

**Evidence of the impact of the council tax premium on second homes and long-term empty properties in Gwynedd**

**November 2024**

**Produced by the Research and Information Service, Cyngor Gwynedd**

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## 1.0 Executive Summary

### Purpose and scope of research

This research was intended to gather evidence on the impact of the two latest increases in the level of the council tax premium in Gwynedd (to 100% for second homes and long-term empty properties in April 2021, and to 150% for second homes in April 2023) aiming to answer the following questions:

- Has increasing the premium led to fewer second homes in Gwynedd?
- What happened to the properties that were formerly second homes – i.e. have they gone from paying council tax with premium (second home), to paying basic council tax (main residence), or to the business tax regime (holiday accommodation), or any other category
- What do we know about the people who live in houses which were previously second homes but are now main homes? Was this related to the sale of the house at the same time, or a change of use under the same ownership?
- Has the premium increase led to long-term empty houses being brought back into use?

The research focused on use of properties and focused on three different elements, namely:

- Analysing the details of property categories in the council tax system (houses changing to/from being a second home or long-term empty).
- Looking at the link between change of property categories for council tax purposes and house sales.
- Collecting further information on properties that have changed from a second home to a main home, via a questionnaire for current occupants.

### Analysing category movements in the council tax system

This element involved analysing the details of the categories of all properties in the county in the council tax system on different dates between October 2019 and April 2024, looking specifically at housing switching to/from a second home or long-term empty, and any different patterns in this around the time of increases in the premium.

In terms of properties moving between being a second home and being a primary residence, there has usually been a (net) flow of properties from main residences to second homes. But the net flow was the other way (i.e. from second homes to main residences) in the run-up to the premium increase to 100% in April 2021, and (more decisively and more long-lasting) before and after the premium increase to 150% in April 2023.

In terms of properties moving between second homes and holiday accommodation, prior to April 2023 there was a flow of properties from second homes (in the council tax regime) to holiday accommodation (in the business tax regime). But after April 2023 (at the time business rate regulations were changed, in terms of the period properties are / are available to let), the flow is now the other way, from holiday accommodation to second homes. There are recent indications, based on Dec 2023 – Apr 2024 data, that this flow has grown so that the total number of second homes across Gwynedd is stabilising (i.e. this flow is around the same as the flow from second homes to main residences).

In summary, it therefore appears (although it must be remembered that other factors may also be influencing the situation) that the premium has made a contribution to bringing second homes back into use as primary residences.

The change in holiday accommodation regulations has also appeared to have a continuing impact – resulting in a flow of properties from holiday accommodation to second homes, somewhat offsetting the impact of the trend (above) for second homes to change into primary residences.

In terms of the impact of the premium on long-term empty properties, it is difficult to detect any definite pattern. A higher number transferred after a premium increase in 2021, but subsequently the numbers have been very variable and there is no noticeable long-lasting effect.

### **Comparison with home sales**

We looked at the period from December 2022, the period in which a net flow of properties from second homes to main residences began. Of properties that changed from a second home to a main residence in this period, 19% had been sold around the same time.

Of the properties that remained a second home constantly from December 2022 to April 2024, around 1% had been sold during this period. This is a lower proportion than in the previous period (Dec 2021 – Dec 2022); there is therefore no evidence that the premium increase to 150% has led to an increase in the number of second homes being sold to other second home owners.

### **Further information on properties which changed from second home to main home**

A questionnaire was sent to over 900 properties which changed status from second home to primary residence (in council tax data) since December 2022 (when a flow of second homes to primary residences began). There was a 20% response rate.

Of those who indicated they owned the house, 64% had bought the house in order to live in it permanently (never having been their second home), and 28% were now living permanently in a house that used to be their second home.

The majority (71%) of those who moved into a house which was their second home, had not previously lived in Gwynedd. Of those who had bought the house to live in permanently, around half (52%) had not previously lived in Gwynedd, but around a third (35%) had lived in Gwynedd for 5 years or more.

Of the properties where a questionnaire response was received, there were Welsh-speaking adult(s) in 39% of the houses purchased to live in permanently. This compares to 26% where owners had moved into houses that were already their second homes.

### **Other considerations**

The data can be analysed into smaller areas as needed, and some results about the individual wards Abersoch with Llanengan, and Aberdyfi, are included in the full report.

In future further sources of information could be looked at, to look at other possible aspects of the impact of increasing the premium. It may also be possible to look at the potential for additional research data to be collected when administering council tax, if the intention is to continue to monitor these trends.

## 2.0 Introduction

### 2.1 Purpose of the report

Since April 2018 the Council has charged a council tax premium on the majority of second homes and long-term empty properties in the county. Over subsequent years, the premium level has been increased (see 'Key dates' below for details of relevant decisions / dates).

In recent discussions about the premium, the need to gather evidence about its impact was raised and as part of this we were commissioned by the Leadership Team to research the information that is available. This will also provide an evidence base to help the Council in determining the appropriate level of premium on second homes and on empty long-term properties in the future.

This report will aim to answer the following questions:

- Has increasing the premium led to fewer second homes in Gwynedd?
- What happened to the properties that were formerly second homes – i.e. have they gone from paying council tax with a premium (second home), to paying basic council tax (main residence), or transferred to the business rates system (holiday accommodation), or any other category?
- What do we know about the people who live in houses that were second homes but are now the main residence? Was this related to the sale of the house at the same time, or a change of use under the same ownership?
- Has the premium increase led to long-term empty houses being brought back into use?

## 2.2 Key dates

It would be useful to summarise the key dates relating to the introduction, and increasing the level of, the premium in Gwynedd over the years (the three dates when the premium, or increases to it, came into force are indicated in bold).

*Table 1: Key dates for introducing and increasing the premium level in Gwynedd over the years*

Date	Event
October 2013	Welsh Government consults on right for authorities to charge a premium
September 2014	The Housing Act (Wales) allows a premium of up to 100% to be charged from April 2017
October 2016	Council consults on the principle of charging a premium, and its level
December 2016	Council decides to charge a 50% premium on second homes and long-term empty properties from April 2018
<b>April 2018</b>	<b>50% premium on second homes and long-term empty properties operational in Gwynedd</b>
December 2020	Council consults on the possibility of increasing the premium to 100%
March 2021	Council decides to increase the premium to 100%
<b>April 2021</b>	<b>Increase to 100% operational in Gwynedd, for second homes and long-term empty properties</b>
August 2021	Welsh Government consults on expanding powers to charge a premium
March 2022	Regulations allowing a premium of up to 300% to be charged on second homes and long-term empty properties from April 2023
September 2022	Council initiates consultation on how to respond to the change in regulations
December 2022	Council decides to increase premium on second homes to 150% (but keeps the premium on long-term empty properties at 100%)
<b>April 2023</b>	<b>Increase to 150% for second homes operational in Gwynedd (retain at 100% for long-term empty properties)</b>
December 2023	Council decides to keep the premium at the same level but notes the intention to conduct further research on the impact of the premium

In addition to the above, April 2023 is also significant as this is when the change to the criterion for defining self-catering accommodation (for taxation as a business rather than through council tax) became effective across Wales – namely, broadly speaking, that they need to be let for a minimum of 182 days rather than 70, and available for letting for 252 days, instead of 140 days. The timetable for implementing this was similar to the timetable for extending the power to charge a premium of up to 300% (i.e. Welsh Government commences consultation in August 2021, announced its intention to tighten the definition in March 2022, effective from April 2023).

In interpreting the results of the research below, it will be necessary to remember that any effect could have occurred over a period on either side of these dates, rather than at that exact time. For example – should an increase in the premium have prompted some second homeowners to sell their property, they might have sold as discussions began on the increase or when it was decided to increase it, rather than waiting until the change took effect. On the other hand, they might not decide to sell until after the premium came into effect and a sale could also take a few months to complete, so this effect might not be noticeable for some time after the premium increase.



Of course, there are also a host of other factors – outside the local taxation system – that could have affected this area in the period under review, for example:

- The Covid period and the subsequent impact of it on the local housing market;
- Changes in the scale and nature of demand for holiday accommodation in Gwynedd (again, including impacts following from the Covid period);
- Devolution, and changes to the rates, of taxation on house purchases resulting in a change in the tax payable on the purchase of a second home, and differences in this respect between England and Wales;
- The nature of the economy and employment in Gwynedd and in general, including the cost of living crisis;
- Discussions on the Article 4 Direction, and its introduction in 2024.

Inevitably, therefore, the research findings need to be interpreted with care, bearing in mind that changes that occurred at the time of the premium being raised, cannot always be assumed to have necessarily occurred because of the premium.

## 2.3 Scope of report

This research focuses on property use (houses changing to/from being a second home or long-term empty, and any different trends in this pattern around the time or following the increase to the premium).

To this end, the main element of the research was to analyse the details of property categories in the council tax system, and to look for patterns in this, particularly around the times of increasing the premium.

We also looked at the link between changing property categories in the council tax system and house sales, by matching the data with Land Registry house sales data and looking at the degree to which the dates match.

In addition, to obtain some further information about properties that used to be second homes but are now main residences, we asked the current occupants of those houses a few questions about the background to this change of use and about those who now live there.

More details on this can be found in the Methodology below.

Of course, there are other possible aspects of the 'premium impact' that this report is unable to consider (economic, linguistic, wider community, etc.); there may be other sources of information available that would help with this (see also the 'Recommendations for data improvement' at the end of the report).

### 3.0 Methodology

As explained above, this research is based on tracking individual property movements in Gwynedd from one category to another, and from one period to the next. This means that comprehensive datasets, in a fully consistent and comparable form to each other, are needed to be able to accurately track the changes over time.

The council tax premium has existed in Gwynedd since April 2018; however, we have not been able to find detailed, complete and consistent data going back that far (the need to preserve such information for research purposes was probably not identified at that time either). It was not possible, therefore, for us to use a time when the premium had not taken effect (or, ideally, a time before there was any discussion on introducing a premium at all) as the starting point of the research.

Having discussed potential data sources with the Finance department, the best source identified was data that is reported to the National Fraud Initiative (NFI) data matching exercise. This includes details of the council tax category of each individual property in Gwynedd.

This data is available for different dates, going back to October 2019. This is a sensible starting point in any case as it allows us to compare the "normal" pattern (over about a year before there was mention of increasing the premium) with any different patterns around:

- the increase to 100% for second homes and long-term empty properties (April 2021); and
- the increase to 150% for second homes (April 2023).

This also keeps the analysis within practically feasible boundaries, as this gives us 9 sets of data on different dates between 1 October 2019 and 1 April 2024. As there are over 60,000 properties in Gwynedd this involves comparing data and tracking changes across a total of over 500,000 data items.

Since NFI data is reported based on specific dates and the gaps between these dates can vary, this means that the analysis we can conduct is based on specific periods, with some longer than others as shown in the diagram below:

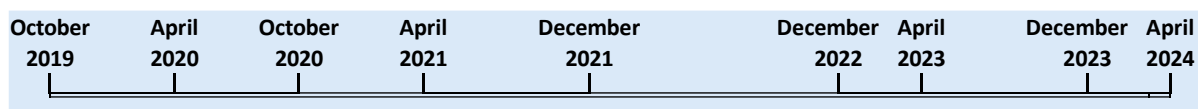


Figure 1: Dates/ periods where we have NFI data for tracking category changes (exact date was 1st of the relevant months except October 2020 (2/10/20) and December 2023 (18/12/23))

In terms of the questionnaire for properties that moved from second home to main residence category, properties that changed category between December 2022 and April 2024 were included (there is more detail on the rationale of this in the relevant part of the report below).

