4 LLAN
PEDAIR

Cryfhau ein cymdeithas   *Strengthening our communities*

TOWARDS A HOUSING ACTION PLAN

ESTABLISHING THE KNOWLEDGE BASE

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About BURUM

BURUM is a Welsh word for "yeast" and reflects the core value of our business. As with baking or winemaking, our core mission is to work with clients to create synergy and add value to their work. BURUM provides research, advice and evaluation services that draws on a deep understanding over many years – often with other like-minded people - of land use planning, economic and community development and regeneration and business management.

Acknowledgements

I would like to thank Mr Gareth Ioan and Mr Wayne Lewis from the 4 Llan Working Group and Ms Carys Purches-Phillips from the Housing Service Cyngor Sir Ceredigion for their co-operation in producing this report.

TOWARDS A HOUSING ACTION PLAN

ESTABLISHING THE KNOWLEDGE BASE

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EXECUTIVE SUMMARY

The core of this report is divided into three parts. Firstly, a profile of the main features of the 4 Llan Area is presented.

Demographic Characteristics

- The usual residential population of the 4 Llan Area has fallen by just over 5% between 2011 and 2021.
- The number of children aged 14 or less decreased by 120 while the population aged 15 to 44 decreased by 253 over the same period. The community of Llangrannog lost 137 of its population under the age of 45.
- There has been an increase of 200 in the population aged 65 and over with 58% of the increase (116) in the community of Llanarth.
- There is a higher percentage of households in the area with everyone aged 66 and over (33.5%) compared to Ceredigion 29.3% and Wales 24.8%. The percentage in the Llanllwchaearn community is significantly higher (169 out of 410 = 41.2%).
- In terms of language skills, the percentage who can speak Welsh in the 4 Llan Area (46.5%) is slightly higher than Ceredigion as a whole (45.3%). There is diversity within the area with less than 41% able to speak Welsh in Llanllwchaearn compared to almost 50% in Llandysiologogo.
- The difference between the ability of 16–49-year-olds and 50+ year olds to speak Welsh is more pronounced within the area (-25 percentage points) than across the county (-4.3 percentage points) and Wales as a whole (-4.1 percentage points).
- In terms of health, the percentage of the population who are in very good or good health is similar to the rest of Wales. The percentage of low birth weights is lower within the area (3.5%) than in Ceredigion (4.8%) and Wales (5.5%).

Characteristics of the economy and employment

- In terms of economic activity, the percentage who are economically active is higher in the 4 Llan Area (50.2%) than in Ceredigion (46.8%), and more akin to the percentage figure for Wales (51.9%).
- Unemployment is quite low within the area (1.6%, Ceredigion 1.8%, Wales 2.5%), and particularly in Llangrannog (0.8%).
- The percentage of retirees is higher in the 4 Llan Area (34.4%) compared to Ceredigion (27.7%) and Wales (24.7%).
- Employment within the agriculture, forestry and fishing industry is higher within the area (11%) than within the county (8%) and the country (2%) overall.
- Employment within the accommodation industry and food service activities is also relatively high (10%, Ceredigion 7%, Wales 5%).

Housing and Accommodating Characteristics

- The number of detached houses - as a percentage of the area's housing stock - is significantly higher within the 4 Llan Area (73%) than in Ceredigion (50.7%) and Wales (28.5%).

- There is a relatively low proportion of private or social rented housing in the 4 Llan Area - the percentage of people owning their houses (80.5%) is significantly higher in the 4 Llan Area than in Ceredigion (68.6%) and Wales (66.1%).
- Almost half (49.3%) of the housing stock in 4 Llan Area were houses which were built before 1919 – an indicator commonly used a proxy for the energy performance of the dwelling stock. This is compared to 43% of Ceredigion housing and 30.4% of Welsh housing.
- In terms of energy efficiency only 15.3% of the 4 Llan Area properties are with scores within bands A to C compared to Ceredigion (25.3%). Within the area, scores range between 8.1% in Llangrannog and 21.3% in Llanllwchaearn.
- The median lower quartile prices is often used as an indicator of entry-level price into the housing market). The median lower quartile over the period 2019 – 23 is higher within the 4 Llan Area (£180,000 than within the county as a whole (£155,000).
- The percentage of all household spaces used a second address is higher in the 4 Llan Area (11.3%) than in Ceredigion (9%) and in Wales (6.8%).
- Around a quarter (25.3%) of all household spaces are empty within the 4 Llan Area – a significantly higher figure than Ceredigion (15.9%) and Wales (8.2%). It is very high in Llangrannog (33%).
- Under-occupancy of property is higher within the 4 Llan Area (87.3%) than within the county as a whole (80.3%) and within the whole of Wales (76.3%).

Other Characteristics of Interest

- Journeys with public transport are likely to take much longer to get to and from grocery stores (97 minutes on average) and GP surgeries (104 minutes on average) within the 4 Llan area. This is compared to the average for Ceredigion (64 and 80 minutes) and Wales (32 and 40 minutes).
- In terms of access to digital services it was recorded in 2019 that 31.6% of 4 Llan Area dwellings did not have access to broadband at 30Mb/s. This is a percentage that is a much higher figure than Ceredigion (18.6%) and particularly Wales as a whole (5.8%). Within the area, the percentage was recorded as being highest in Llandysiologogo (40.6%) and Llanarth (37.7%).
- The percentage of households with access to accessible natural green space (29.8%) is significantly lower than the percentage in Ceredigion (55.4%) and the corresponding percentage for the whole of Wales (77%).
- In terms of anti-social behaviour there are no significant differences in indicators such as burglary and fire incidents between the 4 Llan Area and the average for Ceredigion as a whole.

The second part of the report examines the evidence about the need for accommodation. The key findings are:
- There are just over 200 applications for housing in 4 Llan Area on the Housing Register and it is estimated that these are from 152 lead applicants. 20 of these are applicants require Accessible Entrance Needs.
- Around a third of Lead Applicants live either within the 4 Llan Area or in close proximity.
- More than half of the total applications have expressed priority for a house at either Cross Inn/Maen y Groes or Llanarth.
- The Working Group's 2002 Survey, while not statistically dependable, suggests that there is a not insignificant hidden need in the "aspiration" of some residents to move into smaller properties.

The third part of the report examines the evidence on the availability of land and property to meet the need. The Key findings are:

- The development and use of land for the purpose of building a new house or modifying an existing building is guided by the requirements of the local development plan unless these are overriding material considerations.
- The current operational Local Development Plan (2007 – 22) recognises Llanarth as the only Rural Service Centre within the 4 Llan Area, a settlement with a development boundary around it and land allocated for housing within it.
- 12 "linked settlements" and 6 "other locations" have been recognised and categorised where the Plan, *ceteris paribus,* will give consideration to new affordable housing provided that the need can be proved, that it is within the threshold of growth of the development plan phase and would fit in with the existing built form of the settlement. However, nine of the settlements have already reached their growth threshold for the current Plan.
- There are a number of other possibilities where land or property already developed could be re-purposed to build affordable housing. Any such proposal would be measured against the relevant policy or policies.
- In due course Ceredigion County Council intends to resume the production of a new Local Development Plan but national planning policy is highly likely to limit the Council's ability to pursue significantly different growth location policies from the existing settlement hierarchy.

THE 4 LLAN WORKING GROUP
TOWARDS A HOUSING ACTION PLAN
ESTABLISHING THE KNOWLEDGE BASE

Introduction

1. BURUM (and its associates Iwan Jones and Dafydd Elfryn) were commissioned in early January 2024 to provide consultative support to the 4 Llan Working Group on aspects of preparing a knowledge base for the area. This is to enable the Working Group to plan effectively and efficiently into the future – looking primarily at practical interventions in housing.

2. Perthyn is a scheme funded by the Welsh Government and administered by Scope and its partners, PLANED and Dolan. Perthyn provides local early-stage support to Welsh-speaking communities in North-West and South-West Wales.

3. This project involves producing:

   - A demographic and economic profile of the area.

   - A general overview of local housing needs.

   - A scoping review of local housing, properties and land with potential for development to meet the housing needs of local people.

4. The report is divided into four parts. **Part 1** discusses the methodology and framework used to inform the research. The remaining three parts discuss the work streams of the above fieldwork. **Part 2** focuses on presenting the demographic, social and economic profile with a focus on relevant, useful, and timely evidence that would assist the Working Group and the wider community to better understand the character of the area. **Part 3** presents an overview of housing need. **Part 4** presents the findings of the review of potential property and land that fall within the scope of national and local policies for rural areas, and particularly policies for land use and housing.

5. The main emphasis in the report itself is on underlining the key messages that emerge from the analysis. Appendices then allow readers to scrutinise the data more closely.

PART 1 Methodology

Introduction

6. As explained, the Brief's aim was to select a description for profiling the area. There was a particular need to focus on which information and data to present about the economic and social (as well as environmental and cultural) state of these areas. There was a particular need to develop a knowledge base for the housing situation.

7. One of the fundamental challenges was the area's character. It consists of four very rural community councils. Apart from Llanarth, it is a community of small villages and scattered farms.

8. In forming the methodology, the starting point was to consider the profiles already existing for Ceredigion and similar areas.

9. The most recent assessment of Ceredigion was the Well-being Assessment[1] undertaken in 2022 when preparing the Ceredigion Well-being Plan 2023 – 28[2]. That Assessment is based on a common methodology agreed jointly between the Ceredigion, Carmarthenshire and Pembrokeshire Public Service Boards. Its data has been collected based on a Life Stages Approach.

10. In response to criticism that the geographical areas originally selected did not match the Welsh Government's requirements for basing the Assessment on community areas, the three counties decided to base their analysis on Middle Layer Super Output Areas (MSOAs) to collect the data. Figure 1.1 shows the relevant geography from the perspective of the 4 Llan Area. The geographical area relevant to the 4 Llan Area is New Quay and Penbryn (WO2000122).

11. This is a problematic area for providing the most accurate overview of the current situation of the 4 Llan Area, as the data is skewed by the town of New Quay which has a population of 1,045 out of a total population for the MSOA of approximately 6,500.

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[1] Ceredigion Local Services Board (2022) *Ceredigion Assessment of Local Well-being*
[2] Ceredigion Local Services Board (2023) Ceredigion *Well-being Plan 2023 - 28*

Figure 1.1 New Quay and Penbryn Middle Layer Super Output Area
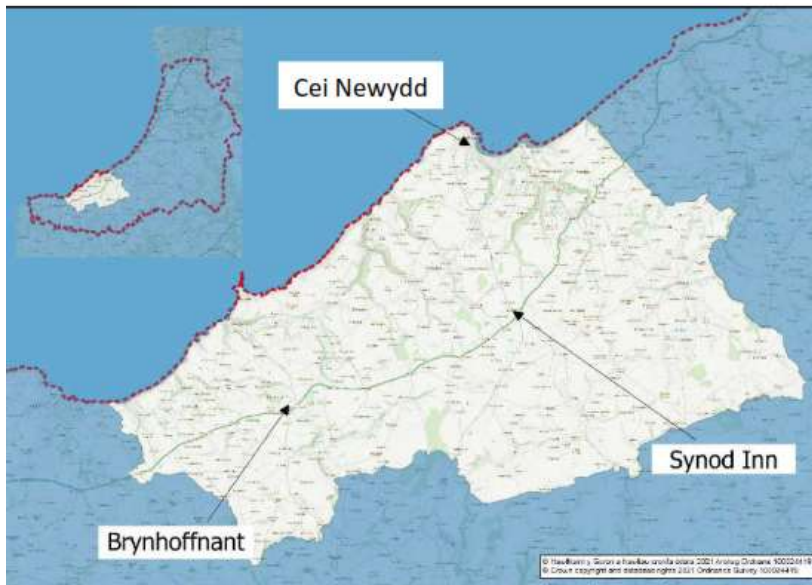
Source: Ceredigion Public Services Board (2022), Ceredigion Local Well-being Assessment, Appendix 12, p.66

12. Although the type of data presented in the Assessment provides a partial picture, the authors felt that this level did not give an accurate enough overview of what the 4 Llan Area contains. Some of the databases also use data from the 2011 Census rather than the 2021 Census, probably because much of the lower-level and county-level data from the 2021 Census had not been published at the time the work was undertaken.

13. The second possibility explored in terms of frameworks was to adapt the framework used by the author to produce an indicator framework for Gwynedd County Council's Regeneration Framework in 2021. That Framework is broadly based on secondary school catchment areas with the data collected based on the seven well-being goals of Gwynedd's Corporate Plan at the time (2018 – 23). This in turn follows a similar pattern to the seven well-being goals of the Well-being of Future Generations Act. Nevertheless, although this methodology used Lower Layer Super Output Areas (LSOAs), the areas used reflect the seven goals of Gwynedd Council's Corporate Plan.

The preferred option

14. **Figure 1.2** reproduces the geographical map relevant to this research and shows
how the area is defined according to the basic units of Census data collection (Lower
Layer Super Output Areas (LSOAs) and Output Areas (OAs)).

Figure 1.2 The 4 Llan Area
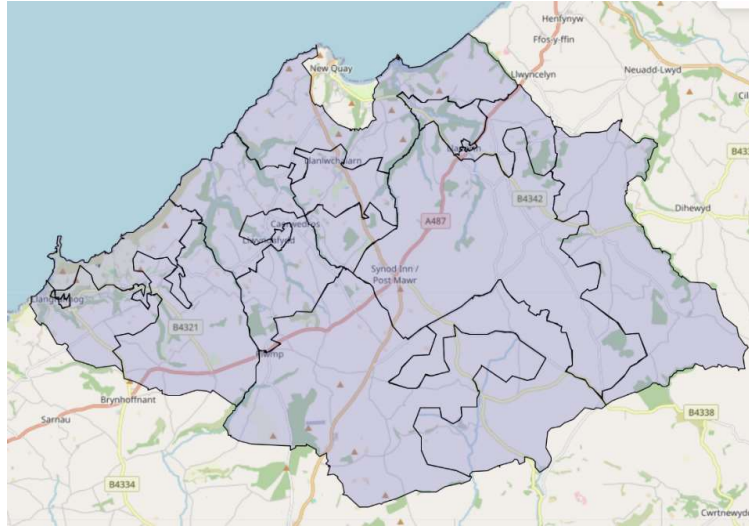
Source: the authors' work based on ONS maps

15. **Figure 1.3** compares the 4 Llan Area with the MSOA area. It is evident that the MSOA
includes the town of New Quay and an area comprising of Penbryn, Tresaith and
parts of Brynhoffnant to the south-west of the 4 Llan Area.

Figure 1.3 Comparison of areas
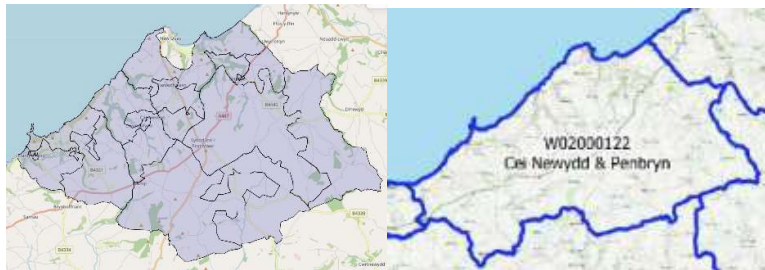
Source: the authors' work

16. Although a good range of information is published at LSOA and OA level, not all
domains follow the same pattern.

17. Two domains in general are problematic:

    - In terms of the **economy** and employment, there is a lack of recent information at a lower level than counties/parliamentary constituencies.

    - Information on **environmental** matters (and **reducing carbon emissions** in particular) tends only to be published at a national level, and sometimes at county level.

18. Another weakness of the Ceredigion Well-being Assessment is that the timing of the publication (2022) meant that those collating and analysing the data did not have the opportunity to use the latest information from the 2021 Census in some domains.

19. With regard to the source of the data, the 2021 Census of Population data is used where available, and a comparison is made with the situation in 2011 where possible. Some use is made of data from the 2019 Welsh Index of Multiple Deprivation.

20. The Welsh Index of Multiple Deprivation (WIMD) is the Welsh Government's official method of measuring the relative deprivation of small areas in Wales. It finds areas with the highest concentrations of different types of deprivation. WIMD ranks all small areas in Wales between 1 (most deprived) and 1,909 (least deprived).

21. Deprivation is a broader concept than poverty. Poverty means a shortage of money. Deprivation points to wider problems caused by shortages of resources and opportunities. WIMD looks at eight different types of deprivation. It was decided to use some of the fields (e.g. income) in this report where they fill a gap and/or add value to the profile.

22. It should be noted that it is not the area itself that is deprived, but rather the circumstances and lifestyle of the people of the area. This is what provides the deprivation ranking. It is also important to remember that not all people who live in an area of deprivation are deprived, and that deprived people do not live solely in areas of deprivation.

23. It should also be noted that deprived people tend to be more geographically dispersed in rural areas than in urban areas. This means that pockets of deprivation in rural areas of Wales tend to be on a significantly lower scale than the small geographical scale of WIMD.

24. WIMD 2019 tends to use LSOAs data either from the 2011 Census or data collected by the Welsh Health Observatory for 2016-18. Therefore, the picture today could be quite different.

Scope of the profile

25. Within the possible range of indicators that could be used, it has been decided that three dimensions should be prioritised: population, economy and housing. A fourth dimension is included to show other indicators that may be of interest.

