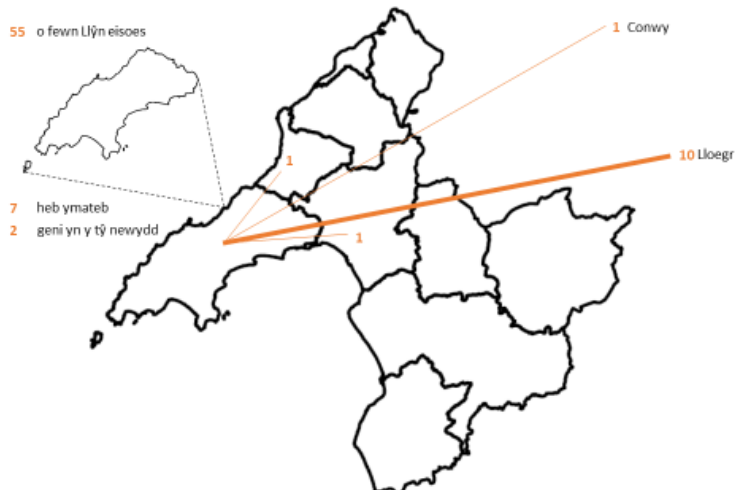
Figure 27: Llŷn area – Moving to the Llŷn area

Symud i ardal Llŷn

55 o fewn Llŷn eisoes

7 heb ymateb

2 geni yn y tŷ newydd



The vast majority (55/77; 71%) of the individuals in the sample have moved to the new house from elsewhere in the Llŷn area. A proportion (10/77; 13%) of individuals had moved there from England. Very few had moved there from other areas.

The age group of those who had moved was fairly mixed but the majority were either in the 25-44 age group or 45-64 years old.

Table 131: Llŷn area - Age

Age	Number	%
0-2	4	5.2%
3-11	13	16.9%
12-17	3	3.9%
18-24	2	2.6%
25-44	21	27.3%
45-64	20	26.0%
65-84	14	18.2%
85+	0	0.0%
No response	0	0.0%
Total	77	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Llŷn area according to the proportion in each age group.

Table 132: Llŷn area – Age and areas (moved to Llŷn area)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Dyffryn Nantlle						100%				1
Llŷn	2%	24%	4%	2%	31%	18%	20%			55
Porthmadog					100%					1
Born in the new house	100%									2
Conwy					100%					1
England	10%				20%	60%	10%			10
No response			14%	14%		43%	29%			7
										77

Language of the people who moved into the new houses

Of the 77 people, 52 (68%) stated that they could speak Welsh.

The language of the individuals

Table 133: Llŷn Area – Able to speak Welsh

	Able to speak Welsh	%
No	25	32.5%
Yes	52	67.5%
Total	77	100%

Of those aged 3 and over, 66% could speak Welsh. (48/73)

According to the 2011 Census, 73% of those over the age of 3 in the Llŷn area could speak Welsh.

Table 134: Llŷn Area – Ability to speak Welsh and age

Age	Able to speak Welsh		Not able to speak Welsh	
0-2	4	100%	0	0%
3-11	13	100%	0	0%
12-17	2	67%	1	33%
18-24	0	0%	2	100%
25-44	17	81%	4	19%
45-64	10	50%	10	50%
65-84	6	43%	8	57%
85+	0	0%	0	0%
No response	0	0%	0	0%
Total	52	68%	25	32%

We see that the lowest % of Welsh speakers is in the 65-84 age group and that all in the 0-2 and 3-11 age groups are able to speak Welsh.

The map below shows the number of individuals who have moved to the Llŷn area and the percentage of these who can speak Welsh.

Of those who have moved within the Llŷn area 80% (44/55) said that they could speak Welsh.

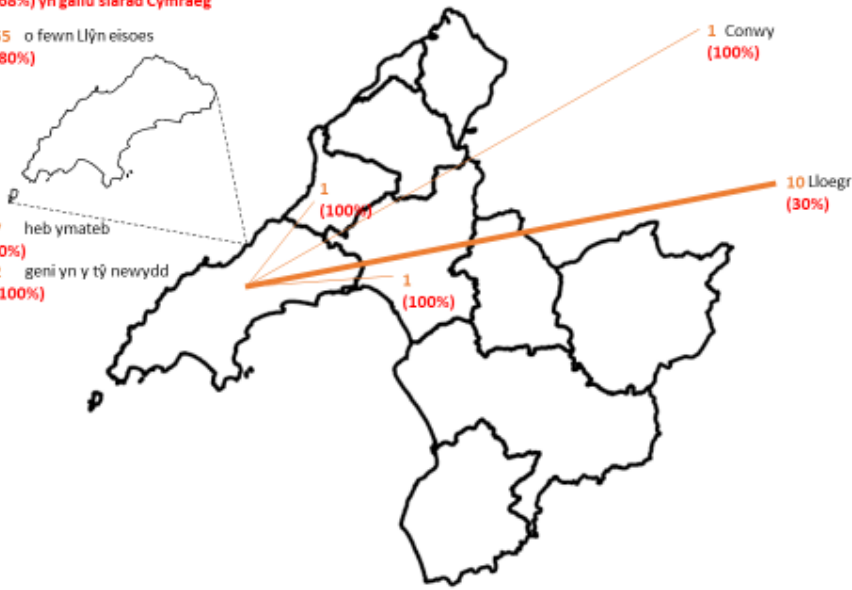
Figure 28: Llŷn area – moving to the area and ability to speak Welsh

Symud i ardal Llŷn
(68%) yn gallu siarad Cymraeg

55 o fewn Llŷn eisoes
(80%)

7 heb ymateb
(0%)

2 geni yn y tŷ newydd
(100%)



Language of the home

In the case of one person households – they were asked to state their first language.

Table 135: Llŷn area – First language (one-person households)

Language	Number of households	%
Welsh	1	50.0%
English	1	50.0%
Total	2	100.0%

In the case of multi person households – we asked which language was spoken most in the household.

Table 136: Llŷn area – Language of the home (multi person households)

Language	Number of households	%
Other	1	3.8%
Welsh	13	50.0%
English	12	46.2%
Total	26	100.0%

Households from the two tables above combined

Table 137: Llŷn area – Language of the home / first language (total)

Language	Number of households	%
Other	1	3.6%
Welsh	14	50.0%
English	13	46.4%
Total	28	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

21% noted that the location was the reason for moving to the Llŷn area. 15% noted that they needed smaller properties, 9% decided to move due to the suitability of a new house to personal needs – a bungalow was required,

Table 138: Llŷn Area – Reasons for moving

Why did you move here?	Number	%
House location	7	20.6%
Needed a smaller property	5	14.7%
No response	5	14.7%
The suitability of the house to personal needs	3	8.8%
High standard / value for money	3	8.8%
Change in life circumstances – a fresh start	2	5.9%
This was the property that was available at the time	2	5.9%
Wanted his/her/their own property	1	2.9%
Affordable rent/prices	1	2.9%
Needed more parking space/garage	1	2.9%
Larger property needed	1	2.9%
Forced out of our previous house	1	2.9%
Views / Natural environment / Countryside	1	2.9%
For our retirement	1	2.9%
	34	

**out of 28 responses (some gave more than one reason)*

Why move to this area?

Of the 28 new houses there were 15 where the family (or some members of the family) were already living within the Llŷn area. 13% had moved to be closer to family / close friends.

Table 139: Llŷn Area – Why move to this area?

Why move to this area?	Number	%
One member already living in the area	15	48.4%
To be closer to family / close friends	4	12.9%
No response	4	12.9%
Work location / closer to work	3	9.7%
For a quieter life / less populated area / a nicer life	3	9.7%
Facilities / links in the area	1	3.2%
Somewhere he/she/they could afford	1	3.2%
	31	

*out of 28 responses (some gave more than one reason)

Why choose a new house?

29% of respondents did not answer this question. 19% noted that this was because of the convenience of a new house – the reason was not work or the new home warranty. 16% reported that they were placed there by the Council/Housing Association. 13% had been able to obtain a plot of land for themselves on which to build.

Table 140: Llŷn area – Why choose a new house

Why choose a new house?	Number	%
No response	9	29.0%
Convenience - No work on a new house / reduced running costs / new home warranty	6	19.4%
Obtained from Council / Housing Association	5	16.1%
Managed to get a plot to build on	4	12.9%
A house we could afford	3	9.7%
Converted building – i.e. not a brand-new house	2	6.5%
The main reason was the location, not that it was a new house	2	6.5%
	31	

*out of 28 responses (some gave more than one reason)

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those who already lived within the Llŷn area 56% of them did not respond. 39% of them would probably have stayed in the Llŷn area.

Table 141: Llŷn Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Llŷn area)

Those already living in the Llŷn area	Number	%
No response	10	55.6%
Somewhere in the Llŷn area	7	38.9%
Not sure	1	5.6%
	18	

**out of 18 responses*

Of those who had moved from other areas, 2 households would still have moved to the Llŷn area and 1 household thought they would have stayed in England.

Table 142: Llŷn Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those not already living in the Llŷn area)

Those <u>NOT</u> already living in the Llŷn area	Number	%
No response	6	60.0%
Would still have moved to the Llŷn area	2	20.0%
Would not have moved and would have stayed in England	1	10.0%
Not sure	1	10.0%
	10	

**out of 10 responses*

Previous connection with the area?

As noted above, in the case of 18 of the respondents, at least one member of the family was already living in the Llŷn area. 7% had been holidaying in the area over the years.

Table 143: Llŷn Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person already living in the area	18	64.3%
No response	3	10.7%
Have been coming on holiday to the area over the years	2	7.1%
At least one person was already living in a nearby area	1	3.6%
Born in Gwynedd, but have always lived in England	1	3.6%
Returning after being away in University/working away	1	3.6%
Close friends / family in the area	1	3.6%
No previous connection	1	3.6%
	28	

