Housing Horizons

Establishing the Challenge

Data Resource

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Community Housing Cymru

savills

Contents

1. Foreword by Community Housing Cymru

Housing is a long term business. Housing Associations typically plan over 30 year or longer timeframes to deliver new, and continue to provide existing, high quality affordable homes. Conversely, funding certainty and political situations rarely last for more than five years at a time. Housing associations have a track record of flexibility and pragmatism, however this now needs to be balanced with a long term vision for the sector which can influence and lead policy decisions in Wales. To make this a reality we have embarked on *Housing Horizons,* an ambitious project to develop a shared vision, with our members, for housing associations in 2036.

This data resource has laid out the challenge before us, to continue to provide homes and services to a changing population with changing needs. It will stimulate discussions both within and outside Welsh housing associations on how we should rise to the challenge and continue to be a positive choice for people looking for a place to live or work.

Over the next two decades, Wales is projected to undergo major demographic changes which will impact heavily on the housing, care and support sectors. Our population is set to continue growing. In 2036 it is projected that there will be an additional 227,000 people aged over 65 in Wales. However, projections estimate 96,000 fewer working aged individuals in the same year, compared to the current population. Future changes to the sizes of households will impact on the demand for certain property sizes. It is projected that we will see a move away from three person families towards two person and one person households. Such changes will have far reaching implications for housing associations in Wales, the homes they develop and adapt.

A shrinking workforce and technological advances will change the way that housing associations operate. The rise of digital natives and increasingly agile working practices may see the end of office based working. Similarly, an increasingly digitally savvy population is already creating a demand for 24/7 services and access to support online. Working practices will inevitably have to change to meet this demand.

The challenge has been set. It is now up to us to develop a positive shared vision for how we see housing associations in 2036.

Stuart Ropke
Chief Executive, Community Housing Cymru

2. Executive Summary

Overall the report focuses on demographic, social and economic factors that will affect housing supply and services in 2036.

By 2036 the context for housing provision and management is likely to include:

Population

- A shift in the profile of the population
    - Increased population of people aged over 65
    - Reduced working age population
- Some local authority areas experiencing a reduced overall population

Households

- All local authorities having an increased the number of households (although some will see little change)
- A shift in the profile of households
    - Increased number of one person households
    - Increased multi-adult households with no children
- Household growth focused predominantly on Cardiff, followed by Swansea, Newport and Wrexham
- Half of all households headed by someone aged over 55
- One quarter of all households headed by someone under 40

Housing need

- 174,000 additional new homes required to cater for housing need
    - Of which 3,300 each year should be either social housing or private rent that caters for benefit claimants
- Mostly 1 and 2 bed homes required to cater for household growth
- Needs of larger households having changed in different ways in different areas

Help with housing costs

- Economic and demographic change at least sustaining the number of housing benefit claims

Housing stock

- Only 27% of homes less than 60 years old

Digital services

- 25% of households headed by a digital native
- Access to internet widespread, even for lower income households

Workforce

- A reduction in skills and experience of the workforce as the current workforce retires and the working age population declines, while the workforce itself grows
- A rise in part time employment that may affect affordability of homes, particularly for households headed by a single adult
- Loss of employment for people in some sectors and difficulty accessing newly created better paid roles.

This projected context has a number of implications for housing associations in terms of taking opportunities, protecting ability to provide homes, supporting communities and furthering social objectives. The 'needs' or opportunities implied by the changing context include:

Service provision

- Plan for a growing population of older people – their expectations and support requirements
- Adapt service provision to cater for digital natives
    - But recognise that the majority of the population will not be digital natives
- Expect to continue dual use of Welsh and English languages

Property ownership and management

- Increase housing supply, in particular of one and two bed properties
- Get ahead of population changes that will affect demand for and use of existing homes
- Cater for low income workers (provision of affordable accommodation)
- Continue to cater for the proportion of households that cannot rent without assistance and are excluded from home ownership by low income
    - Address the different needs and prospects of both working age and older households
- Address demand from older owner occupiers of older properties who want to reduce maintenance costs and/or have a more accessible home

Employer

- Ensure skills and experience are available to fill core roles
- Make use of potential to reduce administrative roles
- Expect to continue dual use of Welsh and English languages

Community anchor

- Sustain work to get tenants online
- Cater for tenants who lose employment as the economy shifts (e.g. advice, support, training)

3. Introduction

Introduction

Housing associations in Wales provide nearly 160,000 homes for around 10% of the population. They offer traditional and specialist housing alongside a range of other support services that benefit tenants, communities, and the wider economy. The role of housing associations over the next 5 years is fairly clear, and is set out in the Housing Pact. But where will associations be in 20 years time? A range of factors will shape this, not least the social and economic context they are working in.

This data resource for Community Housing Cymru's Housing Horizons project details anticipated changes to the Welsh housing context between 2017 and 2036. It has been compiled by Savills using existing data and analyses. These cover the size, demography, income, skills and housing needs of the population; the composition of the workforce; and the profile of housing stock. The researchers have added commentary on the potential implications of the projected changes on housing associations' businesses.

Data sources used are all publicly available, and sources are listed throughout the report.

The resource will support Community Housing Cymru and Welsh housing associations as they co-develop a vision for the sector in 2036. The report is aimed at housing association staff and other key housing sector figures in Wales. The projections and figures in the document will also be used to create a series of infographics and easy read documents that can help to stimulate discussion and debate.

Researcher biographies

Abigail Davies, Associate Director
Abigail is an Associate Director with the Housing Consultancy Team, specialising in strategy development, governance & regulation, and policy evaluation. Key skills are organisational insight, futures thinking and facilitation.

She works primarily in the social housing field to inform business strategy decisions and corporate knowledge in not-for-profit and for-profit organisations. Over the last 15 years she has gained an excellent reputation for her work to shape how housing is delivered in the UK and beyond.

Gwen Mansfield, Analyst
Gwen is an analyst in the Housing Consultancy team delivering financial and asset modelling projects for a range of clients as well as providing advice on the disposal and acquisition of social and private property portfolios.

Since joining Savills in 2014 Gwen has gained a wide breadth of experience across both the private and social residential sectors working in the Residential Capital Markets, Development and Regeneration and Valuation teams and is now focused in the social housing sector.

4. Demographics & Housing Need

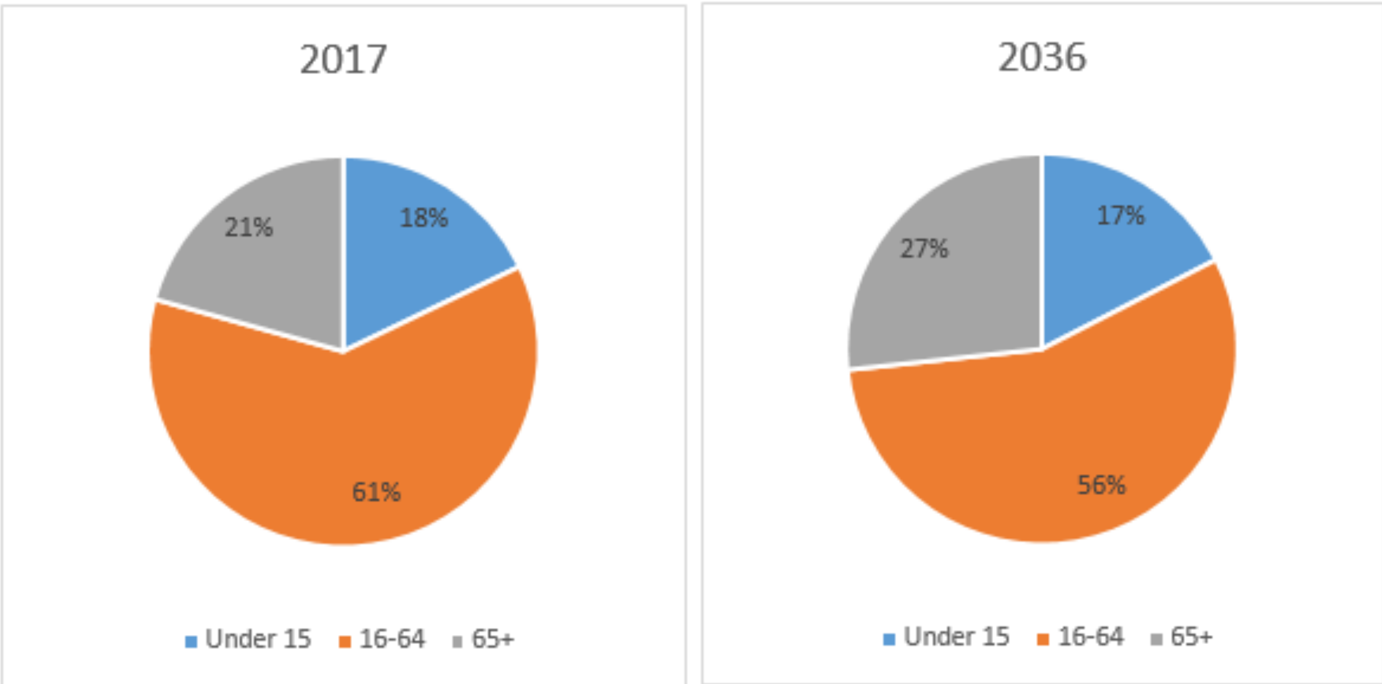
This chapter considers the shape of likely housing need and demand from the Welsh population in 2036

4.1 The overall projected number of households in 2036

The total population is projected to increase to just under 3.3 million in 2036. This is an increase of just over 133,000 people, or 4.3%, on the projected 2017 population1. Nearly all of this growth is accounted for by people aged over 65. It translates into an increase of 108,000 households by 2036, to just under 1.5m households.

The projections include a small increase in the number of children (2000), a fall in the number of working age people (-96,000) and a significant growth in the number of people aged over 65 (227,000). This causes a shift in the relative proportions of households in the different age brackets (shown below). The 2036 population is projected to comprise nearly 0.6m children, just over 1.8m people of working age, and nearly 0.9m people aged over 65.

Table 1 Change in Population Proportion between 2017 and 2036



Source: statswales.gov.wales

[1] This is an increase of just over 200,000 people, or 6.7%, on the population reported at the 2011 census.

By 2036 Powys, Blaenau Gwent, Isle of Anglesey, Pembrokeshire, Merthyr Tydfil and Torfaen are all projected to have smaller populations than currently, but nevertheless see an increase in people aged over 65. They are projected to have a near-static number of households. Only Powys is projected to have an overall decrease in the number of households.

