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Housing need assessment for older people in Gwynedd

Report for Gwynedd Council

Version: 2.0

Status: Final

9th June 2026

Housing Learning and Improvement Network

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party Executive summary

The purpose of this research is to provide an evidence base that provides estimates of future need for supported and specialist housing and accommodation for the administrative area of Gwynedd Council.

The assessment covers need for different types of housing suited to older people, specifically the need for specialist and supported housing and accommodation for older people by 2043.

A range of sources of data and evidence have been used as part of the methodology including:

- Demographic data and projections produced by the Office for National Statistics and data from the Welsh Government
- Data produced by Gwynedd Council in relation to the size and characteristics of older population
- Expertise and insights from a wide range of stakeholders

The estimates of the need for supported and specialist housing and accommodation are produced in five-year intervals from a base year of 2025.

The table below shows estimated need for supported and specialist housing and accommodation for older people in Gwynedd. These estimates are further disaggregated by 13 sub areas in Gwynedd.

It is recommended that these estimates are reviewed and refreshed at least every 5 years.

Table 1. The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	***113***	**286**	**437**	**587**	**729**
Market housing		*86*	*131*	*176*	*219*
Social housing		*200*	*306*	*411*	*510*
Sheltered housing (units)	***674***	**504**	**789**	**1,073**	**1,341**
Market housing		*151*	*237*	*322*	*402*
Social housing		*353*	*553*	*751*	*939*
Accessible housing (units)		**1,149**	**1,726**	**2,289**	**2,799**
Market housing		*345*	*518*	*687*	*840*
Social housing		*805*	*1,208*	*1,602*	*1,959*
Accessible age designated housing (social housing for people 55+) (units)		**383**	**575**	**763**	**933**
Market housing		*115*	*173*	*229*	*280*
Social housing		*268*	*403*	*534*	*653*
Nursing care homes (beds)	***476***	**80**	**167**	**230**	**292**
Residential care homes (beds)	***518***	**-42**	**-7**	**2**	**10**

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Figure 1. Estimated need of Sheltered and extra care housing for older people Gwynedd by subareas to 2043

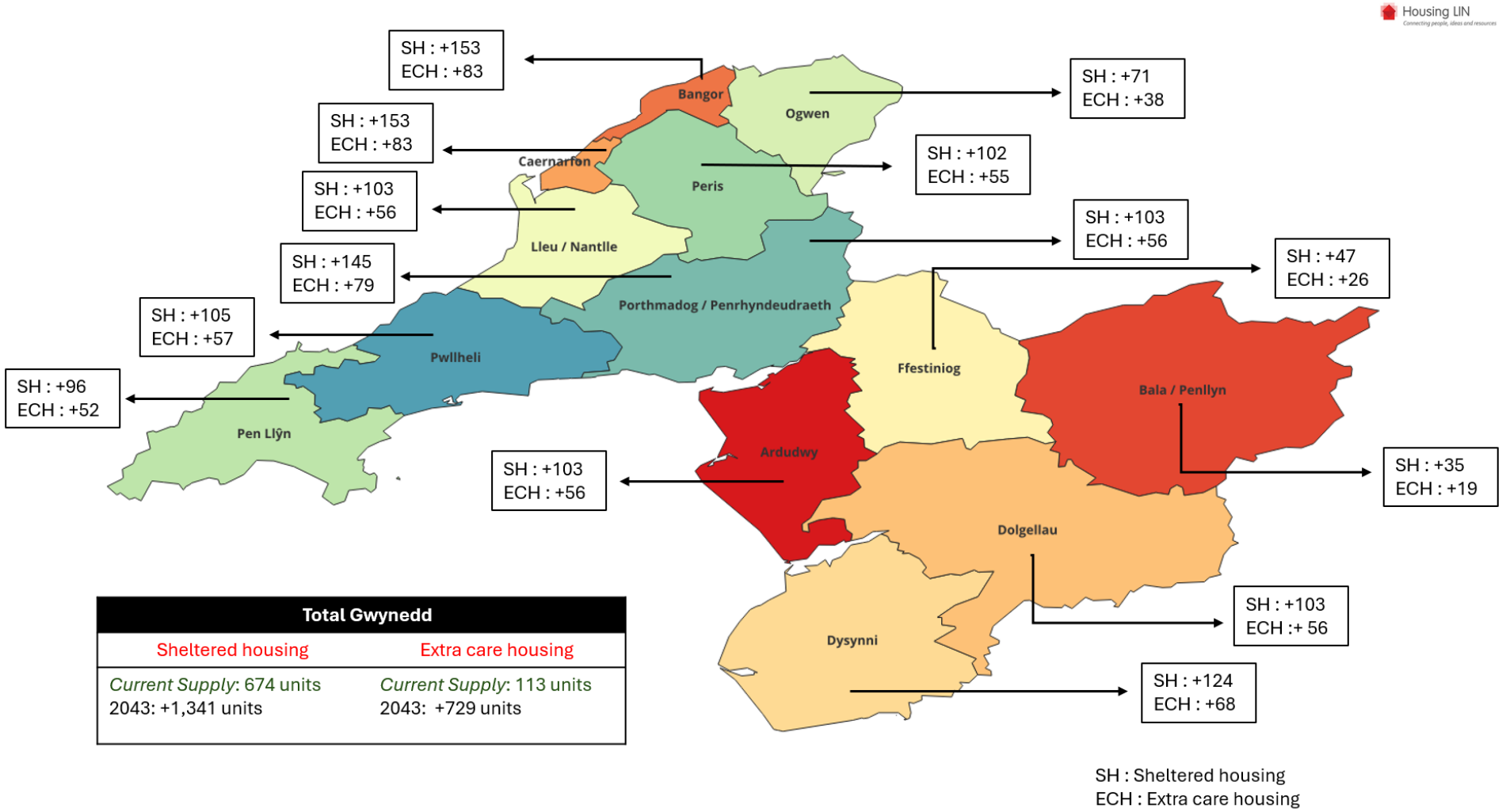


Figure 2. Estimated need of accessible and age designated housing for older people Gwynedd by subareas to 2043