26. **Appendix 1** provides a link to the Tables that contain all the information gathered.

27. The term "parish" is used in Wales to mean ecclesiastical parishes, so to avoid any possible confusion, the statistical description of the "Llannau" has been omitted. In the tables, therefore, the use of "Llangrannog" or "Llandysiliogogo", for instance, refers to the statistical geography rather than the ecclesiastical parish.

28. **Table 1.1** overleaf sets out our proposal and indicator options for this framework.

Table 1.1 The profiling framework

Heading	Domain	Sub-domain	Indicator	Table Reference	Figure Reference
Population characteristics	Population		Usual Resident Population 2021 (2021 Census) Change in Usual Resident Population 2011 – 2021	2.1, 2.2	2.1, 2.2
	Households	Number of households	Total households	2.3	
		Single parent households – lone parent families	% of lone parent families		2.3
	Identity	National identity	The number and % that identify as Welsh or Welsh and British	2.4	
	The ability to speak Welsh	Welsh speaking skills No Welsh language skills	Change between 2011 and 2021 in the number and percentage who can speak Welsh Change in the number and percentage between 2011 and 2021 in those without Welsh skills	2.5, 2.6, 2.7	2.4, 2.5
	Healthy lifestyles	In good or very good health	% enjoying good or very good health	2.8	
		Low birth weight	Low Birth Weight, Singleton Births (live births less than 2.5 Kg) (%)	2.9	

Heading	Domain	Sub-domain	Indicator	Tables	Figures
Economic and Employment Characteristics	Productivity gap	Activity level	Number and % of the 16-64 population who are inactive	2.10	
		Main employment industries	% of those in work who are in the 5 main industries of employment	2.11	
	Economic inclusion	Living income	Working age people in income deprivation (%)	2.12	
	Workforce capacity	Qualifications	Adults aged 25-64 with no qualifications (%)	2.13	

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Heading	Domain	Sub-domain	Indicator	Tables	Figures
Housing Characteristics	Type of accommodation	Proportion in each category	Detached House, Semi-Detached House, Terraced House, Flats	2.14	2.6
		Empty household space	% of empty households		
	Household composition	Tenure	% in each tenure category	2.15	2.7
			% who rent		
	Homes fit for purpose	Age and condition of housing stock	Ratio of houses built before 1919 and houses built after 2000	2.16	
			EPC Ratings – Property per band	2.17	2.8
	Access to affordable housing	Affordability of housing			
			% Second homes and holiday homes	2.19	2.9
			% Empty homes	2.20	2.10
			People living in overcrowded homes (%)	2.21	
			Under occupancy	2.22	2.11

Heading	Domain	Sub-domain	Indicator	Tables	Figures
Other Characteristics of Interest	Access to services	Journey times on public transport	Average return journey time on public transport to surgery Average return journey time on public transport to a grocery store	2.23	
		Broadband unavailability	% of households with unavailability of broadband at 30MB/e	2.24	2.12
		Proximity to green spaces	Score for proximity to the nearest Park, Public Garden or Playground	2.25	
	Safe lives	Crimes Fire Incidence	Police recorded burglary (rate per 100) Fire incidence (rate per 100)	2.26, 2.27	

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PART 2 DEMOGRAPHIC AND ECONOMIC PROFILE OF THE AREA

Introduction

29. In line with the brief, the purpose of this section is "*to present a demographic and economic profile of the area …. including* (information and trends) *that may be of interest and use to the working group*".

30. This section focuses on the main headings under four themes:

- Demographic Characteristics

- Economic and Employment Characteristics

- Housing and Household Characteristics

- Other Characteristics of Interest

31. A more detailed analysis of the data can be found in **Appendix 1**. Some elements relating to the housing situation are also included in Parts 3 and 4 that follow.

DEMOGRAPHIC CHARACTERISTICS

Age of Population

32. **Table 2.1** overleaf provides a picture of the age profile of the population. The population of the area, compared to Ceredigion and Wales, is relatively old, with a higher percentage aged 65 and over (31.7%) compared to the county (25.7%) and national (21.3%) level. The older profile is more pronounced in Llanllwchaearn (39.3%) than in the rest of the area. **Figure 2.1** further analyses the picture by Output Area.

Table 2.1 Population Age

Ardal Area	Holl breswylwyr arferol All usual residents	14 oed neu lai Age 0 to 14	15 i 44 oed Age 15 to 44	45 i 64 oed Age 45 to 64	65 oed ac uwch Aged 65 years and over
Llanarth	100.0%	17.3%	27.1%	27.1%	28.5%
Llandysiliogogo	100.0%	13.3%	25.4%	31.9%	29.5%
Llangrannog	100.0%	10.6%	22.3%	34.2%	32.9%
Llanllwchaiarn	100.0%	8.4%	22.2%	30.2%	39.3%
Ardal y 4 Llan Area	100.0%	13.3%	24.9%	30.1%	31.7%
Ceredigion	100.0%	13.2%	34.6%	26.5%	25.7%
Cymru - Wales	100.0%	16.5%	35.6%	26.5%	21.3%

Source: Table TS007A, 2021 Census

Figure 2.1 Percentage of Retired Population by Output Area
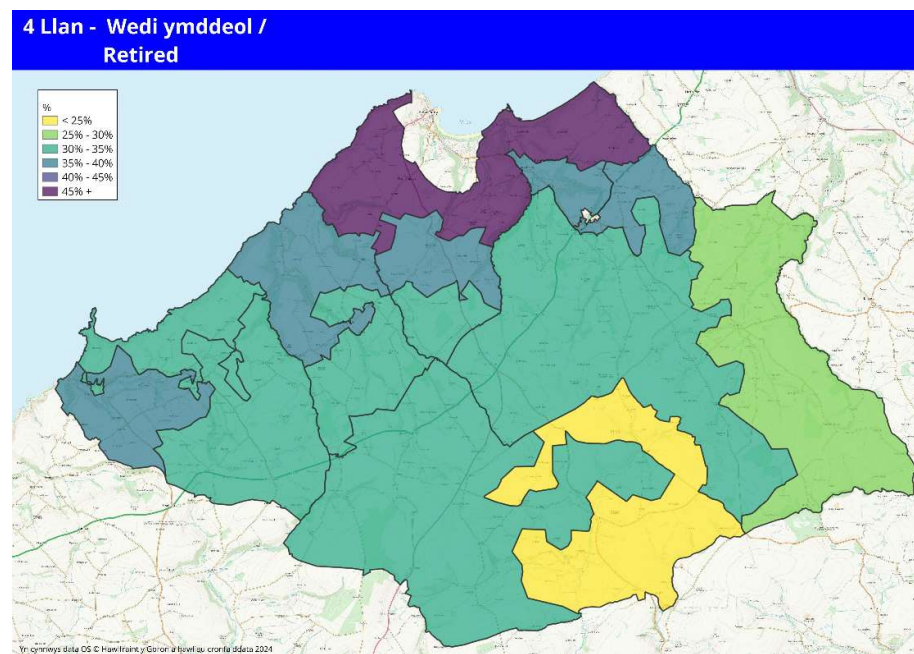
Source: 2021 Census; The Authors

Changes between 2011 and 2021

33. **Table 2.2** shows the population change between 2011 and 2021. The Table shows
    that the usual population of the 4 Llan Area has decreased by 5.1% between 2011
    and 2021, which is a slightly lower percentage than the whole of Ceredigion (-5.9%).

The decline is highest in Llangrannog (-9.8%) and Llandysiologogo (-8.1%). The population of Wales saw an increase of 1.4% over the same period.

34. Over the 10 years, there has been a relatively large decrease in the population of the area aged under 65 (and particularly in the population aged under 45), with a relatively high increase in the population aged 65 and over. There has been a particularly large decrease in the population aged under 45 in Llangrannog, and a particularly large increase in the population aged 65 and over in Llanarth.

Table 2.2 Population Change, 2011-2021 (%)

Ardal Area	Holl breswylwyr arferol All usual residents	14 oed neu lai Age 0 to 14	15 i 44 oed Age 15 to 44	45 i 64 oed Age 45 to 64	65 oed ac uwch Aged 65 years and over
Llanarth	-2.8%	-5.6%	-18.5%	-10.0%	34.1%
Llandysiliogogo	-8.1%	-26.6%	-13.7%	-13.8%	20.9%
Llangrannog	-9.8%	-30.8%	-32.2%	-1.2%	17.3%
Llanllwchaiarn	-1.2%	-23.1%	-17.7%	1.2%	17.1%
Ardal y 4 Llan Area	-5.1%	-17.8%	-19.7%	-7.4%	23.4%
Ceredigion	-5.9%	-9.9%	-16.9%	-5.4%	17.1%
Cymru - Wales	1.4%	-1.0%	-5.1%	1.2%	17.7%

Source: Table KS102EW, 2011 Census and Table TS007A, 2021 Census

35. One interesting aspect of the change is the geographical differences within the 4 Llan Area. **Figure 2.2** below shows the difference per Output Area in the population aged 65 and over. It highlights that the greatest increase has taken place along a narrow inland strip between Llanarth and Synod Inn.

Figure 2.2 Change in Number of Residents aged 65 and over 2011 - 2021
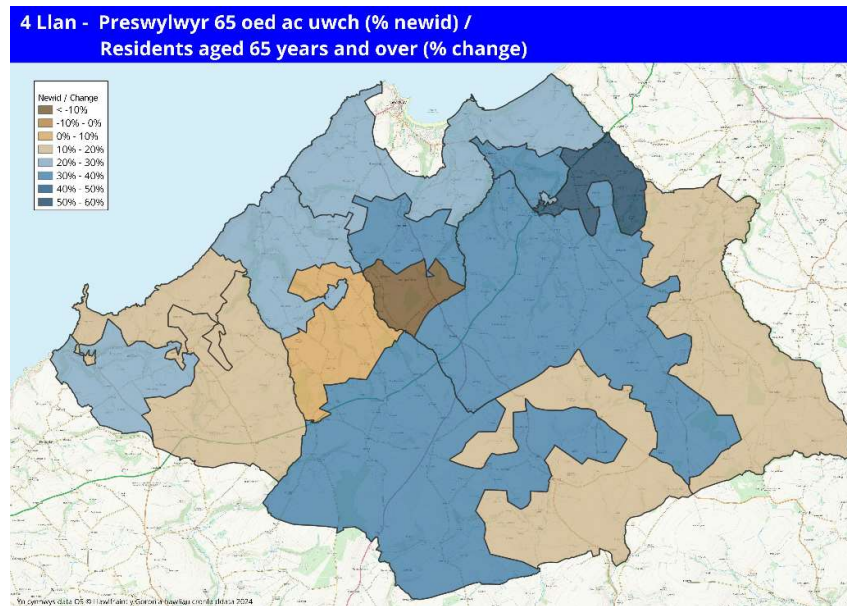
Source: 2011 and 2021 Censuses; The Authors

Household Composition

36. **Table 2.3** shows some of the household characteristics of the area. The Table shows that a lower percentage of households in the area are one-person households (26.8%) compared to Ceredigion (33%) and Wales (31.9%). The percentage of single-parent households is also lower (4 Llan 6.2%, Ceredigion 8.7%, Wales 12%). Reflecting the age structure of the population, there is a higher percentage of households in the area where everyone is aged 66 and over (33.5%, Ceredigion 29.3%, Wales 24.8%), with Llanllwchaearn standing out even higher (41.2%).

Table 2.3 Household Composition

Ardal Area	Aelwyd un person One person household	Aelwyd un teulu Single family household	Aelwydydd eraill Other household types	Cyfanswm Total	Pawb yn 66 oed neu hŷn All aged 66 years and over	Teulu un rhiant Lone parent family
Llanarth	28.7%	66.4%	5.0%	100.0%	30.4%	8.2%
Llandysiliogogo	23.6%	68.8%	7.6%	100.0%	31.5%	5.6%
Llangrannog	24.5%	69.9%	5.6%	100.0%	32.7%	5.2%
Llanllwchaiarn	28.8%	66.6%	4.6%	100.0%	41.2%	4.1%
Ardal y 4 Llan Area	26.8%	67.6%	5.6%	100.0%	33.5%	6.2%
Ceredigion	33.0%	60.4%	6.6%	100.0%	29.3%	8.7%
Cymru - Wales	31.9%	63.1%	5.0%	100.0%	24.8%	12.0%

37. **Figure 2.3** shows the proportion of lone parent families per Output Area.

Figure 2.3 Percentage of Lone Parent Families per Output Area
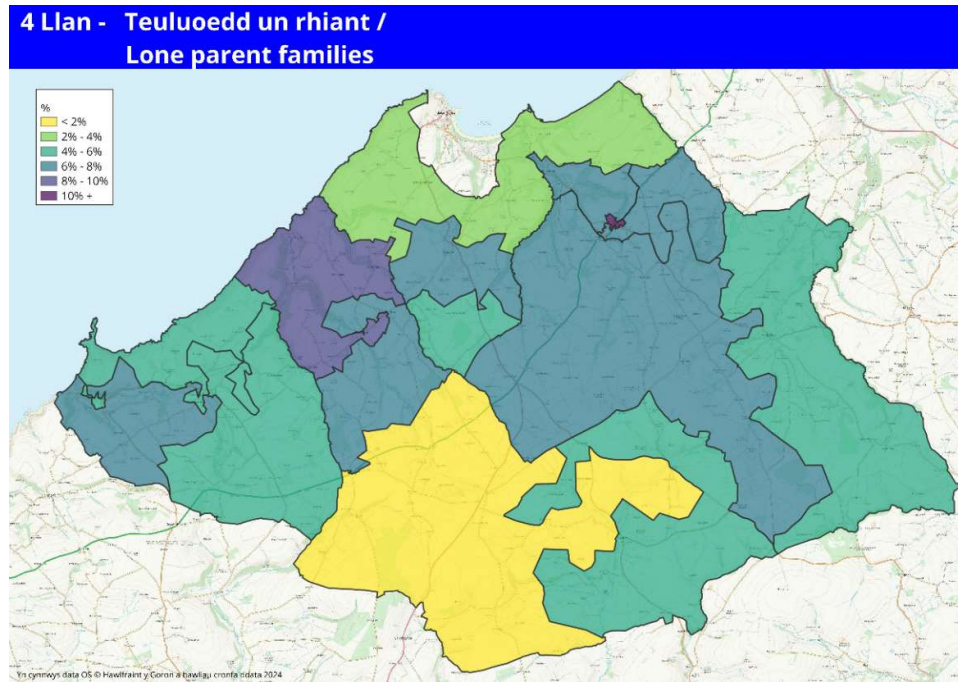
Source: 2011 and 2021 Censuses; The Authors

National Identity

38. **Table 2.4** below shows that the percentage who identified as Welsh only (47%) or Welsh and British only (4.5%) is similar to the county level (47% and 4.7%), but lower than the national level (55% and 8.1%).

Table 2.4 National Identity

Ardal	Holl breswylwyr arferol	Hunaniaeth Cymraeg yn unig	Hunaniaeth Cymraeg yn unig (%)	Hunaniaeth Cymraeg a Phrydeinig yn unig	Hunaniaeth Cymraeg a Phrydeinig yn unig (%)
Area	All usual residents	Welsh only identity	Welsh only identity (%)	Welsh and British only identity	Welsh and British only identity (%)
Ward Llandysilio a Llangranog Llandysilio and Llangrannog Ward	1,740	832	48%	69	4.0%
Ward Llannarth Llannarth Ward	1,571	748	48%	62	3.9%
Ward Cei Newydd a Llanllwchaiarn New Quay and Llanllwchaearn Ward	1,738	763	44%	101	5.8%
msoa2021:W02000122 : Ceredigion 007	6,330	2,958	47%	287	4.5%
Ceredigion	71,476	33,359	47%	3,380	4.7%
Cymru - Wales	3,107,490	1,715,975	55%	250,641	8.1%

Source: TS028 Table, 2021 Census

Welsh Language Skills

39. **Table 2.5** overleaf shows the way the Census respondent described the language skills of the household. The Welsh language skills of residents of the 4 Llan Area are generally like those of the county-wide population.