**out of 28 responses*

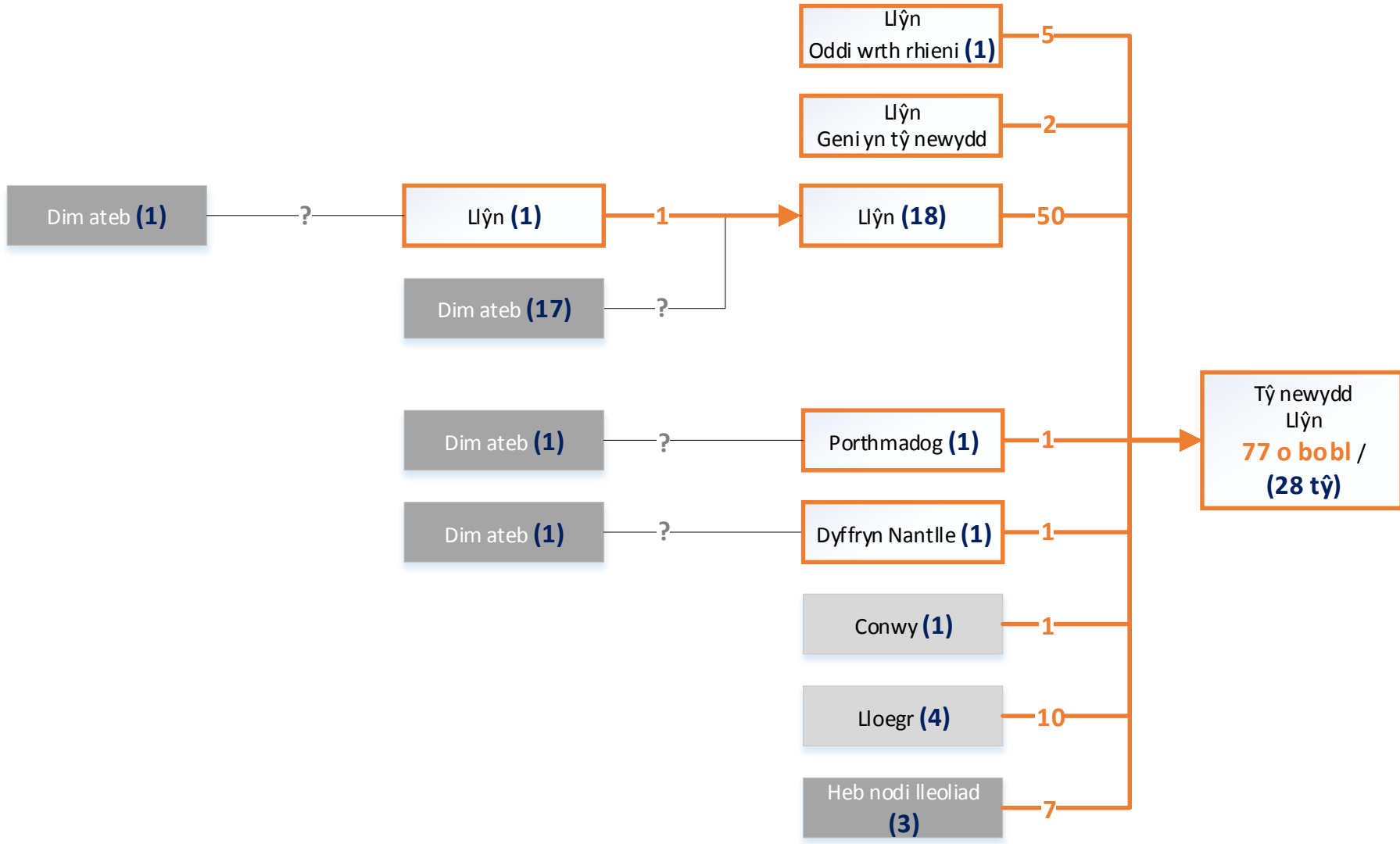
The houses where the residents of the new houses were living before

Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the outcomes, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

Unfortunately, due to the small number of responses for these further stages, it is difficult to draw any conclusions, but there is a suggestion here that the moves further back in the 'chain' remain within the Llŷn area. That is, where a house had become vacant in Llŷn because the residents had moved to one of the new houses in Llŷn, that house had in turn been bought / rented from other people who lived in the Llŷn area before. But it would be rash to assume that this pattern (based on a response from one house) is always repeated.

Figure 29: Llŷn Area – Stages 2 and 3



Main conclusions about the Llŷn area

- Unfortunately, the response rate in Llŷn was amongst the lowest of the areas; the researchers reported that there were a number of households with no-one at home when they called.
- The age profile of the people moving into the new houses was quite mixed, but generally tended to be 'older' than other areas with around 45% aged over 45.
- Over 70% of the residents of the new houses had moved there from another property in Llŷn and a further 13% had moved there from England. Not many had moved there from the rest of Gwynedd.
- About 68% of the residents of the new houses spoke Welsh, which is slightly lower than the proportion in the Llŷn area as a whole.
- 80% of those who were living in Llŷn previously and moved to a new house could speak Welsh. 30% (4/28) of those who moved from England could speak Welsh.
- The most frequently cited reason for moving to a new house in the area was the location. A number of other personal / family reasons were mentioned including the need for a bungalow, a smaller property, and a "new start". 'Not many were able to answer what would have happened if the new house had not been available, but most respondents noted a desire to stay / move to the Llŷn area specifically.
- Of the respondents who had moved to the Llŷn area from other areas, some noted that they had been coming to the area on holiday over the years.
- The main reasons given for choosing a new house specifically were convenience (no work / maintenance costs), getting the house from the Council / housing association, and having a plot of land on which to build.

11. PENLLYN Area

Penllyn area numbers

We had the address of 23 new houses in total which were completed in the Penllyn area between 2012 and 2017. We received a response from 8 houses, which is about 44% of those reached.

Table 144: Penllyn area – Number of houses surveyed

Number	Number reached	Number of responses received	% of those reached who responded
23	18	8	44.4%

These 23 include the development of:-

- 6 new houses at the Rhesdai'r Berllan estate, Y Bala

The map below of the Penllyn area shows the location of the new houses.

Figure 30: Penllyn area – Location of new housing



Population of the Penllyn area

The population of the area concerned is **4,586** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Penllyn area (sample of 8)

Of the 8 new dwellings from which we received a response, 13% were private rented.

Table 145: Penllyn Area – House owner or renting the house

House owner or renting	Number	%
Owner	7	87.5%
Private rented	1	12.5%
Total	8	100.0%

The most common type of new house we received a response from was a terraced house.

Table 146: Penllyn Area – Type of house

Type of house	Number	%
Bungalow	1	12.5%
Semi	2	25.0%
Terrace	3	37.5%
Detached	2	25.0%
Total	8	100.0%

Table 147: Penllyn Area – Number of bedrooms

Number of bedrooms	Number	%
1	3	37.5%
3	2	25.0%
4	3	37.5%
Total	8	100.0%

A total of 17 people were living in the 8 houses from which we received a response to the questionnaire; around 2.1 people per house.

Table 148: Penllyn Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	3	3
2	2	4
3	2	6
4	1	4
Total	8	17

Table 149: Penllyn Area – Number of bedrooms for number of people living in the house

Number of bedrooms↓	Number of people living there→				Total Number of Homes
	1	2	3	4	
1	3				3
3		2			2
4			2	1	3
Total	3	2	2	1	8

The people who moved into the new houses

The map below shows where the 17 people who moved to the 8 new dwellings came from.

Table 150: Penllyn Area – Moving to the Penllyn area

Symud i ardal Penllyn

10 o fewn Penllyn eisoes



It can be seen that the majority (10/17; 59%) of the individuals in the sample have moved to the new house from elsewhere in the Penllyn area. A significant proportion (6/17; 35%) had moved there from England. Very few had moved there from other places.

The majority of the people who have moved to a new house are in the 45-64 age group; there were very few children in the new houses.

Table 151: Penllyn Area - Age

Age	Number	%
0-2	1	5.9%
3-11	0	0.0%
12-17	1	5.9%
18-24	2	11.8%
25-44	2	11.8%
45-64	10	58.8%
65-84	1	5.9%
85+	0	0.0%
No response	0	0.0%
Total	17	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Penllyn area according to the proportion in each age group.

Table 152: Penllyn Area – Age and areas (moved to Penllyn)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Dolgellau						100%				1
Penllyn	10%		10%		20%	50%	10%			10
England				33%		67%				6
										17

Language of the people who moved into the new houses

Of the 17 people, 7 (41%) stated that they could speak Welsh.

The language of the individuals

Table 153: Penllyn Area – Able to speak Welsh

	Able to speak Welsh	%
No	10	58.8%
Yes	7	41.2%
Total	17	100%

Of those aged 3 and over, 38% could speak Welsh. (6/16)

According to the 2011 Census, 76% of those over the age of 3 in the Penllyn area could speak Welsh.

Table 154: Penllyn Area – Ability to speak Welsh and age

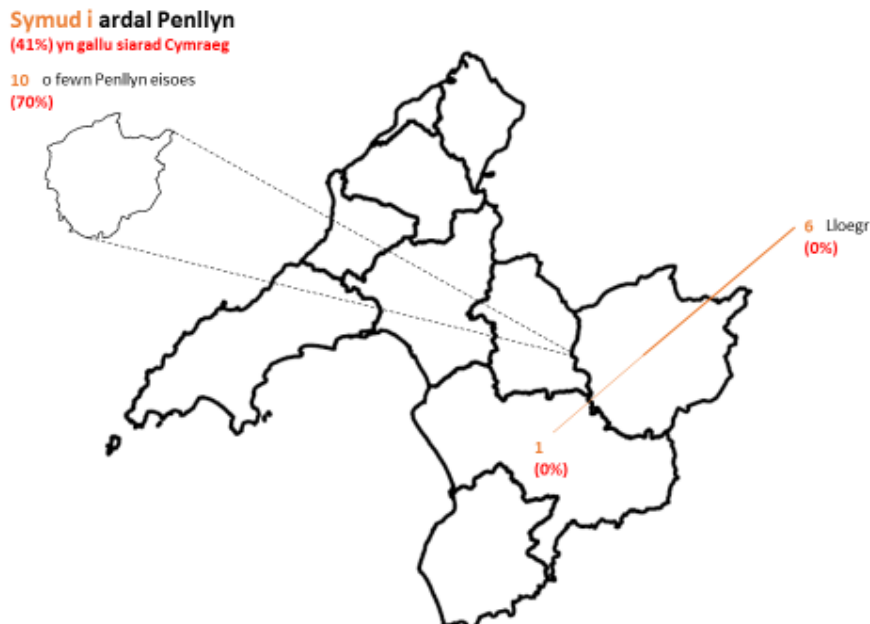
Age	Able to speak Welsh		Not able to speak Welsh	
	Count	Percentage	Count	Percentage
0-2	1	100%	0	0%
3-11	0	0%	0	0%
12-17	1	100%	0	0%
18-24	0	0%	2	100%
25-44	2	100%	0	0%
45-64	2	20%	8	80%
65-84	1	100%	0	0%
85+	0	0%	0	0%
No response	0	0%	0	0%
Total	7	41%	10	59%

We see that the lowest % of Welsh speakers is to be found in the 45-64 age group.

The map below shows the number of individuals who have moved to the Penllyn area and the percentage of these who can speak Welsh.

Of those who have moved within the Penllyn area 70% (7/10) said that they could speak Welsh.

Figure 31: Penllyn Area – moving to the area and ability to speak Welsh



Language of the home

In the case of one-person households – they were asked to state their first language.

Table 155: Penllyn Area – First language (one-person households)

Language	Number of households	%
Welsh	1	50.0%
English	1	50.0%
Total	2	100.0%

In the case of multi person households – we asked which language was spoken most in the household.

Table 156: Penllyn area – Language of the home (multi person households)

Language	Number of households	%
Other	1	3.8%
Welsh	13	50.0%
English	12	46.2%
Total	26	100.0%

Households from the two tables above combined

Table 157: Penllyn Area – Language of the home / first language (total)

Language	Number of households	%
Other	1	3.6%
Welsh	14	50.0%
English	13	46.4%
Total	28	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

21% reported that they had moved for retirement, with 21% also saying that they had moved because of the natural beauty of the area.

Table 158: Penllyn Area – Reasons for moving

Why did you move here?	Number	%
Views / Natural environment / Countryside	3	21.4%
For our retirement	3	21.4%
Affordable rent/prices	2	14.3%
Needed a smaller property	2	14.3%
House location	1	7.1%
Change in life circumstances – a fresh start	1	7.1%
No response	1	7.1%
This was the property that was available at the time	1	7.1%
	14	

**out of 8 responses (some gave more than one reason)*

Why move to this area?