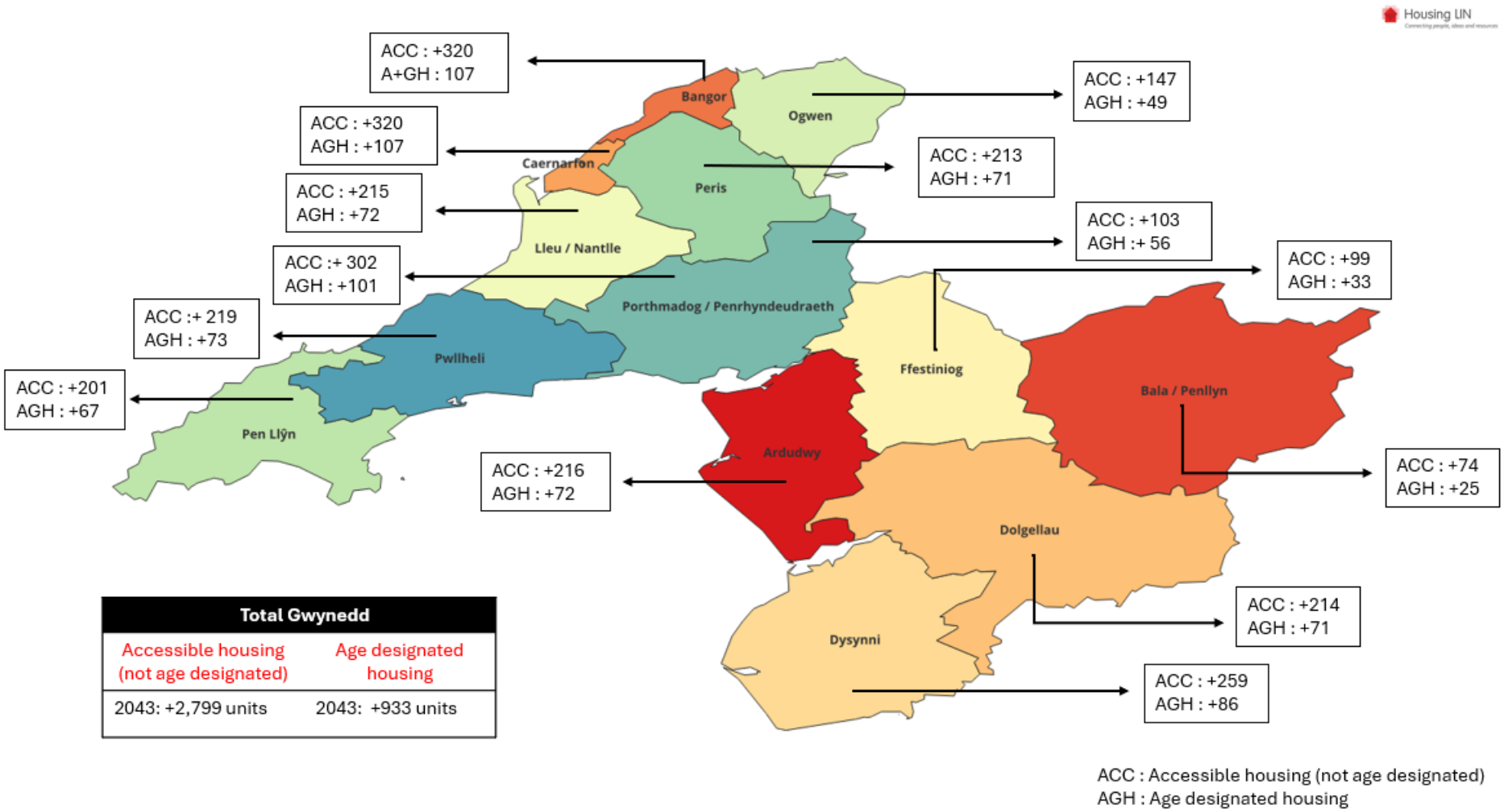
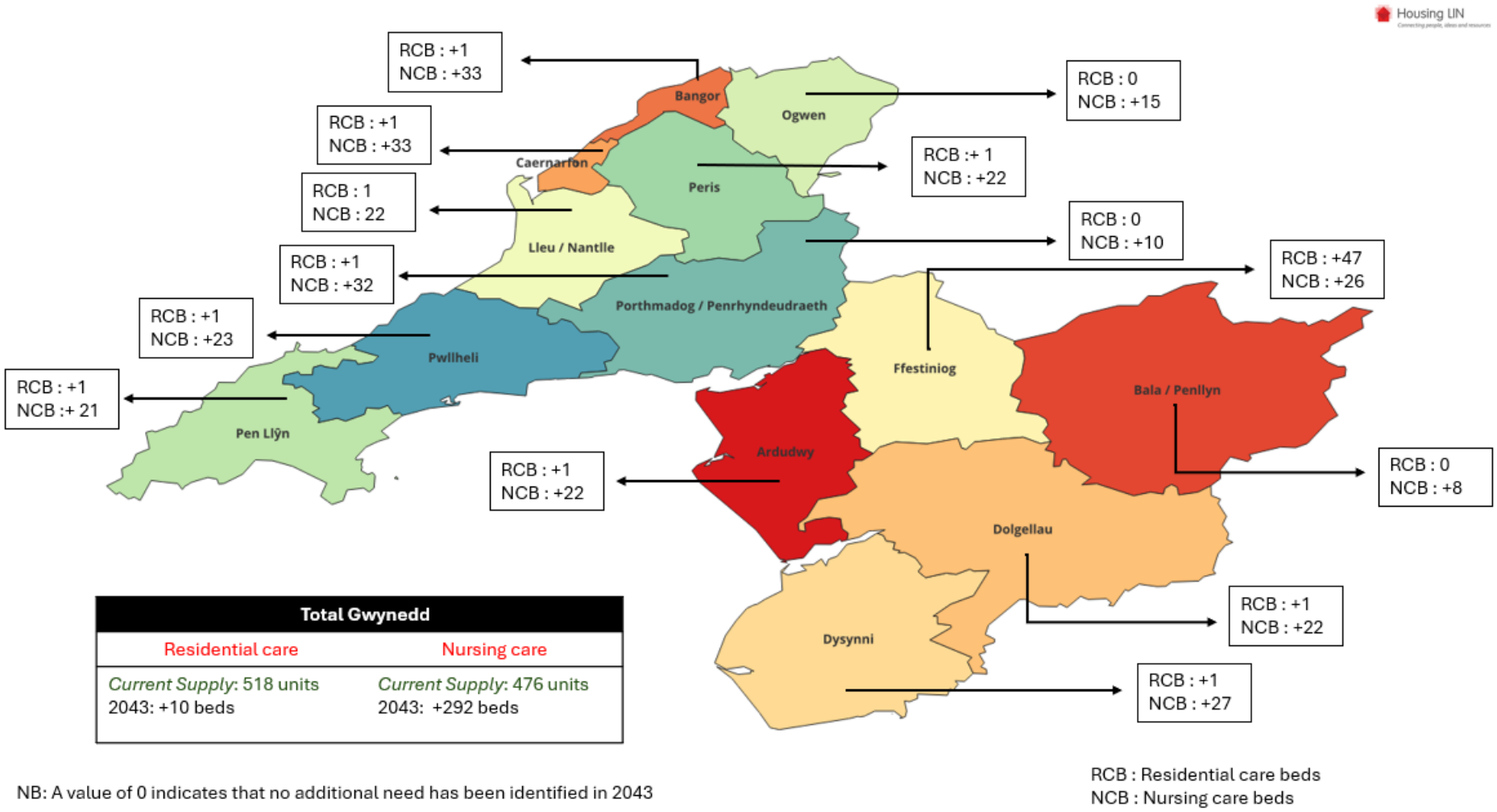