Table 2.5 Welsh Language Skills

Ardal	Yn gallu siarad, darllen ac ysgrifennu Cymraeg	Yn gallu siarad Cymraeg	Yn deall Cymraeg llafar yn unig	Dim sgiliau yn y Gymraeg	Cyfanswm - poblogaeth arferol 3 oed a drosodd
Area	Can speak, read and write Welsh	Can speak Welsh	Can understand spoken Welsh only	No skills in Welsh	Total - all usual residents aged 3 years and over
Llanarth	41.2%	47.8%	8.8%	41.8%	100.0%
Llandysiliogogo	42.8%	49.8%	7.6%	41.3%	100.0%
Llangrannog	38.2%	44.6%	9.3%	44.6%	100.0%
Llanllwchaiarn	33.8%	40.9%	8.7%	47.9%	100.0%
Ardal y 4 Llan Area	39.6%	46.3%	8.6%	43.4%	100.0%
Ceredigion	37.3%	45.3%	8.5%	43.6%	100.0%
Cymru - Wales	14.2%	17.8%	5.2%	74.8%	100.0%

Source: Table TS032, 2021 Census

40. The Table, however, shows that there is an interesting and significant linguistic diversity between the four communities. In Llanllwchaiarn, fewer than 41% stated that they could speak Welsh compared to almost 50% in Llandysiliogogo. The linguistic diversity between coastal and inland communities is more clearly shown in **Figure 2.4.**

Figure 2.4 Welsh Speaking Skills by Output Area
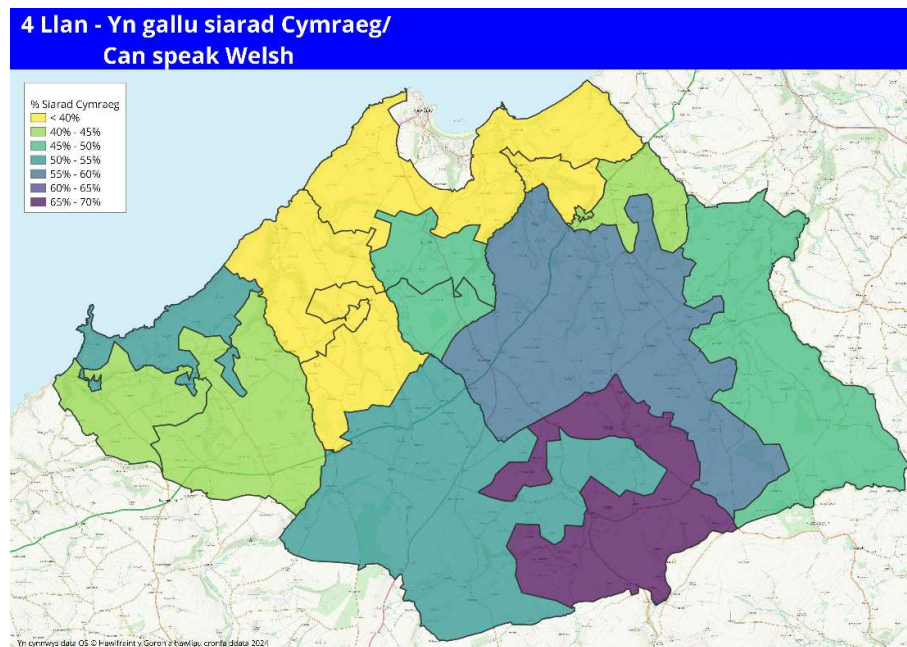
Change to Welsh language skills.

41. There has been an apparent overall decrease across Wales in the percentage of the population aged 3 and over able to speak Welsh. The process of tracking progress towards the Million Welsh Speakers strategy between 2017 and 2021, on the other hand, had suggested incremental progress. The Welsh Government is working with the Office for National Statistics to try to better understand why the Census recorded otherwise. Early indications are that the difference is mainly to be attributed to how household respondents interpreted their children's Welsh-speaking abilities.

42. **Table 2.6** shows that there has been a relatively higher decline in Ceredigion and within the 4 Llan Area than in Wales. For example, in terms of the percentage who can speak, read and write Welsh, reductions of 2.8% have been recorded in the area, along with 1.4% in Ceredigion and 0.3% in Wales. Llanllwchaiarn saw the largest decrease within the area (-6.5%). Meanwhile, there have been increases to the percentages of people without any Welsh language skills: Llanllwchaiarn (5.1%), 4 Llan (3.3%), Ceredigion (1.2%) and Wales (1.5%).

Table 2.6 Change to the percentages of Welsh language skills between 2011 and 2021

Ardal	Yn gallu siarad, darllen ac ysgrifennu Cymraeg	Yn gallu siarad Cymraeg	Yn deall Cymraeg llafar yn unig	Dim sgiliau yn y Gymraeg
Area	Can speak, read and write Welsh	Can speak Welsh	Can understand spoken Welsh only	No skills in Welsh
Llanarth	-1.1%	-2.9%	0.4%	2.2%
Llandysiliogogo	-2.5%	-3.7%	0.2%	4.4%
Llangrannog	-2.3%	-2.7%	1.3%	2.0%
Llanllwchaiarn	-6.5%	-5.6%	0.6%	5.1%
Ardal y 4 Llan Area	-2.8%	-3.6%	0.6%	3.3%
Ceredigion	-1.4%	-2.0%	0.4%	1.2%
Cymru - Wales	-0.3%	-1.2%	-0.1%	1.5%

Source: Table KS207WA, 2011 Census and Table TS032, 2021 Census
1

43. **Figure 2.5** shows the changes that occurred at Output Areas level.

Figure 2.5 Change to the % of Welsh Speakers 2011 – 21 per Output Area
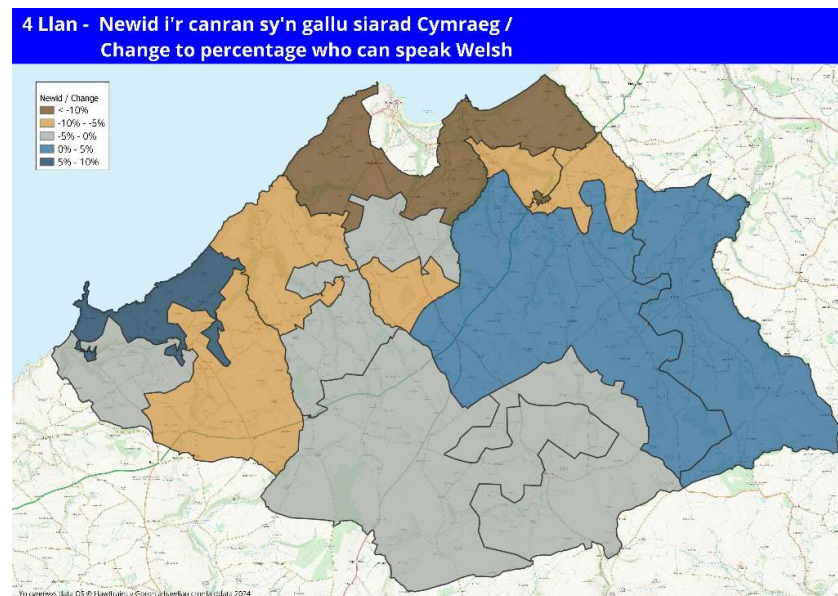
Source: 2021 Census; The Authors

The ability to speak Welsh per age group.

44. **Table 2.7** shows the ability to speak Welsh by age group. In terms of the ability of the population to speak Welsh across age groups, the percentages among children aged 15 and under (75.7%) and people aged 16 to 49 (58.9%) in the 4 Llan Area are higher

than the corresponding percentages for the county (71.9% and 44%) and for Wales (32% and 17.4%).

45. The percentage of people aged 50 and above in the area who can speak Welsh (33.9%) is lower than the percentage for Ceredigion (39.7%), but higher than that of Wales (13.3%). The difference between the ability of 16–49-year-olds and 50+ year olds to speak Welsh is more pronounced within the area (-25 percentage points) than across the county (-4.3 percentage points) and the country (-4.1 percentage points). This is likely to be mainly due to in-migration among older people who cannot speak Welsh.

Table 2.7 Percentage who can speak Welsh per age group

Ardal	Cyfanswm	15 oed ac o dan	16 i 49 oed	50 oed ac uwch
Area	Total	Aged 15 years and under	Aged 16 to 49 years	Aged 50 years and over
Llanarth	48.3%	68.5%	55.9%	37.5%
Llandysiliogogo	49.9%	85.3%	63.2%	35.4%
Llangrannog	44.5%	88.6%	58.5%	30.6%
Llanllwchaiarn	40.8%	68.9%	60.0%	29.9%
Ardal y 4 Llan Area	46.5%	75.7%	58.9%	33.9%
Ceredigion	45.3%	71.9%	44.0%	39.7%
Cymru - Wales	17.8%	32.0%	17.4%	13.3%

Source: Table RM150, Census 2021

General Health

46. **Table 2.8** overleaf shows how the respondent ascertains the health of people in the household. Overall, it suggests that population health within the 4 Llan Area is similar to the picture in Ceredigion and Wales. While still positive, the percentage reporting very good health is slightly lower in Llanllwchaiarn (40.4%, 4 Llan 45.2%, Ceredigion 45%, Wales 46.3%).

Table 2.8 General Health

Ardal Area	Iechyd da iawn Very good health	Iechyd da Good health	Iechyd gweddol Fair health	Iechyd gwael Bad health	Iechyd gwael iawn Very bad health	Cyfanswm - holl breswylwyr arferol Total - all usual residents
Llanarth	45.4%	32.9%	14.9%	4.7%	2.1%	100.0%
Llandysiliogogo	48.6%	31.2%	15.3%	4.1%	0.9%	100.0%
Llangrannog	45.9%	33.9%	13.7%	5.3%	1.3%	100.0%
Llanllwchaiarn	40.4%	36.9%	17.2%	4.1%	1.4%	100.0%
Ardal y 4 Llan Area	45.2%	33.4%	15.3%	4.5%	1.5%	100.0%
Ceredigion	45.0%	33.7%	15.2%	4.7%	1.4%	100.0%
Cymru - Wales	46.2%	32.4%	14.5%	5.3%	1.7%	100.0%

Source: Table TS037, 2021 Census

Low Birth Weight

47. Low birth weight is used as one indicator of relative poverty in an area. **Table 2.9** shows below that the percentage of births with low birth weight is lower within the area (3.5%) than in Ceredigion (4.8%) and Wales (5.5%). Nevertheless, the figure is relatively high within the New Quay Lower Super Output Area (7.1%), but relatively low in Penbryn (1.8%) and in Llandysiliogogo (1.9%).

Table 2.9 Low Birth Weight

Ardal Area	Pwysau geni isel (genedigaethau byw sengl llai na 2.5kg) (%) Low birth weight (live single births less than 2.5kg) (%)
Llanarth	4.3
Llandysiliogogo	1.9
Cei Newydd - New Quay	7.1
Penbryn	1.8
MSOA Ceredigion 007	3.5
Ceredigion	4.8
Cymru - Wales	5.5

Source: Welsh Index of Multiple Deprivation 2019

Key Messages for Possible Interventions in the Housing Sector

➢ The usual residential population of the 4 Llan Area has fallen by just over 5% between 2011 and 2021.

➢ The number of children aged 14 or less decreased by 120 while the population aged 15 to 44 decreased by 253 over the same period. The community of Llangrannog lost 137 of its population under the age of forty-five.

➢ There has been an increase of 200 in the population aged 65 and over with 58% of the increase (116) in the community of Llanarth.

➢ There is a higher percentage of households in the area with everyone aged 66 and over (33.5%) compared to Ceredigion 29.3% and Wales 24.8%. The percentage in the Llanllwchaiarn community is significantly higher (169 out of 410 = 41.2%).

➢ In terms of language skills, the percentage who can speak Welsh in the 4 Llan Area (46.5%) is slightly higher than Ceredigion as a whole (45.3%). There is diversity within the area with less than 41% able to speak Welsh in Llanllwchaearn compared to almost 50% in Llandysiologogo.

➢ The difference between the ability of 16–49-year-olds and 50+ year olds to speak Welsh is more pronounced within the area (-25 percentage points) than across the county (-4.3 percentage points) and Wales as a whole (-4.1 percentage points).

➢ In terms of health, the percentage of the population who are in very good or good health is similar to the rest of Wales. The percentage of low birth weights is lower within the area (3.5%) than in Ceredigion (4.8%) and Wales (5.5%).

ECONOMIC AND EMPLOYMENT CHARACTERISTICS

Economic activity

48. The population's contribution to economic activity is partly measured by the percentage of usual residents aged 16+ who contribute labour to the creation of goods or services in the economy. **Table 2.10** presents the percentage of the population aged 16+ who are in work. The percentage is higher in the 4 Llan Area (50.2%) than in Ceredigion (46.8%) and is closer to the figure for Wales (51.9%). Unemployment is quite low within the area (1.6%, Ceredigion 1.8%, Wales 2.5%), and particularly in Llangrannog (0.8%).

49. The figure that probably stands out is the percentage of people who have retired - 4 Llan Area (34.4%), Ceredigion (27.7%), Wales (24.7%). The percentage of people who have retired in Llanllwchaearn (43.5%) reflects the relative age of the population there.

Table 2.10 Economic Activity

Ardal	Holl breswylwyr arferol 16+	Mewn gwaith	Yn ddiwaith	Yn economaidd weithgar ac yn fyfyriwr llawn amser	Wedi ymddeol	Yn economaidd anweithgar ac yn fyfyriwr	Yn gofalu am y cartref neu deulu	Salwch hirdymor neu'n anabl	Arall
Area	All usual residents aged 16 years and over	In employment	Unemployed	Economically active and a full-time student	Retired	Economically inactive and a student	Looking after home or family	Long-term sick or disabled	Other
Llanarth	100.0%	50.4%	1.9%	0.7%	31.4%	2.6%	4.7%	6.1%	2.2%
Llandysiliogogo	100.0%	52.8%	1.9%	1.0%	30.9%	3.0%	4.3%	3.2%	2.9%
Llangrannog	100.0%	51.4%	0.8%	0.3%	34.5%	3.0%	3.7%	4.6%	1.7%
Llanllwchaiarn	100.0%	45.7%	1.3%	0.9%	43.5%	1.7%	3.3%	2.2%	1.3%
Ardal y 4 Llan Area	100.0%	50.2%	1.6%	0.8%	34.4%	2.6%	4.1%	4.3%	2.1%
Ceredigion	100.0%	46.8%	1.8%	3.5%	27.7%	10.0%	3.5%	4.4%	2.3%
Cymru - Wales	100.0%	51.9%	2.5%	2.2%	24.7%	5.7%	4.3%	5.9%	2.9%

Source: Table TS066, 2021 Census

Employment Sectors and Industries

50. Economic activities are also recorded through the Standard Industrial Classification. **Table 2.11** below shows that employment within the agriculture, forestry and fishing industries is higher within the area (11%) than within the county (8%) and the country (2%) overall. Employment within the accommodation industry and within food services activities is also relatively high (10%, Ceredigion 7%, Wales 5%). In contrast, there is relatively low employment within the education sector (9%, Ceredigion 13%, Wales 10%) and the human health and social work activities industries (12%, Ceredigion 15%, Wales 17%).

Table 2.11 Employment Sectors and Industries

Diwydiant	Industry	Ward Llandysilio a Llangrannog / Llandysilio and Llangrannog Ward	Ward Llannarth / Llannarth Ward	Ward Cei Newydd a Llanllwchaearn / New Quay and Llanllwchaearn Ward	msoa2021: W02000122 : Ceredigion 007 / msoa2021: W02000122 : Ceredigion 007	Ceredigion / Ceredigion	Cymru / Wales
Y sector cynhyrchu	**Production Sector**	**19%**	**21%**	**13%**	**19%**	**14%**	**12%**
A: Amaethyddiaeth, coedwigaeth a physgota	A: Agriculture, Forestry and fishing	13%	14%	6%	11%	8%	2%
B: Cloddio a chwarela	B: Mining and quarrying	0%	0%	0%	0%	0%	0%
C: Gweithgynhyrchu	C: Manufacturing	6%	5%	6%	6%	5%	9%
D: Cyflenwi trydan, nwy, stêm ac aerdymheru	D: Electricity, gas, steam and air conditioning supply	0%	0%	1%	1%	1%	1%
E: Cyflenwi dwr, carthffosiaeth, rheoli gwastraff	E: Water supply; Sewerage, Waste management and Remediation activities	0%	1%	1%	1%	1%	1%
Adeiladu	**Construction**	**12%**	**10%**	**9%**	**10%**	**9%**	**9%**
F: Construction	F: Construction	12%	10%	9%	10%	9%	9%
Sector gwasanaethau	**Services sector**	**69%**	**69%**	**78%**	**72%**	**78%**	**79%**
G: Cyfanwerthu, manwerthu, gyweirio cerbydau modur	G: Wholesale and retail trade; repair of motor vehicles and motorcycles	12%	12%	13%	13%	15%	14%
H: Trafnidiaeth a storio	H: Transport and storage	3%	4%	4%	3%	3%	4%
I: Lety a gweithgareddau gwasanaethau bwyd	I: Accommodation and food service activities	10%	5%	12%	10%	7%	5%
J: Gwybodaeth a chyfathrebu	J: Information and communication	2%	2%	1%	2%	2%	3%
K: Gweithgareddau ariannol ac yswiriant	K: Financial and insurance activities	1%	1%	2%	1%	1%	3%
L: Gweithgareddau eiddo tirol	L: Real estate activities	1%	2%	1%	1%	1%	1%
M: Gweithgareddau proffesiynol, gwyddonol a thechnegol	M: Professional, scientific and technical activities	5%	5%	4%	5%	4%	4%
N: Gweithgareddau gwasanaeth gweinyddol a chymorth	N: Administrative and support service activities	4%	4%	4%	4%	4%	4%
O: Gweinyddu cyhoeddus ac amddiffyn; nawdd cymdeithasol gorfodol	O: Public administration and defence; compulsory social security	6%	7%	10%	7%	7%	9%
P: Addysg	P: Education	8%	10%	9%	9%	13%	10%
Q: Gweithgareddau iechyd pobl a gwaith cymdeithasol	Q: Human health and social work activities	11%	14%	14%	12%	15%	17%
R, S, T, U Arall	R, S, T, U Other	4%	2%	5%	4%	5%	4%
Holl breswylwyr arferol 16+	All usual residents aged 16+	100%	100%	100%	100%	100%	100%

Source: Table TS060, 2021 Census

Income

51. Although data on income is collected on local geographies, it is not normally publicly available unless the local authority decides to publish it as part of its analysis of the local situation. A report on the Office for National Statistics website for Ceredigion contains information on net income for occupied addresses ("Occupied Address Median Net Income") for the tax year ending 2018. This is used as a proxy for household net income. The report notes that the median net income for Ceredigion is £24,222. This is compared to £26,247 for the whole of Wales. The report also suggests that there was no significant variation to be found across Ceredigion in analysing data per LSOA.