## 4.0 Definitions

In the remainder of this report, unless otherwise stated:

- **'Second home'** means property within the council tax system that is furnished, is not a main residence and does not have a planning restriction preventing it from being occupied on a full-time basis. The majority of these pay the council tax premium but there are some exceptions, e.g. (for a period) properties marketed for sale / to let, or work-related properties;
- **'Long-term empty properties'** means properties within the council tax system, which have been empty and unfurnished for more than 12 months and therefore the council tax premium is payable on them;
- **'Other housing'** means all properties within the council tax system except for the above 2 categories also excluding properties with a planning restriction preventing full-time occupation. The vast majority of these, therefore, are main residences (but also include properties that have been empty for less than 12 months);
- **'Holiday unit'** means a self-serviced holiday accommodation unit, which is taxed through the business rates system rather than through council tax;
- **'Total housing'** is the total of the above 4 categories, i.e. all properties in the council tax system except for second homes with a planning restriction preventing full-time occupation, also adding self-catering serviced holiday units that are in the business rates system.

For clarity, we do not include in this exercise second homes that have a planning restriction preventing full-time occupancy ('chalets' etc., known as 'Class A' in council tax regulations). These are considered to be effectively outside the 'normal' usable housing stock, and we will therefore not include them in this analysis.

## 5.0 Numbers and distribution of second homes, holiday units and long-term empty properties

- In April 2024 there were 4,349 second homes in Gwynedd (in line with this category in the council tax system), of which 4,071 (93.6%) paid the premium. This represents 6.8% of total housing.
- The map below shows the proportion of second homes per ward and shows that the distribution of second homes across the county is very uneven, ranging from 0.1% in Hendre ward to 40.4% in Abersoch and Llanengan ward. The highest percentages are generally in the coastal areas of Llŷn, Eifionydd and Meirionnydd.

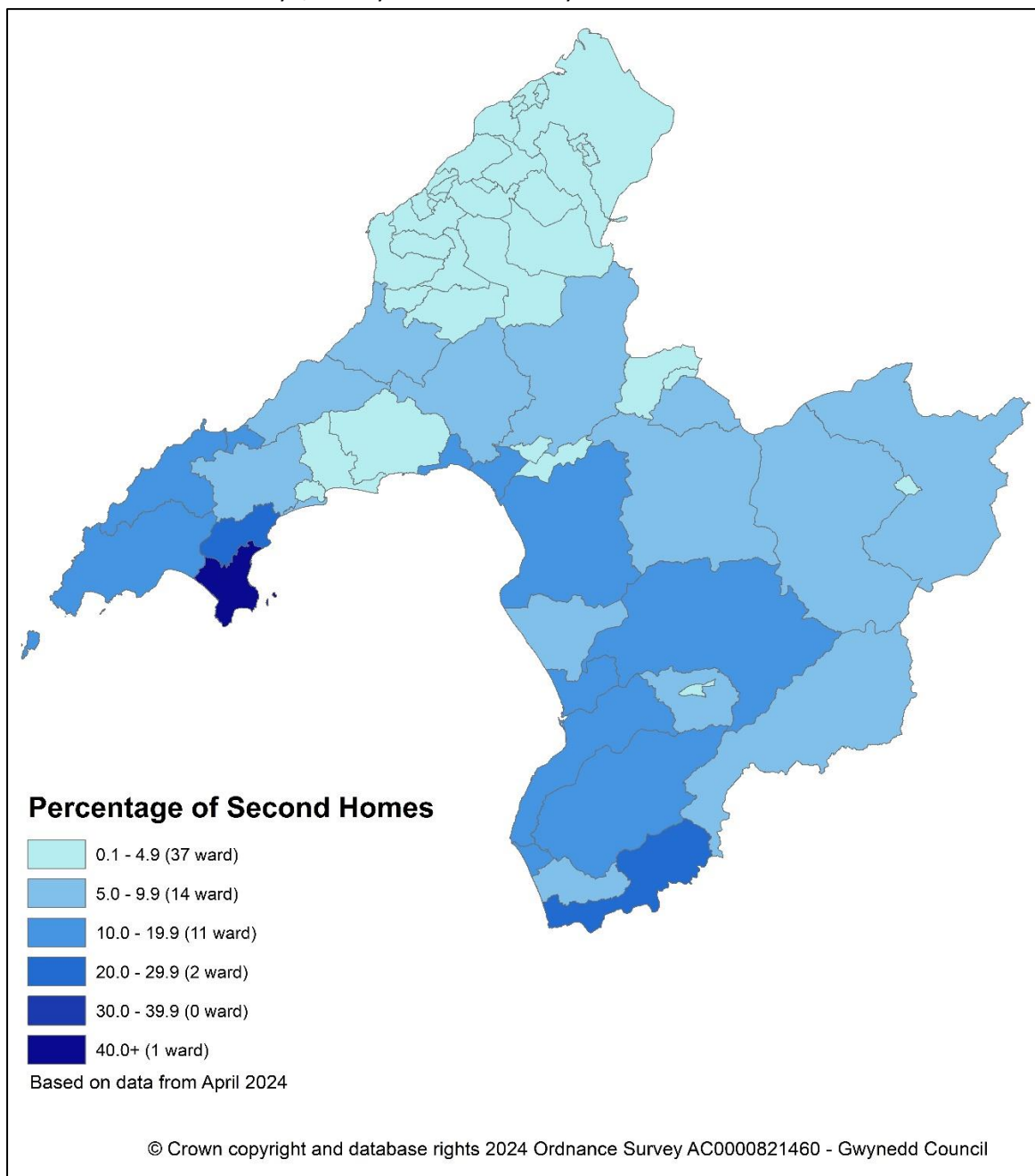


Figure 2: Map of the proportion of second homes by ward, April 2024

- Although this research is not directly related to them – holiday units (taxed as a business) are also a relevant consideration as a number of properties have been moving between the council tax system (as a second home) and the business rates system (as holiday accommodation), and these patterns and numbers can vary at different times. In April 2024 there were 2,628 holiday units in the business rates system in Gwynedd; this represents 4.1% of total housing. The distribution of these across Gwynedd is again uneven, as shown in the map below (ranging from 0.0% in Hendre ward to 13.8% in Llanbedrog and Mynytho ward).

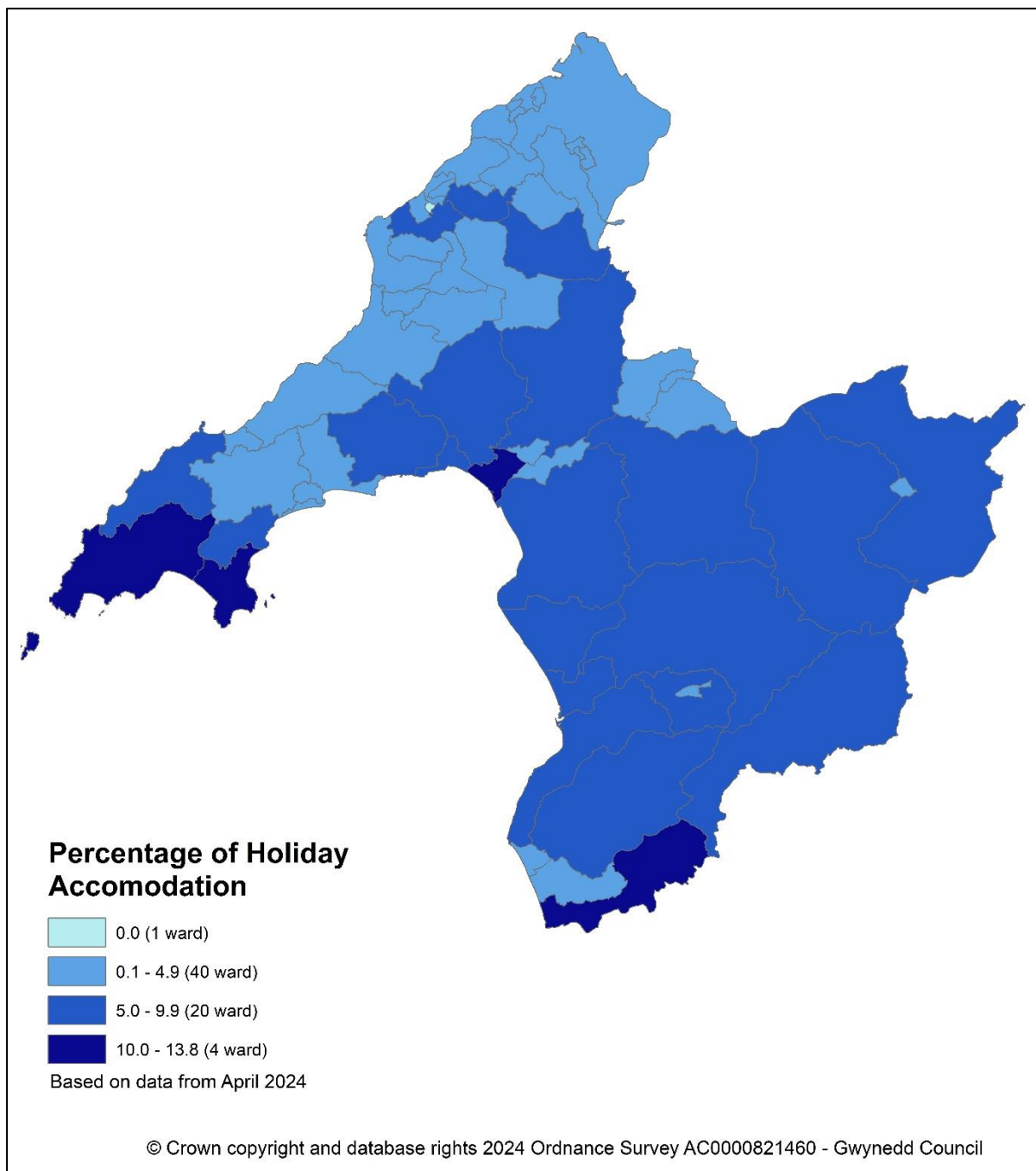


Figure 3: Map of the proportion of holiday accommodation by ward, April 2024

## EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

- In April 2024, there were 1,146 long-term empty properties in the council tax system in Gwynedd, representing 1.8% of total housing. The map below shows the proportion of these per ward in April 2024 and shows that the distribution of long-term empty properties across the county is very uneven, ranging from 0.4% in Hendre ward to 5.0% in Llanbedrog and Mynytho ward. By its very nature, this pattern is also likely to vary over time (e.g. the former Polish Home in Penrhos accounts for the majority of current empty units in the Llanbedrog and Mynytho ward).