Figure 3. Estimated need for residential and nursing care home beds in Gwynedd by subareas to 2043



The summary by sub areas in Gwynedd is given in below tables:

Table 2. Ardudwy: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	22	34	45	56
Market housing		7	10	14	17
Social housing		15	24	32	39
Sheltered housing (units)	*34*	39	61	83	103
Market housing		12	18	25	31
Social housing		27	43	58	72
Accessible housing (units)		89	133	176	216
Market housing		27	40	53	65
Social housing		62	93	123	151
Accessible age designated housing (social housing for people 55+) (units)		30	44	59	72
Market housing		9	13	18	22
Social housing		21	31	41	50
Nursing care homes (beds)	*0*	6	13	18	22
Residential care homes (beds)	*0*	- 3	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 3. Bala / Penllyn: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*30*	8	11	15	19
Market housing		2	3	5	6
Social housing		5	8	11	13
Sheltered housing (units)	*69*	13	21	28	35
Market housing		4	6	8	11
Social housing		9	15	20	25
Accessible housing (units)		30	45	60	74
Market housing		9	14	18	22
Social housing		21	32	42	52
Accessible age designated housing (social housing for people 55+) (units)		10	15	20	25
Market housing		3	5	6	7
Social housing		7	11	14	17
Nursing care homes (beds)	*0*	2	4	6	8
Residential care homes (beds)	*11*	- 1	- 0	0	0

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 4. Bangor: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*43*	33	50	67	83
Market housing		10	15	20	25

Social housing		23	35	47	58
Sheltered housing (units)	*126*	58	90	123	153
Market housing		17	27	37	46
Social housing		40	63	86	107
Accessible housing (units)		131	197	261	320
Market housing		39	59	78	96
Social housing		92	138	183	224
Accessible age designated housing (social housing for people 55+) (units)		44	66	87	107
Market housing		13	20	26	32
Social housing		31	46	61	75
Nursing care homes (beds)	*78*	9	19	26	33
Residential care homes (beds)	*28*	- 5	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)
NB: Estimated needs are not cumulative

Table 5. Caernarfon: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	33	50	67	83
Market housing		10	15	20	25
Social housing		23	35	47	58
Sheltered housing (units)	*123*	58	90	123	153
Market housing		17	27	37	46
Social housing		40	63	86	107
Accessible housing (units)		131	197	262	320
Market housing		39	59	78	96
Social housing		92	138	183	224
Accessible age designated housing (social housing for people 55+) (units)		44	66	87	107
Market housing		13	20	26	32
Social housing		31	46	61	75
Nursing care homes (beds)	*162*	9	19	26	33
Residential care homes (beds)	*226*	- 5	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)
NB: Estimated needs are not cumulative

Table 6. Dolgellau: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	22	33	45	56
Market housing		7	10	13	17
Social housing		15	23	31	39
Sheltered housing (units)	*38*	39	60	82	103
Market housing		12	18	25	31
Social housing		27	42	58	72
Accessible housing (units)		88	132	175	214
Market housing		26	40	53	64

Social housing		62	93	123	150
Accessible age designated housing (social housing for people 55+) (units)		29	44	58	71
Market housing		9	13	18	21
Social housing		21	31	41	50
Nursing care homes (beds)	*0*	6	13	18	22
Residential care homes (beds)	*52*	- 3	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 7. Dysynni: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	26	40	54	68
Market housing		8	12	16	20
Social housing		19	28	38	47
Sheltered housing (units)	*31*	47	73	99	124
Market housing		14	22	30	37
Social housing		33	51	70	87
Accessible housing (units)		107	160	212	259
Market housing		32	48	64	78
Social housing		75	112	149	182
Accessible age designated housing (social housing for people 55+) (units)		36	53	71	86
Market housing		11	16	21	26
Social housing		25	37	50	61
Nursing care homes (beds)	*55*	7	15	21	27
Residential care homes (beds)	*38*	- 4	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 8. Ffestiniog: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	10	15	21	26
Market housing		3	5	6	8
Social housing		7	11	14	18
Sheltered housing (units)	*13*	18	28	38	47
Market housing		5	8	11	14
Social housing		12	19	26	33
Accessible housing (units)		40	61	81	99
Market housing		12	18	24	30
Social housing		28	43	56	69
Accessible age designated housing (social housing for people 55+) (units)		13	20	27	33
Market housing		4	6	8	10
Social housing		9	14	19	23
Nursing care homes (beds)	*0*	3	6	8	10

Residential care homes (beds)	*0*	- 1	- 0	0	0

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 9. Lleu / Nantlle: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	22	34	45	56
Market housing		7	10	14	17
Social housing		15	24	32	39
Sheltered housing (units)	*44*	39	61	83	103
Market housing		12	18	25	31
Social housing		27	42	58	72
Accessible housing (units)		88	133	176	215
Market housing		27	40	53	65
Social housing		62	93	123	151
Accessible age designated housing (social housing for people 55+) (units)		29	44	59	72
Market housing		9	13	18	22
Social housing		21	31	41	50
Nursing care homes (beds)	*0*	6	13	18	22
Residential care homes (beds)	*0*	- 3	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 10. Ogwen: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	15	23	31	38
Market housing		5	7	9	12
Social housing		11	16	22	27
Sheltered housing (units)	*10*	27	42	56	71
Market housing		8	12	17	21
Social housing		19	29	40	49
Accessible housing (units)		60	91	120	147
Market housing		18	27	36	44
Social housing		42	64	84	103
Accessible age designated housing (social housing for people 55+) (units)		20	30	40	49
Market housing		6	9	12	15
Social housing		14	21	28	34
Nursing care homes (beds)	*0*	4	9	12	15
Residential care homes (beds)	*27*	- 2	- 0	0	0

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 11. Pen Llŷn: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	21	31	42	52
Market housing		6	9	13	16
Social housing		14	22	29	37
Sheltered housing (units)	*16*	36	57	77	96
Market housing		11	17	23	29
Social housing		25	40	54	67
Accessible housing (units)		83	124	164	201
Market housing		25	37	49	60
Social housing		58	87	115	141
Accessible age designated housing (social housing for people 55+) (units)		28	41	55	67
Market housing		8	12	16	20
Social housing		19	29	38	47
Nursing care homes (beds)	*0*	6	12	17	21
Residential care homes (beds)	*50*	- 3	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 12. Peris: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	22	33	45	55
Market housing		7	10	13	17
Social housing		15	23	31	39
Sheltered housing (units)	*0*	38	60	82	102
Market housing		11	18	24	31
Social housing		27	42	57	71
Accessible housing (units)		87	131	174	213
Market housing		26	39	52	64
Social housing		61	92	122	149
Accessible age designated housing (social housing for people 55+) (units)		29	44	58	71
Market housing		9	13	17	21
Social housing		20	31	41	50
Nursing care homes (beds)	*0*	6	13	17	22
Residential care homes (beds)	*0*	- 3	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 13. Porthmadog / Penrhyndeudraeth: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*40*	31	47	63	79
Market housing		9	14	19	24