Income deprivation

52. Income deprivation is one of the domains that form part of the Welsh Index of Multiple Deprivation. The income domain consists of a single indicator, which has four elements, namely:

   • Income-Related Benefit Claimants

   • Tax Credit Recipients

   • Asylum Seekers Receiving Support

   • People in receipt of Universal Credit (excluding those with "no work-related requirements")

53. Dependent children of the above are also included. The indicator measures the percentage of the resident population for each LSOA.

54. **Table 2.12** overleaf shows that the percentage of people in income deprivation varies within the area. It is relatively low in Llandysiliogogo (9%) and Penbryn (9%), and higher in Llanarth (17%) and New Quay (16%). The figure for the whole area (12%) is the same as the county figure (12%), and lower than the national figure (16%).

Table 2.12 Income Deprivation

Ardal Area	Pobl mewn amddifadedd incwm (%) People in income deprivation (%)
Llanarth	17
Llandysiliogogo	9
Cei Newydd - New Quay	16
Penbryn	9
MSOA Ceredigion 007	12
Ceredigion	12
Cymru - Wales	16

Source: Welsh Index of Multiple Deprivation 2019

Qualifications

55. The WIMD also shows how many of the population aged 25 – 64 have no qualifications. Table 2.13 below shows that 16.6% of adults aged 25-64 in the area have no qualifications, ranging from 13.5% in Penbryn to 20.2% in Llanarth. By comparison, Ceredigion's equivalent percentage is 14.4%, with Wales's percentage at 19.4%.

Table 2.13 Adults aged 25-64 with no qualifications (%)

Ardal Area	Oedolion 25-64 oed heb unrhyw gymhwyster (%) Adults aged 25-64 with no qualifications (%)
Llanarth	20.2
Llandysiliogogo	17.6
Cei Newydd - New Quay	15.7
Penbryn	13.5
MSOA Ceredigion 007	16.6
Ceredigion	14.4
Cymru - Wales	19.4

Source: Welsh Index of Multiple Deprivation 2019

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Key Messages for Possible Interventions in the Housing Sector

➢ In terms of economic activity, the percentage who are economically active is higher in the 4 Llan Area (50.2%) than in Ceredigion (46.8%), and more akin to the percentage figure for Wales (51.9%).

➢ Unemployment is quite low within the area (1.6%, Ceredigion 1.8%, Wales 2.5%), and particularly in Llangrannog (0.8%).

➢ The percentage of retirees is higher in the 4 Llan Area (34.4%) compared to Ceredigion (27.7%) and Wales (24.7%).

➢ Employment within the agriculture, forestry and fishing industry is higher within the area (11%) than within the county (8%) and the country (2%) overall.

➢ Employment within the accommodation industry and food service activities is also relatively high (10%, Ceredigion 7%, Wales 5%).

HOUSING CHARACTERISTICS

Type of Accommodation

56. The Census reports on the physical characteristics of the housing stock occupied by usual residents and others. **Table 2.14** below shows that the number of detached houses as a percentage of the area's housing stock is significantly higher within the 4 Llan Area (73%) than in Ceredigion (50.7%) and Wales (28.5%). As a result, the percentage of stock that are terraced houses (4.2%) or flats (2.5%) is very low. This pattern may be explained by the historical lack of major industry in the area. As a result, there has been no mass construction for workers or visitors. One example of this is New Quay on the fringes of the area. Here, there is a much higher percentage of terraced housing due to the influence of the boat building and fishing industries and, more recently, tourism.

Table 2.14 Accommodation Type

Ardal	Tŷ ar wahân	Tŷ semi	Tŷ teras	Fflatiau	Carafán neu strwythur dros dro	Cyfanswm
Area	Detached	Semi-detached	Terraced	Flats	A caravan or other mobile or temporary structure	Total
Llanarth	69.1%	21.9%	5.3%	3.1%	0.6%	100.0%
Llandysiliogogo	82.5%	12.8%	3.0%	1.4%	0.5%	100.0%
Llangrannog	66.9%	24.6%	5.2%	3.3%	0.0%	100.0%
Llanllwchaiarn	73.8%	12.5%	2.9%	2.0%	8.8%	100.0%
Ardal y 4 Llan Area	73.0%	18.1%	4.2%	2.5%	2.3%	100.0%
Ceredigion	50.7%	23.1%	14.1%	11.3%	0.8%	100.0%
Cymru - Wales	28.5%	32.1%	26.6%	12.5%	0.3%	100.0%

Source: Table TS044, 2021 Census

57. **Figure 2.6** shows the variety within the area at Output Area level.

Figure 2.6 Percentage of Detached Homes
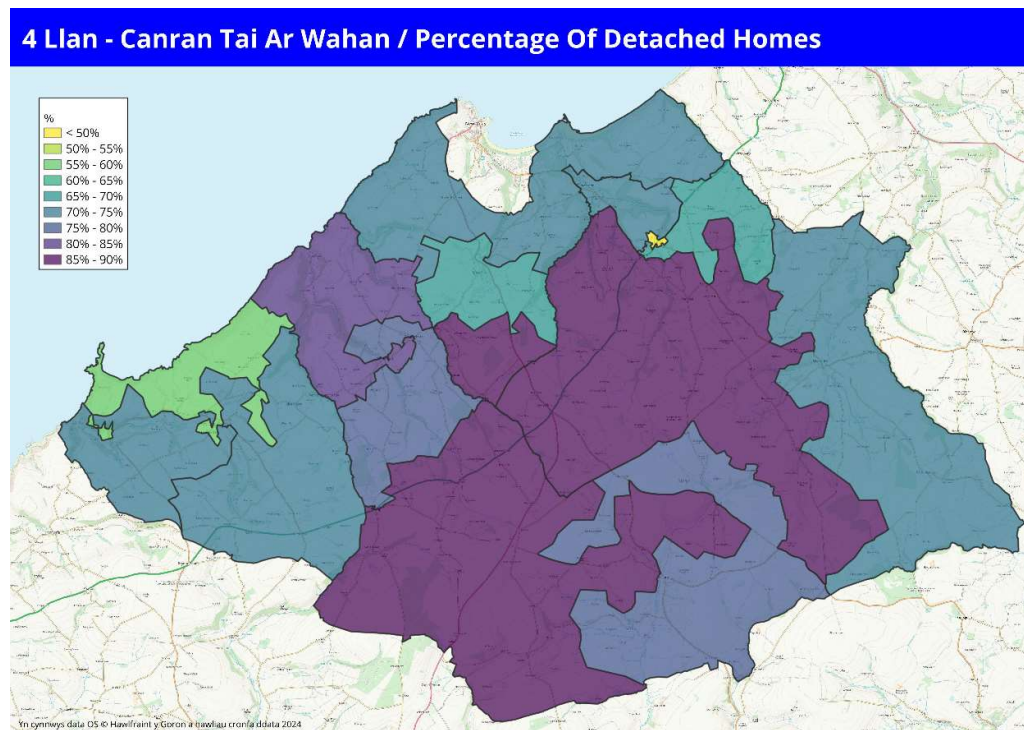
Tenure

58. Tenure is an expression of the financial or ownership arrangements that enables the household to live in the house. **Table 2.15** shows the structure reported in the 2021 Census. The Table shows that the percentage of people who own their houses (80.5%) is higher in the 4 Llan Area than in Ceredigion (68.6%) and Wales (66.1%). As such, there is a relatively low percentage of private or social rented housing in the area.

Table 2.15 Tenure

| Ardal | Perchen (yn cynnwys gyda morgais / benthyciad) Owned | Rhannu Perchnogaeth | Rhent Cymdeithasol | Rhent Preifat | Byw heb dalu rhent | Cyfanswm |
Area	(including with mortgage / loan)	Shared Ownership	Social Rented	Private Rented	Lives rent free	Total
Llanarth	75.7%	0.1%	7.6%	16.5%	0.0%	100.0%
Llandysiliogogo	84.0%	0.5%	1.1%	14.4%	0.0%	100.0%
Llangrannog	78.9%	0.6%	6.8%	13.6%	0.0%	100.0%
Llanllwchaiarn	85.9%	0.7%	2.4%	10.9%	0.0%	100.0%
Ardal y 4 Llan Area	80.5%	0.4%	4.8%	14.3%	0.0%	100.0%
Ceredigion	68.6%	0.3%	10.5%	20.6%	0.0%	100.0%
Cymru - Wales	66.1%	0.3%	16.5%	17.0%	0.2%	100.0%

Ffynhonnell: Table TS054, Cyfrifiad 2021

59. **Figure 2.7** shows the proportion of stock rented from a social or private landlord.

Figure 2.7 Renting
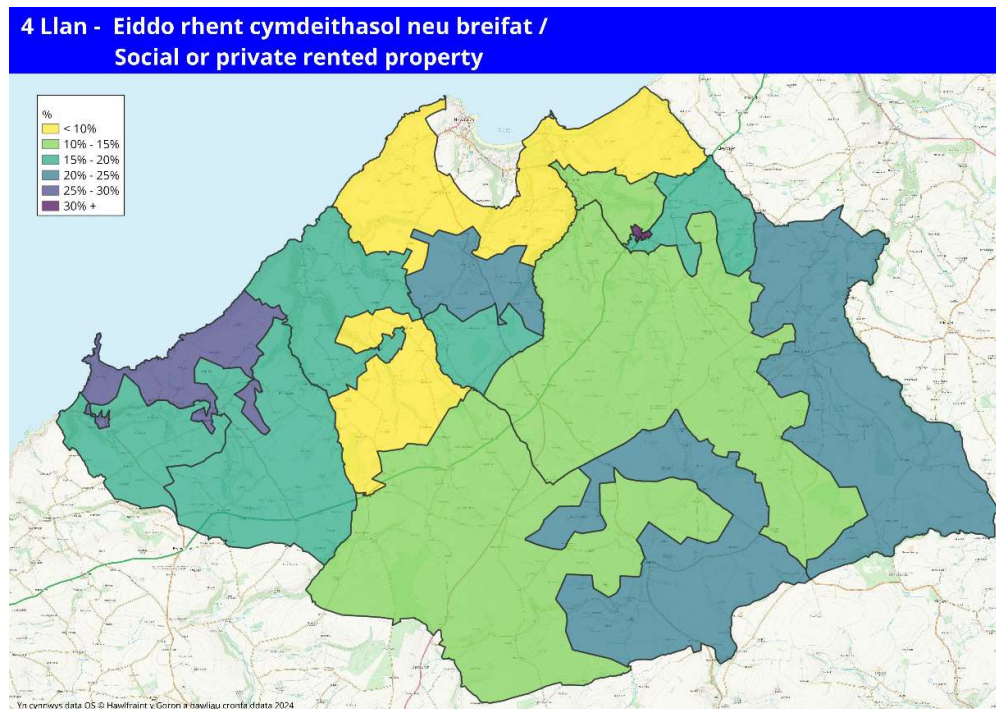
Source: 2021 Census; The Authors

Housing Age

60. The age profile of the stock is a way of assessing how quickly the housing stock is developing. Age can also be an indicator of the stock's fitness for purpose in terms of contemporary needs and its resilience to climate change.

61. **Table 2.16** compares the stock built before 1919 and the stock built after 2000. The Table shows that 49.3% of houses in the area were built before 1919. This is compared to 43% of Ceredigion's houses and 30.4% of Welsh houses. These are the houses that are considered the most 'difficult to deal with' i.e. isolating solid and stone walls is more complex than isolating cavity walls of more modern construction.

Table 2.16 Comparison of houses built before 1919 and houses built after 2000.

Ardal	Tai â adeiladwyd cyn 1919	Tai â adeiladwyd ar ôl 2000	Tai â adeiladwyd cyn 1919 (%)	Tai â adeiladwyd ar ôl 2000 (%)	Cyfanswm tai	Cymhareb cyn 1919 ac ar ôl 2000
Area	Houses build before 1919	Houses built after 2000	Houses build before 1919 (%)	Houses built after 2000 (%)	Total houses	Ratio before 1919 and after 2000
lsoa2021:W01000545 : Ceredigion 007D	550	140	52.4%	13.3%	1050	3.93
lsoa2021:W01002002 : Ceredigion 007E	1170	440	47.6%	17.9%	2460	2.66
msoa2021:W02000122 : Ceredigion 007	1730	570	49.3%	16.2%	3510	3.04
Ceredigion	15360	4730	43.0%	13.2%	35700	3.25
Cymru - Wales	446820	206660	30.4%	14.1%	1469150	2.16

Source: Valuation Office Agency

Note see Section 1 and Figure 1.1 for definitions of the areas.

Energy Performance of Stock

62. When selling houses, sellers must indicate through an Energy Performance Certificate how energy efficient the property is. **Table 2.17** presents a picture of the housing stock by energy efficiency. The Table below shows that 15.3% of properties in the 4 Llan Area have scores that are within bands A to C in terms of energy efficiency. The figure for Ceredigion is significantly higher (25.3%). Within the area, it ranges between 8.1% in Llangrannog and 21.3% in Llanllwchaiarn.

Table 2.17 Properties per Energy Performance Certificate (EPC) band

Ardal Area	Eiddo fesul band EPC Properties by EPC band		Cyfanswm Total
	A - C	D - G	
Llanarth	16.0%	84.0%	100.0%
Llandysiliogogo	15.5%	84.5%	100.0%
Llangrannog	8.1%	91.9%	100.0%
Llanllwchaiarn	21.3%	78.7%	100.0%
Ardal y 4 Llan Area	15.3%	84.7%	100.0%
Ceredigion	25.3%	74.7%	100.0%

Source: Price Paid Data, HM Land Registry

House Prices

63. The level of house prices on the private market is regularly used to measure the accessibility of the local market to young people or couples seeking to climb the housing ladder. **Table 2.18** shows records of selling prices over 5 years between 2019 – 2023. The Table shows that the lowest quartile house price (entry level to the housing market) and the median price are higher within the 4 Llan Area (£180,000 and £255,000) than within the county as a whole (£155,000 and £215,000).

Table 2.18 House Prices, 2019-2023

Ardal Area	Nifer gwerthiannau (2019-2023) Number os sales (2019-2023)	Pris chwartel isaf (£) Lower quartile price (£)	Pris canolrif (£) Median price (£)
Llanarth	132	163000	238475
Llandysiliogogo	92	185000	249500
Llangrannog	83	178750	253000
Llanllwchaiarn	60	238750	307000
Ardal y 4 Llan Area	367	180000	255000
Ceredigion	5741	155000	215000

Source: Price Paid Data, HM Land Registry

64. There is also significant variation within the area (see **Figure 2.8** overleaf), with the lowest quartile and median prices lowest in Llanarth (£163,000 and £238,475) and highest in Llanllwchaearn (£238,750 and £307,000). Access to income data (e.g. CACI Paycheck data) would have made it possible, as can be done in Gwynedd, to calculate 'priced out of the market' figures.

Figure 2.8 Lower Quartile House Price per Community
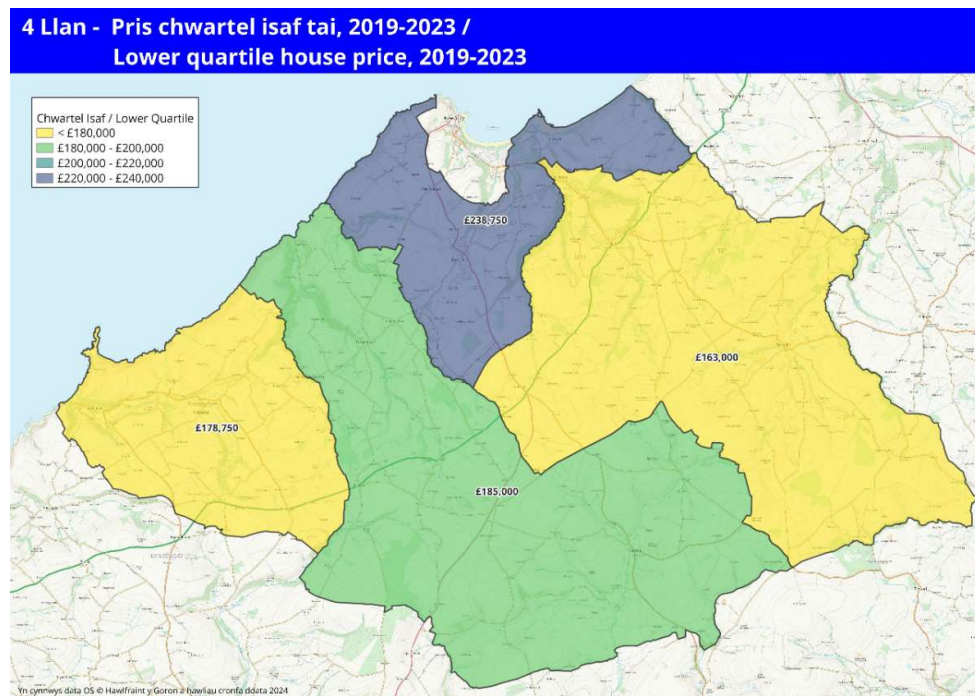
Second Homes and Holiday Homes

65. One of the significant influences on housing, and housing affordability, on the west
coast of Wales is the demand for second homes and holiday homes. **Table 2.19**
shows that the percentage of all household spaces that are second homes is higher
in the area (11.3%) than in Ceredigion (9%) and Wales (6.8%). Focusing on addresses
that are holiday homes, the difference is even more pronounced (5.8%, Ceredigion
1.9%, Wales 0.7%).