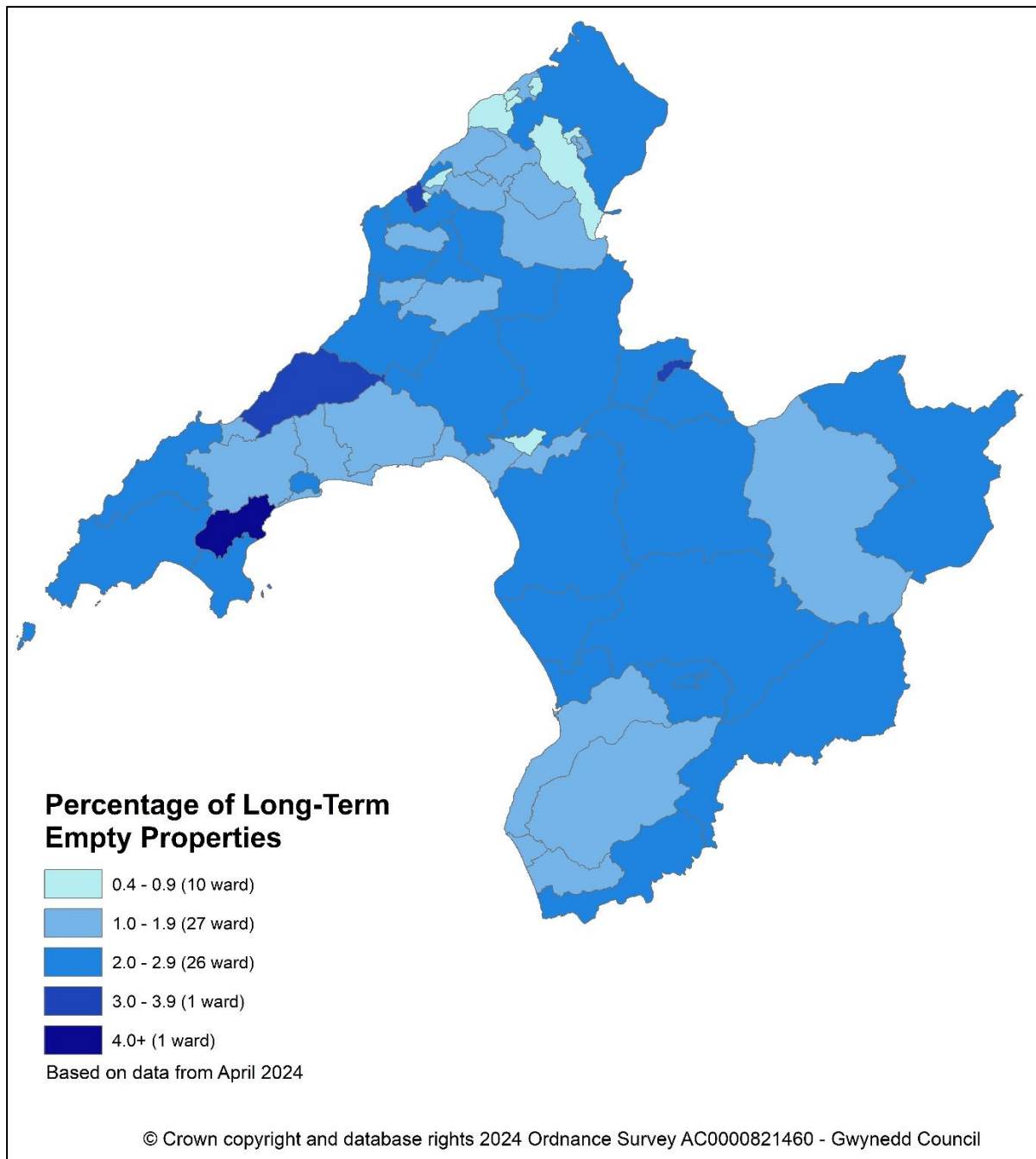


Figure 4: Map of proportion of long-term empty property by ward, April 2024

## EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

- The map below shows the composite percentage (total second homes, long-term empty properties and holiday units, as a percentage of total housing) per ward; Abersoch with Llanengan (57.0%), Aberdyfi (43.0%) and Gorrlewin Porthmadog (31.2%) wards are highest under this measure.

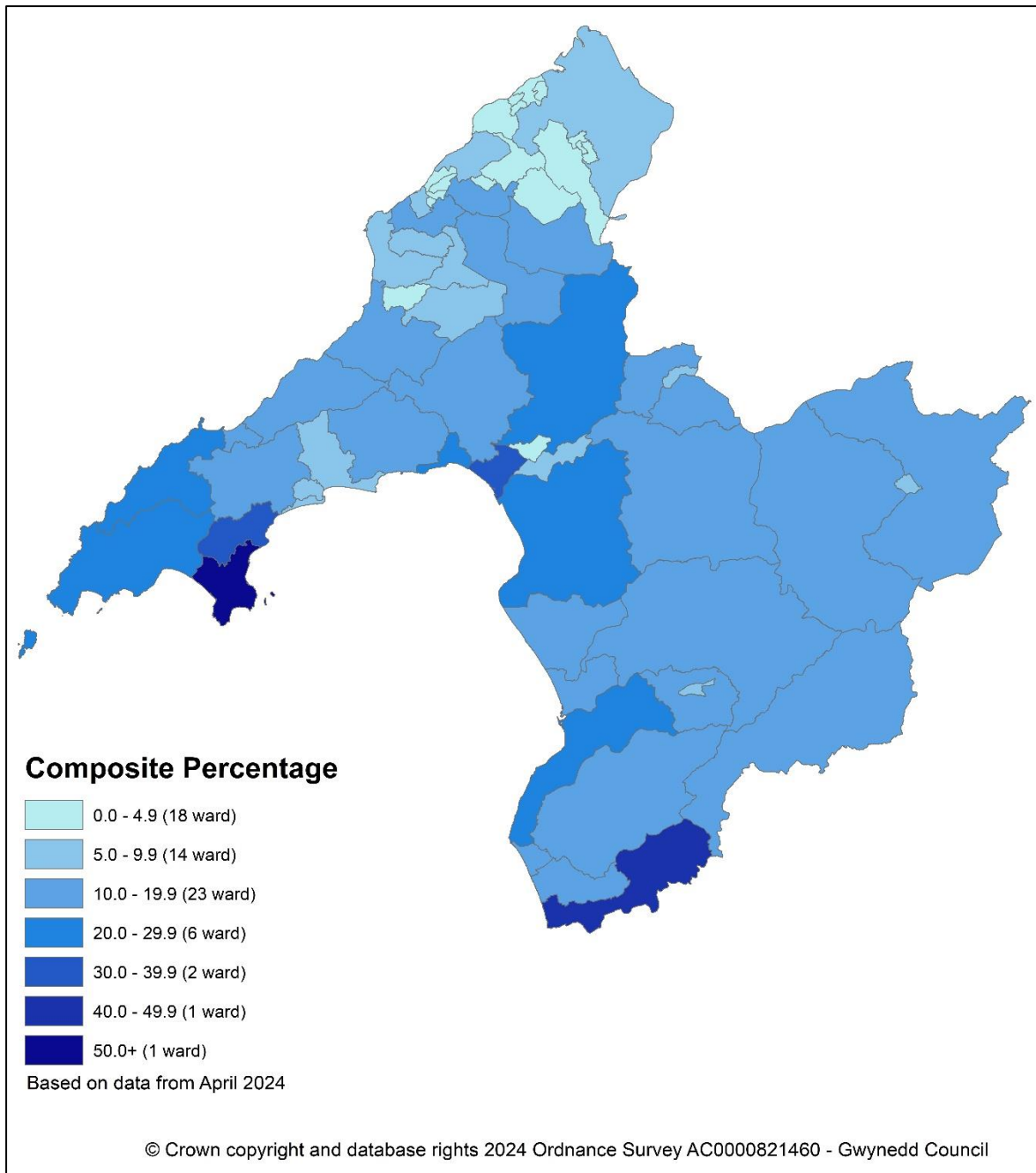


Figure 5: Map of composite proportion (total second homes, long-term empty properties and holiday units) by ward, April 2024

The detailed percentages per ward underpinning the above maps are shown in **Appendix 1**.



## 6.0 Overview of numbers by category from October 2019

The chart below shows the numbers of second homes and long-term empty properties (in the council tax system) and holiday units (in the business rates system) on different dates from October 2019.

(NFI data, but also since this shows the total figure across Gwynedd rather than detailed data, we have been able to find other data so that the analysis can include more dates)

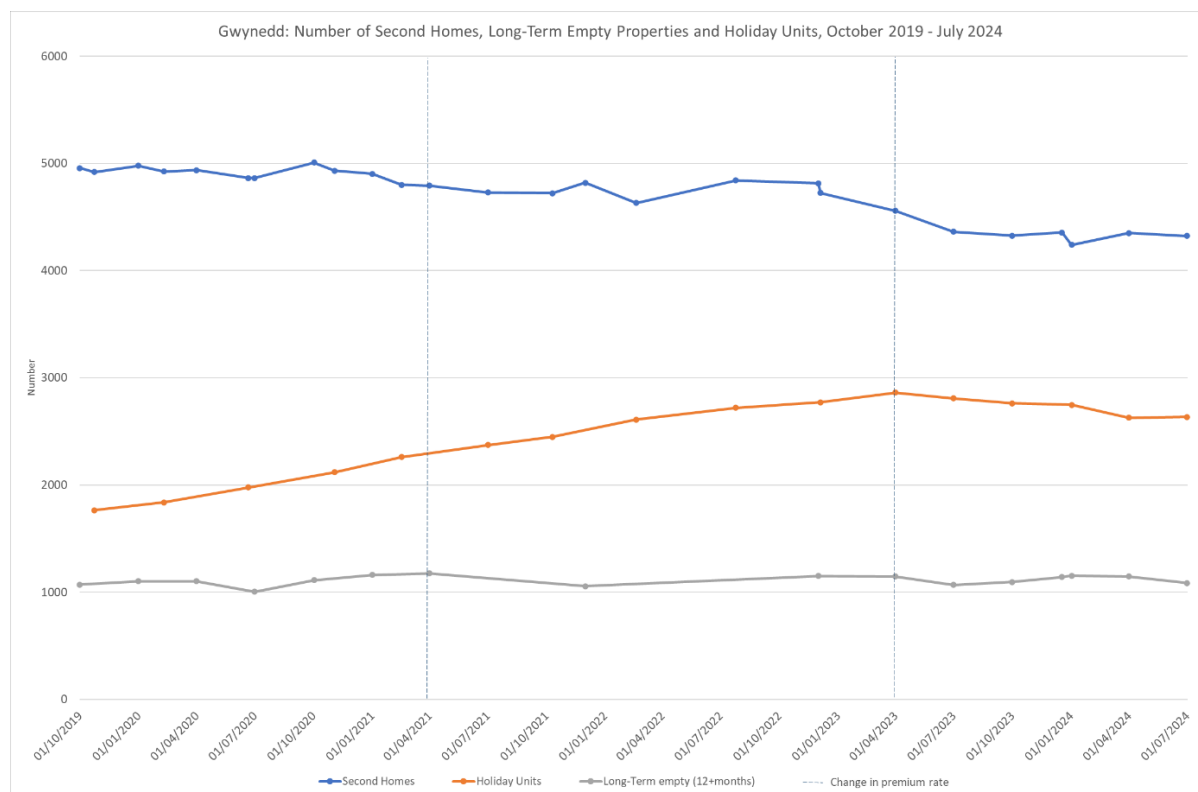


Figure 6: Number of second homes, long-term empty properties and holiday units, October 2019 – July 2024

From this chart, we can see some general patterns:

- **The number of second homes in Gwynedd has been falling.** In 2019 and 2020 the number was quite stable, at around 4,900 to 5,000 (peak of 5,006 in October 2020). The number is now around 4,300 (lowest point of 4,240 in January 2024), with signs that the number is starting to stabilise around that figure.
- **Most of this reduction** has happened **within two specific periods.** It dropped from about 4,900 to about 4,700 between January 2021 and October 2021. It then fell steadily from around 4,700 to around 4,300 between December 2022 and October 2023.
- Until recently **the number of holiday units had been rising steadily**, going from around 1,800 (October 2019) to around 2,900 (April 2023). But there is **some reduction from April 2023**, reaching around 2,600 in April 2024, although again there are recent signs that the number is starting to stabilise.
- Long-term empty property numbers have fluctuated slightly (between around 1,000 and 1,200 across Gwynedd); on the surface there is **no obvious pattern** in these variations. There was some

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decrease between April 2021 and December 2021 (from 1,176 to 1,055) but there have been similar decreases at other times as well.

However, these raw figures do not give much information about what happened to the properties in the various categories (e.g. what is the use of the houses that were previously second homes?). To get a better idea of what is going on therefore, we have tracked the status of individual properties throughout the period covered as shown in the next parts of the report.

## 7.0 Second homes: Tracking property movements over the period

By tracking and analysing individual property categories in the council tax administration system (NFI data on 9 specific dates between October 2019 – April 2024, as explained in the Methodology above), we can take a closer look at the pattern of movements between categories and look for patterns in this, particularly around the times of premium increases.