Social housing		22	33	44	55
Sheltered housing (units)	*126*	54	85	116	145
Market housing		16	26	35	43
Social housing		38	60	81	101
Accessible housing (units)		124	186	247	302
Market housing		37	56	74	91
Social housing		87	130	173	212
Accessible age designated housing (social housing for people 55+) (units)		41	62	82	101
Market housing		12	19	25	30
Social housing		29	43	58	71
Nursing care homes (beds)	*181*	9	18	25	32
Residential care homes (beds)	*41*	- 5	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

Table 14. Pwllheli: The estimates of the need for supported and specialist housing and accommodation

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	*0*	22	34	46	57
Market housing		7	10	14	17
Social housing		16	24	32	40
Sheltered housing (units)	*44*	39	62	84	105
Market housing		12	19	25	32
Social housing		28	43	59	74
Accessible housing (units)		90	135	179	219
Market housing		27	41	54	66
Social housing		63	95	125	153
Accessible age designated housing (social housing for people 55+) (units)		30	45	60	73
Market housing		9	14	18	22
Social housing		21	32	42	51
Nursing care homes (beds)	*0*	6	13	18	23
Residential care homes (beds)	*45*	- 3	- 1	0	1

Source: Ipsos, Gwynedd Council and HLIN (2025)

NB: Estimated needs are not cumulative

1. Introduction

1.01 The intention of this assessment is to identify the need for different types of housing suited to older people, specifically the need for specialist and supported housing and accommodation for older people by 2043 in Gwynedd, including:

- Sheltered housing
- Extra care housing
- Accessible age-designated housing (as distinct from sheltered housing, i.e. age designated housing typically does not have the communal facilities and level of staff support usually associated with sheltered housing); in the context of the Council's brief, this includes social housing for people 55+
- Accessible housing, i.e. housing designed to meet the needs of disabled people and older people (but which is not age designated), e.g. designed to Lifetime Homes standards and/or M4(2) accessibility standard.
- Residential care (including for people with dementia)
- Nursing care (including for people with dementia)

1.02 This assessment covers the need for specialist and supported housing and accommodation amongst the overall older population in Gwynedd including older people (aged 65+) who will need to self-fund their housing and care and for people who are eligible for adult social care support from Gwynedd Council; for this latter cohort of the older population this need may include affordable sheltered housing, extra care housing age-designated housing and accessible housing provided by Registered Social Landlords and care home capacity (placements) funded and/or arranged by Gwynedd Council.

1.03 This housing need assessment for older people in Gwynedd, including an assessment of need for supported and specialist housing and accommodation, follows the Council's specification and contains:

- Introduction: purpose of the research, structure of report and methodology
- Policy context
- Baseline population projections and population characteristics
- Current supply of specialist housing for older people
- Stakeholder and older persons' perspectives
- Detailed assessment of estimated need for housing and accommodation for older people
- Summary of estimated housing and accommodation need for older people
- Trends in and examples of contemporary housing and accommodation for older people
- Annexe 1: Supporting evidence
- Annexe 2: Glossary

1.04 The assessment of need for housing and accommodation suited to the needs of older people draws on a range of evidence, including:

- National and local policy context.

- Demographic evidence: current population and projected population of older people in Gwynedd (Gwynedd Council area and its localities) to 2043.
- Data from Gwynedd Council in relation to the services it provides for older people
- Current provision of specialist housing and accommodation for older people.
- Local stakeholder perspectives and intelligence.
- Evidence from a recent survey of residents, including older people, conducted by Gwynedd Council

2. Policy context

National policy context

2.01 There is a range of national policy that is intended to promote a wider range of housing options and choices suited to older people.

Social Services and Well-being (Wales) Act 2014

2.02 The Act provides the legal framework for improving the well-being of people who need care and support, and carers who need support, and for transforming social services in Wales.

2.03 The fundamental principles of the Act are:

- **Voice and control** – putting the individual and their needs, at the centre of their care, and giving them a voice in, and control over reaching the outcomes that help them achieve well-being.
- **Prevention and early intervention** – increasing preventative services within the community to minimise the escalation of critical need.
- **Well-being** – supporting people to achieve their own well-being and measuring the success of care and support.
- **Co-production** – encouraging individuals to become more involved in the design and delivery of services.

The Wellbeing of Future Generations (Wales) Act 2015[1]

2.04 This Act provides the overarching framework for how public bodies in Wales plan and delivers services, making it directly relevant to later living and the relationship between housing and social care. The Act places a legal duty on organisations such as local authorities and health boards to work towards seven national wellbeing goals, including creating a healthier, more equal Wales with cohesive communities. It also requires them to adopt long-term, preventive, and integrated approaches.

2.05 In practice, this means recognising housing as a key determinant of health and wellbeing and ensuring that housing policy and social care provision are developed in tandem. Accessible, adaptable homes and integrated models such as extra care housing have the potential to reduce demand for residential care and hospital services.

Prosperity for All: The National Strategy (2017)[2]

2.06 National strategy detailing the Welsh Government's key priorities recognises that 'good housing plays a critical role in healthy, independent ageing'.

2.07 In relation to older people, it states that Wales will build more purpose-built housing developments that will allow people to live independently within a protected and sheltered environment, located close to easily accessible public transport.

Age friendly Wales: our strategy for an ageing society (2021)[3]

2.08 It sets out a vision of an 'age friendly Wales that supports people to live and age well'.

2.09 The strategy aims to unlock the potential of today's older people and tomorrow's ageing society and adopts a rights-based approach that promotes equality and social justice across a

[1] https://www.gov.wales/well-being-of-future-generations-wales
[2] https://wcva.cymru/wp-content/uploads/2020/01/Prosperity-for-all.pdf
[3] https://www.gov.wales/age-friendly-wales-our-strategy-ageing-society-html

range of policy areas and places the older people's voice at the core of Welsh Government policy making.

Strategy for an Ageing Society: Delivery Plan 2022[4]

2.10 The Delivery Plan makes reference to housing under 'Aim 2: Improving local services and environments' where it states they will:

- Support the growth of new housing models that support people to age well
- Co-ordinate housing, health and social care capital programmes
- Make sure housing in Wales is of an acceptable standard

2.11 It also specifically references funding for extra care housing from April 2022 to March 2027 by means of the Integrated Care Fund.

Older Persons' Commissioner for Wales: Commissioner's Strategy 2025-28[5]

2.12 The Older Persons' Commissioner for Wales sets out priorities that include identifying opportunities to improve the support available to ensure older people can live safely and independently in their own homes.

2.13 This strategy seeks to enabling older people to live and stay well in their communities by ensuring that older peoples' experiences inform Welsh Government policy on preventative healthcare and are reflected in the delivery of front-line services.