Of the 8 new houses there were 3 where the family (or some members of the family) were already living within the Penllyn area. 30% had moved to be closer to work.

Table 159: Penllyn Area – Why move to this area?

Why move to this area?	Number	%
One member of the family was already living in the area	3	30.0%
Work location / closer to work	3	30.0%
No response	2	20.0%
Facilities / links in the area	1	10.0%
For a quieter life / less populated area / a nicer life	1	10.0%
	10	

**out of 8 responses (some gave more than one reason)*

Why choose a new house?

33% noted that this was because of the convenience of a new house – the reason was not work or the new home warranty. 33% identified the location of the house as the reason and not necessarily because it was a new house.

Table 160: Penllyn Area – Why choose a new house

Why choose a new house?	Number	%
Convenience - No work on a new house / reduced running costs / new home warranty	3	33.3%
The main reason was the location, not that it was a new house	3	33.3%
Managed to get a plot to build on	1	11.1%
No response	1	11.1%
The cost of the rent was the reason and not because it was a new house	1	11.1%
	9	

**out of 8 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Penllyn area 100% of them would probably have moved within the same area.

Table 161: Penllyn Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Penllyn area)

Those already living in the Penllyn area	Number	%
Somewhere within reasonable distance of the Penllyn area	5	100.0%
	5	

**out of 5 responses*

Of those who had moved from other areas, 2 households would have moved to somewhere in North Wales and 1 other would still have moved to the Penllyn area.

Table 162: Penllyn Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those not already living in the Penllyn area)

Those <u>NOT</u> already living in the Penllyn area	Number	%
Somewhere in North Wales	2	66.7%
Would still have moved to the Penllyn area	1	33.3%
	3	

**out of 3 responses*

Previous connection with the area?

As already noted, in the case of 5 of the respondents, at least one family member was already living in the Penllyn area. 25% had no previous connection with the area.

Table 163: Penllyn Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person already living in the area	5	62.5%
No previous connection	2	25.0%
At least one person was already living in a the adjoining area	1	12.5%
	8	

**out of 8 responses*

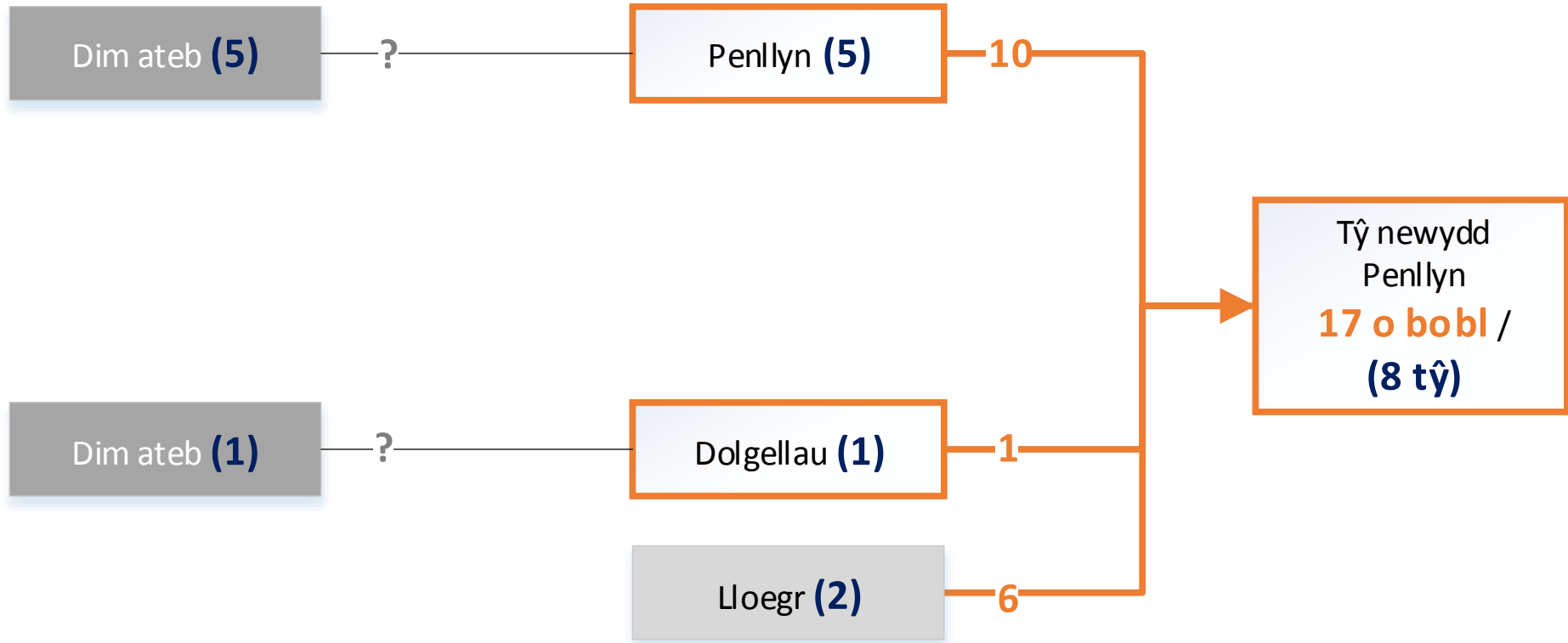
The houses where the residents of the new houses were living before

Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the outcomes, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

Unfortunately, it can be seen that we did not receive an answer for any of the previous stages of the 'chain', so a conclusion cannot be reached regarding this aspect.

Figure 32: Penllyn Area – Stages 2, 3 and 4



Main conclusions about the Penllyn area

- The majority of the people who moved to a new house were in the 45-64 age group; there were very few children in the sample.
- About 60% of the residents of the new houses had moved there from another property in Penllyn and a further 35% had moved there from England. There were hardly any who had moved from other areas.
- About 40% of the residents of the new houses spoke Welsh, which is significantly lower than the proportion in the Penllyn area as a whole.
- Residents aged 45-64 were the least likely to be able to speak Welsh – only 20% were able to speak the language. 70% of those who were living in Penllyn previously and had moved to a new house could speak Welsh, but no-one who moved there from England could speak Welsh.
- The most frequently cited reasons for moving to a new house in the area were the views / natural environment / countryside, and moving for retirement.
- All respondents who had moved from another property in the Penllyn area indicated that they would have looked for another house in the Penllyn area had the new house not been available. ‘This desire was not as strong among those who moved from other areas, with two-thirds indicating that they would otherwise have moved elsewhere “in North Wales”.
- Of the respondents who had moved to the Penllyn area from other areas, the majority had no previous connection with the area.
- A third of respondents noted that the location was the important factor rather than looking for a new house specifically, with a further third noting convenience (no work / maintenance costs, and the new house warranty) as a reason to move to a new property.

12. PORTHMADOG AREA

Porthmadog area numbers

We had the addresses of 82 new houses in total which were completed in the Porthmadog area between 2012 and 2017. We received a response from 31 houses, which is about 41% of those reached.

Table 164: Porthmadog area – Number of houses surveyed

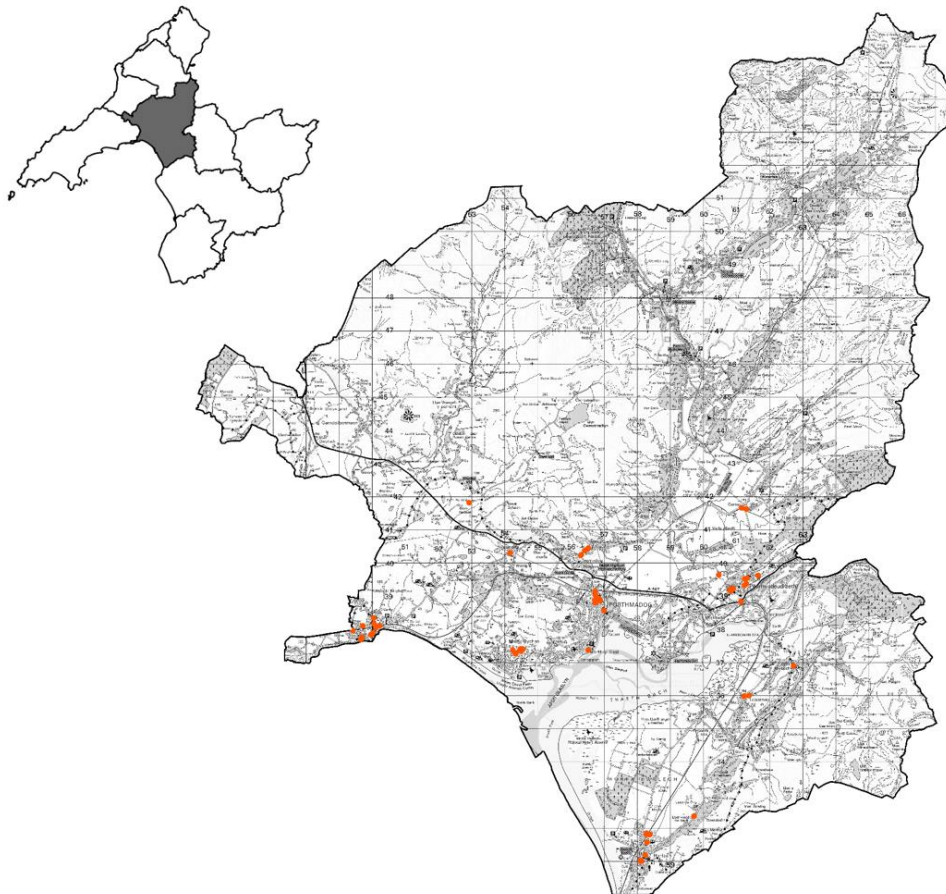
Number	Number reached	Number of responses received	% of those reached who responded
82	76	31	40.8%

These 82 include the development of:-

- 6 new houses at Pant yr Eithin estate, Harlech
- 8 new houses at the Isfryn estate, Penrhyndeudraeth
- 7 new houses at Cae Eithin estate, Morfa Bychan

The map below of the Porthmadog area shows the location of the new houses.

Figure 33: Porthmadog Area – Location of new housing



Population of Porthmadog area

The population of the area concerned is **12,200** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Porthmadog area (sample of 31)

Of the 31 new dwellings from which we received a response, 52% were either private rented or rented from a housing association.

Table 165: Porthmadog Area – House owner or renting the house

House owner or renting	Number	%
Owner	15	48.4%
Private rented	6	19.4%
Social rented	10	32.3%
Total	31	100.0%

The most common type of new house we received a response from was a “semi”.

Table 166: Porthmadog Area – Type of house

Type of house	Number	%
Semi	16	51.6%
Terrace	1	3.2%
Detached	11	35.5%
Flat or maisonette	3	9.7%
Total	31	100.0%

Table 167: Porthmadog Area – Number of bedrooms

Number of bedrooms	Number	%
1	1	3.2%
2	10	32.3%
3	16	51.6%
4	3	9.7%
5	1	3.2%
Total	31	100.0%

A total of 88 people were living in the 31 houses from which we received a response to the questionnaire; about 2.8 people per house.