Table 2.19 Second Addresses

Ardal Area	Holl ofod Aelwyd All household Spaces	Ail gyfeiriadau Second addresses	Ail gyfeiriadau (%) Second addresses (%)	Cartref gwyliau Holiday homes	Cartref gwyliau (%) Holiday homes (%)
Ceredigion 007D	1177	105	8.9%	70	5.9%
Ceredigion 007E	2802	325	11.6%	160	5.7%
Ceredigion 007	3978	450	11.3%	230	5.8%
Ceredigion	36754	3300	9.0%	695	1.9%
Cymru	1467773	99610	6.8%	10070	0.7%

Source: 2021 Census

Note see Section 1 and Figure 1.1 for definitions of the areas.

66. **Figure 2.9** shows the change in "housing availability" for usual residents of the area between 2011 and 2021. The dark blue colours indicate an increase in available stock (including consideration of new housing built over the period) while the brown colours indicate a reduction in available stock.

Figure 2.9 Housing Availability
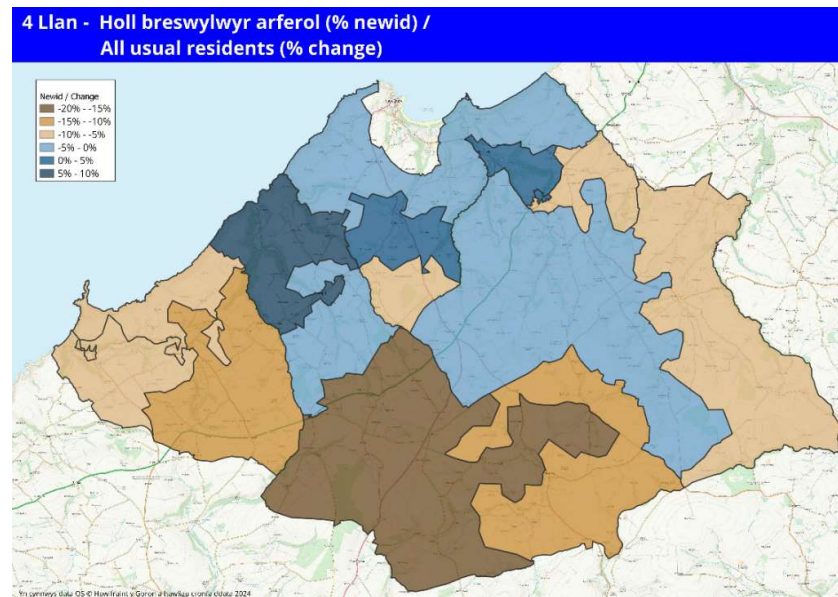
Source: 2011 and 2021 Censuses; The Authors

67. Further information on this subject can be obtained by following the link below:

https://www.ons.gov.uk/peoplepopulationandcommunity/housing/articles/morethan1in10addressesu
sedasholidayhomesinsomeareasofenglandandwales/2023-06-20

Empty Household Spaces

68. **Table 2.20** below shows that around a quarter (25.3%) of all household spaces are vacant within the 4 Llan Area – a significantly higher figure than in Ceredigion (15.9%) and Wales (8.2%). It is very high in Llangrannog (33%). Excluding caravans or other mobile or temporary structures to focus purely on dwellings does not alter the picture substantially, apart from the Llanarth community.

Table 2.20 Empty Household Spaces

Ardal	Tŷ neu fyngalo cyfan	Tŷ neu fyngalo cyfan - tŷ sengl	Tŷ neu fyngalo cyfan - tŷ pâr	Tŷ neu fyngalo cyfan - tŷ teras	Fflat, maisonette neu rhandy	Carafán neu strwythur dros dro	Cyfanswm	Gofod Aelwyd Gwag - eithrio carafán neu strwythur dros dro
Area	Whole house or bungalow	Whole house or bungalow - detached	Whole house or bungalow - semi-detached	Whole house or bungalow - terraced	Flat, maisonette or apartment	A caravan or other mobile or temporary structure	Total	Empty Household Spaces - excluding a caravan or other mobile or temporary structure
Llanarth	12.7%	11.3%	13.9%	23.4%	22.2%	97.4%	26.8%	13.0%
Llandysiliogogo	23.7%	21.0%	30.0%	51.9%	50.0%	50.0%	24.4%	24.3%
Llangrannog	31.4%	25.3%	24.2%	72.4%	47.8%	100.0%	33.0%	32.2%
Llanllwchaiarn	15.5%	15.9%	12.1%	20.0%	41.2%	12.2%	16.2%	16.5%
Ardal y 4 Llan Area	19.8%	17.4%	19.3%	47.6%	38.0%	79.2%	25.3%	20.4%
Ceredigion	13.1%	12.5%	10.8%	18.6%	24.6%	71.8%	15.9%	14.6%
Cymru - Wales	6.5%	7.2%	4.7%	7.8%	15.5%	65.9%	8.2%	7.7%

Source: Table RM002, 2021 Census

69. **Figure 2.10** shows this variation in more detail by Output Area.

Figure 2.10 Percentage of Stock Reported Empty
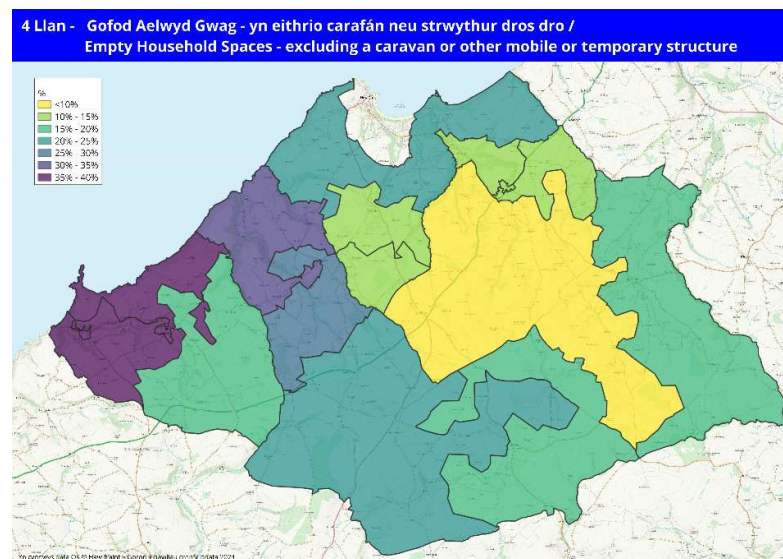
Source: 2021 Census; The Authors

Overcrowding

70. **Table 2.21** shows the percentage of the population in the area (per LSOA) living in overcrowded households. This is an indicator of deprivation in the Welsh Index of Multiple Deprivation from a housing perspective (i.e. lack of suitable space). The Table shows that 4.28% of the population in the area live in overcrowded households, compared to 5.08% of the population of Ceredigion and 5.53% of the

population of Wales. The figure is significantly higher in New Quay (7%) than in Penbryn (2.3%).

Table 2.21 People in overcrowded households (%)

Ardal Area	Pobl mewn aelwydydd gorlawn (%) People in overcrowded households (%)
Llanarth	3.79
Llandysiliogogo	5.27
Cei Newydd - New Quay	7
Penbryn	2.3
MSOA Ceredigion 007	4.28
Ceredigion	5.08
Cymru - Wales	5.53

Source: Welsh Index of Multiple Deprivation 2019

71. Another aspect to the same issue is under occupancy. **Table 2.22** below shows that under occupancy of property was higher within the 4 Llan Area (87.3%) than within the county as a whole (80.3%) and within Wales as a whole (76.3%). This may suggest that the housing mix of the area does not necessarily match the current composition of local households in terms of the number of bedrooms.

Table 2.22 Occupancy rating for bedrooms

Ardal Area	Wedi tan-lenwi - cyfradd llenwi ystafelloedd gwely: +1 neu fwy Under-occupied - occupancy rating of bedrooms: +1 or more	Gorlawn - Cyfradd llenwi ystafelloedd gwely: -1 neu lai Overcrowded - occupancy rating of bedrooms: -1 or less	Cyfanswm - holl aelwydydd Total - all households
Llanarth	84.2%	1.2%	100.0%
Llandysiliogogo	87.4%	1.1%	100.0%
Llangrannog	86.9%	1.0%	100.0%
Llanllwchaiarn	92.9%	0.0%	100.0%
Ardal y 4 Llan Area	87.3%	0.9%	100.0%
Ceredigion	80.3%	1.4%	100.0%
Cymru - Wales	76.3%	2.2%	100.0%

Source: Table TS052, 2021 Census

72. **Figure 2.11** shows under occupancy by Output Area.

Figure 2.11 Under Occupancy
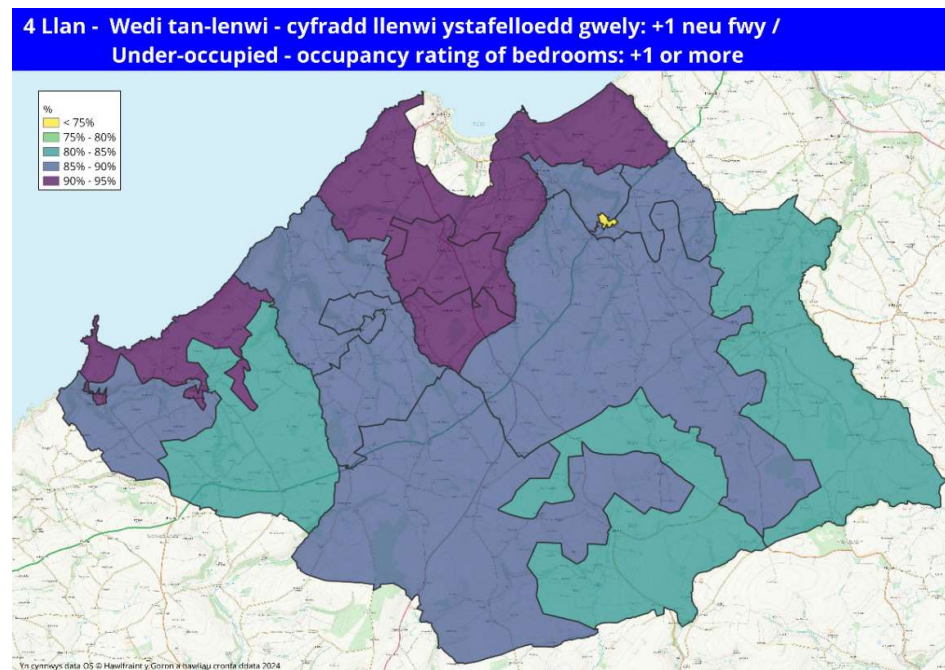
Source: 2021 Census; The Authors

Key Messages for Possible Interventions in the Housing Sector

➢ The number of detached houses- as a percentage of the area's housing stock- is significantly higher within the 4 Llan Area (73%) than in Ceredigion (50.7%) and Wales (28.5%).

➢ There is a relatively low proportion of private or social rented housing in the 4 Llan Area- the percentage of people owning their houses (80.5%) is significantly higher in the 4 Llan Area than in Ceredigion (68.6%) and Wales (66.1%).

➢ Almost half (49.3%) of the housing stock in 4 Llan Area were houses which were built before 1919 – an indicator commonly used a proxy for the energy performance of the dwelling stock.   This is compared to 43% of Ceredigion housing and 30.4% of Welsh housing.

➢ In terms of energy efficiency, only 15.3% of the 4 Llan Area properties are with scores within bands A to C compared to Ceredigion (25.3%). Within the area, scores range between 8.1% in Llangrannog and 21.3% in Llanllwchaearn.

➢ Median lower quartile prices are often used as an indicator of an entry-level price into the housing market). The median lower quartile price over the period 2019 – 23 is higher within the 4 Llan Area (£180,000 than within the county as a whole (£155,000).

➢ The percentage of all household spaces used a second address is higher in the 4 Llan Area (11.3%) than in Ceredigion (9%) and in Wales (6.8%).

➢ Around a quarter (25.3%) of all household spaces or dwellings are empty within the Area 4 Llan – a significantly higher figure than Ceredigion (15.9%) and Wales (8.2%). It is very high in Llangrannog (33%).

➢ Under-occupancy of property is higher within the 4 Llan District (87.3%) than within the county as a whole (80.3%) and within the whole of Wales (76.3%).

OTHER CHARACTERISTICS OF INTEREST
Travel time to services.

73. Another domain in the Welsh Index of Multiple Deprivation is physical and digital access to services. Journey times were calculated using public transport (walking and using a public bus, public train or national coach) or private transport to the nearest access point for a particular service. This is particularly important in rural areas where journey times, especially without private vehicle use, can be a significant barrier.

74. **Table 2.23** contains a selection of the facilities and services used to measure deprivation in the Access to Services domain, namely travel time to a food store and travel time to a surgery.

75. The Table shows that journeys on public transport to and from grocery stores (97 minutes on average) and GP surgeries (104 minutes on average) take much longer within the area than the averages for Ceredigion (64 and 80 minutes) and Wales (32 and 40 minutes).

76. Figures are exceptionally high for Penbryn (145 and 155 minutes), and the picture across the area suggests that travelling on public transport is neither an easy nor an attractive option.

Table 2.23 Travel time to services (a selection of indicators)

Ardal / Area	Amser teithio dwyffordd cyfartalog cyhoeddus i siop fwyd (munudau) Average public return travel time to a food shop (minutes)	Amser teithio dwyffordd cyfartalog cyhoeddus i meddygfa (munudau) Average public return travel time to a GP surgery (minutes)	Amser teithio dwyffordd cyfartalog preifat i siop fwyd (munudau) Average private return travel time to a food shop (minutes)	Amser teithio dwyffordd cyfartalog preifat i meddygfa (munudau) Average private return travel time to a GP surgery (minutes)
Llanarth	98	106	6	18
Llandysiliogogo	104	110	8	16
Cei Newydd - New Quay	21	23	4	5
Penbryn	145	155	9	32
MSOA Ceredigion 007	97	104	7	19
Ceredigion	64	80	6	13
Cymru - Wales	32	40	4	7

Source: Welsh Index of Multiple Deprivation 2019

Digital Access

77. The Access to Services domain also includes Digital Access. Easy and quick access to the internet for conducting business and connecting to family and friends is regarded by many as an essential part of contemporary life.

78. Ofcom's *Connecting the Nations* report provides an estimate of the proportion of households and small businesses unable to access fixed-line broadband services with download synchronisation speeds of 30Mb/e or higher (superfast broadband).

79. **Table 2.24** below shows that 31.6% of 4 Llan Area buildings do not have broadband access at 30Mb/e, which is a much higher figure than Ceredigion (18.6%) and particularly Wales as a whole (5.8%). Within the area, the figure is highest in Llandysiliogogo (40.6%) and Llanarth (37.7%).

Table 2.24 Broadband Availability, September 2021

Ardal	Holl adeiladau	Nifer adeiladau ag argaeledd band eang ar 30Mb/e	Argaeledd band eang ar 30Mb/e (% adeiladau)	Diffyg argaeledd band eang ar 30Mb/e (% adeiladau)
Area	All premises	Number of premises with availability of broadband at 30Mb/s	Availability of broadband at 30Mb/s (% premises)	Unavailability of broadband at 30Mb/s (% premises)
Llanarth	727	453	62.3%	37.7%
Llandysiliogogo	508	302	59.4%	40.6%
Llangrannog	423	329	77.8%	22.2%
Llanllwchaiarn	431	344	79.8%	20.2%
Ardal y 4 Llan Area	2089	1428	68.4%	31.6%
Ceredigion	34548	28138	81.4%	18.6%
Cymru - Wales	1434985	1352075	94.2%	5.8%

Source: 202109_fixed_oa11_res_coverage_r01, OFCOM

80. **Figure 2.12** gives a more detailed picture of the situation by Output Area.

burum

Figure 2.12 Unavailability of Broadband at 30Mb/e (2019)
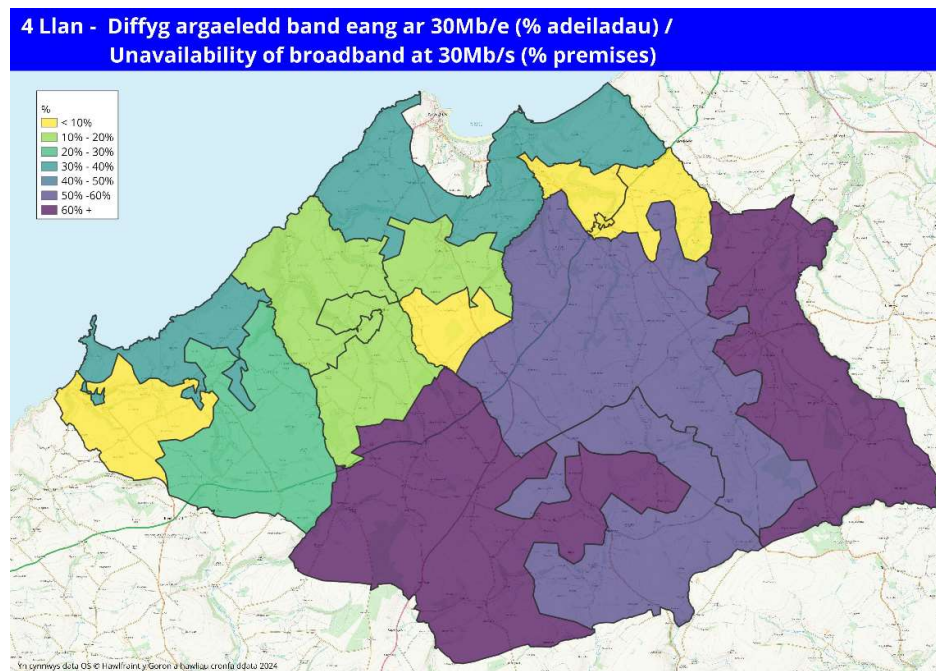
Access to Green Space

81. Another indicator used within the Physical Environment domain in the Welsh Index of Multiple Deprivation is access to "accessible natural green space". Although the 4 Llan Area is a rural area, with substantial parts relatively close to farmland and the coast, perhaps unexpectedly this is a "problem" for the area's inhabitants as it is to many inhabitants of rural areas.