National housing strategy (2021–2026)

2.14 The Welsh Government's national housing strategy (2021–2026) aims to deliver 20,000 new, high-quality, low-carbon social homes for rent, focusing on decarbonization, social justice, and reducing homelessness. Key pillars include strengthening the Welsh Housing Quality Standard (WHQS 2023), improving energy efficiency, and preventing evictions

Older people and people living with frailty: integrated quality statement (2024)[6]

2.15 This sets out what "good" looks like for health and social care for older people, especially those living with frailty. It emphasises helping people stay independent, connected to their community, having choice, and being able to live their later years in the place of their choosing.

Are homes in Wales meeting the needs of an ageing population?[7] **(2024)**

2.16 This briefing paper by the Welsh Senedd provides a snapshot of the policies and strategies in Wales for meeting the housing needs of an ageing population.

2.17 Over and above the demographic challenges, it looks at four particular areas and sets out some of the actions to address these. They are:

- Poor quality or unsafe housing
- A shortage of accessible and adaptable housing
- A lack of housing options for older people

[4] https://www.gov.wales/strategy-ageing-society-delivery-plan
[5] https://olderpeople.wales/commissioners-strategy-2025-28/
[6] https://www.gov.wales/older-people-and-people-living-frailty-integrated-quality-statement-html
[7] https://research.senedd.wales/research-articles/are-homes-in-wales-meeting-the-needs-of-an-ageing-population/

- Demands on health and social care services

Housing Support Grant (HSG) Practice Guidance[8] (2025)

2.18 The Housing Support Grant (HSG) Programme is the policy and funding framework for delivering housing-related support to vulnerable people in different types of accommodation and across all tenures.

2.19 The HSG is an amalgamation of three existing grants: the Supporting People Programme Grant, the Homelessness Prevention Grant and the Rent Smart Wales Enforcement Grant.

2.20 The programme contributes to meeting the aims of 'Improving Lives and Communities - Homes in Wales', the National Housing Strategy and the ten-year Homelessness Plan, with a strong emphasis on the prevention of homelessness. It is also essential in assisting the local authorities to fulfil their duties under the Housing (Wales) Act 2014.

Gwynedd policy context

2.21 Whilst the national policy context (above) encourages local authorities to commission and facilitate a wide range of housing and accommodation options suited to older people, in 2024 Gwynedd Council published a report titled Llechen Lân ('A clean slate'). This report sets out the perfect storm facing Gwynedd Council in relation to meeting the care/support and related accommodation needs of the older population in Gwynedd over the next 20 years:

- An increasing older population, particularly amongst the 'older, older' population aged 70+
- A declining working age population, available to work providing care and support
- Long waiting lists for access to social care services for older people
- The Council's budget to meet the costs of social care for older people is insufficient to meet current demand let alone predicted future demand for care/support
- A current traditional mix of care responses to current demand, e.g. domiciliary care and care homes.
- The need to build on the use of 'preventative' services that may mitigate some of these issues, such as the use of technology, strengths based social work and care practices and accommodation with care models such as extra care housing.

2.22 Without intervention to mitigate these trends, the assessment of this evidence provides a stark conclusion:

"…the social care provision situation for older people in Gwynedd is neither viable nor sustainable. The growth in demand could lead to a shortfall in funding and human resources that would be sufficient to put the Council under extreme financial pressure."

2.23 However, based on an assessment of this evidence the Llechen Lân report also concludes that, *"Having considered the evidence of other counties, the report suggests that social services in Gwynedd would be able to reduce demand and pressure on services for older people by operating differently, but even then, a gap remains in the potential provision and in the funding and workforce available to provide it. "*

[8] https://www.gov.wales/housing-support-grant-practice-guidance

2.24 The range of responses that are proposed to mitigate and manage the situation summarised above, include:

- Community work
- Strength-based working
- Technology and Artificial Intelligence (AI)

2.25 Extra care housing / suitable accommodation models. Anecdotal evidence from providers of extra care housing suggests that it is easier to recruit and retain care staff in these schemes (compared to providing domiciliary care) as staff don't have to travel to clients and tend to have more time for informal interactions with residents.

2.26 In relation to housing and accommodation for older people, the report suggests:

- Increasing demand for residential care can be mitigated, in part, through the development of additional extra care housing services
- There is anticipated to be an increasing need for nursing and residential care for people living with dementia (and other complex health and care needs)
- The role and use of technology can be increased substantially to support older people to remain living independently in their own homes (which could include specialist housing such as extra care housing)

2.27 Whilst the Llechen Lân report doesn't specifically refer to the role of other types of age designated housing, such as sheltered housing, and housing designed to be accessible to better meet the needs of older people to age in place, this assessment of need for different housing and accommodation options for older people is in part a development of the Llechen Lân report and is intended to cover a wide range of housing and accommodation options to provide a part of the evidence base that the Council requires to implement the mitigations outlined in the Llechen Lân report, including:

- Sheltered housing
- Extra care housing
- Age-designated housing (as distinct from sheltered housing, i.e. age designated housing does not have the communal facilities and staff support usually associated with sheltered housing)
- Accessible housing, i.e. housing designed to meet the needs of disabled people and older people (but which is not age designated) e.g. designed to Lifetime Homes standards and/or M4(2) accessibility standard.
- Residential care
- Nursing care
- Residential/nursing care for people with dementia

2.28 To align with the findings of the Llechen Lân report, assumptions are made that reflect the type of mitigating actions that the Council will take, for example, increasing the amount and role of extra care housing as an accommodation with care setting that can support some older people instead of a move to a residential care home.

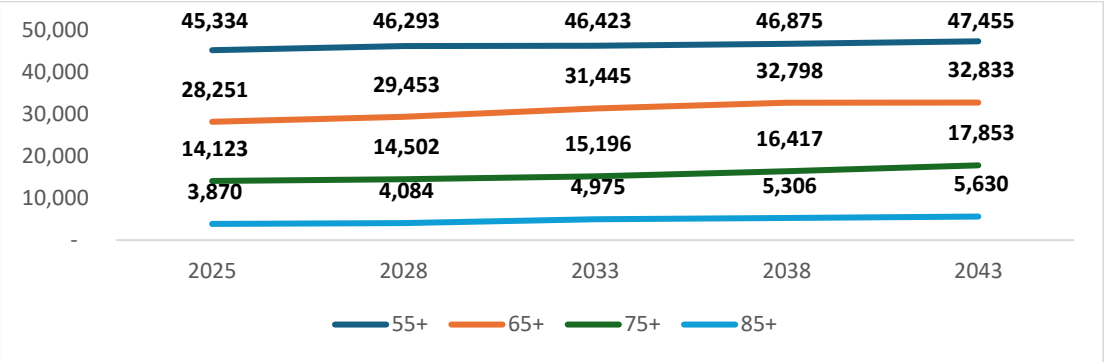
3. Baseline population projections and population characteristics

Demographic projections

3.01 To identify the current older population in Gwynedd, the ONS 2021 census has been used which identifies the number of people over the age of 55, 65, 75 and 85.