Table 168: Porthmadog Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	7	7
2	11	22
3	3	9
4	4	16
5	4	20
7	2	14
Total	31	88

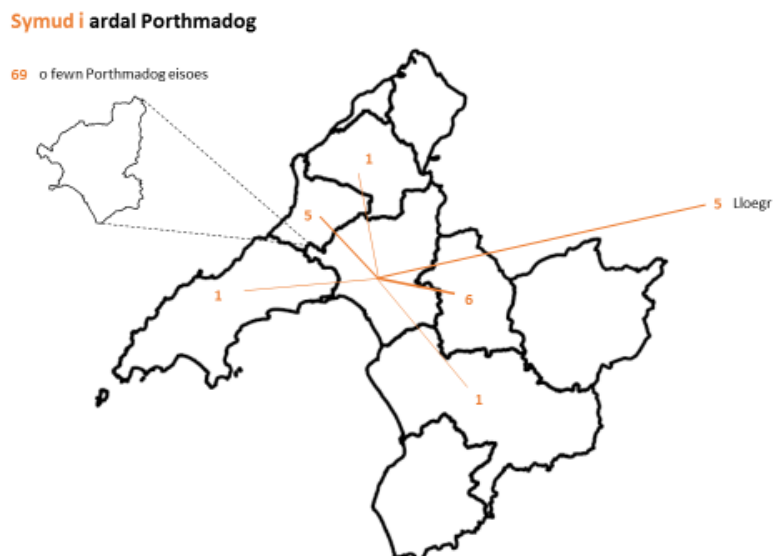
Table 169: Porthmadog Area – Number of bedrooms for number of people living in the house

Number of bedrooms↓	Number of people living there→						Total Number of Homes
	1	2	3	4	5		
1	1						1
2	4	3	1	2			10
3	2	7		2	4	1	16
4		1	2				3
5						1	1
Total	7	11	3	4	4	2	31

The people who moved into the new houses

The map below shows where the 88 people who moved to the 31 new dwellings came from.

Figure 34: Porthmadog Area – Moving to the Porthmadog area



As can be seen, the vast majority of the individuals (69/88; 78%) had moved to the new house from another property in the Porthmadog area.

Approximately 7% had moved from the adjoining Ffestiniog area and about 6% from the neighbouring area of Dyffryn Nantlle and 6% from England. Very few had moved there from other areas.

A high proportion of those who have moved into a new house are in the 25-44 age group, with a significant number of primary aged children as well.

Table 170: Porthmadog Area - Age

Age	Number	%
0-2	4	4.5%
3-11	23	26.1%
12-17	6	6.8%
18-24	4	4.5%
25-44	33	37.5%
45-64	9	10.2%
65-84	9	10.2%
85+	0	0.0%
No response	0	0.0%
Total	88	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Porthmadog area according to the proportion in each age group.

Table 171: Porthmadog Area – Age and areas (moved to Porthmadog area)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Caernarfon							100%			1
Dolgellau				100%						1
Dyffryn Nantlle				20%		40%	40%			5
Ffestiniog	16%				50%	17%	17%			6
Llŷn					100%					1
Porthmadog	4%	33%	9%	3%	42%	7%	1%			69
England						20%	80%			5
										88

Language of the people who moved into the new houses

Of the 88 people, 69 (78%) stated that they could speak Welsh.

The language of the individuals

Table 172: Porthmadog Area – Able to speak Welsh

	Able to speak Welsh	%
No	19	21.6%
Yes	69	78.4%
Total	88	100%

Of those aged 3 and over, 79% could speak Welsh. (66/84)

According to the 2011 Census, 67% of those over the age of 3 in the Porthmadog area could speak Welsh.

Table 173: Porthmadog Area – Ability to speak Welsh and age

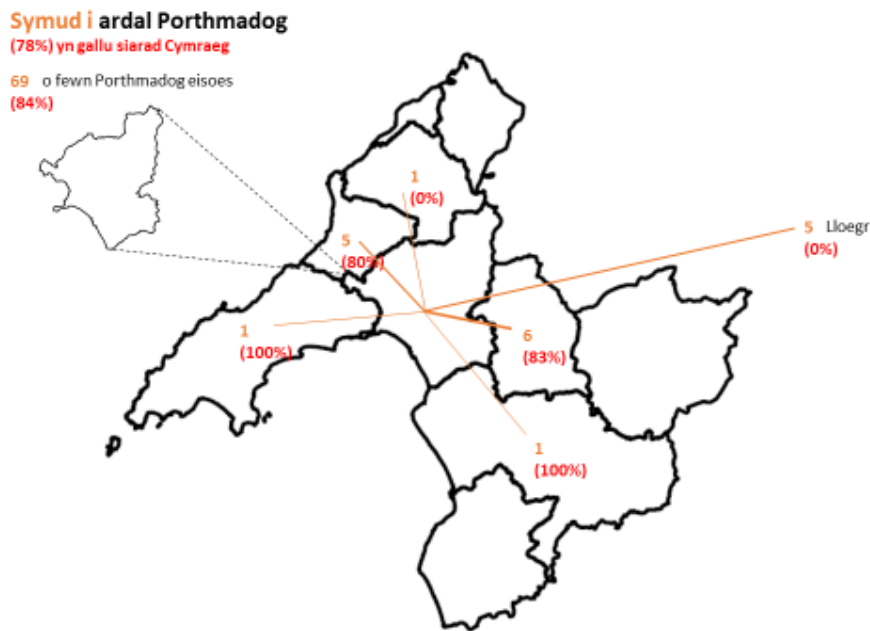
Age	Able to speak Welsh		Not able to speak Welsh	
0-2	3	75%	1	25%
3-11	22	96%	1	4%
12-17	6	100%	0	0%
18-24	4	100%	0	0%
25-44	24	73%	9	27%
45-64	8	89%	1	11%
65-84	2	22%	7	78%
85+	0	0%	0	0%
No response	0	0%	0	0%
Total	69	78%	19	22%

We see that the lowest % of Welsh speakers is in the 65-84 age group and that all in the 12-17 and 18-24 age groups are able to speak Welsh.

The map below shows the number of individuals who have moved to the Porthmadog area and the percentage of these who can speak Welsh.

Of those who have moved within the Porthmadog area 84% (58/69) stated that they could speak Welsh.

Figure 35: Porthmadog Area – moving to the area and ability to speak Welsh



Language of the home

In the case of one-person households – they were asked to state their first language.

Table 174: Porthmadog Area – First language (one-person households)

Language	Number of households	%
Welsh	2	28.6%
English	4	57.1%
Other	1	14.3%
Total	7	100.0%

In the case of multi person households – we asked which language was spoken most in the household.

Table 175: Porthmadog area – Language of the home (multi person households)

Language	Number of households	%
Welsh	13	54.2%
English	11	45.8%
Other	0	0.0%
Total	24	100.0%

Households from the two tables above combined

Table 176: Porthmadog Area – Language of the home / first language (total)

Language	Number of households	%
Welsh	15	48.4%
English	15	48.4%
Other	1	3.2%
Total	31	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

12% stated that they wanted to buy a property of their own, with a further 12% stating that this was the property that was available when they were looking for a house. 11% thought a new house offered value for money.

Table 177: Porthmadog Area – Reasons for moving

Why did you move here?	Number	%
Wanted his/her/their own property	7	12.3%
This was the property that was available at the time	7	12.3%
High standard / value for money	6	10.5%
House location	5	8.8%
Larger property needed	5	8.8%
Liked the house	5	8.8%
Affordable rent/prices	4	7.0%
Did not like where we were living e.g. level of crime and noise	4	7.0%
The suitability of the house to personal needs	3	5.3%
Change in life circumstances – a fresh start	3	5.3%
Knew the person who was renting the house	2	3.5%
Needed a smaller property	2	3.5%
No response	2	3.5%
Views / Natural environment / Countryside	1	1.8%
For our retirement	1	1.8%
	57	

**out of 31 responses (some gave more than one reason)*

Why move to this area?

Of the 31 new houses there were 20 where the family (or some members of the family) were already living within the Porthmadog area. 23% had moved to be closer to family / close friends. 15% were moving to be closer to work.

Table 178: Porthmadog Area – Why move to this area?

Why move to this area?	Number	%
At least one member of the family was already living in the area	20	41.7%
To be closer to family / close friends	11	22.9%
Work location / closer to work	7	14.6%
Facilities / links in the area	3	6.3%
For a quieter life / less populated area - a nice/ideal life	3	6.3%
A suitable place to bring up children	2	4.2%
Less crime in the area	1	2.1%
No response	1	2.1%
	48	

**out of 31 responses (some gave more than one reason)*

Why choose a new house?

29% reported that they were placed there by the Council/Housing Association. 23% identified the convenience of a new house as the reason. 20% had been able to obtain a plot for themselves on which to build. For 11% the location was the attraction and not necessarily a new house.

Table 179: Porthmadog Area – Why choose a new house

Why choose a new house?	Number	%
Obtained from Council / Housing Association	10	28.6%
Convenience - No work on a new house / reduced running costs / new home warranty	8	22.9%
Managed to get a plot to build on	7	20.0%
The main reason was the location, not that it was a new house	4	11.4%
No response	3	8.6%
A house we could afford	2	5.7%
Converted building – i.e. not a brand new house	1	2.9%
	35	

**out of 31 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Porthmadog area 76% of them would probably have remained in the area either by staying in their current home or by looking for another house in the area.

Table 180: Porthmadog Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Porthmadog area)

Those already living in the Porthmadog area	Number	%
Somewhere within reasonable distance of Porthmadog	8	38.1%
Would not have moved and would have stayed in the Porthmadog area	8	38.1%
Not sure	2	9.5%
Somewhere within reasonable distance of the Bangor area	1	4.8%
Would have moved to somewhere in England	1	4.8%
No response	1	4.8%
	21	

*out of 21 responses

Of those who were not living in the area before, 60% of households would still have moved to the Porthmadog area and 1 household thought they would have stayed in the Ffestiniog area.

Table 181: Porthmadog Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those not already living in the Porthmadog area)

Those NOT already living in the Porthmadog area	Number	%
Would still have moved to the Porthmadog area	6	60.0%
Not sure	2	20.0%
Would not have moved and would have stayed in the Ffestiniog area	1	10.0%
No response	1	10.0%
	10	

*out of 10 responses

Previous connection with the area?

As already noted, in the case of 21 of the respondents, at least one family member was already living in the Porthmadog area. A further 23% were already living in a neighbouring area. 7% had been coming on holiday to the area over the years.