The following 3 charts analyse property movements to, and from, the Second Homes category in the council tax system by 3 different types of movements, namely (i) moving between a second home and a main residence (ii) moving between a second home and a holiday unit (iii) switching between a second home and other categories.

In all charts below, the 'gross' movements (number of properties moving to be a second home, and number of properties moving from being a second home), and then the 'net' movement (i.e. the difference between the above two figures), are shown in each of the periods. This also shows that the net position may be masking significant turnover (in and out of the second homes category) within the figures and highlights the need to take care in interpreting the net position, i.e. even in relatively 'normal', stable circumstances there are significant shifts of property to, and from, second homes.

The full data behind these charts (including more detailed analysis within the 'other categories') is in **Appendix 2**.

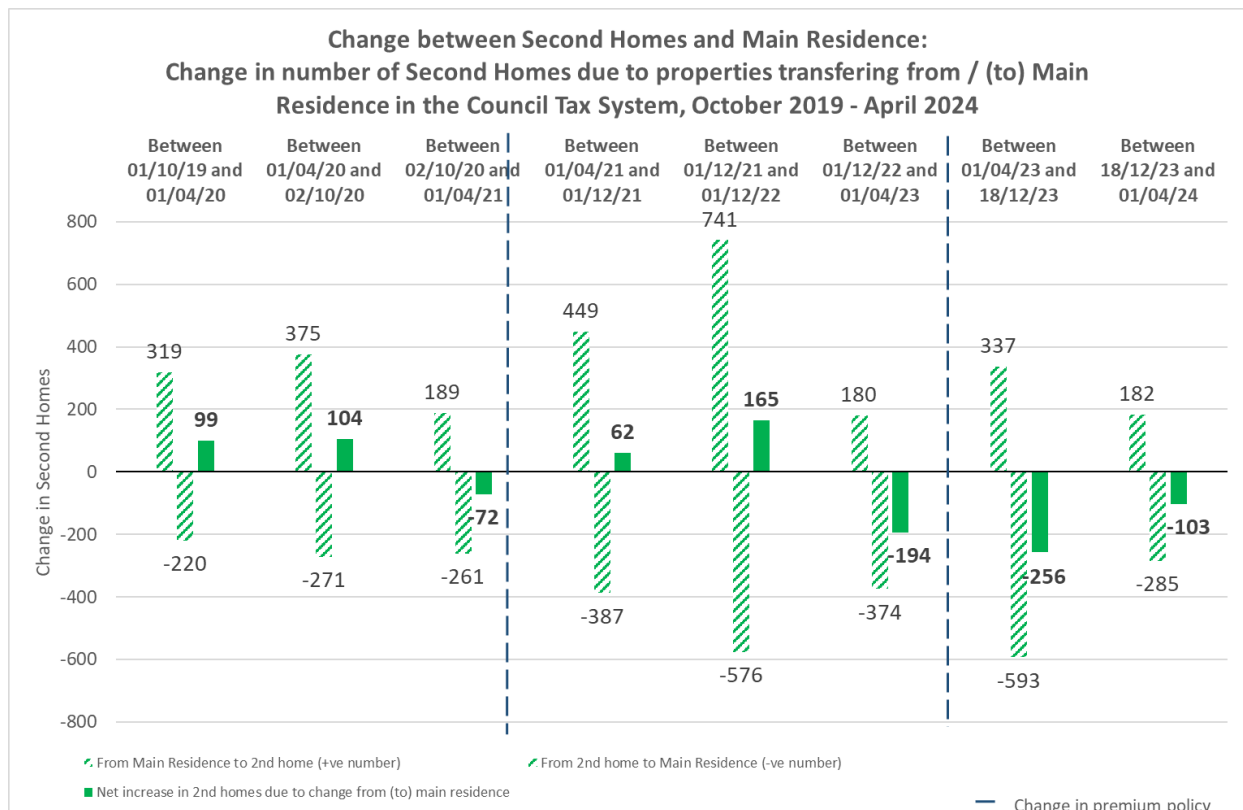


Figure 7: Change in number of second homes due to properties transferring from being or to being a main residence or second home in the Council Tax system by each period between October 2019 and April 2024, showing movements from main residence to second home, from second home to main residence and total net movement.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

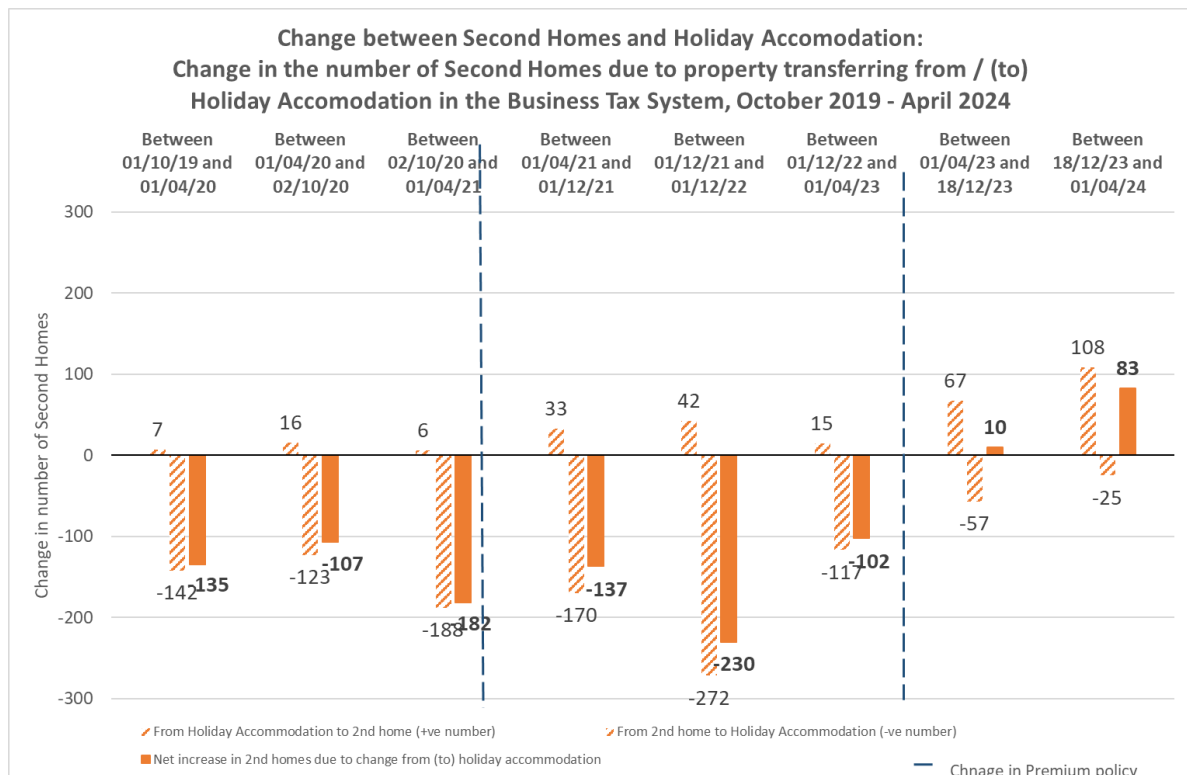


Figure 8: Change in number of second homes due to properties transferring from being or to being holiday accommodation or second homes in the Council Tax system by each period between October 2019 and April 2024, showing movements from holiday accommodation to second home, from second home to holiday accommodation and total net movement.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

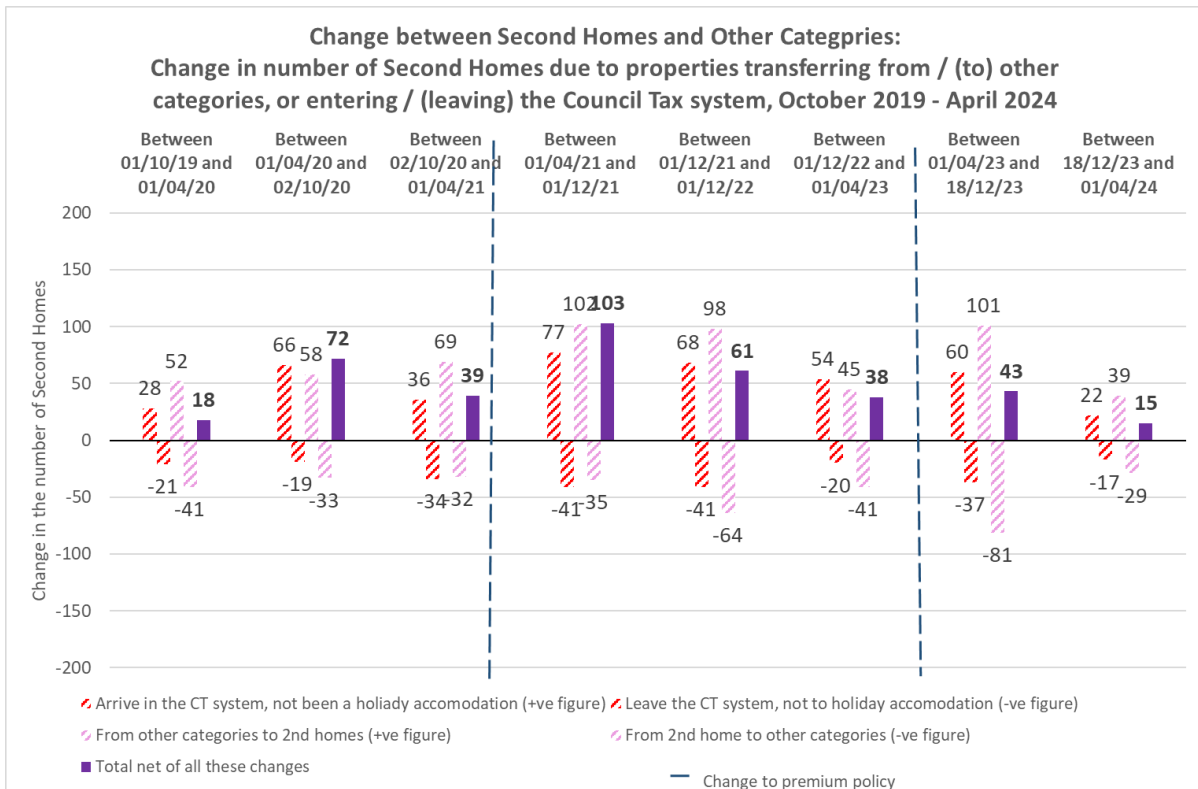


Figure 9: Change in number of second homes due to properties transferring from or into other categories or second homes in the Council Tax system by each period between October 2019 and April 2024, showing movements from other categories to second homes, from second home to other categories and total net movement.