3.02 To produce population projections for the number of people aged 55+, 65+, 75+ and 85+, the most recent population projections for Wales (2018-based) growth rates data has been applied to data from the ONS 2021 census for the years 2025, 2028, 2033, 2038 and 2043.

Figure 4. Population projections for people aged 55+, 65+, 75+ and 85+ in Gwynedd.



Source: ONS Census 2021, population projections for Wales (2018-based) and Gwynedd Council

3.03 For the purposes of this assessment, Gwynedd has been divided into 13 sub-areas, based on groupings of Lower Super Output Areas (LSOAs).

3.04 For populations in locality based sub areas in Gwynedd, the estimates are produced from sub–local authority population projections for areas within the county, using the same methodology as the 2018-based projections for Gwynedd as a whole. However, comparison with the 2021 Census identified discrepancies between Census counts and the 2018-based projected population for 2021. To address this, projections were rebased to the 2021 Census. This was achieved by applying the percentage change between the 2021 and future-year projections from the 2018-based model to the 2021 Census baseline, ensuring consistency with observed population data.

Table 15. Population projections for people aged 55+, 65+, 75+and 85+ in Gwynedd by sub areas

Age	Sub areas	2025	2028	2033	2038	2043
55+	*Ardudwy*	3,244	3,312	3,321	3,354	3,395
	Bala / Penllyn	1,788	1,826	1,831	1,849	1,872
	Bangor	4,863	4,966	4,980	5,029	5,091
	Caernarfon	3,894	3,976	3,987	4,026	4,076
	Dolgellau	2,495	2,548	2,555	2,580	2,612
	Dysynni	3,818	3,899	3,910	3,948	3,997
	Ffestiniog	2,398	2,449	2,456	2,480	2,510
	Lleu / Nantlle	3,723	3,802	3,813	3,850	3,897
	Ogwen	2,808	2,868	2,876	2,904	2,940
	Pen Llŷn	3,559	3,634	3,644	3,680	3,725
	Peris	3,993	4,077	4,089	4,129	4,180
	Porthmadog / Penrhyndeudraeth	4,628	4,725	4,739	4,785	4,844
	Pwllheli	4,123	4,210	4,222	4,263	4,316
	Gwynedd	**45,334**	**46,293**	**46,423**	**46,875**	**47,455**
65+	*Ardudwy*	2,112	2,172	2,316	2,415	2,406

Age	Sub areas	2025	2028	2033	2038	2043
	Bala / Penllyn	1,109	1,185	1,293	1,357	1,396
	Bangor	2,965	3,140	3,405	3,623	3,639
	Caernarfon	2,462	2,588	2,789	2,944	2,946
	Dolgellau	1,484	1,531	1,640	1,700	1,683
	Dysynni	2,458	2,515	2,606	2,599	2,561
	Ffestiniog	1,411	1,475	1,575	1,610	1,585
	Lleu / Nantlle	2,248	2,353	2,534	2,662	2,619
	Ogwen	1,651	1,755	1,889	1,996	1,969
	Pen Llŷn	2,298	2,403	2,588	2,710	2,719
	Peris	2,452	2,568	2,763	2,905	2,866
	Porthmadog / Penrhyndeudraeth	3,067	3,116	3,195	3,238	3,258
	Pwllheli	2,535	2,652	2,853	3,039	3,186
	Gwynedd	**28,251**	**29,453**	**31,445**	**32,798**	**32,833**
75+	*Ardudwy*	1,028	1,029	1,070	1,152	1,269
	Bala / Penllyn	534	553	609	711	793
	Bangor	1,506	1,553	1,669	1,870	2,053
	Caernarfon	1,370	1,449	1,537	1,652	1,800
	Dolgellau	683	688	721	772	850
	Dysynni	1,256	1,243	1,254	1,285	1,365
	Ffestiniog	669	685	715	792	868
	Lleu / Nantlle	1,083	1,138	1,198	1,285	1,400
	Ogwen	729	749	797	895	983
	Pen Llŷn	1,169	1,199	1,275	1,384	1,518
	Peris	1,158	1,221	1,283	1,373	1,498
	Porthmadog / Penrhyndeudraeth	1,652	1,674	1,675	1,736	1,797
	Pwllheli	1,287	1,320	1,394	1,511	1,660
	Gwynedd	**14,123**	**14,502**	**15,196**	**16,417**	**17,853**
85+	*Ardudwy*	245	256	299	311	337
	Bala / Penllyn	142	147	172	200	230
	Bangor	417	436	541	590	641
	Caernarfon	388	427	533	596	624
	Dolgellau	191	200	235	242	263
	Dysynni	382	393	464	444	460
	Ffestiniog	186	187	222	243	261
	Lleu / Nantlle	272	300	376	416	434
	Ogwen	163	171	212	231	250
	Pen Llŷn	360	376	464	491	530
	Peris	280	308	385	428	447
	Porthmadog / Penrhyndeudraeth	492	514	616	635	637
	Pwllheli	352	368	457	479	518
	Gwynedd	**3,870**	**4,084**	**4,975**	**5,306**	**5,630**

Source: ONS Census 2021, population projections for Wales (2018-based) and Gwynedd Council

3.05 This demographic evidence indicates that for Gwynedd from 2025 to 2043:

- The 55+ population is projected to increase from 45,334 to 47,455, an increase of 2,121 people (5%).

- The 65+ population is projected to increase from 28,251 to 32,833, an increase of 4,582 people (16%).
- The 75+ population is projected to increase from 14,123 to 17,853, an increase of 3,730 people (26%).
- The 85+ population is projected to increase from 3,870 to 5,630, an increase of 1,760 people (45%).

3.06 The sub areas with the greatest projected increases in the older population are:

- For the 55+ population, the largest absolute increases are projected in Bangor, Caernarfon, Pwllheli, and Porthmadog / Penrhyndeudraeth.
- For the 65+ population, the strongest growth is expected in Bala / Penllyn (26%), Pwllheli (26%), Bangor (23%) then followed by Caernarfon (20%) and Ogwen (19%).
- For the 75+ population, notable increases are projected across all sub-areas, with particularly strong growth in Bala / Penllyn (49%), Bangor (36%), Ogwen (35%), Caernarfon (31%), Ffestiniog (30%) *(Pen Llŷn and Pwllheli also 30%)*.
- For the 85+ population, the fastest growth is projected in Bala / Penllyn (62%), Caernarfon (61%), Peris (60%), Lleu / Nantlle (59%), Bangor (54%) *(Ogwen also 54%)*., highlighting a significant increase in the oldest age group across both urban and rural parts of Gwynedd.