Table 182: Porthmadog Area – Previous connection with the area

Previous connection with the area?	Number	%
At least one person was already living in the area	21	67.7%
At least one person was already living in a nearby area	7	22.6%
Had been coming on holiday to the area over the years	2	6.5%
No response	1	3.2%
	31	

*out of 31 responses

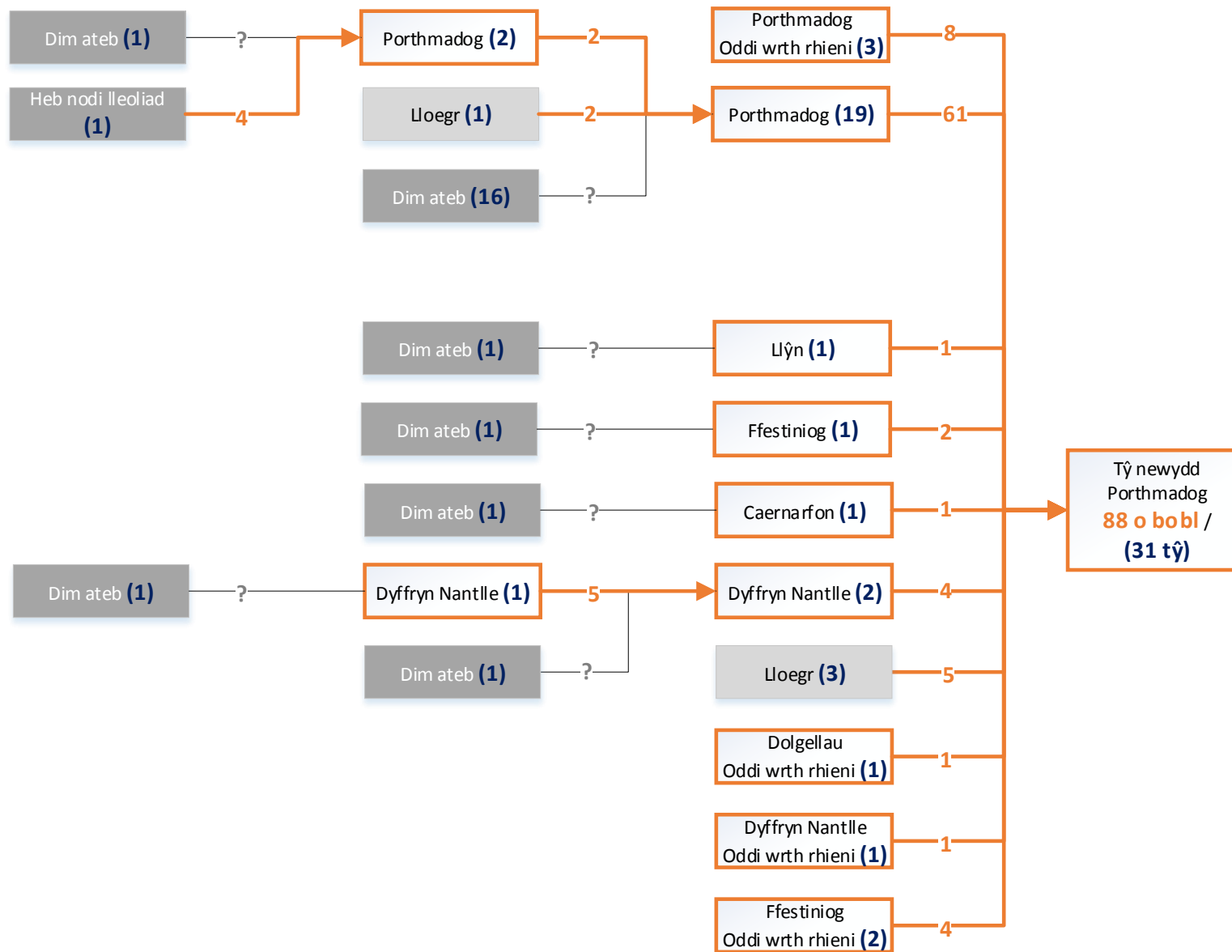
The houses where the residents of the new houses were living before

Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the outcomes, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

The number of responses is too small to surmise anything concrete about the moves further back in the 'chain' but it can be seen, for example, that of the 19 houses in the Porthmadog area that became vacant as people moved into the new houses, 2 had been bought/rented by other people from the Porthmadog area and 1 from people moving from England (although we have not received a response from the other 16 houses). This might suggest that the previous moves have tended to be mostly within the same local area, but it is difficult to be certain about this.

Figure 36: Porthmadog Area – Stages 2, 3 and 4



Main conclusions about the Porthmadog area

- The age profile of those moving into a new house was relatively young, with around 38% aged 25-44 and around a quarter aged 3-11.
- Nearly 80% of the residents of the new houses had moved there from another property in the Porthmadog area. Otherwise, 7% had moved from the Ffestiniog area and 6% from the Ffestiniog area and 6% from England.
- The age profile of those moving from different areas was very different; over 40% of those who were living in the Porthmadog area previously were aged 25-44 years, whilst 80% of those moving from England were aged 65-84 years.
- Approximately 80% of the residents of the new houses spoke Welsh, which is higher than the proportion in the Porthmadog area as a whole.
- The ability of the new residents to speak Welsh varied considerably by age group – the majority of all age groups spoke Welsh except those aged 65-84, where around 20% spoke Welsh.
- 80% of those living in the Porthmadog area previously and had moved to a new house could speak Welsh, but no-one who moved there from England could speak Welsh.
- The most commonly cited reasons for moving to a new house in the area were that they wanted to move to a property of their own, that this was the property that was available at the time, and the idea that a new house was of a quality standard / offered value for money.
- Of the respondents who had moved from another property in the Porthmadog area, the overwhelming majority stated that they would otherwise have remained in the area anyway (either by obtaining another house in the same area or not moving at all). Even among those moving from other areas, 60% indicated that they would have moved to the Porthmadog area anyway if the new house had not been available.
- Of the respondents who had moved to the Porthmadog area from other areas, most had a previous connection to the area through family members living in adjacent areas.
- In terms of the reasons for selecting a new house specifically, the most common were being placed there by the Council / housing association, convenience (no work / maintenance costs, and the new house warranty), and the ability to obtain land on which to build.

13. TYWYN area

Tywyn area numbers

Altogether, we had the addresses of 63 new houses completed in the Tywyn area between 2012 and 2017. We received a response from 23 houses, which is about 40% of those reached.

Table 183: Tywyn area – Number of houses surveyed

Number	Number reached	Number of responses received	% of those reached who responded
63	58	23	39.7%

These 63 include the development of:-

- 13 new houses at Tai Pendre estate, Tywyn

The map below of the Tywyn area shows the location of the new houses.

Figure 37: Tywyn Area – Location of new housing



Tywyn area population

The population of the area concerned is **7,337** (mid-year estimates 2017, Office for National Statistics)

New dwellings in the Tywyn area (sample of 23)

Of the 23 new dwellings from which we received a response, 61% were either private rented or rented from a housing association.

Table 184: Tywyn Area – House owner or renting the house

House owner or renting	Number	%
Owner	9	39.1%
Private rented	6	26.1%
Social rented	8	34.8%
Total	23	100.0%

The most common type of new house we received a response from was a detached house.

Table 185: Tywyn Area – Type of house

Type of house	Number	%
Bungalow	2	8.7%
Semi	6	26.1%
Terrace	1	4.3%
Detached	8	34.8%
Flat or maisonette	6	26.1%
Total	23	100.0%

Table 186: Tywyn Area – Number of bedrooms

Number of bedrooms	Number	%
1	4	17.4%
2	8	34.8%
3	8	34.8%
5	3	13.0%
Total	23	100.0%

A total of 48 people were living in the 23 houses from which we received a response to the questionnaire; about 2.1 people per house.

Table 187: Tywyn Area – Number of people in the house

Number of people in the house	Number of homes	Total number of People
1	8	8
2	9	18
3	3	9
4	2	8
5	1	5
Total	23	48

Table 188: Tywyn Area – Number of bedrooms for number of people living in the house

Number of bedrooms↓	Number of people living there→					Total Number of Homes
	1	2	3	4	5	
1	4					4
2	1	6	1			8
3	2	3	1	2		8
5	1		1		1	3
Total	8	9	3	2	1	23

The people who moved into the new houses

The map below shows where the 48 people who moved to the 23 new dwellings came from.

Figure 38: Tywyn Area – Moving to the Tywyn area

Symud i ardal Tywyn

28 o fewn Tywyn eisoes



It can be seen that the majority (28/48; 58%) of the individuals in the sample have moved to the new house from elsewhere in the Penllyn area. A significant proportion (17/48; 35%) had moved there from England. Few had moved there from other places.

The age group of the people who moved into the new houses was fairly mixed, with almost 30% being children, over a quarter aged 45-64 and nearly 20% aged over 65.

Table 189: Tywyn Area - Age

Age	Number	%
0-2	0	0.0%
3-11	7	14.6%
12-17	7	14.6%
18-24	2	4.2%
25-44	10	20.8%
45-64	13	27.1%
65-84	9	18.8%
85+	0	0.0%
No response	0	0.0%
Total	48	100.0%

The next table provides a breakdown of the number of people who came to live in a new dwelling in the Tywyn area according to the proportion in each age group.

Table 190: Tywyn Area – Age and areas (moved to Tywyn area)

Moved from	0-2	3-11	12-17	18-24	25-44	45-64	65-84	85+	No response	Total
Dolgellau		33%				67%				3
Tywyn		21%	18%	4%	32%	11%	14%			28
England			12%	6%	6%	47%	29%			17
										48

Language of the people who moved into the new houses

Of the 48 people, 24 (50%) stated that they could speak Welsh.

The language of the individuals

Table 191: Tywyn Area – Able to speak Welsh

	Able to speak Welsh	%
No	24	50.0%
Yes	24	50.0%
Total	48	100.0%

No-one under the age of 3 had moved to the Tywyn area.

According to the 2011 Census, 39% of those over the age of 3 in the Tywyn area could speak Welsh.

Table 192: Tywyn Area – Ability to speak Welsh and age

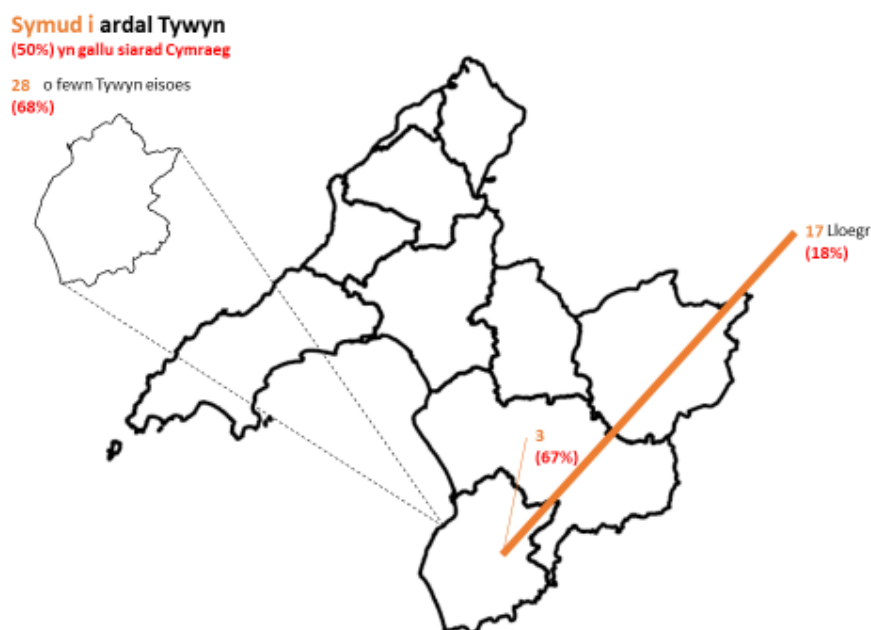
Age	Able to speak Welsh		Not able to speak Welsh	
0-2	0	0%	0	0%
3-11	7	100%	0	0%
12-17	5	71%	2	29%
18-24	2	100%	0	0%
25-44	7	70%	3	30%
45-64	3	23%	10	77%
65-84	0	0%	9	100%
85+	0	0%	0	0%
No response	0	0%	0	0%
Total	24	50%	24	50%

No-one aged 65-84 could speak Welsh. All in the 3-11 and 18-24 age groups can speak Welsh.