We can then pull together the headline figures from the above 3 charts, to show the net movement in each period per the three main categories, in the chart below. This clearly shows the main net trends at the different times during the period.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

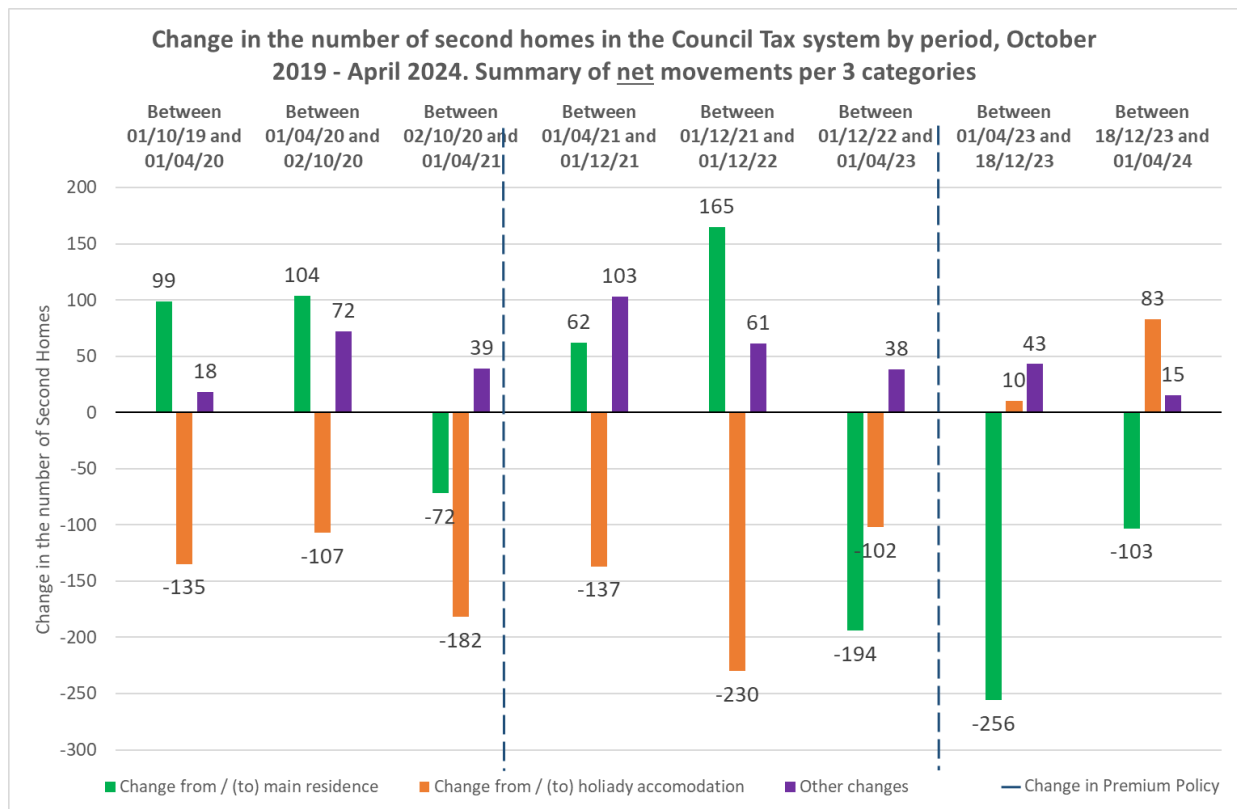


Figure 10: Change in number of second homes in the Council Tax system by period between October 2019 and April 2024 as total net movement per category (change from/to main residence, change from/to holiday accommodation, other changes).

The two charts below bring all of the above-mentioned together to show the total movements into, and out of, the category of second homes in each period. The first chart shows the gross movements (in/out of the second home category) as well as the net change (the difference between the in and out movements), highlighting again that there is significant turnover in terms of individual property position even at times where the total figure is fairly stable.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

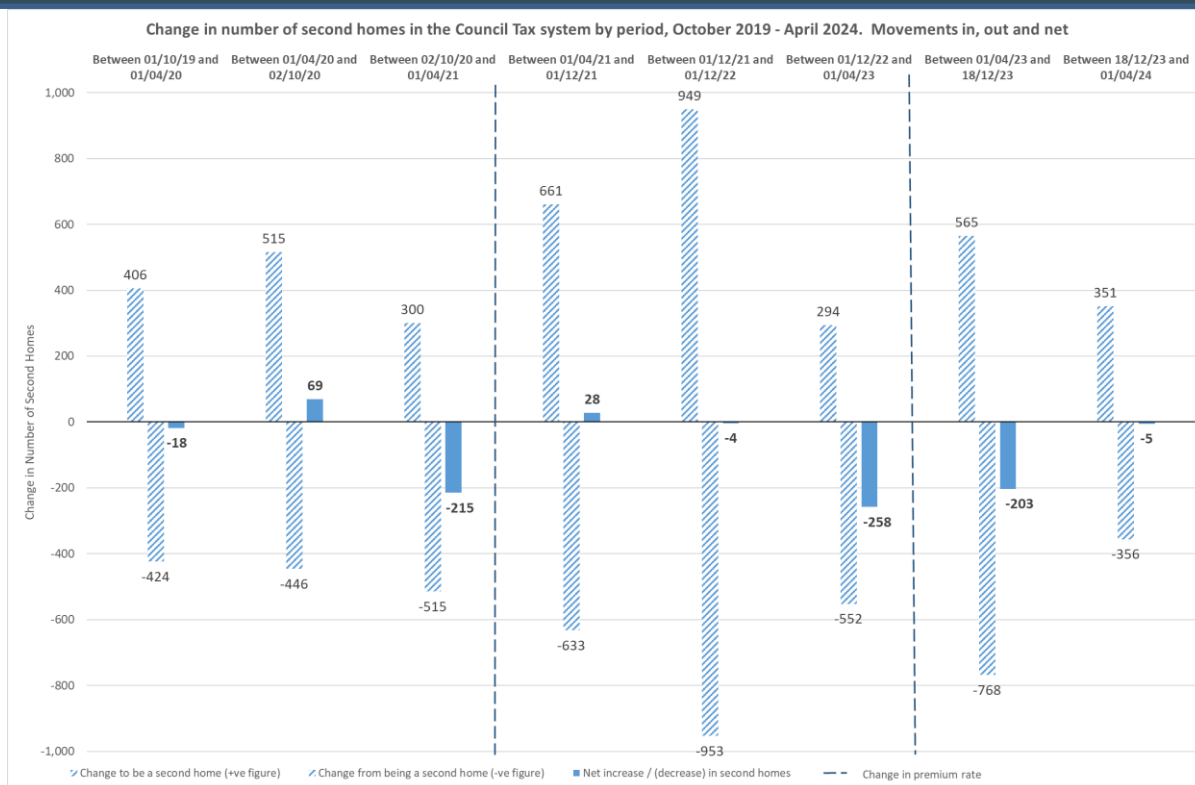


Figure 11: Change in number of second homes in the Council Tax system by periods between October 2019 and April 2024 showing movements in and out of second home category and total net movement.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

The chart below shows the net change in the total number of second homes in the 8 periods covered.

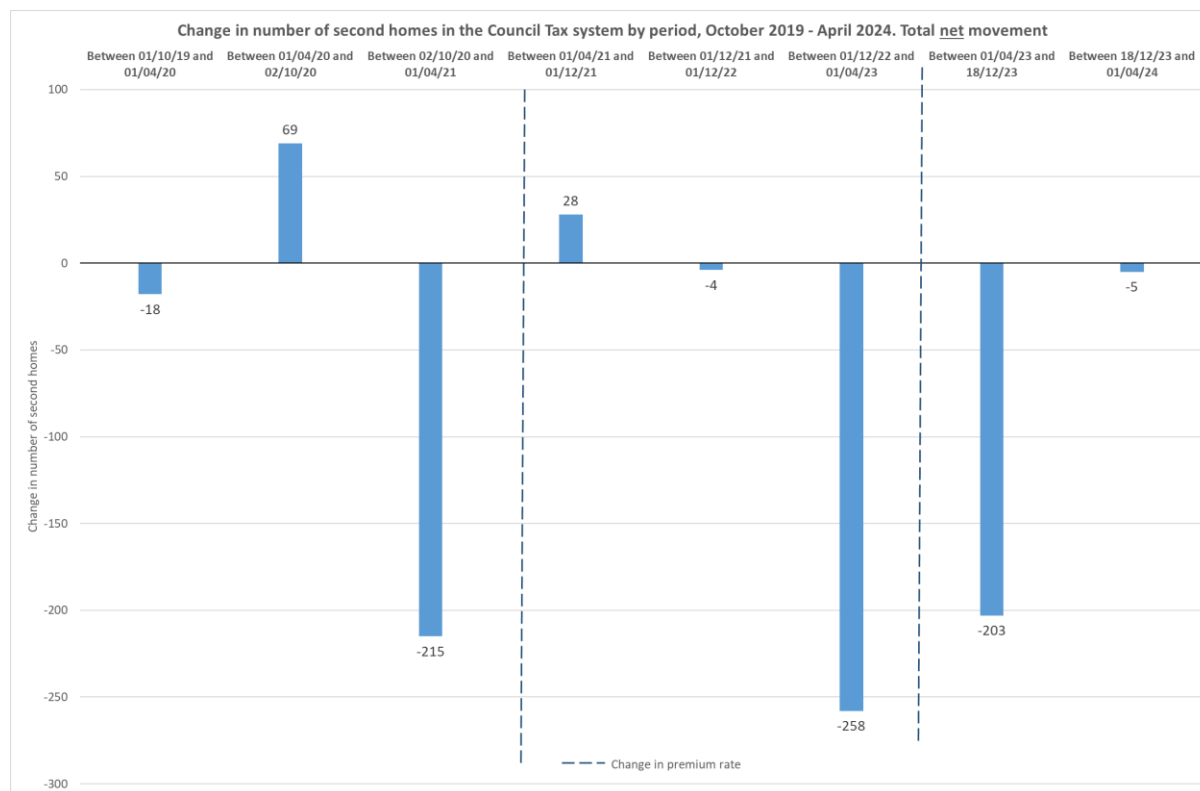


Figure 12: Change in the number of second homes in the Council Tax system per period between October 2019 and April 2024 as total net movement.



# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

## 7.1 Results - tracking second homes

The table below summarises the above information showing the change (net) in the number of second homes in every period, per category of changes.

Table 2: Net change in the total number of second homes in Gwynedd in each period, per 3 main category of changes.

	Oct 2019 - Apr 2020 (1)	Apr 2020 - Oct 2020 (2)	Oct 2020 - Apr 2021 (3)	Apr 2021 - Dec 2021 (4)	Dec 2021 - Dec 2022 (5)	Dec 2022 - Apr 2023 (6)	Apr 2023 - Dec 2023 (7)	Dec 2023 - Apr 2024 (8)
Number of second homes at the start of the period	4,955	4,937	5,006	4,791	4,819	4,815	4,557	4,354
Net increase / (reduction) due to second homes changing <b>from / (to) a main residence</b>	+99	+104	-72	+62	+165	-194	-256	-103
Net increase / (reduction) due to second homes changing <b>from / (to) holiday accommodation</b>	-135	-107	-182	-137	-230	-102	+10	+83
Net increase / (reduction) due to <b>other changes</b>	+18	+72	+39	+103	+61	+38	+43	+15
Number of second homes at the end of the period	4,937	5,006	4,791	4,819	4,815	4,557	4,354	4,349

Therefore, the main patterns can be described as follows:

## EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

- In "usual" periods before any discussion about the two increases in the premium (*before October 2020, and again between December 2021 and December 2022; columns (1), (2) and (5) in the table*) there was a constant flow (net) of property from being a main residence to being a second home but also a flow (one-way, more or less) of property from second homes to holiday accommodation. The combination of these two impacts, as well as a small increase due to other factors (e.g. new housing developments), mean that **the total number of second homes remained relatively stable** in these periods.
- In the period **before increasing the premium to 100%** (*between October 2020 and April 2021; column (3) in the table*) the pattern was different - there was a **net shift of property from second homes to main residences**. This, as well as the continued flow from second homes to holiday accommodation, meant that **the total number of second homes reduced** in this period.
- However, in the **period immediately after increasing the premium to 100%** (*April 2021 - December 2021; column (4) in the table*) the patterns seem to be reverting to normal (namely a flow of main residences to second homes, with the other flow of second homes to holiday accommodation meaning that the number of second homes remained relatively constant). Therefore, **although increasing the premium to 100% seems to have changed the pattern for a while**, it appears that this **impact was relatively small and short-lived**.
- In the **period before, and after, the premium increase to 150%**, however, (*from December 2022 onwards; columns (6), (7) and (8) in the table*) there was a **steady flow of properties from second homes to main residences**. At the start of this period (*December 2022-April 2023; column (6)*) the flow of second homes to holiday accommodation also continued, meaning that **the total of second homes fell substantially in a short period**.
- But **after the change in the business rates regulations** (*namely from April 2023 onwards; columns (7) and (8)*), the direction of the shift changed between second homes and holiday accommodation, so that now **there was a net flow from holiday units to second homes**.
- **Between April 2023 and December 2023** (*column 7*), the **shift from second homes to main residences was greater than the shift from holiday units to second homes**, leading therefore to a reduction in the total number of second homes.
- **Between December 2023 and April 2024** (*column 8*) however, an increase was seen in the flow of second homes to holiday units, meaning that the **total number of second homes was more or less static** in this latest period.