Table 16. Projected percentage increases in the older population to 2043 (to baseline 2025)

Age	Sub areas	2028	2033	2038	2043
55+	*Ardudwy*	2%	2%	3%	5%
	Bala / Penllyn	2%	2%	3%	5%
	Bangor	2%	2%	3%	5%
	Caernarfon	2%	2%	3%	5%
	Dolgellau	2%	2%	3%	5%
	Dysynni	2%	2%	3%	5%
	Ffestiniog	2%	2%	3%	5%
	Lleu / Nantlle	2%	2%	3%	5%
	Ogwen	2%	2%	3%	5%
	Pen Llŷn	2%	2%	3%	5%
	Peris	2%	2%	3%	5%
	Porthmadog / Penrhyndeudraeth	2%	2%	3%	5%
	Pwllheli	2%	2%	3%	5%
	Gwynedd	**2%**	**2%**	**3%**	**5%**
65+	*Ardudwy*	3%	10%	14%	14%
	Bala / Penllyn	7%	17%	22%	26%
	Bangor	6%	15%	22%	23%
	Caernarfon	5%	13%	20%	20%
	Dolgellau	3%	11%	15%	13%
	Dysynni	2%	6%	6%	4%
	Ffestiniog	5%	12%	14%	12%
	Lleu / Nantlle	5%	13%	18%	16%
	Ogwen	6%	14%	21%	19%
	Pen Llŷn	5%	13%	18%	18%
	Peris	5%	13%	18%	17%

Age	Sub areas	2028	2033	2038	2043
	Porthmadog / Penrhyndeudraeth	2%	4%	6%	6%
	Pwllheli	5%	13%	20%	26%
	Gwynedd	**4%**	**11%**	**16%**	**16%**
75+	*Ardudwy*	0.1%	4%	12%	23%
	Bala / Penllyn	4%	14%	33%	49%
	Bangor	3%	11%	24%	36%
	Caernarfon	6%	12%	21%	31%
	Dolgellau	1%	6%	13%	24%
	Dysynni	-1%	-0.2%	2%	9%
	Ffestiniog	2%	7%	18%	30%
	Lleu / Nantlle	5%	11%	19%	29%
	Ogwen	3%	9%	23%	35%
	Pen Llŷn	3%	9%	18%	30%
	Peris	5%	11%	18%	29%
	Porthmadog / Penrhyndeudraeth	1%	1%	5%	9%
	Pwllheli	2%	8%	17%	29%
	Gwynedd	**3%**	**8%**	**16%**	**26%**
85+	*Ardudwy*	4%	22%	27%	37%
	Bala / Penllyn	3%	22%	41%	62%
	Bangor	5%	30%	42%	54%
	Caernarfon	10%	37%	53%	61%
	Dolgellau	5%	23%	27%	38%
	Dysynni	3%	21%	16%	20%
	Ffestiniog	1%	19%	31%	40%
	Lleu / Nantlle	10%	38%	53%	59%
	Ogwen	5%	30%	42%	54%
	Pen Llŷn	4%	29%	36%	47%
	Peris	10%	38%	53%	60%
	Porthmadog / Penrhyndeudraeth	4%	25%	29%	29%
	Pwllheli	5%	30%	36%	47%
	Gwynedd	**6%**	**29%**	**37%**	**45%**

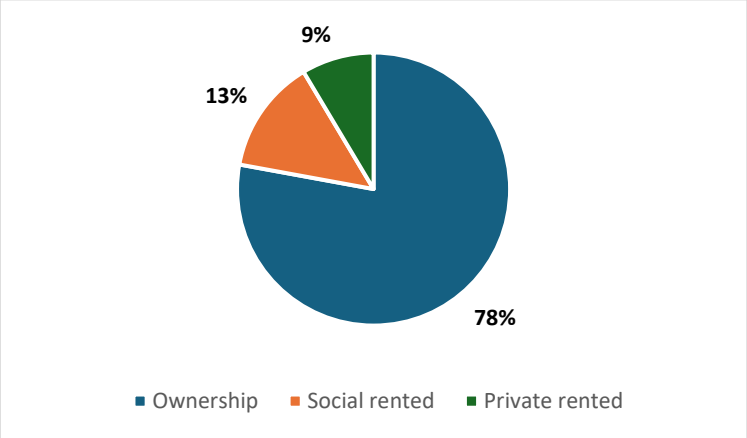
Source: Population projections for Wales (2018-based) and Gwynedd Council
NB: Percentage changes are rounded to the nearest whole number; minor variations exist at sub-area level but do not materially affect the overall pattern.

3.07 The projected increases to 2043 in the 75+ and 85+ populations in particular are significant; this demographic trend suggests a likely increasing need for supported and specialist types of housing and accommodation for older people over the period to 2043.

Tenure and income characteristics

3.08 The majority of households headed by a person aged 65+ are home owners (78%). 13% of households headed by a person aged 65+ live in social housing. 9% of households headed by a person aged 65+ live in private rented housing. This is shown in Table 17.

Figure 5. Tenure split of 65+ households in Gwynedd



Source: ONS Census (2021)

3.09 It should be noted that amongst the 45-64 age group the home ownership rate is considerably lower at 71%. This is likely to be reflected in changes in the tenure split of need for sheltered/retirement housing and for extra care housing as this cohort enters the 65+ age cohort over the next 20 years, i.e. the need for social/affordable sheltered and extra care housing is likely to increase over the period 2033-2043 compared with the period 2025-2033.

Table 17. Household tenure type by different aged households in Gwynedd

Age group	Ownership	%	Social rented	%	Private rented	%	Total	%
45-64	13,577	71%	3,086	16%	2,526	13%	19,189	100%
65+	14,066	78%	2,447	13%	1,548	9%	18,061	100%

Source: ONS Census (2021)

3.10 The equivalent tenure breakdown amongst 65+ and 45 - 64 years households for the Gwynedd sub areas are shown in the table below.

3.11 The sub areas where the percentage of 65+ households who are home owners is lower than the Gwynedd average are Bala, Bangor, Caernarfon, Pen Llŷn and Pwllheli. These areas are likely to have a greater need for affordable sheltered/retirement housing and extra care housing.

Table 18. Household tenure type by 65+ and 45-64 years households in Gwynedd by sub area

Sub areas	Age group	Ownership	%	Social rented	%	Private rented	%	Total	%
Ardudwy	65+	1,130	82%	135	10%	120	9%	1,385	100%
Bala / Penllyn		485	70%	118	17%	91	13%	694	100%
Bangor		1,298	69%	473	25%	121	6%	1,892	100%
Caernarfon		991	76%	227	17%	80	6%	1,298	100%
Dolgellau		784	82%	98	10%	79	8%	961	100%
Dysynni		1,159	86%	69	5%	123	9%	1,351	100%
Ffestiniog		760	80%	113	12%	79	8%	952	100%
Lleu / Nantlle		915	80%	148	13%	76	7%	1,139	100%
Ogwen		666	79%	120	14%	61	7%	847	100%
Pen Llŷn		1,116	77%	163	11%	165	11%	1,444	100%
Peris		1,274	81%	199	13%	92	6%	1,565	100%
Porthmadog / Penrhyndeudraeth		1,544	81%	214	11%	158	8%	1,916	100%
Pwllheli		1,252	77%	171	10%	209	13%	1,632	100%
Gwynedd		**13,374**	**78%**	**2,248**	**13%**	**1,454**	**9%**	**17,076**	**100%**
Ardudwy	45-64	775	71%	128	12%	195	18%	1,098	100%
Bala / Penllyn		555	72%	108	14%	106	14%	769	100%