The largest projected population growth, by some margin, is in Cardiff. Cardiff is also the only local authority area projected to see an increase in working age population. Few areas see much growth in the number of children, and many see a decrease. Cardiff is the exception with 22% of its growth accounted for by children. In most areas the growth in the number of people aged over 65 is quite striking in comparison to the changes in the number of children and working age people.

The period to 2036 sees the emergence of 6 areas where more than 30% of the population is over 65, compared to none currently. It also sees 20 out of 22 local authorities with less than 60% of the population of working age, compared to only 7 currently.

Table 2 Change in total population by age, by local authority 2017-36

	Under15	16-64	65+	Total
Isle of Anglesey	-691	-5,267	4,585	-1,373
Gwynedd	1,575	-193	6,734	8,117
Conwy	-729	-7,505	10,005	1,771
Denbighshire	-194	-4,754	7,000	2,053
Flintshire	-1,284	-9,656	12,692	1,751
Wrexham	-216	-155	10,563	10,192
Powys	-2,384	-16,524	11,453	-7,455
Ceredigion	1,179	-310	4,331	5,200
Pembrokeshire	-1,539	-8,693	9,393	-838
Carmarthenshire	-1,550	-9,667	14,636	3,419
Swansea	124	1,674	15,164	16,963
Neath Port Talbot	-697	-7,692	10,302	1,914
Bridgend	-141	-6,122	11,817	5,555
Vale of Glamorgan	-1,326	-8,780	10,687	582
Cardiff	15,496	29,531	24,651	69,678
Rhondda Cynon Taf	593	-6,573	13,750	7,770
Merthyr Tydfil	-1,504	-3,453	4,252	-704
Caerphilly	-1,917	-9,221	12,869	1,731
Blaenau Gwent	-1,112	-5,937	4,517	-2,531
Torfaen	-1,011	-5,969	6,792	-188
Monmouthshire	-1,301	-8,934	10,614	379
Newport	679	-1,738	10,216	9,158

Source: statswales.gov.wales

Projections also indicate changes in the proportions of the total population that live in the 22 local authority areas. Cardiff, Swansea, Newport, Wrexham, Gwynedd and Ceredigion are expected to have a greater share of the population than currently. All other areas are expected to have a smaller share than now.

Table 3 Population Growth by Local Authority with falls in share of population Highlighted

	2017	2036
Isle of Anglesey	2.25%	2.12%
Gwynedd	3.96%	4.04%
Conwy	3.75%	3.65%
Denbighshire	3.06%	3.00%
Flintshire	4.96%	4.81%
Wrexham	4.45%	4.58%
Powys	4.24%	3.84%
Ceredigion	2.44%	2.50%
Pembrokeshire	3.98%	3.79%
Carmarthenshire	5.96%	5.82%
Swansea	7.83%	8.03%
Neath Port Talbot	4.53%	4.40%
Bridgend	4.57%	4.55%
Vale of Glamorgan	4.11%	3.96%
Cardiff	11.67%	13.34%
Rhondda Cynon Taf	7.64%	7.56%
Merthyr Tydfil	1.90%	1.80%
Caerphilly	5.80%	5.62%
Blaenau Gwent	2.23%	2.06%
Torfaen	2.95%	2.82%
Monmouthshire	2.98%	2.87%
Newport	4.76%	4.84%

Source: statswales.gov.wales

Table 4 Change in Local Authority Demographics between 2017 and 2036

2017	Under15	16-64	65+
Isle of Anglesey	17%	57%	25%
Gwynedd	17%	60%	23%
Conwy	16%	57%	27%
Denbighshire	18%	58%	24%
Flintshire	18%	61%	21%
Wrexham	19%	61%	19%
Powys	16%	57%	27%
Ceredigion	14%	62%	24%
Pembrokeshire	17%	58%	25%
Carmarthenshire	17%	59%	24%
Swansea	17%	63%	20%
Neath Port Talbot	17%	62%	21%
Bridgend	18%	62%	20%
Vale of Glamorgan	18%	61%	21%
Cardiff	19%	67%	14%
Rhondda Cynon Taf	19%	62%	19%
Merthyr Tydfil	19%	63%	19%
Caerphilly	19%	62%	19%
Blaenau Gwent	17%	63%	20%
Torfaen	19%	61%	20%
Monmouthshire	16%	59%	25%
Newport	20%	62%	18%

2036	Under15	16-64	65+
Isle of Anglesey	17%	51%	33%
Gwynedd	17%	56%	27%
Conwy	15%	50%	35%
Denbighshire	18%	52%	31%
Flintshire	17%	54%	29%
Wrexham	18%	57%	25%
Powys	15%	47%	38%
Ceredigion	15%	58%	28%
Pembrokeshire	16%	51%	33%
Carmarthenshire	16%	53%	31%
Swansea	16%	60%	24%
Neath Port Talbot	17%	55%	28%
Bridgend	17%	55%	28%
Vale of Glamorgan	17%	53%	29%
Cardiff	19%	63%	18%
Rhondda Cynon Taf	18%	58%	24%
Merthyr Tydfil	16%	57%	26%
Caerphilly	18%	56%	26%
Blaenau Gwent	16%	56%	27%
Torfaen	18%	55%	28%
Monmouthshire	15%	49%	36%
Newport	19%	58%	23%

Source: statswales.gov.wales

The implications of these projected population changes are:

- An increase in the total number of people requiring accommodation
- A need to understand and plan for housing requirements at the local level rather than relying on national averages
- All areas will need to prepare for an increase in the number of people who may want to access housing and services that cater specifically for life in later years
- Some areas will need to manage a declining population alongside changes within the shape of that population e.g. less housing needed overall but possibly a requirement to increase the number of homes that cater for older people
- Possible changes in economic activity linked to changes in the working age population, which are explored further in chapter 5.

4.2 Projected need and demand across the range of property sizes

It is projected that there will be nearly 1.5m households in 2036, an 8% increase on 2017. Projected household growth is concentrated in a small number of local authorities, with nearly one third of the increase being in Cardiff.

Table 5 Difference and % change in number of households by local authority 2017-2036

	2017	2036	Difference	% change
Isle of Anglesey	31,145	31,456	311	1%
Gwynedd	53,922	58,831	4,909	9%
Conwy	52,411	54,343	1,931	4%
Denbighshire	41,550	42,961	1,411	3%
Flintshire	65,830	69,279	3,449	5%
Wrexham	59,530	66,345	6,816	11%
Powys	59,389	58,423	-965	-2%
Ceredigion	32,151	34,835	2,684	8%
Pembrokeshire	54,871	56,575	1,704	3%
Carmarthenshire	80,713	84,457	3,744	5%
Swansea	107,885	121,494	13,610	13%
Neath Port Talbot	61,458	63,843	2,385	4%
Bridgend	60,775	65,402	4,627	8%
Vale of Glamorgan	55,452	58,676	3,223	6%
Cardiff	152,758	189,383	36,625	24%
Rhondda Cynon Taf	103,571	113,011	9,441	9%
Merthyr Tydfil	24,533	24,620	87	0%
Caerphilly	76,426	79,889	3,463	5%
Blaenau Gwent	30,892	31,118	227	1%
Torfaen	39,453	40,745	1,292	3%
Monmouthshire	39,536	41,261	1,725	4%
Newport	63,102	69,285	6,183	10%
Total	**1,347,354**	**1,456,234**	**108,881**	**8%**

Source: statswales.gov.wales

Two thirds of households in 2036 will be one and two person with no children. 25% will be households with children and 9% multi-adult (not including 2 adult households).

The composition of households is projected to change between now and 2036. The largest increase is in one person households, which is likely to correlate with the increasing number of people aged over 65 and increasing rates of divorce/separation. Multi-adult households with no children account for much of the rest of the growth – this probably reflects both the ageing population (couples), student numbers (house shares with peers), and affordability pressures for younger single people (house shares with family or peers). There is a projected decline in the number of couples with children, which perhaps links to the declining working age population.

Other patterns are more difficult to articulate, for example there is a projected increase in the number of households comprising single adults with children, but the total is slightly reduced by a projected fall in the number of single adults with two children.

Table 6 Total number of households 2036 and change in household composition 2017-2036

	Total 2036	**Change 2017-36**
1 person	517,711	87,417
2 person (No children)	440,121	19,725
2 person (1 adult, 1 child)	65,367	12,329
3 person (No children)	85,870	-5,614
3 person (2 adults, 1 child)	83,023	-2,330
3 person (1 adult, 2 children)	24,409	-747
4 person (No children)	36,123	3,179
4 person (2+ adults, 1+ children)	115,124	-4,993
4 person (1 adult, 3 children)	9,397	312
5+ person (No children)	14,438	3,302
5+ person (2+ adults, 1+ children)	60,948	-3,928
5+ person (1 adult, 4+ children)	3,705	229
Total	**1,456,234**	**108,881**

Source: statswales.gov.wales

These national differences conceal important variations across local authorities. For example, Cardiff is projected to see 39% growth in single person households, whilst Merthyr Tydfil might see only 1% growth in these households.