Therefore, to summarise, there was a net flow of properties from second homes to main residences before the premium increase to 100% in April 2021, and (more definitively and seemingly more longer lasting) before and after the premium increase to 150% in April 2023. This is contrary to the usual pattern where an opposite flow was seen, from main residences to second homes.

The pattern of movements between second homes and holiday accommodation also changed as a result of the change in the business rates regulations in April 2023. Whereas before there was a flow of second homes to holiday units, the flow is now going in the opposite direction. There are signs (based on the latest data in this research, i.e. December 2023 - April 2024), that this flow has grown

so that the number of second homes is now stable (i.e. this flow is around the same as the flow of second homes to main residences).

The Welsh Government conducted an analysis, looking at the changes in the numbers of taxable second homes in Gwynedd, looking at data from 13 April 2023 and 13 April 2024. Their research showed a reduction in the number of taxable second homes in the whole of Gwynedd between these two dates. Although this analysis shows a similar trend to what has been seen in Gwynedd's internal council tax data, as the source of the data used by the Welsh Government is different to the data being discussed in this report, the two are not directly comparable.

**Appendix 3** presents the same information in a slightly different way, starting with the properties that were second homes in October 2019 and showing what happened to those in subsequent periods (and also where the newly-arrived second homes in subsequent periods came from).

It is difficult to make a direct comparison between this and the above charts due to properties going back and forth on more than one occasion (and the charts in Appendix 3 cannot reflect this). But this again highlights the substantial turnover within the figures (of the 4,955 properties that were second homes in October 2019, only 2,769 of them (56%) remained as second homes by April 2024 but another 1,580 properties had reached the second homes category by then).

### 7.2 Results for the areas with the highest proportion of second homes

As the core data which forms the basis of this report has been categorised per geographical area (wards, neighbourhoods, well-being areas, etc.), it is possible to report further according to smaller areas, as needed.

However, to avoid overloading this report with an excess of information, the analysis below looks at the picture in two specific wards, namely **Abersoch with Llanengan**, and **Aberdyfi** (it was seen in part 5 above that these are the two wards with the highest proportions of second homes and holiday units in Gwynedd, and the highest composite percentage of second homes, holiday units and long-term empty properties collectively).

The following charts show the net shift of property to, and from, the Second Homes category per three main categories of movements (the first graph per ward) and in total (the second graph per ward) in these two wards.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

## Abersoch with Llanengan

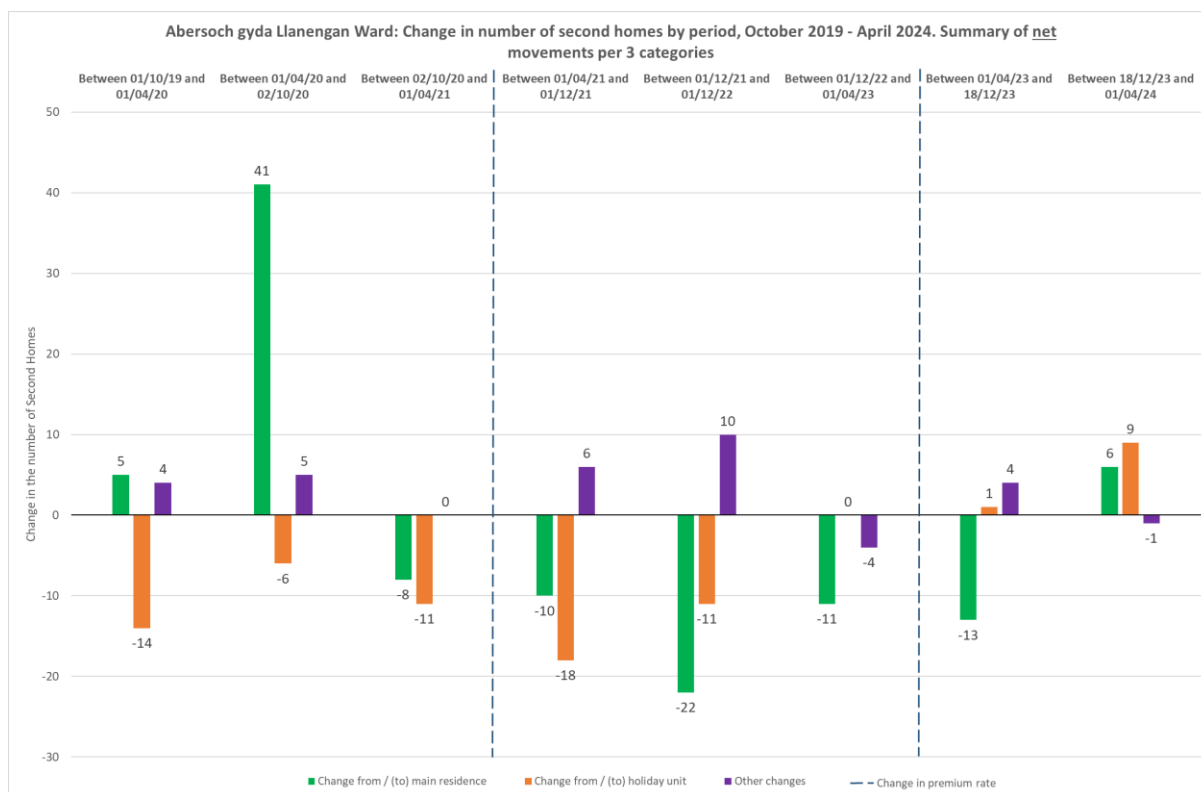


Figure 13: Change in the number of second homes in the Council Tax system by period between October 2019 - April 2024 as total net shift per category (change from/to main residence, change from/to holiday accommodation, other changes) in the Abersoch with Llanengan ward.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

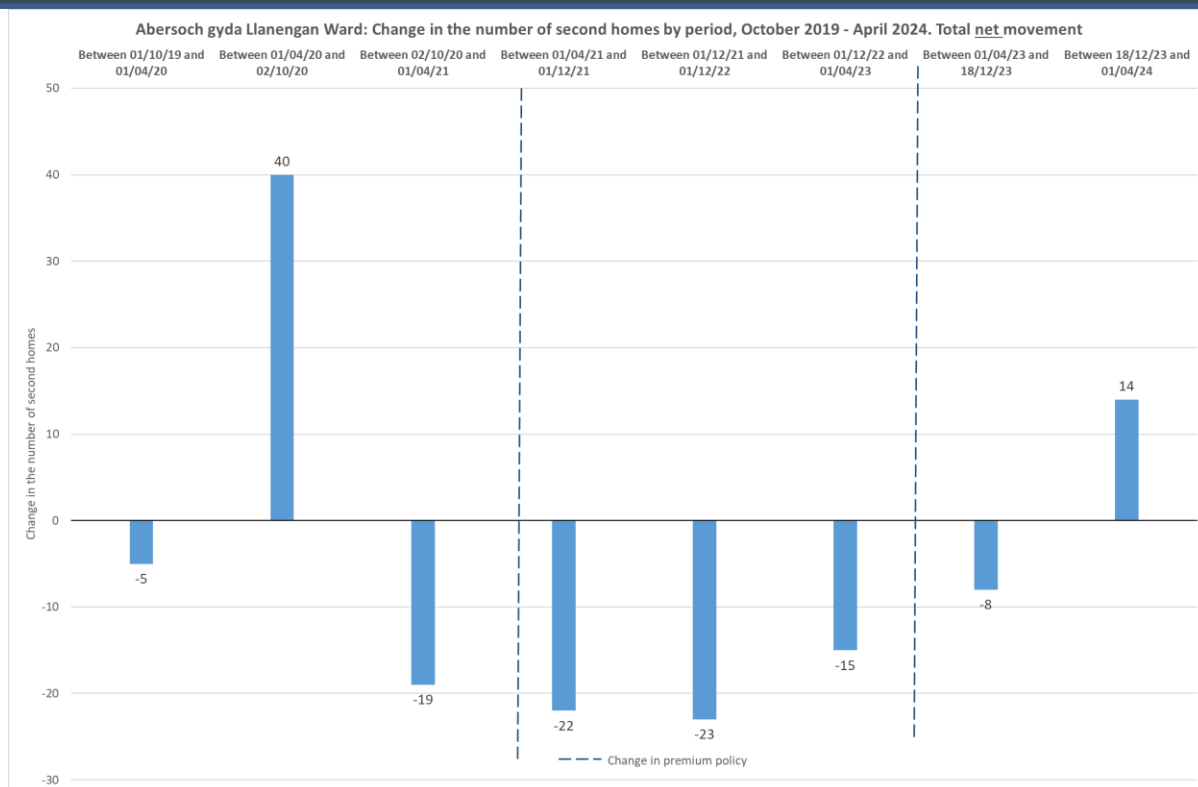


Figure 14: Change in the number of second homes in the Council Tax system per period between October 2019 - April 2024 as total net shift in the Abersoch with Llanengan ward.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

## Aberdyfi

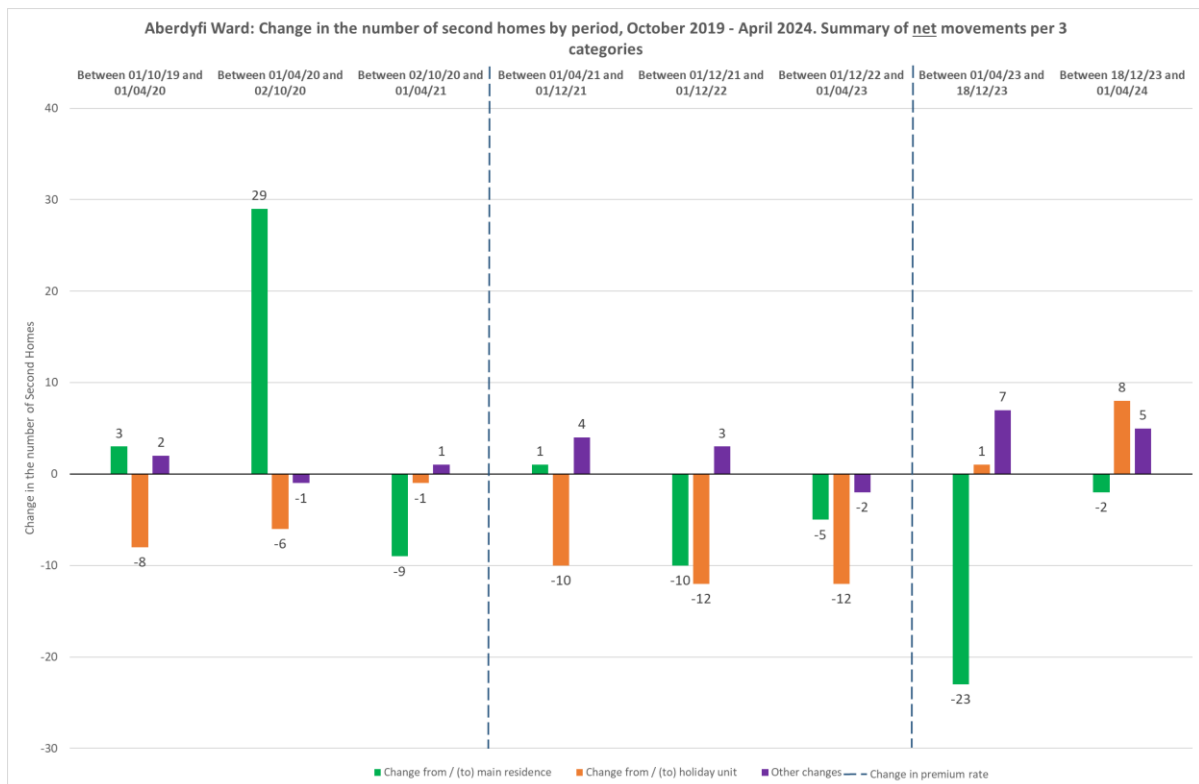


Figure 15: Change in the number of second homes in the Council Tax system by period between October 2019 and April 2024 as total net movement per category (change from/to main residence, change from/to holiday accommodation, other changes), in the Aberdyfi ward