The map below shows the number of individuals who have moved to the Tywyn area and the percentage of these who can speak Welsh.

Of those who have moved within the Porthmadog area 68% (19/28) stated that they could speak Welsh.

Figure 39: Tywyn Area – moving to the area and ability to speak Welsh



Language of the home

In the case of one-person households – they were asked to state their first language.

Table 193: Tywyn Area – First language (one-person households)

Language	Number of households	%
Welsh	0	0.0%
English	8	100.0%
Total	8	100.0%

In the case of multi person households – we asked which language was spoken most in the household.

Table 194: Tywyn area – Language of the home (multi person households)

Language	Number of households	%
Welsh	1	6.7%
English	14	93.3%
Total	15	100.0%

Households from the two tables above combined

Table 195: Tywyn Area – Language of the home / first language (total)

Language	Number of households	%
Welsh	1	4.3%
English	22	95.7%
Total	23	100.0%

Reasons for moving to a new house

The main responses to the more ‘open ended’ question which sought to get the “story” of the residents of the new houses to ascertain the reasons why they had moved to new properties in the area are set out below.

Why did you move here?

23% noted that this property was available when they were looking for a house. 15% had moved due to the natural beauty of the area. 13% had moved because of changes in their life circumstances and they wanted a new start, with 10% stating they didn’t like where they lived before due crime/noise levels.

Table 196: Tywyn Area – Reasons for moving

Why did you move here?	Number	%
This property was available at the time	9	22.5%
Views / Natural environment / Countryside	6	15.0%
Change in life circumstances – a new start	5	12.5%
Did not like where we were living e.g. crime and noise levels	4	10.0%
Wanted his/her/their own property	3	7.5%
House location	3	7.5%
The suitability of the house to personal needs	3	7.5%
Larger property needed	2	5.0%
Needed a smaller property	2	5.0%
Forced to leave our previous house	1	2.5%
Wanted a second home	1	2.5%
For our retirement	1	2.5%
	40	

**out of 23 responses (some gave more than one reason)*

Why move to this area?

In 9 of the 23 new houses, the family (or some family members) were already living within the Tywyn area. 23% had moved to be nearer to family / close friends. 23% were moving for a quieter life.

Table 197: Tywyn Area – Why move to this area?

Why move to this area?	Number	%
One member of the family was already living in the area	9	34.6%
To be closer to family / close friends	6	23.1%
For a quieter life / less populated area / a nicer life	6	23.1%
A suitable place to bring up children	2	7.7%
Facilities / links in the area	2	7.7%
Work location / closer to work	1	3.8%
	26	

**out of 23 responses (some gave more than one reason)*

Why choose a new house?

35% reported that they were placed there by the Council/Housing Association. For 30% the location was the attraction and not necessarily a new house. 17% chose a new house because it was a convenient option.

Table 198: Tywyn Area – Why choose a new house?

Why choose a new house?	Number	%
Obtained from Council / Housing Association	8	34.8%
The main reason was the location, not that it was a new house	7	30.4%
Convenience - No work on a new house / reduced running costs / new home warranty	4	17.4%
Converted building – i.e. not a brand-new house	2	8.7%
No response	2	8.7%
	23	

**out of 23 responses (some gave more than one reason)*

Where would you have been likely to have moved to (if at all) if this new house had not been available?

Of those already living within the Tywyn area 100% of them would probably have remained in the Tywyn area and would have looked for another house in the area

Table 199: Tywyn Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those already living in the Tywyn area)

Those already living in the Tywyn area	Number	%
Somewhere within reasonable distance of the Tywyn area	13	100.0%
	13	

**out of 13 responses*

The responses of the 10 from outside the Tywyn area varied.

Table 200: Tywyn Area – Where would you have been likely to have moved to (if at all) if this new house had not been available? (those not already living in the Tywyn area)

Those <u>NOT</u> already living in the Tywyn area	Number	%
Would still have moved to the Tywyn area	2	20.0%
Would have moved to Aberystwyth instead	2	20.0%
Not sure	2	20.0%
Would have moved to the Porthmadog area instead	1	10.0%
Would not have moved and would have stayed in England	1	10.0%
Somewhere in North Wales	1	10.0%
No response	1	10.0%
	10	

**out of 10 responses*

Previous connection to the area?

As already noted, in the case of 13 of the respondents, at least one family member was already living in the Tywyn area. 22% had been coming on holiday to the area over the years. 13% had no previous connection with the area.

Table 201: Tywyn Area – Previous connection with the area

Previous connection to the area?	Number	%
At least one person was already living in the area	13	56.5%
Had been coming on holiday to the area over the years	5	21.7%
No previous connection	3	13.0%
Close friends / family in the area	2	8.7%
	23	

**out of 23 responses*

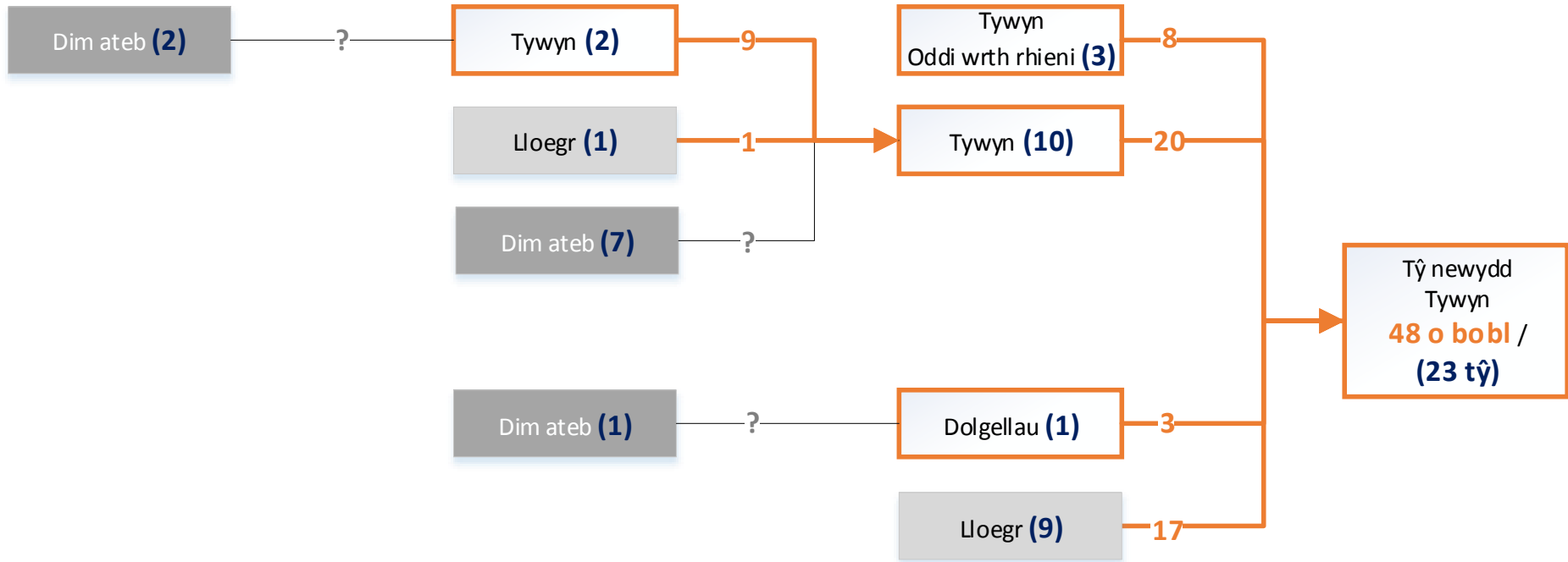
The houses where the residents of the new houses were living before

Where new housing respondents (Stage 1) indicated that they had moved there from somewhere in Gwynedd, we then tried to go to the previous house to track the housing 'chain' back.

The diagram **on the next page** summarises the outcomes, showing, for the cases where we received a response, the areas (in the boxes) where the previous houses of residents were located, and (on the arrows) the number of people who moved from area to area at each stage.

The number of responses is too small to surmise anything concrete about the moves further back in the 'chain' but it can be seen, for example, that of the 10 houses in the Tywyn area that became vacant as people moved into the new houses, 2 had been bought/rented by other people from the Tywyn area and 1 from people moving from England (although we have not received a response from the other 7 houses). This might suggest that the previous moves have tended to be mostly within the same local area, but it is difficult to be certain about this.

Figure 40: Tywyn Area – Stages 2, 3 and 4



Main conclusions about the Tywyn area

- The age profile of people who moved into the new houses was fairly mixed, with almost 30% being children, over a quarter aged 45-64 and nearly 20% aged over 65.
- Nearly 60% of the residents of the new houses had moved there from another property in the Tywyn area and 35% had moved there from England.
- The age profile of those moving from different areas was very different; about three-quarters of those who were living in the Tywyn area previously were under 44 years of age, whilst three-quarters of those moving from England were over 45 years old.
- 50% of the residents of the new houses spoke Welsh, which is higher than the proportion in the Tywyn area as a whole.
- The ability of the new residents to speak Welsh varied considerably by age group – the majority of the youngest age groups were able to speak Welsh but only around a quarter of those aged 45-64, and no-one over the age of 65, could speak Welsh.
- Around half of those who were living in the Tywyn area previously and had moved to a new house could speak Welsh, but less than 20% of those who moved from England.
- The most frequently cited reasons for moving to a new house in the area were that it was that house that had been available at the time, views / natural environment / countryside, and personal circumstances / wanting a “fresh start”.
- All of the respondents who had moved from another property in the Tywyn area indicated that they would have remained within a reasonable distance of the area had that house not been available. Among those moving from other areas, the picture was not so clear with the majority indicating that they would have moved to various other neighbouring areas had the new house not been available.
- Of the respondents who had moved to the Tywyn area from other areas, the majority had visited the area on holiday over the years.
- In terms of the reasons for selecting a new house specifically, around a third indicated that they had been located there by the Council / housing association, with a further third stating that the location was the important factor for them, rather than having a new house.

14. Types of development

This chapter analyses the above results according to the type of development in question (whether the development was large / small, and also whether the houses in question were social rented housing) to see if that had any significant impact on the outcomes.

Responses from residents of new houses which were part of a housing development of 5 or more houses

Of the 351 new dwellings from which a response was received, 238 (68%) were part of a 'large' development of 5 or more dwellings (note: a threshold of 5 or more houses is used here to align with the draft SPG on Notable and Sustainable Communities).

604 people had come to live in these houses and of these 66% were able to speak Welsh (note that there had been no development of 5 or more houses in the Ffestiniog area during the period).

Table 2022: New housing forming part of a development of 5 or more houses

Area	Number of Houses	Number of People	% of people able to speak Welsh
Bangor	124	312	60%
Caernarfon	39	89	97%
Dolgellau	11	23	43%
Dyffryn Nantlle	6	16	88%
Dyffryn Ogwen	8	27	81%
Ffestiniog	0	0	0%
Llŷn	17	42	57%
Penllyn	4	9	22%
Porthmadog	14	51	73%
Tywyn	15	35	54%
Total	238	604	66%

In total 72% of residents of these new houses had moved there from within Gwynedd, and around 10% had come from England. The pattern varies slightly between areas (Table 203).