Table 7 Projected percentage change in number of households by local authority and household composition

	1 person	2 person (No children)	2 person (1 adult, 1 child)	3 person (No children)	3 person (2 adults, 1 child)	3 person (1 adult, 2 children)	4 person (No children)	4 person (2+ adults, 1+ children)	4 person (1 adult, 3 children)	5+ person (No children)	5+ person (2+ adults, 1+ children)	5+ person (1 adult, 4+ children)
Isle of Anglesey	14.06%	-4.49%	-2.74%	-10.79%	-7.72%	-17.04%	3.39%	-8.52%	-9.19%	36.29%	-7.55%	14.63%
Gwynedd	20.72%	1.80%	5.82%	-12.15%	4.74%	-0.59%	3.70%	-0.99%	28.65%	48.10%	5.15%	24.96%
Conwy	10.94%	2.14%	14.08%	-2.48%	-14.83%	5.70%	4.49%	-2.18%	-0.41%	19.14%	-8.86%	3.21%
Denbighshire	7.30%	3.61%	16.00%	-2.92%	-9.25%	-1.56%	9.96%	-2.40%	14.26%	4.57%	-2.54%	36.49%
Flintshire	16.74%	5.65%	30.69%	-14.00%	-4.97%	2.77%	-9.84%	-6.32%	2.15%	21.20%	-10.93%	23.44%
Wrexham	22.95%	7.21%	34.21%	-1.39%	11.63%	19.73%	1.92%	-1.57%	36.45%	22.32%	-17.36%	45.63%
Powys	7.86%	-0.05%	21.95%	-21.73%	-18.77%	-12.45%	-27.52%	-15.61%	-4.33%	32.25%	-21.75%	23.50%
Ceredigion	16.99%	-2.20%	36.73%	6.14%	9.13%	2.07%	23.96%	5.78%	21.25%	-9.41%	9.57%	-23.22%
Pembrokeshire	16.10%	0.19%	20.42%	-14.91%	-20.07%	-17.30%	8.55%	-9.95%	-3.77%	14.26%	-4.46%	0.76%
Carmarthenshire	12.43%	4.89%	28.23%	-9.46%	-11.54%	-2.18%	8.31%	-9.32%	-3.84%	29.44%	-4.46%	17.66%
Swansea	27.99%	8.32%	29.48%	-10.99%	-2.36%	-3.46%	5.58%	-2.65%	-2.42%	29.17%	-7.17%	-20.83%
Neath Port Talbot	10.69%	6.37%	13.59%	-8.10%	-8.87%	-14.03%	5.64%	-4.75%	-17.10%	29.37%	-3.81%	0.04%
Bridgend	18.77%	6.81%	22.90%	-1.33%	-6.74%	-1.96%	25.63%	-9.57%	10.84%	37.06%	-10.59%	22.22%
Vale of Glamorgan	23.21%	1.56%	8.68%	-8.20%	-4.06%	-12.67%	12.10%	-7.66%	1.89%	36.84%	-19.98%	-11.54%
Cardiff	39.21%	16.54%	27.57%	2.57%	19.63%	-10.79%	21.98%	19.38%	1.37%	33.65%	13.80%	-12.27%
Rhondda Cynon Taf	25.55%	2.42%	37.44%	-7.87%	-3.02%	20.47%	6.53%	-10.18%	13.75%	7.73%	-15.86%	5.12%
Merthyr Tydfil	1.19%	4.32%	17.15%	5.09%	-11.64%	-31.11%	28.11%	-15.58%	-25.99%	24.25%	-12.38%	-37.21%
Caerphilly	14.81%	4.24%	25.56%	-5.59%	-7.82%	-7.21%	14.05%	-10.05%	-9.49%	28.63%	-11.92%	38.61%
Blaenau Gwent	12.27%	-1.33%	7.76%	-2.43%	-5.22%	-16.23%	-2.09%	-19.03%	-19.20%	6.01%	-14.21%	-38.90%
Torfaen	15.10%	-2.01%	17.58%	-2.06%	-0.45%	10.24%	7.28%	-9.22%	2.15%	29.01%	-15.87%	-20.68%
Monmouthshire	17.27%	5.69%	-10.50%	-7.31%	-8.56%	4.53%	4.64%	-11.72%	11.95%	32.35%	-14.18%	24.76%
Newport	24.50%	2.01%	22.94%	-3.29%	-2.39%	-22.53%	19.70%	-0.36%	3.62%	69.45%	-0.49%	-15.54%

It is notable that even areas projected to have a declining population overall are projected to see double digits percentage growth in some household types e.g. Isle of Anglesey is projected to see 14% growth in the number of single person households and 36% growth in the number of 5+ adult households. This presumably reflects the student population, in-migration of older households and the general ageing of the population. It reinforces the need to understand and plan for local markets.

This information does not convert very reliably into the number or type of additional properties that may be required to house these households because it does not show the exact household composition or give any indication of their preferred living arrangements. Indeed, national housing need projections, which are based on the same data, report on the need to cater for particular household types and the tenures that might suit them, rather than the size of accommodation that may be required. However 85% of the gross growth is one and two adult households with no children, which certainly indicates the majority of property needed to cater for household growth could be additional 1 or 2 bed properties (to meet need and probably aspiration). Some areas are projected to have a striking increase in larger households, which will need to be separately understood and catered for. Many areas see a falling number of larger households, and strategies will be required to deal with declining demand of stock regardless of whether it sits in the social or market sector.

Government projections of housing need indicate a need for 174,000 new homes between 2011 and 2031[2]. All areas have some need for new homes, even those projected to have a drop in population and/or a static number of households over that period. This reflects the need to replace or provide alternatives to unsuitable stock and cater for changing needs i.e. changing compositions within the total number of households. The projection is for 65,000 (37%) of these new homes to be in the social sector (which includes private rent supported by housing benefit), which would require 3,300 new homes to be built each year.

The late Alan Holmans produced an alternative projection, based on the belief that recent trends suppressing household growth would be reversed. He suggested a need for 240,000 new homes between 2011 and 2031, with 84,000 (35%) in the social sector or supported by housing benefit, which would require 4,200 new social sector homes to be built each year.

The table below showing local authority-level breakdown of % increases in stock required does not exactly match the % increases in households for local authority areas shown above, but it does mirror them. They could therefore be a fair guide for the more detailed need that must be addressed.

[2] Future need and demand for housing in Wales, 2015

Table 8 Future Demand and Need for Housing in Welsh Districts 2011- 2031

	Market sector		Social sector		Total	
	require-ment in '000s	% of district total	require-ment in '000s	% of district total	require-ment in '000s	% of national total
Anglesey	0.7	50%	0.7	50%	1.4	1%
Gwynedd	5.2	69%	2.3	31%	7.5	4%
Conwy	2.1	68%	1	32%	3.1	2%
Denbigh	2.2	54%	1.9	46%	4.1	2%
Flintshire	3.1	60%	2.1	40%	5.2	3%
Wrexham	8.7	67%	4.3	33%	13	7%
Powys	3.8	67%	1.9	33%	5.7	3%
Ceredigion	1.7	59%	1.2	41%	2.9	2%
Pembrokeshire	3.1	53%	2.7	47%	5.8	3%
Carmarthenshire	5.8	56%	4.5	44%	10.3	6%
Swansea	11.8	63%	6.8	37%	18.6	11%
Neath Port Talbot	1.2	40%	1.8	60%	3	2%
Bridgend	5.1	64%	2.9	36%	8	5%
Vale of Glamorgan	6.1	85%	1.1	15%	7.2	4%
Cardiff	33.7	72%	12.9	28%	46.6	27%
Rhondda Cynon Taff	4.3	48%	4.6	52%	8.9	5%
Merthyr Tydfil	0.9	47%	1	53%	1.9	1%
Caerphilly	2.2	40%	3.3	60%	5.5	3%
Blaenau Gwent	-1.1	-58%	2	105%	1.9	1%
Torfaen	0.9	41%	1.5	68%	2.2	1%
Monmouthshire	1.1	52%	1	48%	2.1	1%
Newport	7	65%	3.7	35%	10.7	6%
Wales	109	63%	65	37%	174	100%

Source: Future Need and Demand for Housing in Wales, September 2015, Public Policy Institute for Wales

Some areas are earmarked for social housing to be a particularly high proportion of the overall total. A delivery model that enables this (i.e. not planning gain) will be required.

The total number of homes suggested to be required each year has not been reached for at least 10 years, with the social sector having produced nowhere near the suggested annual output of social housing for over 20 years. The new supply challenge is therefore particularly acute.

The implications of these projected changes in need and demand are:

- Supply of new homes must be stepped up
    - Focus should be on 1 and 2 bed homes but in some areas attention should be given to larger homes
- Efforts to produce new supply should focus on Cardiff, Swansea, Wrexham and Newport
- Some housing stock / provision will need to be remodelled to get ahead of changes in patterns of need
- Funding models that are effective where new supply of social / low cost PRS accommodation outstrips market provision are required

- The growth in single adult households may see a growth in households with restricted employment opportunities or particular needs for support to access employment.

4.3 Projected proportion and number of households in specific age groups

The housing need projections to 2031 give an indication of the number and type of households in different age groups.

Households aged over 65 will make up over one third of all households, and households aged over 55 will make up over half of all households.

One quarter of all households will be in the age group that currently (in 2017) finds it difficult to afford property i.e. under 40.

Table 9 Projected households in Wales in 2031 (,000s)

Age	All households	One person	Lone parent	Couple	Other
Under 35	251	56	39	141	15
35-54	425	136	56	220	13
55-64	247	80	5	150	12
65+	544	239	3	275	27
Total	**1467**	**511**	**103**	**786**	**67**

Source: Future Need and Demand for Housing in Wales, September 2015, Public Policy Institute for Wales

The implications of these changes in number and composition of households include:

- The older age group will command particular attention in terms of suitability of housing provision
- The needs of younger people may less visibility due to the size of the older group.

4.4 Projected proportion of households who will be above state retirement age in 2036

State retirement age will be linked to life expectancy after 2028 and will be reviewed every 5 years. In 2027-28 it will be 67. So, if current policies continue to apply for the foreseeable future it is reasonable to assume the retirement age could be 68 in 2036. However, projections are currently presented in 5 year age bands so 65+ is the closest age bracket that can be illustrated.

As stated above, over one third of households will be headed by someone aged 65+ by 2036. Using the projections cited above, there would be just over 0.5m households over retirement age, with about half of which living along and half living in a couple. Of the 0.5m, 100,000 are projected to be over 85, with three quarters of which living alone. This is a group of people likely to have higher needs in terms of access to suitable accommodation and additional support services. Currently the needs of this group are not well met by the market, other than for better off households.

The implications of the proportion of households expected to be above state retirement age include:

- Exacerbation of the challenges of catering for the housing and support needs of people aged over 85
- Greater requirement for provision of homes and associated services to meet the specific needs of older households.

5. Workforce & Incomes

This chapter considers the likely profile of the population as regards employment, income and ability to meet housing costs

5.1 Projected workforce size in 2036

Workforce projections do not extend to 2036. Projections to 2024 indicate around 4% growth in the workforce, which compares to a 2% projected fall in the working age population over that period. This growth therefore relies on adults moving into employment when they were not previously employed. The majority of that growth is in part time roles, which generally have lower incomes. Despite this growth the split of full time, part time and self-employed roles is projected to stay more or less the same in the 10 years between 2014 and 2024. Part time roles, particularly for single person or single earner households, have a direct link to affordability of housing.

Table 10 Workforce Predictions

Employment Status	FT	PT	SE	Total
2014	773,659	432,808	205,799	1,412,266
2019	787,408	450,277	203,213	1,440,898
2024	794,921	472,919	198,048	1,465,888

Source: https://www.gov.uk/government/publications/labour-market-projections-for-wales

Table 11 Changes in Employment Status

	FT	PT	SE	Total
2014-2019	13,749	17,469	-2,586	28,632
2019-2024	7,513	22,642	-5,165	24,990
2014-2024	21,262	40,111	-7,751	53,622

Source: https://www.gov.uk/government/publications/labour-market-projections-for-wales

The implications of these changes in workforce size and employment status include:

- Housing provision may need to cater for a growing cohort of households with lower incomes due to part time work
- Employers may need to up skill employees who have limited workplace experience.