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

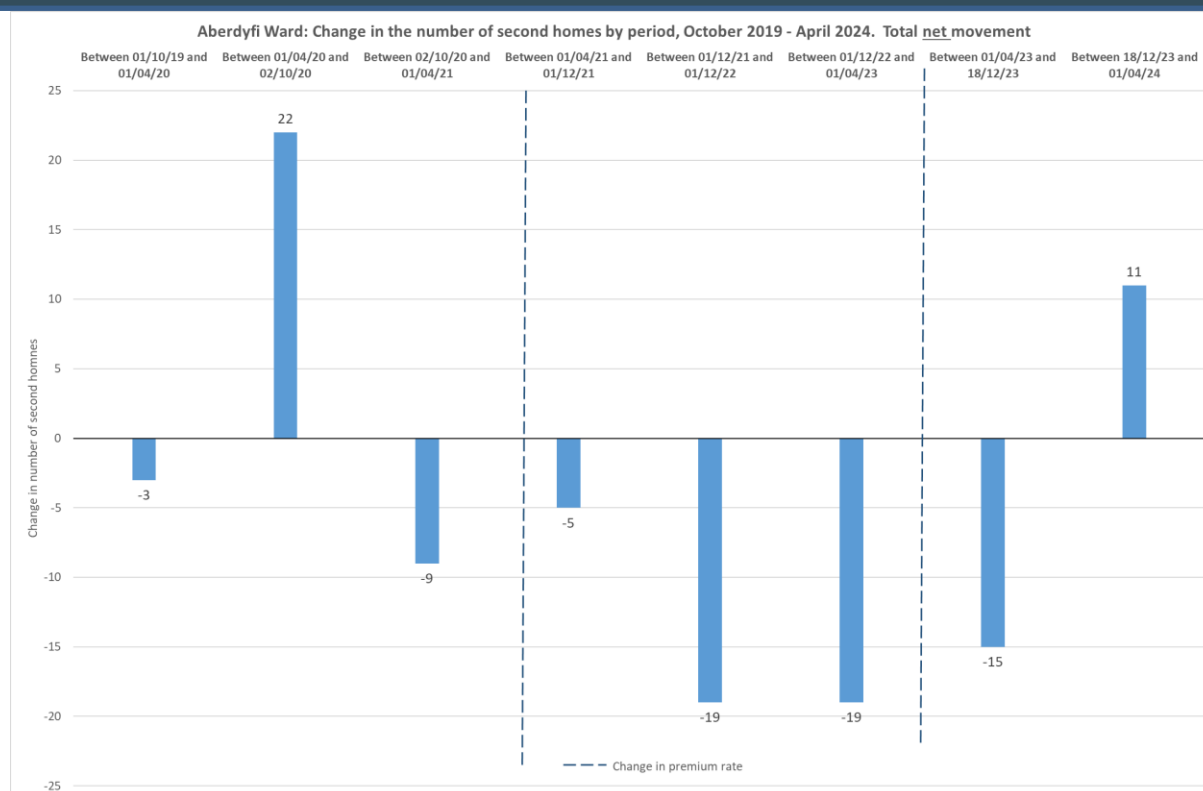


Figure 16: Change in the number of second homes in the Council Tax system per period between October 2019 and April 2024 as total net shift in the Aberdyfi ward

## Conclusions - Results for the Abersoch with Llanengan, and Aberdyfi wards

If we compare the pattern in these two wards with the picture across Gwynedd:

- The pattern is similar to a large degree - certainly in terms of the changes between second homes and holiday accommodation; there are no significant differences between these two areas and Gwynedd in general;
- There is some difference in terms of the flow between second homes and main residences. For whatever reason, it appears that the impact of increasing the premium to 100% (April 2021) has been more long-lasting in these two wards (in Abersoch / Llanengan in particular), than in the rest of Gwynedd, with the net flow from second homes to main residences continuing to a degree after April 2021, contrary to the pattern in Gwynedd in general.
- Also, there was a (small) flow from main residences to second homes between December 2023 and April 2024 in the Abersoch / Llanengan ward - again this is contrary to Gwynedd in general.

Therefore, on the surface (and bearing in mind that caution needs to be exercised and not to read too much into the results about a relatively small number of properties), the pattern in these two wards is slightly different to Gwynedd as a whole. The increase in the premium seems to have had an impact in this ward as it does in the rest of Gwynedd - but it appears that the exact scale and timing of this impact has been different to a degree, particularly so in Abersoch / Llanengan.

### 7.3 Comparison with house sales data

We have also compared the council tax categories data with the Land Registry data for the houses sold. For this element, we looked at the period from December 2022 onwards (i.e. the period immediately before, and then after, increasing the premium 150%) as this is when we started to see a substantial, consistent net flow of properties from the second homes category to the main residence category.

The results showed:

- Of the 857 properties (where the data could be linked together), which had transferred from a second home to a main residence during the period, 163 of them (19%) had been sold around the same time (i.e. within a year of the change in taxation category).
- Of the 3,379 properties which had remained as a second home consistently from December 2022 to April 2024 (and where it was possible to link the data), 31 (1%) of them had changed ownership during this period.

This can be compared with the previous period (December 2021 - December 2022): 3,714 properties had remained as second homes consistently during this period, with 84 (2%) changing ownership during the period.

Therefore, it is not obvious that increasing the premium to 150% has led to any significant change of pattern in terms of the number of second homes being sold to other second home-owners – in fact, the data suggests that this occurred to a somewhat lesser extent following the increase in premium compared to previously.

#### *Above results for Abersoch with Llanengan ward*

- Of the 35 properties (where it was possible to link the data together) that had transferred from a second home to a main residence during the period, 3 of them (9%) had been sold around the same time (within a year of the taxation category change).
- Of the 464 properties that remained a second home uninterrupted from December 2022 until April 2024 (and where it was possible to link the data together), 4 (1%) of them had changed ownership during this period.

#### *Above results for Aberdyfi ward*

- Of the 45 properties (where it was possible to link the data together) that had transferred from a second home to a main residence during the period, 6 of them (13%) had been sold around the same time (within a year of the taxation category change).
- Of the 269 properties that remained a second home uninterrupted from December 2022 until April 2024 (and where it was possible to link the data together), 8 (3%) of them had changed ownership during this period.



## EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

In these two particular wards, therefore, looking at properties which transferred from a second home to a principal residence around / following the premium increase to 150%:- a lower proportion of these had been connected with the sale of the house, than was the case in such transfers in Gwynedd as a whole.

Looking at the properties that had remained a second home uninterrupted during this period, the proportion sold (i.e. transferring from being one owner's second home, to another owner's second home) in the Abersoch and Llanengan ward, was similar to the proportion across the whole of Gwynedd. The proportion was somewhat higher in the Aberdyfi ward.

## 8.0 Questionnaire results

A simple questionnaire was sent to addresses which (according to council tax data), had changed from a second home to a main residence since December 2022. This period was selected as the increase to 150% for second homes was operational in Gwynedd in April 2023 and, as seen above, from December 2022 onwards the Council Tax data shows a substantial, consistent (net) flow of properties from second homes to main residences.

A letter was sent out to all of these addresses (906 of them)<sup>1</sup>, with a link to complete the questionnaire on-line or an instruction to contact Galw Gwynedd should they prefer a paper copy of the questionnaire. The purpose of the questionnaire was to obtain a little more information on properties that used to be second homes but are now main residences, to understand more about the background of this change and about those now residing there. A copy of the letter is in **Appendix 4** and a copy of the questionnaire in **Appendix 5**.

177 responses were received; this is a 19.5% response rate. 167 (94.4%) of these responded on-line and 10 (5.6%) completed a paper questionnaire.

The majority of responders noted that they owned the house (85.3%, N=151). 6.8%(N=12) rented and 1.1% (N=2) lived in the house without paying rent.

*Table 3: Response to the question 'Do you own or rent the house?' as a number and a percentage.*

	Number	Percentage
Own	151	85.3
Rent	12	6.8
Living in the house without paying rent	2	1.1
Other	2	1.1
No response	10	5.6
<b>Total</b>	<b>177</b>	<b>100.0</b>

For those who had noted that they owned the house, they were asked to put a tick in the box which best described the situation. 64.2% (N=97) noted that they had bought the house in order to live in it permanently (it was never their second home) and 27.8% (N=42) noted that the house used to be their second home, but that they now lived there permanently.

<sup>1</sup>A total of 1,252 properties had moved from a second home to a main residence in this period (gross) (see 7.1 above). But as some of these subsequently moved category again, or as their situation is generally more complex (e.g. some of them are now empty), the number of properties questioned was restricted to 906 in order to restrict this part of the research to relatively 'simple' situations and to avoid confusion to the recipients of the questionnaire.

# EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – NOVEMBER 2024

Table 4: Response to the question 'Which of these best describes the situation of your house?' as a number and a percentage.<sup>12</sup>

	Number	Percentage
Have bought this house to live in it permanently (it was never my second home)	97	64.2
This house was my second home but I / we are now living in it permanently.	42	27.8
Other	12	7.9
<b>Total</b>	<b>151</b>	<b>100.0</b>

For those who had noted that they had bought this house in order to live in it permanently, they were asked whether this was the first house that they had bought. 20.6% (N=20) noted that this was the first house that they had bought.

Table 5: Response to the question 'Is this the first house you bought?' as a number and a percentage.

	Number	Percentage
No	76	78.4
Yes	20	20.6
No response	1	1.0
<b>Total</b>	<b>97</b>	<b>100.0</b>

The next part of the questionnaire asked about the features of the home. Half the responders (50.3%, N=89) noted that more than one person aged 18 or over lived in the house, with 44.1% (N=78) noting that one adult aged 18 years and over lived in the house, and 5.6% (N=10) had not responded.

Table 6: Response to the question 'What best describes your home?' as a number and a percentage.

	Number	Percentage
More than one adult (18 years old and over) lives here	89	50.3
One adult (18 years old and over) lives here	78	44.1
No response	10	5.6
<b>Total</b>	<b>177</b>	<b>100.0</b>

87.0% (N=154) of the responders noted that no children lived in the house, with 7.9% (N=14) noting that children lived in the house, and 5.1% (N=9) did not respond.

Table 7: Response to the question 'Are there children under the age of 18 living here?' as a number and percentage.

	Number	Percentage
No	154	87.0
Yes	14	7.9
No response	9	5.1
<b>Total</b>	<b>177</b>	<b>100.0</b>

The next question was asked to see whether the responders had a local connection, and this list was based on the local connection criteria of the Common Housing Register. Just over half of the respondents (55.4%, N=98) had not lived in Gwynedd before. Almost a third of them (29.9%, N=53) had lived in Gwynedd for 5 years or more before living in this house. 8.5% (N=15) of the respondents had been brought up in Gwynedd but had moved away and then had moved back to Gwynedd; and 5.1% (N=9) had lived in Gwynedd for less than 5 years before living in this house.