The percentage of people moving from elsewhere in Gwynedd is lowest in the Dolgellau area with 39%, and at its highest in the Porthmadog area with 92%.

Patterns of migration from England can also be seen with over a third of people in the Dolgellau, Penllyn and Tywyn areas having moved from England. No-one had moved from England to the Dyffryn Nantlle area and only 1% to the Caernarfon area.

In terms of the language of the residents, although 66% of the individuals were able to speak Welsh, it was only in 37% of the homes that Welsh was the main language of the home (table 205 to 210). This also varied from area to area, with the highest percentage of homes where Welsh is the main language in the Caernarfon area, at 85%, and the lowest percentage in the Tywyn area at approximately 7%.

Table 2033: New housing forming part of a housing development of 5 or more houses by area – from where people have moved

	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Within the same area	51.6%	68.5%	26.1%	31.3%	37.0%	0.0%	81.0%	55.6%	82.4%	68.6%	57.6%
Other areas of Gwynedd	15.7%	14.6%	13.0%	37.5%	33.3%	0.0%	2.4%	0.0%	9.8%	0.0%	14.2%
England	7.7%	1.1%	39.1%	0.0%	11.1%	0.0%	7.1%	44.4%	7.8%	31.4%	9.8%
Conwy and Anglesey	16.0%	10.1%	0.0%	18.8%	14.8%	0.0%	0.0%	0.0%	0.0%	0.0%	10.9%
Rest of Wales	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Other	8.3%	5.6%	21.7%	12.5%	3.7%	0.0%	9.5%	0.0%	0.0%	0.0%	7.1%
	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Within Gwynedd	67.3%	83.1%	39.1%	68.8%	70.4%	0.0%	83.3%	55.6%	92.2%	68.6%	71.9%

*no housing development of 5 or more houses in this area

Table 2044: New housing not forming part of a housing development of 5 or more houses by area – from where people have moved

	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Within the same area	47.1%	61.5%	40.0%	38.1%	78.9%	81.8%	60.0%	62.5%	73.0%	30.8%	57.1%
Other areas of Gwynedd	2.9%	15.4%	0.0%	38.1%	15.8%	0.0%	2.9%	12.5%	24.3%	23.1%	15.0%
England	11.8%	7.7%	53.3%	4.8%	0.0%	0.0%	20.0%	25.0%	2.7%	46.2%	14.3%
Conwy and Anglesey	11.8%	10.3%	0.0%	4.8%	0.0%	0.0%	2.9%	0.0%	0.0%	0.0%	3.8%
Rest of Wales	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Other	20.6%	5.1%	6.7%	14.3%	5.3%	18.2%	14.3%	0.0%	0.0%	0.0%	9.1%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Within Gwynedd	50.0%	76.9%	40.0%	76.2%	94.7%	81.8%	62.9%	75.0%	97.3%	53.8%	72.1%

Table 2055: New housing forming part of a housing development of 5 or more houses by area – ability to speak Welsh

Number	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Able to speak Welsh	186	86	10	14	22	0	24	2	37	19	400
Not able to speak Welsh	122	2	13	2	5	0	18	7	14	16	199
No response	4	1	0	0	0	0	0	0	0	0	5
	312	89	23	16	27	0	42	9	51	35	604

*no housing development of 5 or more houses in this area

Table 2066: New housing forming part of a housing development of 5 or more houses by area – ability to speak Welsh

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Able to speak Welsh	59.6%	96.6%	43.5%	87.5%	81.5%	0.0%	57.1%	22.2%	72.5%	54.3%	66.2%
Not able to speak Welsh	39.1%	2.2%	56.5%	12.5%	18.5%	0.0%	42.9%	77.8%	27.5%	45.7%	32.9%
No response	1.3%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*no housing development of 5 or more houses in this area

Table 2077: New housing not forming part of a housing development of 5 or more houses by area – ability to speak Welsh

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Able to speak Welsh	55.9%	76.9%	56.7%	81.0%	89.5%	81.8%	80.0%	62.5%	86.5%	38.5%	74.2%
Not able to speak Welsh	44.1%	23.1%	43.3%	11.9%	7.9%	18.2%	20.0%	37.5%	13.5%	61.5%	24.4%
No response	0.0%	0.0%	0.0%	7.1%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 2088: New housing forming part of a development of 5 or more houses - Language of the Home

Numbers	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Other	19	0	1	0	0	0	1	0	0	0	21
Welsh	32	33	1	5	4	0	7	0	5	1	88
English	73	5	8	1	3	0	9	4	9	14	126
No response	0	1	1	0	1	0	0	0	0	0	3
	124	39	11	6	8	0	17	4	14	15	238

*no housing development of 5 or more houses in this area

Table 2099: New housing forming part of a development of 5 or more houses - Language of the Home

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Other	15.3%	0.0%	9.1%	0.0%	0.0%	0.0%	5.9%	0.0%	0.0%	0.0%	8.8%
Welsh	25.8%	84.6%	9.1%	83.3%	50.0%	0.0%	41.2%	0.0%	35.7%	6.7%	37.0%
English	58.9%	12.8%	72.7%	16.7%	37.5%	0.0%	52.9%	100.0%	64.3%	93.3%	52.9%
No response	0.0%	2.6%	9.1%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*no housing development of 5 or more houses in this area

Table 210: New housing not forming part of a development of 5 or more houses - Language of the Home

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Other	16.7%	5.3%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%
Welsh	25.0%	52.6%	16.7%	66.7%	63.6%	25.0%	63.6%	50.0%	58.8%	0.0%	46.0%
English	58.3%	42.1%	83.3%	33.3%	27.3%	75.0%	36.4%	50.0%	35.3%	100.0%	49.6%
No response	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.9%	0.0%	0.9%
	100.0%	100.0%	100.0%	100.0%	100.0%	0.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Conclusions: 'large' developments compared to 'small' developments

- There were very few differences in respect of where people were living before moving into the new houses. 58% of residents of 'large' developments had moved there from within the same local area, compared to 57% in the new houses that were part of 'small' developments. The pattern was similar in the case of those moving from another area in Gwynedd (14% in 'large' developments, compared to 15% in 'small' developments), and those moving from England (10% in 'large' developments, compared to 14% in 'small' developments).
- In terms of the Welsh language, there was some variation between residents of new houses in 'small' developments (74% able to speak Welsh) and those in 'large' developments (66% able to speak Welsh). Different patterns can be seen across the areas (table 205 to 207) with the pattern in the Bangor, Caernarfon, Dyffryn Nantlle and Tywyn areas at variance with the pattern for Gwynedd as a whole.
- In terms of the main language of the household, there were some differences between residents of new houses in Gwynedd in 'small' developments (46% stating that Welsh was the main language of the home) and those in 'large' developments (37% stating that Welsh was the main language of the home). Different patterns can be seen across areas (table 208 to 210) with the pattern in the areas of Bangor, Caernarfon, Dyffryn Nantlle and Tywyn again at variance with the pattern in Gwynedd as a whole.

Responses from new residents of Social Rented housing

Of the 351 new dwellings from which a response was received, 60 (17%) were Social Rented housing. 177 people had come to live in these houses and of these 74% were able to speak Welsh. There has been no social rented development in Dyffryn Nantlle, Ffestiniog or Penllyn area during the period in question.

Table 211: New Social Rented Housing

Area	Number of Houses	Number of People	% of people able to speak Welsh
Bangor	23	62	73%
Caernarfon	7	14	93%
Dolgellau	3	9	67%
Dyffryn Nantlle	0	0	0%
Dyffryn Ogwen	3	9	67%
Ffestiniog	0	0	0%
Llŷn	6	18	78%
Penllyn	0	0	0%
Porthmadog	10	43	77%
Tywyn	8	22	64%
Total	60	177	74%

In total, 92% of residents of these new Social Rented houses had moved there from Gwynedd (80% within the same local area and 12% from another area in Gwynedd). Around 2% have come from England. The pattern is slightly different across areas within Gwynedd (Table 212 to 213).

The percentage of people who moved there within Gwynedd is lowest in the Dolgellau area at 67%, and at 100% in the Caernarfon, Dyffryn Ogwen, Llŷn and Porthmadog areas.

It is only in the Tywyn area that people have moved from England to Social Rented housing, at around 18%.

In terms of the language of the homes, although 74% of the individuals were able to speak Welsh, it was only in 37% of the homes that Welsh was the main language of the home (Table 214 and 219). This also varied from area to area, with the highest percentage of homes where Welsh is the main language in the Caernarfon area, at 86%, and the lowest percentage in the Dolgellau area, where Welsh was not the main language at all.

Table 212: New Social Rented Housing – where occupants have moved from

	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle*	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn*	Porthmadog	Tywyn	Gwynedd
Within the same area	75.8%	85.7%	66.7%	0.0%	11.1%	0.0%	100.0%	0.0%	93.0%	81.8%	80.2%
Other areas of Gwynedd	11.3%	14.3%	0.0%	0.0%	88.9%	0.0%	0.0%	0.0%	7.0%	0.0%	11.3%
England	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.2%	2.3%
Conwy and Anglesey	12.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%
Rest of Wales	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
	100.0%	100.0%	100.0%	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%	100.0%	100.0%
Within Gwynedd	87.1%	100.0%	66.7%	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%	81.8%	91.5%

*no new social housing in this area

Table 213: New non-Social Rented Housing – where occupants have moved from

	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog	Llŷn	Penllyn	Porthmadog	Tywyn	Gwynedd
Within the same area	45.8%	64.0%	27.3%	36.2%	69.6%	81.8%	62.7%	58.8%	64.4%	38.5%	51.8%
Other areas of Gwynedd	15.1%	14.9%	6.8%	37.9%	12.5%	0.0%	3.4%	5.9%	24.4%	11.5%	15.3%
England	9.9%	3.5%	56.8%	3.4%	5.4%	0.0%	16.9%	35.3%	11.1%	50.0%	13.4%
Conwy and Anglesey	16.2%	11.4%	0.0%	8.6%	7.1%	0.0%	1.7%	0.0%	0.0%	0.0%	9.7%
Rest of Wales	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Other	11.6%	6.1%	9.1%	13.8%	5.4%	18.2%	15.3%	0.0%	0.0%	0.0%	9.2%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Within Gwynedd	60.9%	78.9%	34.1%	74.1%	82.1%	81.8%	66.1%	64.7%	88.9%	50.0%	67.1%

Table 214: New Social Rented Housing – ability to speak Welsh

Number	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle*	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn*	Porthmadog	Tywyn	Total
Able to speak Welsh	45	13	6	0	6	0	14	0	33	14	131
Not able to speak Welsh	16	1	3	0	3	0	4	0	10	8	45
No response	1	0	0	0	0	0	0	0	0	0	1
	62	14	9	0	9	0	18	0	43	22	177