5.2 Projected proportion of households who will be in employment in 2036

A workforce projection of 1.47m in 2024, compared to 1.41m in 2014, gives an approximate employment rate of 77% compared to 73%. This is a function of a growing workforce and declining working age population.

It is beyond the scope of this report to project the workforce beyond 2024. However it is worth observing that the 2017 employment rate for 16-64 year olds is 73%[3], so to move to 77% by 2024 will require some proactive support, training and recruitment. Population projections do extend to 2036, and they show that the fall in working age population is likely to be

[3] ONS National Labour Survey April 2017

greater from 2017-2024 than between 2024-36. Perhaps the greatest changes impacting the shape of the 2036 workforce will actually be seen in the immediate future.

The implications of the projected changes in the proportion of households in employment include:

- Although the number of people available for work will have increased, their skills and experience may not match employers' requirements.

5.3 Projected demography of the workforce in 2036

34% of the current workforce will have passed retirement age by 2036[4]. Assuming the same proportion of people leave the workplace and the same number of roles remain in the economy, that requires the skills of just under 0.5m people to be replaced. However, the working age population will be smaller in 2036 than it is now, in real terms, so employers will have a smaller pool of people to draw on.

Across the UK, education, health and social work, and public administration and construction are known to have a high proportion of the workforce aged over 50 and a high fall in employment rates over as people move between age 50 and 60[5]. All of these sectors are relevant to the provision and management of housing. Real estate, which is perhaps more directly relevant to housing management, has a higher proportion of older employees but is better at retaining them. With an ageing population and an increasing retirement age jobs will have to be attractive to, and suitable for, older people.

Timely recruitment and training of younger people, bringing more working age adults into the workforce, use of technology, and support (such as flexible working) to attract new workers and retain older people in the workforce can all help to address the dual challenges of loss of skills, a decreasing working age population, and longer working lives.

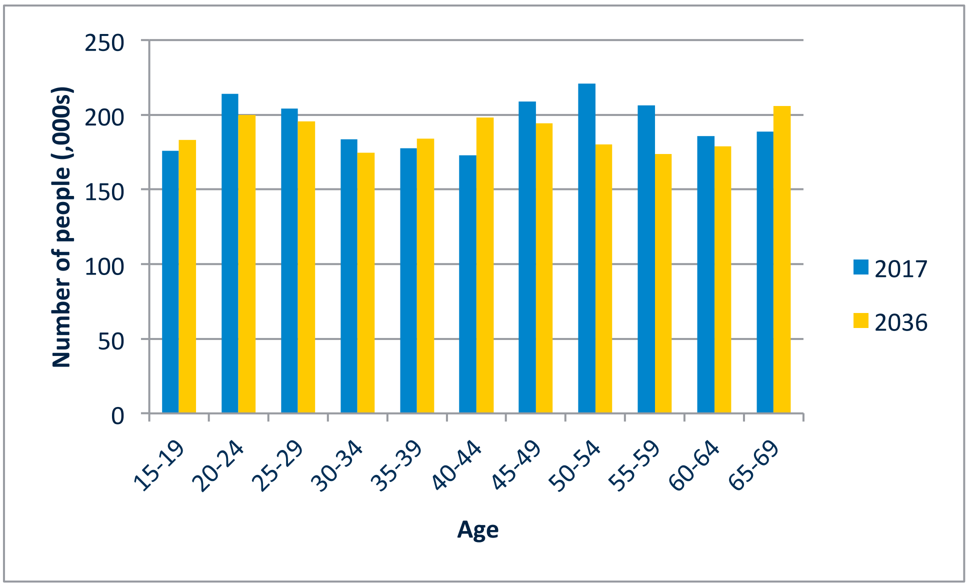
In addition to large numbers of retirements from the current workforce, the age profile of the workforce may look slightly different in 2036 than it does now.

Although not everybody of working age will be part of the workforce, changes to the profile of the working age population are likely to be reflected in the workforce. Population projections suggest there will be fewer people in the 20-34 age bracket than there are today, more people in the 35-44 age bracket, and fewer people in the 45-64 age bracket. There are also projected to be more people in the 15-19 age bracket – this is the group of people who will be just about to enter the workforce in 2036. [6]

This may mean there are more people beginning their careers now who could be brought into professions that support housing associations, in anticipation of the high levels of retirement described above. This could assist employers that want to act on the suggestions about recruitment and training of younger people made above. Looking forward from 2036 this trend may be waning, although if the 35-44 year olds benefited from early career investment then there may be increased availability of people who have a decade or more of relevant work experience behind them.

[4] ONS Labour Force Survey, April 2017
[5] CIPD, Avoiding the demographic crunch, June 2015
[6] ONS, Principal population projection, October 2015

Table 12 Age profile of the working age population



Source: ONS Wales population in age groups 2014 based projections

The implications of changes in the demography of the workforce include:

- Housing providers may be exposed to high retirement rates from disciplines that are central to delivery of their functions
- Employers may need to replace lost skills from a reduced population, so they may need to focus on training and employer attractiveness
- A need to reduce exposure to loss of skills, for example by focusing on suitability and attractiveness of roles for older employees
- Immediate opportunities to bring younger employees into housing associations and the professions that support them.

5.4 Projected changes to composition of industries within the economy

The Welsh government has produced some projections on number of people in work, type of jobs and qualifications required for them up to 2022. Fairly significant changes in the make-up of the economy are projected. Some sectors are projected to shed quite large numbers of employees. Manufacturing and public administration are projected to see large reductions (in numbers more than percentages). Both could have a bearing on current or future social housing tenants. Areas of high proportional expansion look to be professional sectors that could have barriers of entry for people looking to establish or change career into them, especially if they need to move from a declining sector. Health and social work, and construction to a lesser extent, are projected to increase significantly in numbers, which may offer opportunities although incomes are often low.

Table 13 Projections of employment for 22 industry groups

	2012	2022	Exp.	% Exp.	Rep.	Total
Agriculture	35,300	31,900	-3,300	-9.4	16,100	12,800
Mining and quarrying	3,000	2,500	-500	-16.0	900	400
Food drink and tobacco	21,400	18,900	-2,500	-11.7	7,200	4,700
Engineering	20,300	18,300	-2,100	-10.1	6,800	4,700
Rest of manufacturing	106,600	98,400	-8,200	-7.7	35,300	27,100
Electricity and gas	9,700	11,400	1,700	18.0	3,600	5,400
Water and sewerage	10,900	11,700	800	7.4	4,100	4,900
Construction	87,200	96,800	9,600	11.0	30,700	40,300
Wholesale and retail trade	192,400	195,800	3,400	1.8	73,900	77,300
Transport and storage	47,100	51,800	4,700	9.9	18,800	23,400
Accommodation and food	95,000	102,500	7,500	7.9	38,600	46,100
Media	7,600	7,900	200	3.1	2,800	3,100
Information technology	18,500	22,600	4,100	22.1	7,000	11,100
Finance and insurance	32,100	40,000	8,000	24.9	13,400	21,400
Real estate	15,900	19,900	4,000	25.2	7,200	11,200
Professional services	58,200	66,100	7,900	13.7	23,400	31,300
Support services	88,100	95,700	7,500	8.5	34,800	42,300
Public admin. and defence	85,100	77,300	-7,800	-9.1	29,500	21,800
Education	146,400	141,800	-4,700	-3.2	60,000	55,300
Health and social work	207,300	230,600	23,300	11.3	85,900	109,200
Arts and entertainment	34,200	35,400	1,200	3.4	14,000	15,100
Other services	40,100	42,600	2,400	6.1	17,000	19,500
All industries	**1,362,500**	**1,419,900**	**57,400**	**4.2**	**531,000**	**588,400**

Source: UK Commission for Employment and Skills labour market projections

These figures cannot be used to deduce ability to reduce labour costs in social housing provision, although there is an implied expectation around administration. The potential to save through use of technology or other modernisation of functions should be explored separately.

Some general implications of these projected shifts in the labour market include:

- Social landlords may see some existing tenants falling out of employment. Consequently, they may be able to support some tenants to remain in employment by offering access to skills and retraining
- Where employment support is offered, the nature of support will need to take account of changes in the job market so that people can be equipped for roles that will continue to be available in the future
- In future there will be changes in the nature of opportunities for people who lack skills, and wages are likely to be low. This could impact on demand for social housing, especially where the main earner in the household is affected.

5.4 Projected proportion of households who will be claiming housing costs through the benefit system in 2036

Benefits forecasts are available at UK level for 5 years to March 2022. The most recent projection for housing benefit claims was that it would remain steady across the 5 year period. Interestingly the projection has been revised down since the summer budget in 2015.

Table 14 Total housing benefit caseload (,000s)

	2015/16 Outturn	2016/17 F/C	2017/18 F/C	2018/19 F/C	2019/20 F/C	2020/21 F/C	2021/22 F/C
HA/PRS	182	177	182	182	182	183	183
LA	61	60	61	61	60	60	60
Total	**243**	**237**	**243**	**243**	**242**	**243**	**243**

Source: Department for Work and Pensions Autumn Statement 2016 Expenditure and Caseload Forecasts

If the Westminster government expects housing benefit claims to hold steady across the UK, that assumption could be extended to Wales for illustrative purposes. This would mean around 160,000 social rent claimants and 6,000 private rent claimants in 2022.

Table 15 Current benefit caseload for social rented housing in Wales by age

	Under 25	25 to 34	35 to 44	45 to 49	50 to 54	55 to 59	60 to 64	65 to 69	70 plus	Total
Social rented	7,757	22,729	23,151	13,356	13,726	12,885	12,965	14,850	36,940	158,359
Private rented	5,730	19,014	16,941	7,394	6,548	4,934	4,018	4,102	7,575	5,730

Source: Stat-Xplore November 2016 Caseload for Welsh Westminster Parliamentary Constituencies

A way to consider possible longer term patterns could be to map benefit claims against projected population increases. Projected claims for 2021 are equivalent to 12% of households (using 2021 household projections). If extended to 2036, 12% of all households would be 176,040.

In practice economic performance and future welfare rules would have a bearing on the number of welfare claims, as well as age profile of the population. The figure above is illustrative only.