82. **Table 2.25** overleaf shows that access to accessible natural green space is a problem for many within the area, with the percentage of households with access to accessible natural green space (29.8%) significantly lower than that in Ceredigion (55.4%) and in Wales (77%).

Table 2.25 Proximity to Accessible Natural Green Space

Ardal Area	Sgôr agosrwydd at ofod gwyrdd naturiol hygyrch (% aelwydydd) Proximity to accessible natural green space score (% of households)
Llanarth	22.2
Llandysiliogogo	17.9
Cei Newydd - New Quay	73.8
Penbryn	15
MSOA Ceredigion 007	29.8
Ceredigion	55.4
Cymru - Wales	77

Source: Welsh Index of Multiple Deprivation 2019

83. The next two indicators are part of the suite of indicators used to measure Community Safety in the Welsh Index of Multiple Deprivation.

Burglary

84. **Table 2.26** below shows that similar rates of burglary were recorded by the police in both the area (0.47 per 100 persons in the population) and the county (0.56), with the national figure significantly higher (0.98).

Table 2.26 Police recorded burglary.

Ardal Area	Bwrgleriaeth wedi ei gofnodi gan yr Heddlu (cyfradd fesul 100) Police recorded burglary (rate per 100)
Llanarth	0.47
Llandysiliogogo	0.68
Cei Newydd - New Quay	0.5
Penbryn	*
MSOA Ceredigion 007	0.47
Ceredigion	0.56
Cymru - Wales	0.98

Source: Welsh Index of Multiple Deprivation 2019

Fire incidence.

85. The rate of fire incidents per 100 persons in the population is similar in the area (0.3), in Ceredigion (0.27) and in Wales (0.38) (see **Table 2.27** below).

Table 2.27 Fire Incidence

Ardal Area	Digwyddiadau tân (cyfradd fesul 100) Fire incidences (rate per 100)
Llanarth	0.28
Llandysiliogogo	0.37
Cei Newydd - New Quay	*
Penbryn	0.31
MSOA Ceredigion 007	0.3
Ceredigion	0.27
Cymru - Wales	0.38

Source: Welsh Index of Multiple Deprivation 2019

Key Messages for Possible Interventions in the Housing Section

➢ Journey times with public transport are likely to take much longer to get to and from grocery stores (97 minutes on average) and GP surgeries (104 minutes on average) within the 4 Llan area. This is compared to the average for Ceredigion (64 and 80 minutes) and Wales (32 and 40 minutes).

➢ In terms of access to digital services it was recorded in 2019 that 31.6% of Llan Area 4 buildings did not have access to broadband at 30Mb/s. This is a percentage that is a much higher figure than Ceredigion (18.6%) and particularly Wales as a whole (5.8%). Within the area, the percentage was recorded as being highest in Llandysiologogo (40.6%) and Llannerch (37.7%).

➢ The percentage of households with access to accessible natural green space (29.8%) is significantly lower than the percentage in Ceredigion (55.4%) and the corresponding percentage for the whole of Wales (77%).

➢ In terms of anti-social behaviour there are no significant differences in indicators such as burglary and fire incidents between the 4 Llan Area and the average for Ceredigion as a whole.

PART 3 OVERVIEW OF HOUSING NEEDS

Introduction

86. The second part of the project asks us to present an overview of the housing needs of the 4 Llan Area. The presumption was that this overview would be based on the following:

- Data from Ceredigion County Council and Barcud Housing Association on the need for homes in the area.

- Further analysis of any other statistics, including the 4 Llan Housing Survey conducted by the working Group in 2022.

The general picture in Ceredigion

87. Local housing authorities have a statutory responsibility to undertake a five-year review of housing need. This is part of their duty to provide community leadership in their strategic housing role. This is known as the Local Housing Market Assessment (LHMA). These assessments are intended to give approximate estimates of long-term housing needs, rather than precise estimates. They are a key evidence base for development plans and for giving rough estimates of open market and affordable housing. The last assessment was undertaken for Ceredigion in 2019. The Climate Change Minister has asked every local housing authority to renew and submit its latest LHMA by no later than 31 March 2024. This is based on a Tool or Template published by the Welsh Government in 2022.

88. In relation to geographies, although it is for individual housing authorities to determine the appropriate geography for their area, the Welsh Government guidance highlights the challenges of defining housing market areas in rural areas.

89. Ceredigion County Council's new Housing Strategy, "Housing for All 2023-28"[3] responds to what are regarded as priorities in responding to housing needs in the County. It addresses not only current needs but those of future generations as well. It was based on the Local Housing Market Assessment for 2019 where it was decided

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[3] Ceredigion County Council (2023) "Housing for All" Housing Strategy 2023- 28

to treat Ceredigion effectively as a single housing market area (with a "sub-market" for the Aberystwyth catchment). The main challenges are set out in the Introduction:

- *"With high house prices and low incomes, Ceredigion is unaffordable to many, making it harder for first time buyers and local people to remain in their communities."*

  - *Between 2020 and 2023 house prices have increased 42% on average*
  - Average property price £262,535 (September 2022)
  - Median family income £31, 162
  - 1,750 on the Ceredigion Housing Register in January 2023
  - 280 social housing lettings each year

- *"Much of the housing stock has low energy efficiency ratings".*

  - *A high proportion of houses built before 1919.*
  - *45% of households in fuel poverty*

- *"With an ageing population, we need houses that can be adapted, which can sustain people at different stages of their lifetime".*

  - *26% of the population is of retirement age.*

Type of housing required.

90. **Table 3.1** reproduces the table published in the Strategy showing the demand for the number of bedrooms compared to the current stock.

Table 3.1 Housing demand

| Bed size	Current stock	Demand
1 bed	16%	60%
2 bed	46%	24%
3 bed	35%	11%
4 bed	2%	4%
5+ bed	1%	1%

Bedroom size demand compared to current Social Housing Stock

Source: Cyngor Sir Ceredigion (2023) Housing for All Ceredigion 2023-28

91. **Figure 3.1** reproduces the figure showing the options for the types of financial arrangements or occupancy structures are available to those registered on the Ceredigion Common Housing Register.

Figure 3.1 Affordable Housing Options

Affordable Housing Options demand, as identified on the Common Housing Register
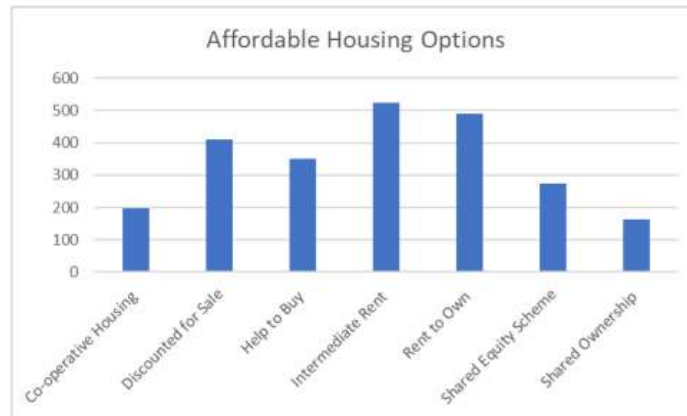
Source: Cyngor Sir Ceredigion (2023) Housing for All Ceredigion 2023-28

Local Housing Market Assessment in the 4 Llan Area

92. The Local Housing Market Assessment helps to determine the level of housing demand in Ceredigion. Unfortunately, as explained above, from the perspective of the 4 Llan Area the current assessment does not recognise a local housing market at below county level (apart from the sub-area of Aberystwyth).

93. The Golland Housing Viability Assessment Study[4] published in April 2017 identified seven housing submarkets within Ceredigion. The submarket covering the 4 Llan Area is New Quay and South West Coast.

94. The area includes New Quay and the following postcodes:
    - SA44 6 – Llangrannog, Pontgarreg, Sarnau, Plwmp.
    - SA45 9 – New Quay, Cross Inn/ Penrhiwgaled, Maen y Groes, Gilfachreda.
    - SA47 0 – Llanarth, Derwen Gam.

95. It does not include the SA44 4 (Talgarreg) and SA47 7 (Mydroilyn) post code areas.

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[4] Dr Andrew Golland (2017) *Ceredigion County Council Affordable Housing Viability Assessment*

Housing Demand in the 4 Llan Area

96. The Social Housing Register is one of the main sources used to identify housing need. However, care must be taken in interpreting the scale and type of need, for the following reasons:

- Not everyone applies to be on the Register (some may choose to search for a private landlord or not search at all).

- The Register allows applicants to identify up to 5 areas where they would be willing to live. The Register for an area such as the 4 Llan Area may therefore include a preference by an applicant for more than one settlement.

- The register sometimes lists applicants who already have a home but are looking to transfer within the area or from another authority.

- The Register may include applicants who request minor modifications to their current home.

- The Register may include applicants who registered some time ago but are no longer in need.

97. Ceredigion County Council's Housing Service provided access to data that gives an indication of the level of need for homes within the 4 Llan Area.

98. **Table 3.2** shows the distribution of applicants' preference for the 4 Llan Area per settlement and the minimum number of bedrooms required.

Table 3.2 Applicants on The Waiting List Per Settlement and The Minimum Number Of Bedrooms Required.

Anheddle/Settlement	Isafswm nifer yr ystafelloedd Gwely/ Minimum Number of Bedrooms					Cyfanswm/ Total
	1	2	3	4	5	
Cross Inn/Maen-y-Groes	24	17	9	5	0	55
Gilfachreda	8	11	4	1	0	24
Llanarth	35	21	11	2	1	70
Gorsgoch	2	0	2	1	0	5
Brynhoffnant	4	5	1	0	0	10
Caerwedros	1	1	0	0	0	2
Llangrannog	6	2	3	1	0	12
Pentregat	0	0	1	0	0	1
Pontgarreg	5	2	0	0	0	7
Pentre'r Bryn/Synod Inn	5	4	5	0	0	14
Talgarreg	4	2	2	0	0	8
Ardal y 4 Llan Area	94	65	38	10	1	208
%	45.2%	31.3%	18.3%	4.8%	0.5%	100.0%

Source: Cyngor Sir Ceredigion Housing Service (March 2024) The Housing Waiting List

99. The Table shows that there are just over 200 applications on the Register. Comparing this with the percentage of houses rented by a social or private landlord, which is shown in **Figure 2.7** (and the Tenure table in **Appendix 1**), it is evident that applicants appear to be making a rational decision to maximise their opportunities by choosing a settlement where a cluster of social rental stock already exists (e.g. Llanarth).

100.   The Table also suggests that most people prioritise smaller houses (minimum 1 or 2 bedrooms) rather than larger ones.

101.   **Table 3.3** includes a sub-set of applicants from above, which includes having a member of the household who is a full-time or part-time wheelchair user and has special requirements in terms of accessible entrance. It suggests that a little fewer than 10% of the total have such needs, with a definite tendency towards Llanarth and having one bedroom as a minimum.

Table 3.3 Applicants on the Housing Register with Accessible Entrance Requirements

Anheddle/Settlement	Isafswm yr Ystafelloedd Gwely/ Minimum Bedrooms			Cyfanswm/Total
	1	2	3	
Cross Inn/Maen-y-Groes	1	2	0	3
Gilfachreda	1	1	0	2
Llanarth	4	1	0	5
Brynhoffnant	0	1	0	1
Caerwedros	1	0	0	1
Llangrannog	1	0	1	2
Pontgarreg	1	1	0	2
Pentre'r Bryn/Synod Inn	1	0	2	3
Talgarreg	0	0	1	1
Ardal y 4 Llan Area	**10**	**6**	**4**	**20**
%	50%	30%	20%	

Source: Cyngor Sir Ceredigion Housing Service (March 2024) The Housing Waiting List

102.   Such released information only indicates the age of the Lead Applicant and the postcode area given as his or her current home. It therefore does not indicate on behalf of whom the applicant is making the application (household composition) or the type of property in terms of financial structure (e.g. rental/part ownership etc), or type (e.g. flat or terraced house).

103.   **Figures 3.2** and **3.3** give a picture of the Level of Need according to the age group of the Lead Applicants. A total of 152 Lead Applicants were recorded. This reinforces the point made in paragraph 95 that the Register can include multiple applications from the same applicant and suggests that up to 56 applications are "duplicate" applications within the 4 Llan Area.

Figure 3.2 4 Llan Area Distribution of Need by Age Group of Lead Applicant
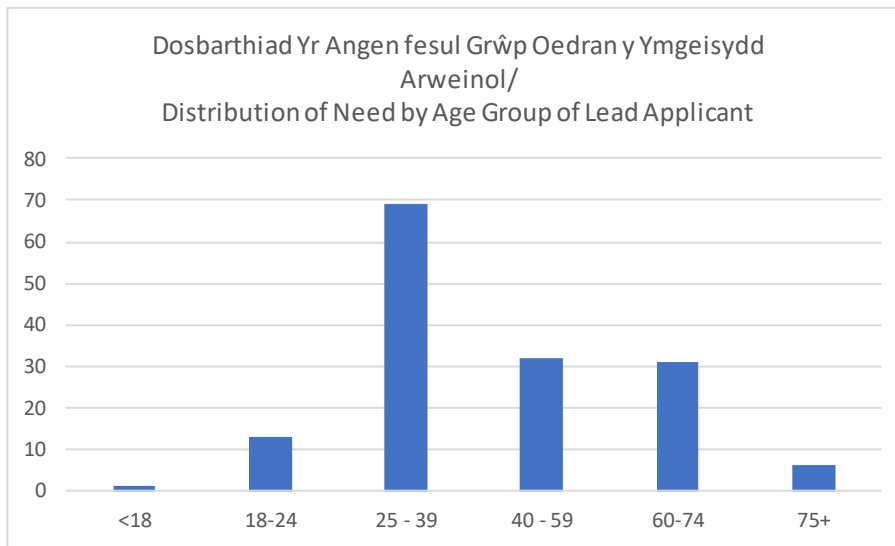
Source: Cyngor Sir Ceredigion Housing Service (March 2024) The Housing Waiting List

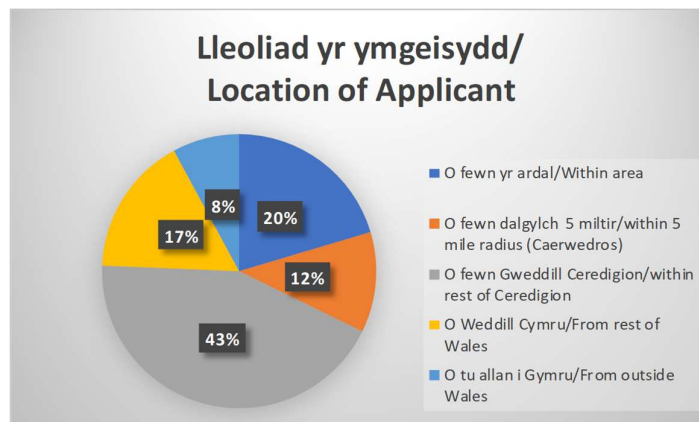Figure 3.3 Distribution of Need by Age Group of Lead Applicant
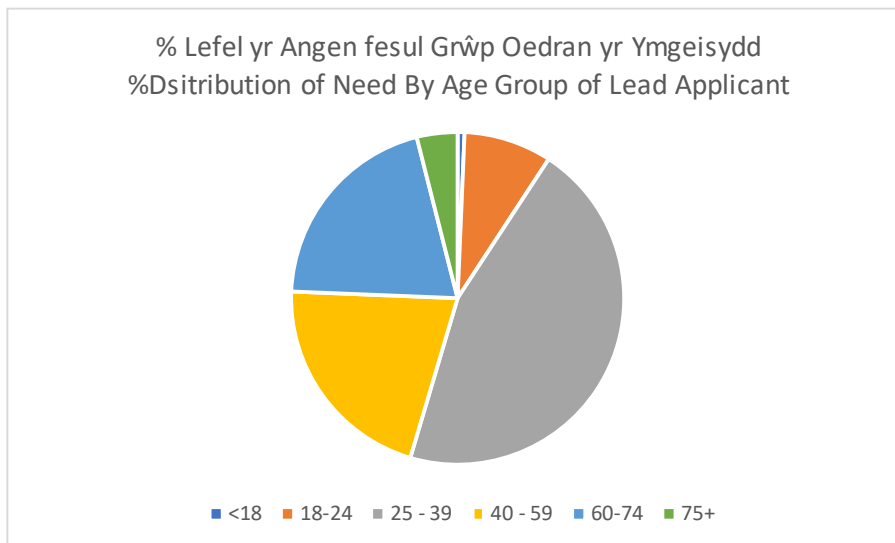
Source: Cyngor Sir Ceredigion Housing Service (March 2024) The Housing Waiting List

104.   **Figure 3.4** overleaf analyses the list of Lead Applications by the location of their address. It shows that around a third of applicants (32% - around 50) currently live at an address either within the 4 Llan Area or within five miles of Caerwedros.