*Table 8: Response to the question 'For the period immediately before you lived in this house, which of the below applies to the adults living in the house?' as a number and percentage.*

	<b>Number</b>	<b>Percentage</b>
Have lived in Gwynedd for 5 years or more before living in this house	53	29.9
Have lived in Gwynedd for less than 5 years before living in this house	9	5.1
Have been brought up in Gwynedd but then moved away; and then have moved back to Gwynedd	15	8.5
Have not lived in Gwynedd before	98	55.4

*The percentages will not add to 100 as it was possible to select more than one option in this question.*

By combining the data forming the basis to two of the above tables, we can look at whether there was a relationship between the situation with the house (whether it had been bought, moved to a second home they already had, etc.), and whether the adults living there had a local connection.

It can be seen that 71% of the adults who moved to live permanently to a house, which was formerly their second home, had not lived in Gwynedd before. 52% was the equivalent percentage for people who had bought the house to live in it permanently (not previously their second home).

35% of the adults who bought a house to live in it permanently (not previously their second home) had lived in Gwynedd for 5 years or more.

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Table 9: Response to the question 'For the period immediately before you lived in this house, which of the following applies to the adults living in the house?' compared with the situation of the property

	Have lived in Gwynedd for 5 years or more before living in this house		Have lived in Gwynedd for less than 5 years before living in this house		Have been brought up in Gwynedd but then moved away; and then have moved back to Gwynedd		Have not lived in Gwynedd before		Total
	Number	Percentage	Number	Percentage	Number	Percentage	Number	Percentage	
Have bought this house to live in it permanently (it was never my second home)	36	35.3	3	2.9	10	9.8	53	52.0	102
This house was my second home but I / we are now living in it permanently.	7	16.7	0	0.0	5	11.9	30	71.4	42
Other	3	23.1	2	15.4	0	0.0	8	61.5	13

## EVIDENCE OF THE IMPACT OF THE COUNCIL TAX PREMIUM ON SECOND HOMES AND LONG-TERM EMPTY PROPERTIES IN GWYNEDD – OCTOBER 2024

65.3% (N=109) noted that no adult in the house could speak Welsh. A third of the responders had at least one adult living in the house who was able to speak Welsh (33.5%, N=56).

Table 10: Response to the question 'Are any of the adults in the house able to speak Welsh?' as a number and percentage.

	Number	Percentage
No	109	65.3
Yes	56	33.5
No response	2	1.2
<b>Total</b>	<b>167</b>	<b>100.0</b>

Again, by combining the data from different questions, we can look at whether there was a relationship between the situation with the house (whether it had been bought, moved to a second home they already had, etc.) and whether any adults in the house could speak Welsh.

It is seen, in the case of houses bought specifically to live in them permanently (not a second home for those owners previously), that an adult(s) spoke Welsh in 39% of them. This compares with 26% in the case of houses where the owners have moved permanently to houses that were their second homes previously.

Table 11: Response to the question 'Are any of the adults in the house able to speak Welsh?' versus 'For the period immediately before you lived in this house, which of the below applies to the adults living in the house?'

	Adult able to speak Welsh		Adult unable to speak Welsh		No response		Total
	Number	%	Number	%	Number	%	
This house was my second home but I / we are now living in it permanently.	11	26.2	31	73.8	0	0.0	42
Have bought this house to live in it permanently (it was never my second home)	38	39.2	58	59.8	1	1.0	97
Other	2	16.7	10	83.3	0	0.0	12
No response	5	31.3	10	62.5	1	6.3	16

Of the 14 responders who had children living in the house, 71.4% (N=10) of them were able to speak Welsh and 28.6% (N=4) of them could not speak Welsh.

Table 12: Response to the question 'Can any of the under 18s in the house speak Welsh?' as a number and percentage.

	Number	Percentage
Yes	10	71.4
No	4	28.6
<b>Total</b>	<b>14</b>	<b>100.0</b>

Therefore, to summarise some of the main results of this part of the research (and bearing in mind that the response rate was 20%, and that it is therefore difficult to make overly definitive conclusions, particularly should there be a tendency for some categories of owners to be more prepared to respond than others):

- The majority (64%) of the responders who owned the house, had bought the house in order to live there permanently (it had never been their second home). 28% of the responders had used it as a second home previously but they now lived in it permanently.
- Of those who had bought the house in order to live there permanently, around 21% were first-time buyers.
- 71% of the adults who moved to live permanently to a house that was previously their second home, had never lived in Gwynedd before. 52% was the equivalent percentage for people who had bought the house to live in it permanently (not previously their second home); 35% of these owners had lived in Gwynedd for 5 years or more.
- In the case of houses bought specifically to live in them permanently (not a second home for those owners previously), an adult / adults spoke Welsh in 39% of them. This compares with 26% in the case of houses where the owners have moved permanently to houses that were their second homes previously.

## 9.0 Long-term empty properties

In the same way as was done with second homes (above), we have also tracked and analysed changes to individual property categories to, and from, the long-term empty property category in the council tax administration system to look for any patterns with this, particularly around the time that the premium was increased to 100% in April 2021.

The chart below summarises the net shift to, and from, the long-term empty property category per period (full data in **Appendix 6**).

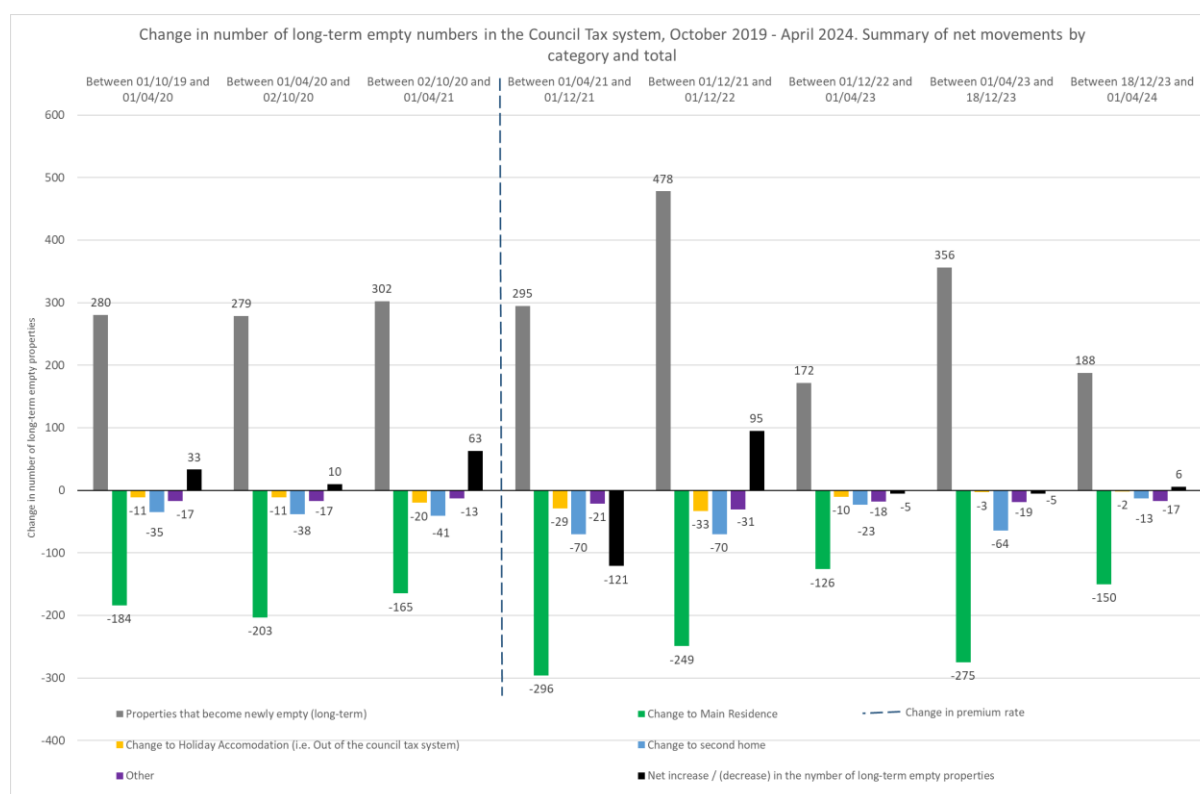


Figure 17: Change in long-term empty property numbers in the Council Tax system by period between October 2019 and April 2024 as a summary of net movements per category and in total.

In general (and as also seen in Figure 5 above), there was only a slight change in the number of long-term empty properties across Gwynedd over the entire period. The biggest change was the net reduction of -121 in April - December 2021 (i.e. following the premium increase). However, this was more or less counterbalanced by the net increase of +95 in the subsequent period from December 2021 - December 2022.

Looking more specifically at property changing from long-term empty properties to main residences, the following pattern can be seen:



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Table 13: Change from long-term empty property to main residence

Period	Number of months	Number of properties transferring from long-term empty properties to main residences	Average number of properties transferring per month
1/10/19 – 1/4/20	6	184	31
1/4/20 – 2/10/20	6	203	34
2/10/20 – 1/4/21	6	165	28
1/4/21 – 1/12/21	8	296	37
1/12/21 – 1/12/22	12	249	21
1/12/22 – 1/4/23	4	126	32
1/4/23 – 18/12/23	9	275	31
18/12/23 – 1/4/24	3	150	50

Therefore, the pattern is relatively inconclusive - a higher number transferred in the period immediately after the premium increase in April 2021, but subsequently the numbers have varied a lot and it is difficult to see that there is any long-lasting impact. It is also difficult to see a definitive pattern in the numbers that newly become empty.

## 10.0 Recommendations for data improvement

The main source of this research was data used for council tax administration / collection purposes, and there is room to consider whether further data needs to be collected in future, particularly if there is an intention to continue to monitor trends.

More specifically:

- Ensuring a unique property reference (UPRN) in full in the council tax system
- Reconciling the format of the business rates / council tax database so that it is possible to link the data better between both
- Are there opportunities to collect further information (language spoken, etc.) when recording changes in ownership, etc.?

## 11.0 Conclusions

There was a net flow of properties from second homes to main residences before increasing the premium to 100% in April 2021, and (more definitive and more long-lasting) before and after the premium increase to 150% in April 2023. This goes against the usual pattern where the flow goes in the opposite direction, from main residences to second homes. Therefore, it appears (although we must bear in mind the restrictions of the information, and other factors that could have influenced the situation), that the premium has contributed towards bringing second homes back into use as main residences.

It also appears that the change in regulations in terms of holiday accommodation, has (and continues to), influence the situation - there is now a flow of properties from holiday accommodation to second homes (and slightly counterbalancing the above trend of fewer second homes).

Around 19% of the properties changing from second homes to main residences recently (since December 2022), were sold at around the same time.

The majority (64%) of the questionnaire responders (in relation to houses that used to be second homes but are now occupied permanently), had bought the house to live in it permanently (it had never been their second home). 28% of the responders had used it as a second home previously but they now lived in it permanently. This is contrary to the above finding that a relatively low proportion of these properties had been sold according to the Land Registry data - and possibly suggests that caution should be exercised in order to avoid making overly definitive conclusions based on the results of the questionnaire (also bearing in mind that the response rate was 20%, and therefore it is possible that there is a tendency for some categories of owners to be more willing to respond than others).

71% of the adults who moved to live permanently to a house that was previously their second home, had never lived in Gwynedd before. 52% was the equivalent percentage for people who had bought the house to live in it permanently (not previously their second home). 35% of the adults who bought a house to live in it permanently (not previously their second home) had lived in Gwynedd for 5 years or more.

In the case of houses bought specifically to live in them permanently (not a second home for those owners previously), an adult / adults spoke Welsh in 39% of them. This compares with 26% in the case of houses where the owners have moved permanently to houses that were their second homes previously.

In terms of long-term empty properties, the pattern seen was relatively inconclusive - a higher number transferred in the period immediately after the premium increase in April 2021, but subsequently, the numbers have varied greatly and it is difficult to see any long-lasting impact. It is also difficult to see a definitive pattern in the numbers that newly become empty.