It is difficult from these government projections to see what is happening below the surface e.g. changes in eligibility, employment, or housing costs. Looking at section 5.2 we might expect a smaller call on benefits from working age households. However, transition to the industry composition shown in 5.4 could create additional need for support from working age households.

With such speculative figures it is hard to comment on implications. However:

- There is likely to be an ongoing need to cater for households who can benefit from low rents and who know they are unable to buy a home – this will also benefit government due to reduced pressure on expenditure.

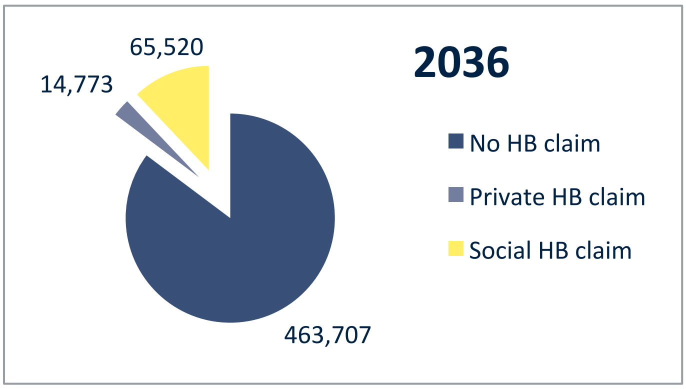
5.5 Projected proportion and number of households who will be retired but unable to meet housing costs through their pension/savings income in 2036

There is no benefit caseload projection beyond 2022. Using the DWP assumption that caseload will not increase by 2022, in the social sector, nearly 52,000 projected claimants would be over 65 - this is one third of claimants. Across all rented properties, around 38% of claimants are expected to be over 65. Note that this assumes there is no change in the age breakdown of claiming households, as well as no change in the overall caseload, which may not be the case.

A way to consider possible longer term patterns could be to map benefit claims against projected population increases. Projected claims for 2021 are equivalent to 12% of households (using 2021 household projections). If extended to 2036, 12% of all households would be 176,040.

If population projections are overlaid onto current benefit caseloads, 66,000 households aged 65+ would be claiming housing benefit for social housing in 2036 (80,000 total). This illustrates the impact of the increase in the 65+ population which features in the population projections to 2036.

Table 16 Possible pensioner housing benefit caseload for social and private rented sectors 2036



Source: Stat-Explore, StatsWales and DWP Autumn Statement Forecasts

In practice economic performance and future welfare rules would have a bearing on the number of welfare claims, as well as age profile of the population. The figures above are illustrative only.

With such speculative figures it is hard to comment on implications. However:

- There is likely to be a growing need to cater for older households who can benefit from low rents – this will also benefit government due to reduced pressure on expenditure.

6. Housing Association Stock and Services

This chapter considers the likely profile of housing association stock and some social factors that could affect how associations undertake customer-facing services

6.1 Projection(s) of the age of housing stock in 2036 and any future maintenance/improvement challenges this will bring

Data on housing stock is very old, and the different tenures are not separated out. The refresh due in 2018 will give a useful update.

Looking at the whole Welsh housing stock the striking feature is the high proportion of very old stock. Assuming no demolitions, around 29% of stock would be over 90 years old by 2036. Only around 27% would be less than 60 years old.

Table 17 Age of all housing stock

Date of construction	Number	% of total
Pre 1850	56780	4.5
1850 - 1899	151185	11.9
1900 - 1918	175098	13.8
1919 - 1944	138716	10.9
1945 - 1964	269025	21.2
1965 - 1974	180816	14.3
1975 - 1980	72748	5.7
1981 - 1990	94362	7.4
1991 - 1995	36578	2.9
1996 - 2002	61533	4.9
Post 2002	31580	2.5
Total	1268419	100

Source: 2008 Living in Wales survey

Around 63,000 homes have been built since 2006 which are additional to those reported in this survey. They are included in the percentages given above.

The implications of the age profile of housing stock include:

- For all property owners in general, high maintenance costs linked to age of property
- Likely challenges around suitability of property for older people, in terms of accessibility, adaptability, and affordability of maintenance costs
- Possible demand from older owner occupiers for rented housing (i.e. no maintenance cost for resident) as well as for new build accessible/adaptable housing

6.2 Projection(s) around the method of service delivery housing associations will undertake to their tenants and the wider community in 2036. With a focus on:

- **The rise of digital natives and their expectations.**
- **The proportion of housing association tenants who will remain internet illiterate in 2036**

Digital natives

It is very hard to foresee technological developments/ norms 20 years hence. However, there will be a proportion of the population who are digital natives i.e. people who have always used or had access to digital platforms to support access to services, entertainment, information, social interactions etc. Based on projected age of households in Future Housing Need in Wales, in 2036 25% of households might be headed by someone who is a digital native (i.e. aged 18-39).

Their expectations about 24 hour access to information and ability to transact business online will be stronger than those of the current adult population. They will be accustomed to providing information in different formats and in different timescales, and to dealing with multiple tasks at the same time. They also expect to be able to access digital services wherever they are.

Implications of the rise of digital natives include:

- Opportunities to do more via digital platforms (possibly reducing costs)
- Need to recognise that the majority of people will not be digital natives by 2036, and may have different expectations of service provision.

Digital literacy

The Digital Wales strategy has a target that everyone who wants to can get online by 2020. This is not the same as every person being able to get online by 2020. Current figures show high rates of digital exclusion for social housing tenants.

Table 18 Percentage of households with internet access, by tenure

		Yes	No
Tenure	Owner-occupied	**81**	**19**
	Social housing	**61**	**39**
	Private rented	**81**	**19**

Source: StatsWales, National Survey for Wales, 2014-15

Using number of social housing properties as a proxy for number of households living in social housing, this would suggest there were 53,500 households in social housing without internet access in 2014-15. However, this was down from 60,300 the year before. This rate of annual reduction would deliver universal internet access in 7 years.

Implications of the change in internet access include:

- Potential for the gap to be closed if landlord action, government investment, and changes in commercial service provision are sustained
- A need to remember that access to the internet is not synonymous with digital literacy.
- Nevertheless, an opportunity for greater focus on channel shift and digital inclusion.

6.3 Projection(s) of the number and proportion of the population who:

- **Are fluent Welsh speakers**
- **Use Welsh daily**

There is quite a volume of data on use of the Welsh language, but few forward projections. The most recent projection suggests just over 20% of the population will be able to speak Welsh in 2031.

Table 19 Projected ability to speak Welsh (population aged over 3 years)

	2001	2011	2021	2031
% able to speak Welsh	20.8	20	20	20.3
Number able to speak Welsh	582,000	583,000	617,000	654,000

Source: A statistical overview of the Welsh language; Hywel M Jones; Welsh Language Board; 2012

This work was completed before 2011 Census data was available, but its projection for 2011 is broadly the same as Census figures. It suggests the proportion of Welsh speakers would hold steady but not increase much by 2031. An upper bound is also considered, where the transmission rate (i.e. Welsh speakers passing language skills to their children) is assumed to increase. This projection shows that the number of Welsh speakers could be above 800,000 in 2031, and the percentage around 26%.

It is notable that recent Annual Population Surveys report significantly higher incidence of Welsh speaking than the Census. If the projections above were revisited now it is possible that they could be higher.

Data over the last few years probably reflect the impact of investment in Welsh medium education, which has driven an increase in the number of younger people able to speak Welsh. It could be assumed that continued investment over time would lead to sustained increases as the proportion of the population that has received Welsh language education grows. However, population projections do suggest a falling working age population, and the prospect of outward migration of people who have received a Welsh language education needs to be taken into account.

Although some areas report over 50% of the population speaking Welsh, Wales overall is starting from an overall average of less than 30%, so the difference between the north and west, and the rest of the country is likely to persist.

Table 20 2016 estimates of number and percentage of people aged over 3 who can speak Welsh

		Yes, can speak Welsh	Percentage of people who say they can speak Welsh
Wales		843700	27.4
Wales	Gwynedd	86200	71
	Isle of Anglesey	43100	62
	Ceredigion	41100	55.8
	Carmarthenshire	90700	49.9
	Conwy	43400	37.9
	Denbighshire	34500	36.6
	Pembrokeshire	35000	28
	Wrexham	37000	27.2
	Powys	34400	26.3
	Rhondda Cynon Taf	53800	22.8
	Caerphilly	39900	22.2
	Neath Port Talbot	30700	21.9
	Swansea	51600	21.4
	Flintshire	30300	19.7
	Merthyr Tydfil	11500	19.6
	Newport	27300	18.7
	Vale of Glamorgan	23300	18.5
	Cardiff	63400	17.8
	Bridgend	24600	17.6
	Torfaen	15400	16.9
	Blaenau Gwent	11500	16.7
	Monmouthshire	15100	16.5

Source: StatsWales – Annual Population Survey

In terms of service provision there will be a difference between those who can speak Welsh and those who prefer to speak Welsh. For example, the Welsh Language Survey has identified a decline in fluency amongst Welsh speakers. However, the drive to protect and reinvigorate use of the Welsh language may have established new cultural norms and expectation about the dual use of English and Welsh in the workplace and in service provision.

Implications of the trends in ability to speak Welsh include:

- A continued differential in use of Welsh around the country
- Continued need to use both Welsh and English in the workplace and service provision.

7. Data Tables

Data tables

This section includes data that has been referred to but not presented in the main report.