Figure 3.4 Source Address of Lead Applicant

Findings of the 4 Llan Working Group Survey

105. In addition to the evidence on the need for homes obtained from Ceredigion Council, the 4 Llan Working Group, in collaboration with the former Rural Housing Facilitator, surveyed the area in Summer 2022[5].

106. It is noted that the survey's aim was to "identify housing needs locally within the four communities" and to gain insight into these "housing needs", recognising that this was only an initial, innovative survey.

107. They collaborated with Cwmni Iaith Cyf. to produce a questionnaire, a copy of which was made available online and on social media, while paper copies were distributed in local shops. The survey was promoted through the summer months in the local press.

108. Responses were received from 28 individuals. This number is not considered statistically sufficient to be reliable, especially if one seeks to draw conclusion by sub-dividing the responses by geography and by age. However, it is useful to identify some general trends.

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[5] 4 Llan Working Group (2023*) Local Housing Needs Questionnaire for Llanllwchaiarn, Llandysiliogogo, Llanarth*

- Regarding their current situation, almost 3 out of 5 (57%) owned their own houses and a little fewer than 1 in 3 (29%) live in private rented housing.

- In terms of tenure type, six out of seven (86%) indicated their desire to own their own home.

- When asked about the reasons for changing their current arrangements, it was noted that 4 in 10 (41%) said they wanted a larger space (including situations where families were growing) and just over a third (36%) said they wanted a smaller place.

109.   **Box 3.1** sets out the overall conclusions of the report.

Box 3.1 Findings of the 4 Llan Area Survey

3.0   Survey-based conclusion

Overall, the survey was responded to by middle-aged and older individuals who hailed from the area or had lived in the area for a decade or more (88%). Respondents tended not to have children living with them in the home (75%), and they tended to own their own house (57%). Representation of Welsh speakers among respondents (68%) exceeded the overall percentage in the general population. The salary profile of the respondents was roughly equivalent to the general distribution locally.

The majority of respondents lived in detached houses (57%) and owned their own properties (57%). The majority lived in homes with 2-3 bedrooms (61%).

Looking to the future, the housing needs (or aspirations) of the respondents did not appear to be significant in terms of housing (bedrooms) size. Needs varied, with some wanting larger properties than their current homes, and that for a variety of reasons. A significant number were seeking to down-size (36%).

In terms of the desired type of tenure, those wishing to own their own homes came to 23 out of the 28 respondents (86%). By comparison, the desire to live in rented housing was very low.

Only one respondent signaled a measure of urgency in finding an alternative place to live.

Based on the comments submitted, the non-availability of affordable housing for local people was the respondents' main concern. From the responses given, it is assumed that what is meant in this connection is a shortage of privately-owned family-sized homes that are available to buy on the open market.

Source *The 4 Llan Working Group (2023) Local Housing Needs Questionnaire for Llanllwchaearn, Llandysiliogogo, Llanarth*, Llangrannog Page 5

110.   The overall conclusions of the report highlight the marked differences between the profile of survey respondents and that of the Housing Register (and in particular the marked difference in the housing financing position of the two cohorts). While it is not possible to be certain, the survey appears to identify a not

insignificant gap in terms of the "aspiration" of a cohort of residents to move into smaller properties – possibly as a result of reaching a stage in life where children leave home.

Key Messages for Possible Interventions in the Housing Sector

➢ There are just over 200 applications for housing in 4 Llan Area on the Housing Register and it is estimated that these are from 152 lead applicants. Twenty of these are applicants require Accessible Entrance Needs.

➢ More than half of the total applications have expressed priority for a house at either Cross Inn/Maen y Groes or Llanarth.

➢ Around a third of Lead Applicants live either within the 4 Llan Area or in close proximity.

➢ The Working Group's 2002 Survey, while not statistically dependable, suggests that there is a not insignificant hidden need in the "aspiration" of some residents to move into smaller properties.

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PART 4 A REVIEW OF HOUSING, LAND AND PROPERTY TO MEET THE NEED

Introduction

111.	There has been a lot of talk recently about the lack of housing available to meet needs, especially within a competitive market where finding a house either to buy or rent is often beyond the capacity of a person or family on an average income.

112.	The blame is often attributed to the planning system for being too stringent, or to landowners or developers who accumulate their accounts in the hope that creating a shortage will raise the value of their assets. These aspects are therefore worth briefly exploring to understand why this is happening.

The Planning System

113.	The background to planning legislation is complex, from the first significant piece of legislation that established the regime in 1947 to the Town and Country Planning Act 1990 (which in turn largely consolidated laws in development control and enforcement since the 1960s) and the Planning and Compulsory Purchase Act 2004 (which laid the foundations for local development plans as we know them today).

114.	The planning system is driven by the requirements of the Planning and Compulsory Purchase Act 2004 where it was established that development plan policies and allocations would be the basis of planning decisions unless these were outweighed by other material planning considerations.

115.	The Government of Wales Act 2007 established that the Welsh Government would have primary responsibility for land use planning from that point onwards, and the Planning (Wales) Act 2015[6] introduced a statutory purpose to the planning system in Wales for the first time. Public bodies (Welsh Ministers, local planning authorities or any other public body) have a duty to ensure that "*the development and use of land contribute to improving the economic, social, environmental and*

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[6] https://www.legislation.gov.uk/cy/anaw/2015/4/contents/enacted

cultural well-being of Wales"[7] when exercising their function as part of carrying out sustainable development.

116.   A Planning Consolidation Bill is due to be introduced this summer. Its main purpose will be to draw together planning legislation, secondary legislation and regulations in Wales all under one roof into a single Planning Code.

117.   The Framework guiding land use planning policies and decisions is summarised effectively by the diagram below (**Figure 4.1**), reproduced from Planning Policy Wales[8].

Figure 4.1 The Planning Framework in Wales
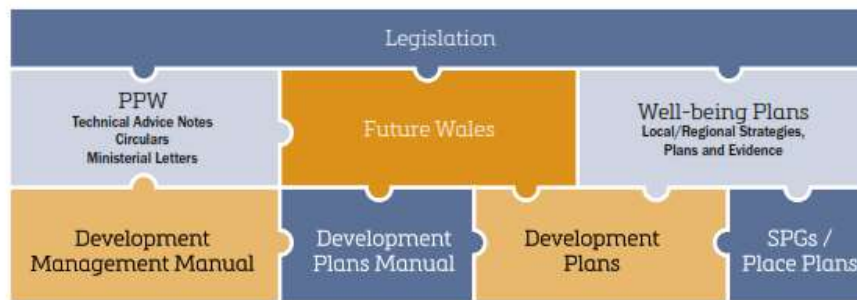
Source: Welsh Government (2024) Planning Policy Wales, Edition 12

118.   Under the legislation, there is a tier of national (and in due course regional) guidance and toolkits:

- **Planning Policy Wales** (Edition 12) 2024, and **Technical Advice Notes, Circulars** and **Ministerial Letters**
- National Development Framework: **Future Wales – The National Plan 2040**
- Development Plans Manual 2021
- *Strategic Development Plans[9]*

119.   Under these are then 25 Local Development Plans for counties and the 3 national parks, each with its series of Supplementary Planning Guidance. The purpose of this guidance is to provide technical advice on how to interpret the policy

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[7] Op. Cit. Part 2(2)

[8] Welsh Government (February 2021) *Planning Policy Wales Edition 11*

[9] There will be one for mid-Wales eventually, covering Ceredigion and Powys

requirements or site allocation of the relevant scheme, <u>rather than to introduce a different or additional policy or allocation.</u>

## The general situation in Ceredigion

120.   The current Ceredigion Local Development Plan was adopted in 2013 and runs from 2007 to 2022. Although its lifespan has technically ended, Ceredigion County Council has been given permission to continue operating it until the effects of Covid-19 have passed, and more recently until the suspension of development in the River catchment areas of the Special Conservation Areas (which include the Teifi, and the origins of the Severn and Usk), due to high levels of phosphates, is relaxed.

121.   Each development plan is driven by what is known as a Preferred Strategy in terms of the scale and location of growth over the period of the Plan. In the 2007 – 2022 Plan, a growth level of 6,000 homes and 4,000 jobs was adopted. In terms of growth location, "*the aim of the Plan is to move away from a dispersed distribution of development and to re-focus growth in the most sustainable location*"[10]. Therefore, the strategy preferred to concentrate most of the growth in 22 Urban and Rural Service Centres. Of these 22, 15 are known as Rural Service Centres. The nearest Urban Service Centres to the 4 Llan Area are Aberaeron to the north, Cardigan to the south and Llandysul to the south-east.

122.   Each Service Centre has its "Linked Settlements" and "Other Locations". In terms of development management and the Proposals Map, each Service Centre has a surrounding development boundary and usually an allocation of land for housing and/or employment use.

The Planning Situation within the 4 Llan Area

123.   The only Rural Service Centre within the 4 Llan Area is Llanarth. **Figure 4.2** shows the boundary and allocations within the boundary. The proposal in the Scheme amounted to 77 houses over the Scheme's lifespan (an increase of 32.5%).

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[10] Ceredigion Local Development Plan (2007 – 22) example quote, para. 13.1.4

Figure 4.2 Llanarth Proposals Map
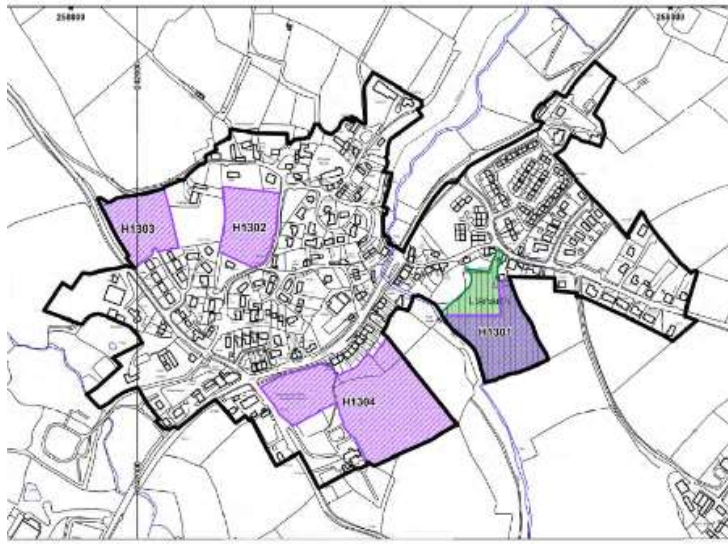
Source: Ceredigion County Council. Ceredigion Local Development Plan (2007 – 2022) Proposals Map

124.   **Table 4.1** shows the other linked settlements identified in the local development plan together with the "other locations".

Table 4.1 Hierarchy of the 4 Llan Area settlements

Rural Service Centre			
06 - Llandysul	**08 – Aberporth/Parcllyn**	**10 New Quay**	**13 Llanarth**
Linked settlements			
Talgarreg	Brynhoffnant Llangrannog Pontgarreg	Caerwedros Cross- Inn/Penrhiwgaled Maen-y-Groes Pentre'r Bryn Plwmp	Gilfachreda Derwen-gam Mydroilyn
Other locations			
	Blaencelyn Pentre-gât	Nantermis Llwyndafydd Cwmtudu	Llaingarreglwyd

Source: Ceredigion County Council. Ceredigion Local Development Plan (2007 – 2022) Proposals Map

125.   Generally, neither Linked Settlements nor Other Locations have a development boundary (there are some exceptions) and any new development is usually expected to fit into the existing built form (see policy SO4).

126.   Overall, over the lifespan of the Plan, the County Council aimed to limit the scale of growth outside the Service Centres to 25% and growth in the Linked Settlements to no more than 12% of the stock at the commencement date of the Scheme in 2007. **Table 4.2** below reproduces figures from Appendix 5 to the Scheme.

Table 4.2 Breakdown of the "12%" threshold per 4 Llan settlements

Name of Linked Settlement	Dwelling Stock April 2007	12% of the 2007 Dwelling Stock
Talgarreg	58	7
Brynhoffnant	48	6
Llangrannog	92	11
Pontgarreg	83	10
Caerwedros	61	7
Cross Inn/Penrhiwgaled	112	13
Maen-y-Groes	59	7
Pentre'r Bryn	34	4
Plwmp	41	5
Derwen Gam	33	4
Gilfachreda	88	11
Mydroilyn	66	8

Source: Ceredigion County Council. Ceredigion Local Development Plan (2007 – 2022) Proposals Map

127.   The recent Annual Monitoring Reports on the Plan suggest that, although the level of housing growth is significantly lower than expected, the Council has faced challenges to contain the level in the Linked Settlements and Other Locations to below 12%. For example, the 2023 Annual Monitoring Report shows that the percentage of planning commitments over the 10-year period from the date of adoption of the Scheme in 2013 is 35% (housing completed = 43%). This is within a period when the population and number of households has reduced significantly[11]. 50% of Linked Settlements have reached or exceeded their growth limit of 12%.

128.   **Table 4.3** overleaf shows which settlements (Llanarth and its Linked Settlements within the 4 Llan Area) have reached or exceeded their growth limit.

129.   The overall picture shows that the scale of growth has been higher than that provided for in 2013. It also shows that a high proportion of the growth has taken

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[11] Population 2012 – 76,000 2020 70,600 Households– 2013 31,860 2020 – 31,410

place outside the Rural Services Centre (Llanarth) and is contrary to the overall aim of the Scheme.

130.   The Monitoring Report also identifies housing developments approved in "Other Locations". From the analysis given for the whole county, it appears that the majority of the 33 permitted in 2022/23 were either on the edge of a Service Centre (13) or Link Settlement (11), or a conversion from an existing building (4).

Table 4.3 Spare Capacity in the 4 Llan Settlements

Settlement Name	Dwelling Stock April 2007	12% of the 2007 Dwelling Stock/ Allocation	Standing permissions (30/4/23)	Completed units (April 2023)	Total Commitments	Remaining units
Talgarreg	58	7	3	12	15	-8
Brynhoffnant	48	6	1	5	6	0
Llangrannog	92	11	0	3	0	+3
Pontgarreg	83	10	14	10	24	-14
Caerwedros	61	7	5	8	13	-6
Cross Inn/ Penrhiwgaled	112	13	4	39	43	-30
Maen-y-Groes	59	7	0	3	3	+4
Pentre'r Bryn	34	4	0	6	6	-2
Plwmp	41	5	1	5	6	-1
Derwen Gam	33	4	0	4	4	0
Gilfachreda	88	11	1	2	3	+8
Mydroilyn	66	8	2	7	9	-1
Llanarth	237	77	18	38	56	+21
The 4 Llan	1012				188	-26

Source: Ceredigion County Council Annual Monitoring Report 2022 - 23

The Replacement Local Development Plan (2022 – 2037)

131.	The formulation of a Replacement Local Development Plan has started since 2016 but has effectively come to a standstill. Initially this was because of the onset and effects of the Covid-19 Pandemic in early 2020, but then it was followed by Natural Resources Wales's prohibition on development due to concerns about phosphates in the Teifi catchment. Although the Local Planning Authority consulted on its Preferred Strategy in Summer 2019, the Welsh Government raised some fundamental concerns about the document[12]. These include comments on the need to address the following issues if the Plan was to meet the "soundness" criteria for Local Development Plans:

- The relationship between the Level of Preferred Growth and the Well-being Plan, the Local Housing Market Assessment, and the impact on the Welsh language.
- The need to consider various options for Growth Distribution.

132.	One of the few steps taken before pausing was (in 2019) to invite the public to propose candidate sites for consideration as part of the New Development Plan.

133.	Sites have been proposed in the following settlements within the 4 Llan Area:

- Caerwedros
- Maen-y-groes
- Cross Inn / Penrhiwgaled
- Plwmp
- Brynhoffnant (outside, but on the edge of the area)
- Llanarth

134.	 **Appendix 2** reproduces a description and maps of these application sites. Normally the next step would be for the Local Planning Authority to assess the appropriateness of the proposals and their location against the strategy for the scale

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[12] Welsh Government (September 2019) Regulation 15 response to the Consultation on the Preferred Strategy
www.gov.wales/sites/default/files/publications/2019-09/ceredigion-county-council-preferred-strategy-first-review-regulation-15-consultation-welsh-government-response_1.pdf

and location of growth, and against the draft policies of the new Plan. It should therefore be emphasised that there is no evidence that this has happened yet and that applying to include a site does not mean that that site will eventually be included in the Proposals Map.

135.   However, it is highly likely that the Welsh Government's national planning policy on "placemaking "[13] will significantly limit Ceredigion Council's ability to choose a radically different spatial strategy to that of the existing strategy that would give significantly greater flexibility to the LDP to allow further land allocations in the 4 Llan Area.