*no housing development of 5 or more houses in this area

Table 21115: New Social Rented Housing – ability to speak Welsh

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle*	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn*	Porthmadog	Tywyn	Total
Able to speak Welsh	72.6%	92.9%	66.7%	0.0%	66.7%	0.0%	77.8%	0.0%	76.7%	63.6%	74.0%
Not able to speak Welsh	25.8%	7.1%	33.3%	0.0%	33.3%	0.0%	22.2%	0.0%	23.3%	36.4%	25.4%
No response	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
	100.0%	100.0%	100.0%	0.0%	100.0%	0.0%	100.0%	0.0%	100.0%	100.0%	100.0%

*no housing development of 5 or more houses in this area

Table 21216: New non-Social Rented Housing – ability to speak Welsh

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Able to speak Welsh	56.3%	90.4%	47.7%	82.8%	89.3%	81.8%	64.4%	41.2%	80.0%	38.5%	67.5%
Not able to speak Welsh	42.6%	8.8%	52.3%	12.1%	8.9%	18.2%	35.6%	58.8%	20.0%	61.5%	31.4%
No response	1.1%	0.9%	0.0%	5.2%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Table 217: New Social Rented Housing – Language of the Home

Numbers	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle*	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn*	Porthmadog	Tywyn	Total
Other	1	0	1	0	0	0	0	0	0	0	2
Welsh	6	6	0	0	1	0	4	0	4	1	22
English	16	1	2	0	2	0	2	0	6	7	36
No response	0	0	0	0	0	0	0	0	0	0	0
	23	7	3	0	3	0	6	0	10	8	60

*no new social housing in this area

Table 218: New Social Rented Housing – Language of the Home

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle*	Dyffryn Ogwen	Ffestiniog*	Llŷn	Penllyn*	Porthmadog	Tywyn	Total
Other	4.3%	0.0%	33.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
Welsh	26.1%	85.7%	0.0%	0.0%	33.3%	0.0%	66.7%	0.0%	40.0%	12.5%	36.7%
English	69.6%	14.3%	66.7%	0.0%	66.7%	0.0%	33.3%	0.0%	60.0%	87.5%	60.0%
No response	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*no new social housing in this area

Table 219: New non-Social Rented Housing – Language of the Home

As a %	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen	Ffestiniog	Llŷn	Penllyn	Porthmadog	Tywyn	Total
Other	17.7%	2.0%	0.0%	0.0%	6.3%	25.0%	4.5%	0.0%	0.0%	0.0%	8.2%
Welsh	25.7%	72.5%	15.0%	71.4%	62.5%	75.0%	45.5%	25.0%	52.4%	0.0%	41.2%
English	56.6%	23.5%	80.0%	28.6%	25.0%	0.0%	50.0%	75.0%	42.9%	100.0%	49.1%
No response	0.0%	2.0%	5.0%	0.0%	6.3%	0.0%	0.0%	0.0%	4.8%	0.0%	1.4%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Conclusions: new Social Rented housing compared to other housing

- Moves to new social rented housing were generally more “local” in nature than moves to other new housing. 80% of new social rented housing residents had moved from within the same local area (compared to 52% in new non-social housing), and a further 11% had moved there from another area in Gwynedd (15% in new non-social housing). Around 2% had moved from England (compared to 13% in new non-social housing).
- A slightly higher proportion of residents of new social rented housing across Gwynedd spoke Welsh, compared to residents of new non-social rented housing (74% compared to 68%). Different patterns can be seen across the areas (tables 214 to 216) with the pattern in the Dyffryn Ogwen and Porthmadog areas at variance with the pattern for Gwynedd as a whole.
- As regards the main language of the household, there was some difference between residents of new non-social rented housing in Gwynedd (41% stating that Welsh was the main language of the home) and those in social rented developments (37% stating that Welsh was the main language of the home). Different patterns can be seen across areas (tables 208 to 210) with the pattern in the Bangor, Caernarfon and Llŷn areas at variance with the pattern for Gwynedd as a whole.

15. Main Conclusions

What becomes evident when looking at the outcomes of the 10 individual areas is that new housing patterns, and those who buy them, can vary considerably from area to area. Therefore it cannot really be assumed that the overall pattern necessarily reflects the situation across Gwynedd; reference should be made to the chapters dealing with the individual areas in order to get a better idea of the findings.

However, by drawing comparisons across the areas surveyed, some key messages become apparent, either because similar patterns manifest themselves in a number of areas, or because some areas show a different pattern to the rest of Gwynedd:-

Who moves into new housing and from where

- In total, 57% of new housing residents moved from another house in the same local area, with a further 15% moving from other areas of Gwynedd (usually adjacent areas).
- 9% moved from Anglesey / Conwy, 11% from England, and 8% from the rest of Wales or other countries.
- The detailed pattern by area is as follows:

Table 220: Who moves into new housing and from where

	Bangor	Caernarfon	Dolgellau	Dyffryn Nantlle	Dyffryn Ogwen
Moving within the same area	51%	66%	34%	36%	61%
Moving from another part of Gwynedd	14%	15%	6%	38%	23%
Moving from Anglesey / Conwy	16%	10%	0%	9%	6%
Moving from England	8%	3%	47%	3%	5%
Moving from somewhere else	11%	6%	13%	14%	5%

	Ffestiniog	Llŷn	Penllyn	Porthmadog	Tywyn
Moving within the same area	82%	71%	59%	78%	58%
Moving from another part of Gwynedd	0%	3%	6%	16%	6%
Moving from Anglesey / Conwy	0%	1%	0%	0%	0%
Moving from England	0%	13%	35%	6%	36%
Moving from somewhere else	18%	12%	0%	0%	0%

- In almost all areas therefore, the majority of new housing residents in the area had moved there from other houses within the same area. This increased to 70% or above in the Ffestiniog, Llŷn and Porthmadog areas. The main exception to this was the Dolgellau area where almost half the residents had moved from England compared to around a third who had moved within the Dolgellau area.
- Relatively few moved to a new house in Gwynedd from other areas of Gwynedd. To some degree, this could be seen in the areas of Bangor (predominantly from the Caernarfon area), Caernarfon (mostly from the Bangor and Dyffryn Nantlle areas), Dyffryn Nantlle (largely from the Caernarfon area), Dyffryn Ogwen (primarily from the Bangor area) and Porthmadog (largely from the Ffestiniog area). But – apart from the moves from Bangor to Dyffryn Ogwen, and from Caernarfon to Dyffryn Nantlle - all of these movements were relatively small.
- There was also some movement from Anglesey / Conwy to new housing in the Bangor and Caernarfon areas, but this was again relatively small.
- Apart from the Dolgellau area (see above), the proportion of new housing residents moving from England ranged from 35% (Penllyn and Tywyn areas), 15% (the Llŷn area), approximately 5-10% (Bangor and Porthmadog areas), to hardly any in the other four areas.
- There were no significant differences between “large” developments (5 houses or more) and “small” (4 houses or fewer), as regards the areas from which residents had moved.
- The proportion of new social housing residents moving from another house in Gwynedd (92%) was significantly higher than the corresponding percentage for other new housing (67%).
- The age profile of those moving into new housing varied by area, with a relatively “young” age profile in the Bangor, Caernarfon and Porthmadog areas in particular, and an “older” age profile in the Dolgellau, Llŷn and Penllyn areas.

The houses where residents of new housing lived previously

- The evidence regarding other movements in the housing “chain” – i.e. who moved into houses that became vacant as people moved into new housing – is more ambiguous due to the small number of responses.
- But overall, the results suggest that those movements are largely local with around 60% (across all areas) occurring within the same local area.
- Around another 10% of these movements from further afield were from other areas of Gwynedd, and around 8% from Anglesey. Around 13% had moved from England.
- On the whole therefore, this suggests that the market for the houses in the “chain” (i.e. the houses that became vacant as people moved into new housing) is similar to the new housing market itself, since a high proportion of the houses go to local people rather than to people

from outside the area or county. But once again it must be emphasised that it is difficult to be certain due to the low number of responses.

Language

- Apart from one area, the proportion of new housing residents who spoke Welsh was similar or slightly higher than the proportion in the area as a whole in the last Census. The exception was the Penllyn area, where the proportion was significantly lower (40% compared to 80%).
- The pattern by age group shows that younger residents of new homes are more likely to speak Welsh than older residents, with 91% of children aged 3 – 11 and 68% of people aged 25-44 able to speak Welsh. The lowest proportion (47%) is in the 65 – 84 age group.
- Residents of new housing in “small” developments (4 houses or fewer) were slightly more likely to be able to speak Welsh than residents in larger developments (74% compared to 66%). A slightly higher proportion of new social rented housing residents also spoke Welsh, compared to residents of other new housing (74% compared to 68%).

Why people move to a new house

- The reasons why people moved to a new house were quite varied – in the Bangor area a convenient location and close proximity to work was the most important consideration, whilst a location in the countryside / near views was important in areas such as Llŷn, Penllyn and Tywyn.
- In terms of the reason for choosing a new house specifically, convenience (no costs / maintenance, and the new house warranty) was one of the most important reasons. In some areas (such as Dyffryn Ogwen, Ffestiniog, Llŷn and Porthmadog) the availability of land to build on was an important reason.
- A significant number also reported that they were not looking for a new house as such but that it was available at the location they were looking for.
- In general, people already living in the area indicated that they would have looked for another house in that area, or that they would not have moved house at all, had the new house not been available.
- Among people who had moved from other areas the picture was more mixed - in some areas (Bangor, Caernarfon, Dolgellau, Llŷn, Porthmadog) there was a particular desire to move to that area, but in other areas, respondents indicated that they would otherwise have searched in neighbouring areas / counties

In the future, it would be useful to keep an eye on trends in the buying and renting of new housing to see whether the above patterns remain consistent or change in response to factors such as a change in the type / location of housing available, trends in the local and national housing market, changes in population and buyer aspirations, etc. To this end there may be scope to look at the possibilities for working with housing developers, housing associations etc to try to gather information of this kind as new houses are bought and rented.

Annex – Questions asked

About the house

1. Are you the first owner/tenant of the house?
 - Yes / No

2. Do you own or rent the house?
 - Own / Private rented / Social rented / Part Ownership

3. The year you purchased/started renting the house?

4. Type of house?
 - Detached / Semi / Terrace / Bungalow / Flat or Maisonette / Other

5. How many bedrooms?

About you and others living in the house

1. How many people usually live here?

About the people who usually live here:

	2. Age (0-2)(3-11)(12-17) (18-24)(25-44)(45-64)(65-84)(85+)	3. Are they Welsh-speaking?	4. Where did you used to live before moving to this house? <i>(+ details e.g. sold? moved from home?)</i>
Person 1:		Yes [] No []	
Person 2:		Yes [] No []	
Person 3:		Yes [] No []	
Person 4:		Yes [] No []	
Person 5:		Yes [] No []	
Person 6:		Yes [] No []	
Person 7:		Yes [] No []	
Person 8:		Yes [] No []	

Language of the home

If more than 2 people live in the house:

Which language is spoken most in the home? - English / Welsh / Other (box to state which one) /
More than one language equally (box to state which languages)

If 1 person lives in the house:

What is your first language? – Welsh / English / Other (box to state which language)

Reason for moving here

Why did you move here?

Why move to this area?

Why choose a new house?

Where would you have been likely to have moved to (if at all) if this new house had not been available?

If you have moved from another area – did you have any previous connection with the area?