Chapter 4: Demographics and housing need

Table 21 Total Population by Age

	Under 15	16-64	65+	Total
2014	554,841	1,922,448	614,747	3,092,036
2015	554,475	1,921,884	624,906	3,101,265
2016	555,268	1,919,888	635,659	3,110,815
2017	557,199	1,917,393	645,787	3,120,379
2018	560,591	1,912,707	656,557	3,129,855
2019	564,183	1,908,002	667,198	3,139,383
2020	567,354	1,904,845	676,528	3,148,727
2021	569,805	1,901,811	686,446	3,158,062
2022	571,270	1,898,679	697,649	3,167,598
2023	572,332	1,895,341	709,551	3,177,224
2024	571,959	1,892,963	721,917	3,186,839
2025	572,147	1,889,675	734,558	3,196,380
2026	571,599	1,885,818	748,267	3,205,684
2027	570,018	1,881,804	762,785	3,214,607
2028	568,992	1,876,953	777,130	3,223,075
2029	568,981	1,869,664	792,323	3,230,968
2030	569,765	1,861,535	806,982	3,238,282
2031	570,662	1,854,355	820,023	3,245,040
2032	571,282	1,847,167	832,725	3,251,174
2033	571,581	1,841,257	843,840	3,256,678
2034	571,586	1,834,998	854,945	3,261,529
2035	571,252	1,830,922	863,696	3,265,870
2036	570,619	1,826,112	873,098	3,269,829
2037	569,739	1,823,577	880,180	3,273,496
2038	568,633	1,824,035	884,259	3,276,927
2039	567,444	1,826,917	885,761	3,280,122

Source: statswales.gov.wales

Housing Horizons Data Resource

Table 22 Population Growth to 2036 by Local Authority

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
Isle of Anglesey	70,169	70,165	70,170	70,176	70,175	70,174	70,169	70,162	70,149	70,129	70,094	70,045	69,984	69,908	69,819	69,718	69,607	69,488	69,362	69,231	69,093	68,950	68,803
Gwynedd	122,273	122,605	122,948	123,299	123,660	124,034	124,426	124,835	125,265	125,710	126,166	126,628	127,091	127,551	128,006	128,456	128,901	129,338	129,768	130,191	130,608	131,014	131,416
Conwy	116,287	116,414	116,561	116,717	116,879	117,048	117,223	117,402	117,585	117,761	117,925	118,076	118,210	118,326	118,422	118,499	118,555	118,593	118,611	118,610	118,588	118,547	118,488
Denbighshire	94,791	94,959	95,144	95,336	95,530	95,729	95,931	96,131	96,328	96,517	96,690	96,847	96,984	97,102	97,199	97,275	97,333	97,376	97,401	97,414	97,415	97,404	97,389
Flintshire	153,804	154,088	154,372	154,651	154,923	155,186	155,442	155,689	155,927	156,149	156,347	156,515	156,655	156,765	156,840	156,885	156,899	156,880	156,834	156,760	156,662	156,543	156,402
Wrexham	136,714	137,318	137,927	138,536	139,143	139,751	140,358	140,965	141,572	142,172	142,756	143,327	143,884	144,425	144,952	145,465	145,963	146,453	146,932	147,396	147,850	148,295	148,728
Powys	132,675	132,487	132,303	132,116	131,922	131,721	131,514	131,301	131,080	130,840	130,573	130,279	129,955	129,593	129,192	128,755	128,282	127,770	127,222	126,636	126,011	125,351	124,661
Ceredigion	75,425	75,640	75,864	76,092	76,324	76,563	76,812	77,071	77,343	77,624	77,912	78,205	78,500	78,795	79,087	79,377	79,662	79,944	80,222	80,499	80,768	81,032	81,292
Pembrokeshire	123,666	123,758	123,858	123,957	124,054	124,149	124,241	124,329	124,412	124,482	124,533	124,562	124,564	124,537	124,487	124,405	124,296	124,163	124,006	123,822	123,611	123,376	123,119
Carmarthenshire	184,898	185,181	185,485	185,796	186,110	186,428	186,752	187,079	187,405	187,720	188,015	188,284	188,524	188,732	188,907	189,049	189,160	189,243	189,295	189,317	189,309	189,274	189,215
Swansea	241,297	242,157	243,046	243,951	244,867	245,801	246,752	247,720	248,710	249,706	250,696	251,677	252,639	253,574	254,485	255,374	256,239	257,078	257,893	258,685	259,452	260,194	260,914
Neath Port Talbot	140,490	140,679	140,879	141,083	141,284	141,486	141,688	141,890	142,093	142,288	142,469	142,635	142,779	142,900	142,996	143,068	143,117	143,146	143,156	143,143	143,111	143,063	142,997
Bridgend	141,214	141,622	142,038	142,450	142,862	143,272	143,683	144,093	144,497	144,892	145,271	145,626	145,959	146,265	146,544	146,797	147,028	147,240	147,432	147,605	147,758	147,889	148,005
Vale of Glamorgan	127,685	127,833	127,985	128,133	128,280	128,424	128,565	128,702	128,836	128,958	129,067	129,163	129,240	129,295	129,325	129,331	129,314	129,274	129,209	129,119	129,006	128,871	128,715
Cardiff	354,294	357,353	360,491	363,693	366,959	370,299	373,717	377,217	380,806	384,465	388,172	391,915	395,679	399,451	403,227	407,005	410,781	414,557	418,330	422,096	425,858	429,615	433,371
Rhondda Cynon Taf	236,888	237,240	237,626	238,042	238,482	238,945	239,431	239,936	240,455	240,977	241,486	241,977	242,441	242,878	243,289	243,674	244,037	244,379	244,701	245,003	245,290	245,561	245,812
Merthyr Tydfil	59,065	59,101	59,139	59,180	59,219	59,254	59,287	59,313	59,332	59,343	59,343	59,332	59,308	59,269	59,220	59,161	59,091	59,011	58,921	58,823	58,717	58,601	58,476
Caerphilly	179,941	180,206	180,481	180,754	181,027	181,296	181,558	181,812	182,057	182,287	182,489	182,661	182,799	182,905	182,977	183,015	183,019	182,994	182,943	182,866	182,763	182,636	182,485

Table 23 Household Composition Projections 2017 to 2036 (Source: statswales.gov.wales)

		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
1 person	Lower Variant	429,639	434,368	439,216	443,899	448,572	454,107	459,210	463,896	468,212	472,209	476,030	479,824	483,522	486,871	490,054	493,844	497,216	500,151	502,796	505,230
	Projection	430,293	435,330	440,473	445,452	450,439	456,312	461,779	466,860	471,603	476,074	480,419	484,794	489,140	493,196	497,156	501,833	506,180	510,186	514,010	517,711
	Higher Variant	430,524	435,700	441,013	446,193	451,407	457,541	463,309	468,732	473,866	478,770	483,602	488,526	493,483	498,216	502,922	508,462	513,743	518,748	523,653	528,526
	Zero Migration Variant	429,970	435,071	440,272	445,097	449,603	454,931	459,851	464,362	468,465	472,268	475,923	479,574	483,179	486,451	489,573	493,376	496,862	499,990	502,879	505,578
2 person (No children)	Lower Variant	420,056	422,088	424,132	425,835	427,512	428,881	430,140	431,595	432,940	434,261	435,361	435,954	436,435	436,861	437,170	436,404	435,512	434,635	433,726	432,720
	Projection	420,396	422,595	424,807	426,685	428,551	430,123	431,602	433,301	434,914	436,534	437,960	438,910	439,783	440,638	441,420	441,148	440,806	440,543	440,340	440,121
	Higher Variant	420,612	422,927	425,267	427,288	429,311	431,057	432,732	434,651	436,512	438,406	440,135	441,417	442,654	443,911	445,133	445,326	445,490	445,780	446,197	446,656
	Zero Migration Variant	419,280	421,187	423,053	424,335	425,290	425,874	426,288	426,878	427,355	427,748	427,886	427,384	426,790	426,360	426,050	424,731	423,289	421,956	420,780	419,647
2 person (1 adult, 1 child)	Lower Variant	52,928	53,447	53,972	54,511	55,075	55,643	56,199	56,721	57,201	57,648	58,046	58,451	58,830	59,163	59,506	59,895	60,317	60,728	61,127	61,536
	Projection	53,037	53,648	54,291	54,974	55,700	56,451	57,204	57,930	58,616	59,271	59,877	60,491	61,084	61,638	62,207	62,830	63,489	64,138	64,755	65,367
	Higher Variant	53,110	53,771	54,471	55,217	56,013	56,839	57,678	58,508	59,322	60,127	60,892	61,673	62,437	63,164	63,909	64,712	65,556	66,397	67,201	68,005
	Zero Migration Variant	52,829	53,416	54,046	54,706	55,395	56,109	56,828	57,517	58,175	58,823	59,431	60,058	60,675	61,238	61,823	62,461	63,164	63,845	64,450	64,970
3 person (No children)	Lower Variant	91,447	91,339	91,158	90,914	90,599	90,150	89,715	89,303	88,956	88,614	88,279	87,905	87,522	87,243	86,909	86,490	86,078	85,691	85,369	85,006
	Projection	91,484	91,394	91,232	91,005	90,710	90,281	89,869	89,480	89,159	88,845	88,542	88,201	87,855	87,617	87,329	86,965	86,619	86,311	86,098	85,870
	Higher Variant	91,509	91,431	91,282	91,072	90,793	90,382	89,989	89,623	89,326	89,039	88,765	88,455	88,144	87,944	87,698	87,383	87,092	86,846	86,717	86,582
	Zero Migration Variant	91,110	90,888	90,590	90,224	89,758	89,150	88,561	88,008	87,553	87,089	86,621	86,099	85,573	85,197	84,771	84,288	83,831	83,424	83,118	82,795
3 person (2 adults, 1 child)	Lower Variant	85,203	84,822	84,457	84,133	83,895	83,658	83,414	83,168	82,874	82,560	82,252	81,972	81,659	81,301	80,945	80,637	80,392	80,139	79,889	79,682
	Projection	85,353	85,094	84,883	84,742	84,689	84,648	84,603	84,549	84,433	84,287	84,135	84,003	83,838	83,632	83,433	83,296	83,229	83,156	83,073	83,023
	Higher Variant	85,454	85,261	85,123	85,063	85,082	85,117	85,153	85,198	85,207	85,206	85,206	85,225	85,207	85,138	85,070	85,067	85,136	85,205	85,263	85,362
	Zero Migration Variant	85,221	85,009	84,874	84,802	84,811	84,846	84,907	84,951	84,873	84,690	84,493	84,303	84,053	83,717	83,343	82,991	82,689	82,356	82,055	81,853
3 person (1 adult, 2 children)	Lower Variant	25,110	25,021	24,939	24,870	24,811	24,749	24,663	24,546	24,398	24,233	24,041	23,867	23,687	23,481	23,289	23,134	23,001	22,874	22,749	22,637
	Projection	25,156	25,105	25,070	25,058	25,070	25,089	25,093	25,071	25,022	24,960	24,875	24,810	24,742	24,650	24,573	24,530	24,506	24,483	24,447	24,409
	Higher Variant	25,187	25,156	25,144	25,157	25,201	25,256	25,300	25,326	25,333	25,338	25,323	25,331	25,340	25,329	25,335	25,374	25,433	25,494	25,535	25,574