Market Conditions and Landbanking

136.   Ceredigion County Council is expected to publish its update of its Local Housing Market Assessment before the end of March 2024 in accordance with Welsh Government requirements. Unfortunately, from the point of view of the 4 Llan Area, the last Assessment published in 2016 treated all of Ceredigion as one housing market. Information at a geographical level below county level (apart from the Aberystwyth catchment) was not available.

137.   The Golland Housing Viability Assessment Study [14] published in April 2017 identified seven housing submarkets within Ceredigion. The submarket covering the 4 Llan Area is New Quay and South West Coast. The area includes New Quay and the following postcodes:

- SA44 6 – Llangrannog, Pontgarreg, Sarnau, Plwmp.
- SA45 9 – New Quay, Cross Inn/ Penrhiwgaled, Maen y Groes, Gilfachreda.
- SA47 0 – Llanarth, Derwen Gam.

138.   It does not include the SA44 4 (Talgarreg) and SA47 7 (Mydroilyn) post code areas.

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[13] Welsh Government (2024) Planning Policy Wales, Edition 12
[14] Dr Andrew Golland (2017) *Ceredigion County Council Affordable Housing Viability Assessment*

139.   In most urban places in the United Kingdom, market conditions would be a major influence on the scale and location of growth in the release of land for the construction of new housing. There is also evidence of a deliberate attempt by major developers ("volume builders") to accumulate land ("landbanking") in order to keep the land supply for housing relatively scarce, and therefore raise the prices they might achieve from new home buyers.

140.   In a rural, relatively remote area such as Ceredigion (and even more so in an area such as the 4 Llan Area), the market is not driven by the building model considerations of major developers. The evidence presented in Table 4.3 above, and in the remainder of the latest Annual Monitoring Report, suggests that the construction rate remains relatively low and lower than predicted when the Plan was adopted in 2013.

141.   Within the 4 Llan Area, **Table 4.4** overleaf presents evidence of what has happened at sites of 5 units and more. To summarise:

- Eight sites with 5 units and more have been granted planning permission. There are two sites at New Quay on the edge of the area.
- The eight sites have a total of 86 units; of this total, 61 remain.
- The number built in the year since 1/4/22 or built over the period 1/4/23 – 31/3/24 is 3.
- The number assessed as "not viable" is 36.
- The number assessed as being built in the 5 years since 1/4/23 is 26.

142.   In terms of New Quay:

- The number built in the year since 1/4/22 or under construction over the period 1/4/23 – 31/3/24 again is 3.
- It is assessed that it would be possible to build 36 units in the 5 years after 1/4/23.
- The number assessed as not viable is 105.

Table 4.4   Land availability list for 5 or more units in the 4 Llan Area

Settlement/Site	Total Capacity	Units built since 31/3/22	Units remaining	Units under construction	Potential units to be built in the next 5 years	Units not viable
Cross Inn/Penrhiwgaled						
Fforch y Cwm	21	1	1	0	0	0
Llanarth						
Field near Vicerage	9	0	9	0	0	9
Field behind Brynawen	9	0	9	2	7	0
H1301 behind Brynawen	26	0	26	0	16	10
H1303 near Allt y Bryn	5	0	5	0	3	0
Llangrannog						
Cae OS 0731 Bro Cregin	5	0	5	0	0	5
Pontgarreg						
H0104 near Maes y Pentre	6	0	6	0	0	6
Near Heol y Garreg	5	0	5	0	0	5
Ar gyrion yr ardal						
New Quay						
Dolphin Court	86	2	8	1	1	6
Towyn Farm	234	0	134		35	99

Source Ceredigion County Council (2023) Annual Monitoring Report 2022/23

Identification of Other Property and Land

143.   Other land and property that are unused or unearmarked or unidentified as potential housing sites are likely to come forward. For example, a building where current use has ended (e.g. a school, hall or chapel) where it is possible to convert it to a house or dwelling or where the building/site has become dilapidated and can be cleared and reused.

144.   To address the negative impact that second homes and short-term holiday lets can have on the availability and affordability of housing for local people, the Welsh Government's Welsh Language Communities Housing Plan recognises that "*Co-operative and community-led housing can help communities, registered social landlords and local authorities to develop bespoke solutions*"[15].   BURUM considers that it may well also be worth the Working Group having a conversation with Ceredigion County Council to establish whether they may be in possession of suitable land that could be available for consideration as part of meeting the housing needs of the area.

145.   Due to the sensitive nature of seeking to identify suitable properties and land, it is not regarded as appropriate for this report to identify specific properties or land for consideration. Members of the Working Group and the wider community will certainly have more complete and up-to-date knowledge of such opportunities. This part of the report therefore seeks to give guidance about what kind of considerations a Planning Authority would assess. It should be noted that each building or site would be considered on its own merits within the relevant policy context.

Type 1 – Subdividing an existing large dwelling.

146.   **Box 4.1** below sets out the relevant planning policy in a situation where consideration is given to subdividing a house or an existing dwelling. The statement notes that "*Conversions provide a sustainable alternative to new build and have an*

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[15] Welsh Government (2022) The Welsh Language Communities Housing Plan

important role to play in increasing the available level and type of housing stock within the County".[16]

Box 4.1 Land Use Policy in Relation to Subdivision of Existing Dwellings

Subdivision of Existing Dwellings

Policy LU07:
Subdivision of Existing Dwellings

The conversion of large residential units to flats will be permitted provided that:

1. The dwelling is of a suitable size and layout capable of conversion without substantial extension;

2. The development does not adversely affect the amenity of the adjoining occupants and includes adequate soundproofing between units;

3. The development does not result in significant parking problems;

4. There is adequate provision for the storage of refuse; and

5. Provision of 3 and 4 bedroom apartments is included as part of the mix, where there is evidence of unmet local need for larger flats and the property has appropriate physical capacity.

Conversion of residential units to HMOs, that require planning permission, will not be permitted.

Source: Ceredigion County Council (2013) Ceredigion Local Development Plan 2007 - 22

Type 2 Re-use of former or abandoned dwellings

147.   **Box 4.2** sets out the relevant planning policy in a situation where consideration is given to restoring a former or abandoned dwelling. Paragraph 7.48 states that "re-use of former or abandoned dwellings, as a result of renovation or rebuild in rural areas can have a valuable contribution to make in meeting the housing need of rural communities. It is important to ensure however, that the re-use of the dwelling does not have adverse impacts on the character of the location."

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[16] Ceredigion County Council (2013) *Ceredigion Local Development Plan 2007 – 22 Written Statement* (para. 7.37)

Box 4.2 Land Use Policy in Relation to Re-use of former or abandoned dwellings

The Re-use of Former/Abandoned Dwellings:

Policy LU09:
The Re-use of Former/Abandoned Dwellings

Within Service Centres and Linked Settlements the choice of renovation or re-build will be considered on its merits.

In the open countryside, re-use will only be permitted where:

1. The original dwelling:
    i. Has not been demolished, or fallen into such a state of disrepair so that it no longer has the substantial appearance of a dwelling;
    ii. Is capable of renovation. Where renovation is not practicable because the building is structurally unsound, detailed justification must be provided for re-build.
    iii. Is not a temporary or mobile dwelling;

2. The replacement dwelling is of a form, bulk, size, scale and high quality design that respects the qualities of the original building and the character of the surrounding area. The replacement building should respect the footprint of the original dwelling and should make re-use, where practicable, of the original materials;

3. The replacement dwelling and its associated works, subject

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to conditions, would not have a detrimental effect on the character of the landscape or on the open countryside.

Otherwise proposals will be deemed to be for new housing in the open countryside and determined in accordance with national guidance.

Source: Ceredigion County Council (2013) Ceredigion Local Development Plan 2007 - 22

Type 3 – Change of Use in Relation to Existing Employment, Trade or Tourism Sites

148.   In general, the Local Development Plan policies oppose the loss of existing sites used for employment, trade or tourism. **Box 4.3** contains an example extract from Policy LU16 in relation to hotels, guesthouses and B&Bs.

Box 4.3 Land Use Policy In Relation To The Re-Use Of Tourist Accommodation With Services

Policy LU16:
Tourism Accommodation – Types of Accommodation not covered by Policy LU14

In terms of types of accommodation not covered by Policy LU14, including; hotels, guest houses, bed and breakfast and hostels, the LDP will:

1. Resist the change of use of establishments where possible unless it can be demonstrated that;
   i. potential or continued use of the facility is unviable; or

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   ii. there is no demand for this type of accommodation; or
   iii. demand is adequately met by other providers in the Settlement Group.

Source: Ceredigion County Council (2013) Ceredigion Local Development Plan 2007 - 22

149.　　As regards retail uses, again there is a presumption in favour of retaining the existing use unless evidence could be presented that the facility is no longer viable. **Box 4.4** below refers to the relevant part of Policy LU21.

Box 4.4 Re-use of Shops

Policy LU21:
Change of Use from an Existing Retail Use

Applications for the change of use of land or buildings which currently have a retail use (A class) will be determined in accordance with the following:

2. Where a change of use is proposed in locations other than within a defined Town Centre (see Proposals Map), and it is the only provision within the existing use class for that specific settlement it will only be permitted where it can be demonstrated that its retention in its present use class is no longer viable, through appropriate marketing for a period of 12 months at an appropriate market value.

Source: Ceredigion County Council (2013) Ceredigion Local Development Plan 2007 - 22

Type 4 – Re-use of Community Facilities

150.   Regarding the conversion of community facilities (e.g. schools, halls, faith buildings), Policy LU22 seeks to protect such buildings. **Box 4.5** reproduces Clause 2 of the Policy.

Box 4.5 Re-use of Community Facilities

2. Resisting the loss or change of use of an existing community provision unless:

    i.   Alternative provision of at least equivalent local community value can be provided either within or adjoining the settlement or other settlements which are part of the Settlement Group. In relation to open space specifically, the alternative should be an enhanced provision which is preferably located within close proximity to the existing provision.

    ii. It can be demonstrated that existing level of community provision is inappropriate or surplus to the community needs of that settlement or Settlement Group; or

    iii. The current use has ceased to be viable and no other community use can be viably established.

A report will need to be submitted with any planning application for the change of use or loss of facility explaining why the loss or change of use is justifiable.

Source: Ceredigion County Council (2013) Ceredigion Local Development Plan 2007 - 22

Key Messages for Possible interventions the Housing Sector

➢ The development and use of land for the purpose of building a new house or modifying an existing building is guided by the requirements of the local development plan unless these are overriding material considerations.

➢ The current operational Local Development Plan (2007 – 22) recognises Llanarth as the only Rural Service Centre within the 4 Llan Area, a settlement with a development boundary around it and land allocated for housing within it.

➢ 12 "linked settlements" and 6 "other locations" have been recognised and categorised where the Plan, *ceteris paribus.* will give consideration to new affordable housing provided that the need can be proved, that it is within the threshold of growth of the development plan phase and would fit in with the existing built form of the settlement. However, nine of the settlements have already reached their growth threshold for the current Plan.

➢ There are a number of other possibilities where land or property already developed could be re-purposed to build affordable housing. Any such proposal would be measured against the relevant policy or policies.

➢ In due course Ceredigion County Council intends to resume the production of a new Local Development Plan but national planning policy is highly likely to limit the Council's ability to pursue significantly different growth location policies from the existing settlement hierarchy.

PART 5 SUMMARY AND CONCLUSION

151.   This report seeks to respond to the brief from the 4 Llan Worfking Group
which was to prepare a knowledge base for the area to enable the Working Group to
plan effectively and efficiently into the future – looking mainly at practical
interventions in housing.

152.   The report has looked specifically at formulating:

- A demographic and economic profile of the area.

- A general overview of local housing needs.

- A scoping review of the planning context in relation to the supply of local
property and land with potential for development to meet the housing needs of
local people.

153.   The report underlines that the area is generally typical of the situation in
rural Wales, but it also shows that there are significant variations within the area
that need to be considered when planning practical interventions in the housing
sector.
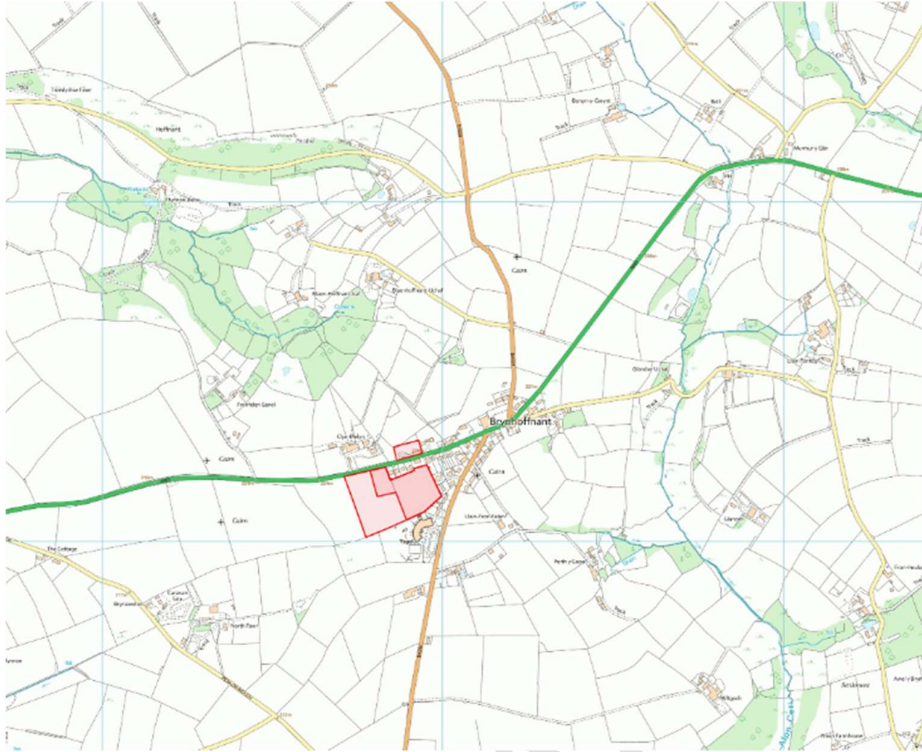
APPENDICES

APPENDIX 1

[Link to Detailed Tables]

APPENDIX 2 CEREDIGION NEW LOCAL DEVELOPMENT PLAN -Candidate Sites 2019

Anheddiad Agosaf CDLl 2 / Nearest Settlement LDP 2	Enw Lleoliad / Name Locations	Cyf AO / OS Reference	Arwynebedd ha / Area ha	Defnydd Presennol / Existing Use	Defnydd Arfaethedig / Proposed Use	Rheswm / Reason
Safleoedd Ymgeisio **fydd** yn cael eu Hystyried fel rhan o'r CDL Adenueol						
Candidate Sites **Progressing** for consideration as part of the Deposit LDP						
Cei Newydd	H1001 tu Cefn i Fferm Towyn	SN387596	2.19	Amaeth/Agri	Tai/Housing	CGG/RSC
Cei Newydd	tir Cnwc y Lili	SN400588	2.15	Amaeth/Agri	Tai/Housing	CGG/RSC
Brynhoffnant LLS	tir ger Glynmelyn	SN328512	0.31	Amaeth/Agri	Tai/Housing	CGG/RSC
Brynhoffnant LLS	tir Brynhoffnant	SN328511	1.11	Amaeth/Agri	Tai/Housing	CGG/RSC
Llannarth RSC	H1303 Cae ger Stad Allt y Bryn	SN420376	0.84	Amaeth/Agri	Tai/Housing	CGG/RSC
Llannarth RSC	Gwynfryn	SN420574	1.79	Amaeth/Agri	Tai/Housing	CGG/RSC
Llannarth RSC	H1302 Tir ger y Ficerdy	SN421576	0.83	Amaeth/Agri	Tai/Housing	CGG/RSC
Llannarth - RSC	tir rhan o Wenfron	SN427574	1.94	Amaeth/Agri	Tai/Housing	CGG/RSC
Safleoedd Ymgeisio **na fydd** yn cael eu Hystyried fel rhan o'r CDL Adneuol						
Candidate Sites **not considere for progressing** as part of the Deposit LDP						
Pontgarreg LS	Heol Millview	SN327541	0.17	Amaeth/Agri	Tai/Housing	DCGG/NRSC
Maen-y-Groes	tir ger Springfield	SN384584	0.28	Arall/Other	Tai/Housing	OAC/WLS
Mydroilyn	tir ger Brodwel	SN458552	0.33	Amaeth/Agri	Arall/Tai	OAC/WLS
Plwmp	tir Plwmp	SN366523	0.39	Amaeth/Agri	Tai/Housing	OAC/WLS
Plwmp	OS3652	SN367524	1.28	Amaeth/Agri	Tai/Housing	OAC/WLS

Allwedd	Key					
Cei Newydd	Safleodd tu allan ond ar gyrion y 4 Llan					
Brynhoffnant	Sites outside but adjacent to the 4 Llan					
Heb fod gerllaw Canolfan Gwasanaethau Gwledig presennol	Not adjacent to existing Rural Services Centre	DCGG/NRSC				
O fewn Annedd Cysylltiedig	Within Linked Settlement	OAC/WLS				
O fewn Anneddiadau Cysylltiol mwy o Faint	Within Larger Linked Settlements	ACM/LLS				
Canolfannau Gwasanaethau Gwledig	Rural Services Centres	CGG/RSC				

Llanarth

Brynhoffnant

Plwmp

Remainder of the 4 Llan Area