Housing Horizons Data Resource

		2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036
	Zero Migration Variant	25,024	24,950	24,894	24,857	24,838	24,830	24,805	24,754	24,683	24,612	24,528	24,477	24,425	24,339	24,272	24,238	24,228	24,211	24,171	24,122
4 person (No children)	Lower Variant	32,937	33,152	33,298	33,411	33,463	33,480	33,516	33,572	33,705	33,842	34,019	34,200	34,395	34,662	34,902	35,107	35,297	35,480	35,666	35,831
	Projection	32,944	33,162	33,312	33,428	33,485	33,506	33,546	33,607	33,745	33,888	34,072	34,259	34,462	34,739	34,991	35,213	35,427	35,642	35,883	36,123
	Higher Variant	32,949	33,170	33,322	33,441	33,501	33,526	33,570	33,635	33,779	33,928	34,117	34,312	34,522	34,807	35,069	35,305	35,536	35,773	36,052	36,337
	Zero Migration Variant	32,538	32,572	32,533	32,492	32,421	32,301	32,177	32,079	32,094	32,151	32,246	32,347	32,470	32,681	32,847	32,981	33,103	33,248	33,427	33,631
4 person (2+ adults, 1+ children)	Lower Variant	119,927	119,246	118,584	118,040	117,521	116,979	116,467	115,903	115,314	114,726	114,110	113,547	112,952	112,279	111,637	111,090	110,571	110,056	109,495	108,951
	Projection	120,117	119,593	119,129	118,826	118,590	118,373	118,214	118,019	117,806	117,594	117,349	117,154	116,924	116,610	116,322	116,116	115,922	115,717	115,427	115,124
	Higher Variant	120,245	119,805	119,437	119,239	119,130	119,050	119,047	119,038	119,048	119,087	119,107	119,183	119,230	119,200	119,197	119,269	119,353	119,426	119,399	119,358
	Zero Migration Variant	119,644	119,068	118,590	118,292	118,042	117,823	117,694	117,539	117,365	117,217	117,065	117,002	116,894	116,619	116,334	116,115	115,905	115,648	115,244	114,770
4 person (1 adult, 3 children)	Lower Variant	9,065	9,079	9,094	9,107	9,120	9,130	9,128	9,109	9,076	9,036	8,982	8,931	8,880	8,824	8,773	8,732	8,701	8,673	8,651	8,634
	Projection	9,084	9,114	9,149	9,187	9,232	9,278	9,317	9,342	9,355	9,363	9,357	9,355	9,354	9,347	9,344	9,350	9,362	9,375	9,386	9,397
	Higher Variant	9,097	9,136	9,180	9,229	9,288	9,351	9,408	9,455	9,494	9,532	9,557	9,588	9,622	9,651	9,685	9,727	9,774	9,823	9,866	9,909
	Zero Migration Variant	9,034	9,054	9,081	9,111	9,149	9,191	9,227	9,249	9,259	9,266	9,263	9,265	9,267	9,260	9,259	9,264	9,275	9,284	9,287	9,282
5+ person (No children)	Lower Variant	11,134	11,315	11,469	11,619	11,717	11,803	11,913	12,036	12,211	12,408	12,649	12,884	13,116	13,368	13,601	13,792	13,939	14,074	14,191	14,282
	Projection	11,136	11,319	11,473	11,624	11,724	11,811	11,923	12,047	12,225	12,424	12,667	12,904	13,140	13,397	13,634	13,834	13,994	14,148	14,299	14,438
	Higher Variant	11,138	11,320	11,476	11,628	11,728	11,817	11,930	12,055	12,235	12,436	12,681	12,921	13,160	13,420	13,662	13,869	14,038	14,203	14,378	14,545
	Zero Migration Variant	10,308	10,042	9,735	9,542	9,525	9,535	9,563	9,611	9,721	9,862	10,035	10,204	10,376	10,582	10,773	10,929	11,047	11,170	11,294	11,411
5+ person (2+ adults, 1+ children)	Lower Variant	64,769	64,394	64,010	63,651	63,281	62,875	62,480	62,063	61,630	61,202	60,765	60,353	59,935	59,502	59,077	58,696	58,343	58,004	57,667	57,348
	Projection	64,876	64,590	64,320	64,098	63,897	63,688	63,509	63,323	63,128	62,935	62,730	62,544	62,345	62,122	61,898	61,702	61,519	61,338	61,141	60,948
	Higher Variant	64,948	64,710	64,494	64,333	64,209	64,085	64,004	63,932	63,874	63,833	63,785	63,761	63,728	63,675	63,621	63,589	63,568	63,545	63,497	63,450
	Zero Migration Variant	64,559	64,226	63,933	63,705	63,488	63,275	63,117	62,962	62,802	62,654	62,501	62,388	62,250	62,045	61,802	61,564	61,315	61,051	60,755	60,454
5+ person (1 adult, 4+ children)	Lower Variant	3,467	3,481	3,494	3,505	3,515	3,520	3,520	3,514	3,504	3,489	3,470	3,451	3,435	3,418	3,403	3,392	3,385	3,380	3,379	3,380
	Projection	3,476	3,497	3,520	3,542	3,567	3,589	3,608	3,623	3,633	3,640	3,642	3,644	3,649	3,652	3,657	3,664	3,673	3,683	3,694	3,705
	Higher Variant	3,482	3,507	3,535	3,562	3,593	3,623	3,650	3,675	3,697	3,718	3,733	3,751	3,770	3,790	3,810	3,832	3,857	3,881	3,905	3,929
	Zero Migration Variant	3,457	3,474	3,495	3,514	3,536	3,558	3,575	3,586	3,595	3,602	3,606	3,612	3,620	3,627	3,634	3,640	3,650	3,659	3,668	3,677

Table 24 Household Composition by Local Authority 2017

2017	1 person	2 person (No children)	2 person (1 adult, 1 child)	3 person (No children)	3 person (2 adults, 1 child)	3 person (1 adult, 2 children)	4 person (No children)	4 person (2+ adults, 1+ children)	4 person (1 adult, 3 children)	5+ person (No children)	5+ person (2+ adults, 1+ children)	5+ person (1 a 4+ childre
Isle of Anglesey	31,145	10,481	10,173	905	2,024	1,814	424	703	2,626	166	193	1,559
Gwynedd	53,922	19,915	16,312	1,364	3,091	2,774	847	1,343	4,129	342	769	2,918
Conwy	52,411	18,088	17,676	1,585	3,152	2,787	892	1,022	4,167	309	238	2,380
Denbighshire	41,550	13,045	13,963	1,440	2,545	2,437	742	908	3,695	284	173	2,203
Flintshire	65,830	18,685	21,968	2,360	4,603	4,482	1,272	1,538	6,655	401	344	3,341
Wrexham	59,530	18,144	18,398	2,417	3,992	4,535	1,162	1,283	5,970	480	290	2,665
Powys	59,389	19,426	21,199	2,017	3,597	3,042	789	954	4,843	263	407	2,750
Ceredigion	32,151	11,070	10,559	794	2,308	1,551	366	864	2,334	140	605	1,526
Pembrokeshire	54,871	17,770	18,529	2,338	3,331	2,822	897	1,144	4,473	357	241	2,830
Carmarthenshire	80,713	24,710	26,763	3,453	5,533	4,732	1,526	1,871	6,926	506	489	4,003
Swansea	107,885	37,741	31,845	4,573	6,699	6,382	2,105	2,747	8,905	684	1,588	4,412
Neath Port Talbot	61,458	18,872	19,357	2,384	4,751	4,209	1,131	1,561	5,819	368	265	2,611
Bridgend	60,775	17,741	19,576	2,413	4,558	4,390	1,251	1,683	5,653	445	270	2,646
Vale of Glamorgan	55,452	17,473	17,459	2,021	3,589	3,931	1,099	1,246	5,318	379	246	2,563
Cardiff	152,758	52,800	42,254	5,617	9,643	9,304	2,699	4,470	13,064	1,083	2,893	8,419
Rhondda Cynon Taf	103,571	32,724	30,116	5,210	7,717	7,034	2,561	2,685	9,467	883	544	4,357
Merthyr Tydfil	24,533	6,549	7,304	1,415	2,225	1,702	483	876	2,338	192	131	1,257
Caerphilly	76,426	21,370	23,852	3,709	5,867	5,573	1,599	1,966	7,526	569	338	3,780
Blaenau Gwent	30,892	10,154	8,942	1,508	2,484	2,213	664	726	2,558	192	111	1,295
Torfaen	39,453	11,848	12,143	1,592	2,904	2,928	842	935	3,851	278	173	1,863
Monmouthshire	39,536	11,317	14,258	908	2,775	2,557	595	896	3,813	199	245	1,891
Newport	63,102	20,371	17,751	3,016	4,097	4,156	1,209	1,524	5,987	566	585	3,607

Source: statswales.gov.wales

Table 25 Household Composition by Local Authority 2036

2036	1 person	2 person (No children)	2 person (1 adult, 1 child)	3 person (No children)	3 person (2 adults, 1 child)	3 person (1 adult, 2 children)	4 person (No children)	4 person (2+ adults, 1+ children)	4 person (1 adult, 3 children)	5+ person (No children)	5+ person (2+ adults, 1+ children)	5+ person (1 adult, 4+ children)
Isle of Anglesey	31,456	11,955	9,716	880	1,805	1,674	352	727	2,402	151	263	1,441
Gwynedd	58,831	24,042	16,606	1,443	2,715	2,906	842	1,393	4,088	440	1,139	3,068
Conwy	54,343	20,066	18,054	1,808	3,074	2,373	943	1,068	4,076	308	284	2,170
Denbighshire	42,961	13,998	14,468	1,670	2,471	2,211	731	999	3,606	324	180	2,147
Flintshire	69,279	21,814	23,209	3,085	3,958	4,260	1,307	1,387	6,234	409	416	2,976
Wrexham	66,345	22,307	19,725	3,244	3,937	5,062	1,391	1,307	5,876	654	354	2,203
Powys	58,423	20,953	21,189	2,459	2,816	2,471	691	692	4,087	252	538	2,152
Ceredigion	34,835	12,951	10,326	1,085	2,450	1,692	374	1,071	2,468	170	548	1,672
Pembrokeshire	56,575	20,631	18,564	2,815	2,834	2,256	742	1,241	4,028	343	276	2,704
Carmarthenshire	84,457	27,781	28,072	4,428	5,009	4,186	1,493	2,026	6,281	486	633	3,824
Swansea	121,494	48,306	34,496	5,921	5,962	6,231	2,032	2,901	8,669	667	2,051	4,096
Neath Port Talbot	63,843	20,889	20,591	2,708	4,366	3,835	972	1,649	5,543	305	343	2,511
Bridgend	65,402	21,070	20,909	2,965	4,497	4,094	1,227	2,115	5,112	493	370	2,366
Vale of Glamorgan	58,676	21,528	17,731	2,197	3,295	3,771	960	1,397	4,911	387	337	2,051
Cardiff	189,383	73,504	49,241	7,166	9,891	11,130	2,408	5,453	15,596	1,098	3,867	9,581
Rhondda Cynon Taf	113,011	41,084	30,843	7,161	7,110	6,821	3,085	2,860	8,504	1,004	586	3,666
Merthyr Tydfil	24,620	6,627	7,620	1,657	2,339	1,504	332	1,122	1,974	142	163	1,102
Caerphilly	79,889	24,535	24,862	4,657	5,539	5,137	1,484	2,242	6,770	515	435	3,330
Blaenau Gwent	31,118	11,400	8,823	1,625	2,424	2,097	556	711	2,072	155	118	1,111
Torfaen	40,745	13,637	11,900	1,872	2,844	2,915	928	1,003	3,496	284	223	1,568
Monmouthshire	41,261	13,272	15,069	813	2,572	2,338	622	937	3,366	223	324	1,623
Newport	69,285	25,362	18,107	3,708	3,962	4,056	936	1,825	5,966	586	991	3,590

Source: statswales.gov.wales

Table 26 Geographical Distribution of Households 2017

2017	1 person	2 person (No children)	2 person (1 adult, 1 child)	3 person (No children)	3 person (2 adults, 1 child)	3 person (1 adult, 2 children)	4 person (No children)	4 person (2+ adults, 1+ children)	4 person (1 adult, 3 children)	5+ person (No children)	5+ person (2+ adults, 1+ children)	5+ person (1 adult, 4+ children)
Isle of Anglesey	2.44%	2.42%	1.71%	2.21%	2.13%	1.68%	2.13%	2.19%	1.83%	1.73%	2.40%	2.23%
Gwynedd	4.63%	3.88%	2.57%	3.38%	3.25%	3.37%	4.08%	3.44%	3.76%	6.91%	4.50%	3.43%
Conwy	4.20%	4.20%	2.99%	3.45%	3.27%	3.55%	3.10%	3.47%	3.40%	2.14%	3.67%	3.34%
Denbighshire	3.03%	3.32%	2.72%	2.78%	2.86%	2.95%	2.76%	3.08%	3.12%	1.55%	3.40%	3.28%
Flintshire	4.34%	5.23%	4.45%	5.03%	5.25%	5.06%	4.67%	5.54%	4.41%	3.09%	5.15%	5.22%
Wrexham	4.22%	4.38%	4.56%	4.36%	5.31%	4.62%	3.89%	4.97%	5.28%	2.60%	4.11%	5.63%
Powys	4.51%	5.04%	3.80%	3.93%	3.56%	3.14%	2.90%	4.03%	2.90%	3.65%	4.24%	2.91%
Ceredigion	2.57%	2.51%	1.50%	2.52%	1.82%	1.46%	2.62%	1.94%	1.54%	5.43%	2.35%	1.04%
Pembrokeshire	4.13%	4.41%	4.41%	3.64%	3.31%	3.56%	3.47%	3.72%	3.92%	2.17%	4.36%	4.05%
Carmarthenshire	5.74%	6.37%	6.51%	6.05%	5.54%	6.07%	5.68%	5.77%	5.57%	4.39%	6.17%	5.81%
Swansea	8.77%	7.58%	8.62%	7.32%	7.48%	8.37%	8.34%	7.41%	7.53%	14.26%	6.80%	5.87%
Neath Port Talbot	4.39%	4.60%	4.50%	5.19%	4.93%	4.50%	4.74%	4.84%	4.05%	2.38%	4.02%	3.76%
Bridgend	4.12%	4.66%	4.55%	4.98%	5.14%	4.97%	5.11%	4.71%	4.90%	2.42%	4.08%	4.33%
Vale of Glamorgan	4.06%	4.15%	3.81%	3.92%	4.61%	4.37%	3.78%	4.43%	4.18%	2.21%	3.95%	3.66%
Cardiff	12.27%	10.05%	10.59%	10.54%	10.90%	10.73%	13.57%	10.88%	11.92%	25.98%	12.98%	14.73%
Rhondda Cynon Taf	7.61%	7.16%	9.82%	8.44%	8.24%	10.18%	8.15%	7.88%	9.72%	4.88%	6.72%	7.87%
Merthyr Tydfil	1.52%	1.74%	2.67%	2.43%	1.99%	1.92%	2.66%	1.95%	2.12%	1.18%	1.94%	1.76%
Caerphilly	4.97%	5.67%	6.99%	6.41%	6.53%	6.36%	5.97%	6.27%	6.26%	3.04%	5.83%	7.98%
Blaenau Gwent	2.36%	2.13%	2.84%	2.72%	2.59%	2.64%	2.20%	2.13%	2.12%	1.00%	2.00%	1.31%
Torfaen	2.75%	2.89%	3.00%	3.17%	3.43%	3.35%	2.84%	3.21%	3.06%	1.55%	2.87%	2.76%
Monmouthshire	2.63%	3.39%	1.71%	3.03%	3.00%	2.37%	2.72%	3.17%	2.20%	2.20%	2.91%	2.35%
Newport	4.73%	4.22%	5.69%	4.48%	4.87%	4.80%	4.63%	4.98%	6.23%	5.25%	5.56%	6.68%

Source: statswales.gov.wales

Table 27 Geographical Distribution of Households 2036

2036	1 person	2 person (No children)	2 person (1 adult, 1 child)	3 person (No children)	3 person (2 adults, 1 child)	3 person (1 adult, 2 children)	4 person (No children)	4 person (2+ adults, 1+ children)	4 person (1 adult, 3 children)	5+ person (No children)	5+ person (2+ adults, 1+ children)	5+ person (1 adult, 4+ children)
Isle of Anglesey	2.31%	2.21%	1.35%	2.10%	2.02%	1.44%	2.01%	2.09%	1.61%	1.82%	2.36%	2.40%
Gwynedd	4.64%	3.77%	2.21%	3.16%	3.50%	3.45%	3.85%	3.55%	4.68%	7.89%	5.03%	4.02%
Conwy	3.88%	4.10%	2.77%	3.58%	2.86%	3.86%	2.96%	3.54%	3.28%	1.97%	3.56%	3.24%
Denbighshire	2.70%	3.29%	2.56%	2.88%	2.66%	2.99%	2.76%	3.13%	3.45%	1.25%	3.52%	4.20%
Flintshire	4.21%	5.27%	4.72%	4.61%	5.13%	5.35%	3.84%	5.42%	4.35%	2.88%	4.88%	6.05%
Wrexham	4.31%	4.48%	4.96%	4.58%	6.10%	5.70%	3.62%	5.10%	6.96%	2.45%	3.61%	7.69%
Powys	4.05%	4.81%	3.76%	3.28%	2.98%	2.83%	1.91%	3.55%	2.68%	3.72%	3.53%	3.37%
Ceredigion	2.50%	2.35%	1.66%	2.85%	2.04%	1.53%	2.97%	2.14%	1.81%	3.79%	2.74%	0.75%
Pembrokeshire	3.99%	4.22%	4.31%	3.30%	2.72%	3.04%	3.44%	3.50%	3.65%	1.91%	4.44%	3.83%
Carmarthenshire	5.37%	6.38%	6.77%	5.83%	5.04%	6.12%	5.61%	5.46%	5.18%	4.38%	6.27%	6.41%
Swansea	9.33%	7.84%	9.06%	6.94%	7.51%	8.33%	8.03%	7.53%	7.10%	14.21%	6.72%	4.36%
Neath Port Talbot	4.03%	4.68%	4.14%	5.08%	4.62%	3.98%	4.56%	4.81%	3.24%	2.37%	4.12%	3.53%
Bridgend	4.07%	4.75%	4.54%	5.24%	4.93%	5.03%	5.85%	4.44%	5.25%	2.56%	3.88%	4.96%
Vale of Glamorgan	4.16%	4.03%	3.36%	3.84%	4.54%	3.93%	3.87%	4.27%	4.11%	2.33%	3.37%	3.03%
Cardiff	14.20%	11.19%	10.96%	11.52%	13.41%	9.86%	15.09%	13.55%	11.68%	26.78%	15.72%	12.12%
Rhondda Cynon Taf	7.94%	7.01%	10.95%	8.28%	8.22%	12.64%	7.92%	7.39%	10.68%	4.06%	6.01%	7.76%
Merthyr Tydfil	1.28%	1.73%	2.54%	2.72%	1.81%	1.36%	3.11%	1.71%	1.51%	1.13%	1.81%	1.04%
Caerphilly	4.74%	5.65%	7.12%	6.45%	6.19%	6.08%	6.21%	5.88%	5.48%	3.01%	5.46%	10.37%
Blaenau Gwent	2.20%	2.00%	2.49%	2.82%	2.53%	2.28%	1.97%	1.80%	1.65%	0.81%	1.82%	0.75%
Torfaen	2.63%	2.70%	2.86%	3.31%	3.51%	3.80%	2.78%	3.04%	3.03%	1.54%	2.57%	2.06%
Monmouthshire	2.56%	3.42%	1.24%	3.00%	2.82%	2.55%	2.59%	2.92%	2.38%	2.24%	2.66%	2.76%
Newport	4.90%	4.11%	5.67%	4.61%	4.89%	3.84%	5.05%	5.18%	6.24%	6.86%	5.89%	5.30%

Source: statswales.gov.wales

Chapter 6: Housing association stock and services

Table 28 2011 Census number and percentage of people aged over 3 who can speak Welsh

	Able to speak Welsh	Percentage able to speak Welsh
Wales	562016	19
Gwynedd	77000	65.4
Isle of Anglesey	38568	57.2
Ceredigion	34964	47.3
Carmarthenshire	78048	43.9
Conwy	30600	27.4
Denbighshire	22236	24.6
Pembrokeshire	22786	19.2
Powys	23990	18.6
Neath Port Talbot	20698	15.3
Flintshire	19343	13.2
Wrexham	16659	12.9
Rhondda, Cynon, Taff	27779	12.3
Swansea	26332	11.4
Caerphilly	19251	11.2
Cardiff	36735	11.1
The Vale of Glamorgan	13189	10.8
Monmouthshire	8780	9.9
Torfaen	8641	9.8
Bridgend	13103	9.7
Newport	13002	9.3
Merthyr Tydfil	5028	8.9
Blaenau Gwent	5284	7.8

Source: StatsWales Welsh speakers by local authority, 2011 Census