Sub areas	Age group	Ownership	%	Social rented	%	Private rented	%	Total	%
Bangor		1,572	64%	611	25%	288	12%	2,471	100%
Caernarfon		945	67%	299	21%	162	12%	1,406	100%
Dolgellau		721	72%	133	13%	145	15%	999	100%
Dysynni		749	76%	89	9%	150	15%	988	100%
Ffestiniog		799	72%	168	15%	148	13%	1,115	100%
Lleu / Nantlle		1,074	77%	194	14%	130	9%	1,398	100%
Ogwen		877	73%	166	14%	157	13%	1,200	100%
Pen Llŷn		894	69%	170	13%	237	18%	1,301	100%
Peris		1,558	80%	213	11%	176	9%	1,947	100%
Porthmadog / Penrhyndeudraeth		1,141	73%	206	13%	221	14%	1,568	100%
Pwllheli		1,216	68%	296	17%	267	15%	1,779	100%
Gwynedd		**12,876**	**71%**	**2,781**	**15%**	**2,382**	**13%**	**18,039**	**100%**

Source: ONS Census (2021)

NB: Tenure data at sub-area level has been calculated by aggregating Census 2021 data for the constituent LSOAs within each sub-area. Data is available for 67 of the 71 LSOAs; results for the remaining four LSOAs cannot be published due to personal data protection and disclosure control requirements. As a result, sub-area totals do not sum to the Gwynedd County total.

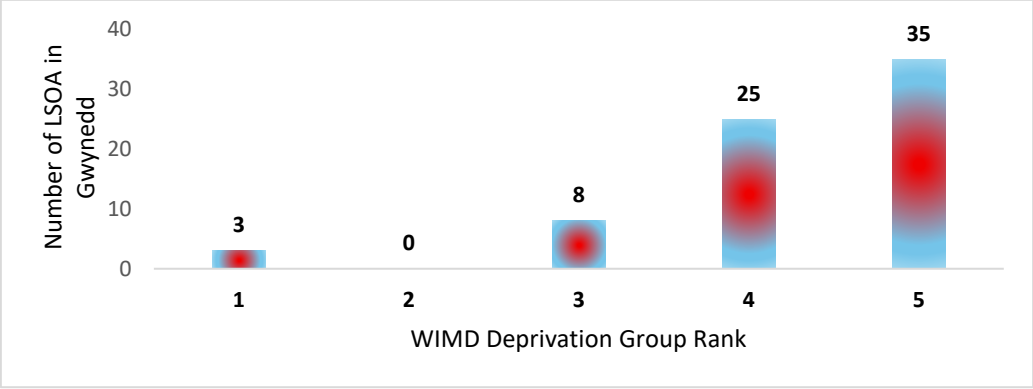
3.12 The Welsh Index of Multiple Deprivation (WIMD) 2025 identifies relative levels of multiple deprivation across Wales's 1,917 LSOAs, ranking them from most deprived (1) to least deprived (1,917) based on eight deprivation domains including income, employment, health, education, access to services, housing, community safety, and the physical environment. The deprivation groups are ranked 1 to 5 within these, 1 is the most deprived group.

Table 19. WIMD Deprivation group ranks

WIMD 2025 Deprivation Group Rank	Group
10% Most deprived (Rank 1-191)	1
10-20% Most deprived (Rank 192-382)	2
20-30% Most deprived (Rank 383-574)	3
30-50% Most deprived (Rank 575-958)	4
50% Least deprived (Rank 959-1917)	5

Source: WIMD[9]

Figure 6. Distribution of Gwynedd LSOAs across WIMD overall deprivation groups



Source: WIMD (2025)

3.13 WIMD 2025 analysis shows that only three LSOAs (4%) in Gwynedd fall within the most deprived WIMD deprivation group in Wales, while almost half (49%) are among the least

[9] WIMD 2025 available at https://www.gov.wales/welsh-index-multiple-deprivation-2025

deprived WIMD deprivation group, indicating relatively low overall deprivation with limited pockets of higher deprivation.

3.14 Whilst Gwynedd's overall WIMD 2025 deprivation profile is relatively low, the housing domain reveals a markedly different picture. There are 27 neighbourhoods (38% of all neighbourhoods in Gwynedd) within the most housing-deprived 10% in Wales, and 56 neighbourhoods (79%) fall within the most deprived 30% nationally.

3.15 Housing deprivation is widespread across the county, affecting both rural and urban communities. The most deprived neighbourhoods include Deiniolen, Llandderfel and Llanfor, Aberdaron–Botwnnog–Tudweiliog, Efailnewydd and Buan, and Llanuwchllyn and Llanycil, all of which rank among the ten most housing-deprived areas in Wales

3.16 Housing conditions deprivation, poor quality stock and serious hazards is most pronounced in former slate-quarrying communities in the Ffestiniog valley, where older housing stock performs poorly against modern standards.

3.17 Evidence suggests that poor housing conditions and low energy efficiency are key contributors to Gwynedd's housing deprivation profile. Six neighbourhoods are among the ten worst in Wales for poor-quality housing, while nine neighbourhoods rank among the ten worst for housing energy efficiency. Areas such as Llanuwchllyn and Llanycil, Aberdaron–Botwnnog–Tudweiliog, Corris and Mawddwy, and Deiniolen feature prominently on both measures

Health and social care characteristics

3.18 The table below shows that Gwynedd's older population is relatively healthy with over 89% of older people reporting 'very good' or 'fair' health status. Health may influence an older person's decision to move into specialist housing and accommodation. For example, older people reporting 'bad' or 'very bad' health (11% of those aged 65+ in Gwynedd) may be more likely to need specialist housing or accommodation for health-related reasons.

Table 20. Self-reported health status of people aged 65+ living in Gwynedd

Self-reported health status	'Very good' or 'good'	'Fair'	'Bad' or 'very bad'	Total
Number of people (65+)	16,213	7,932	3,127	27,272
% of total counted	59%	29%	11%	100%

Source: ONS Census (2021)

3.19 In Gwynedd, the average life expectancy at age 65 for females during the period 2021–2023 was 21.0 years, which is higher than the Wales average of 20.6 years. For males, life expectancy at age 65 in Gwynedd was 18.5 years, which is slightly higher than the Wales average of 18.2 years over the same period.

3.20 In Gwynedd, in 2024, there were an estimated 2,050 people aged 65 and over living with dementia. Of this total, approximately 1,150 people were aged 65–84, while 900 people were aged 85 and over, highlighting the significant concentration of dementia among the oldest age groups.

Table 21. Estimated/projected number of people living with dementia aged 65+ in Gwynedd

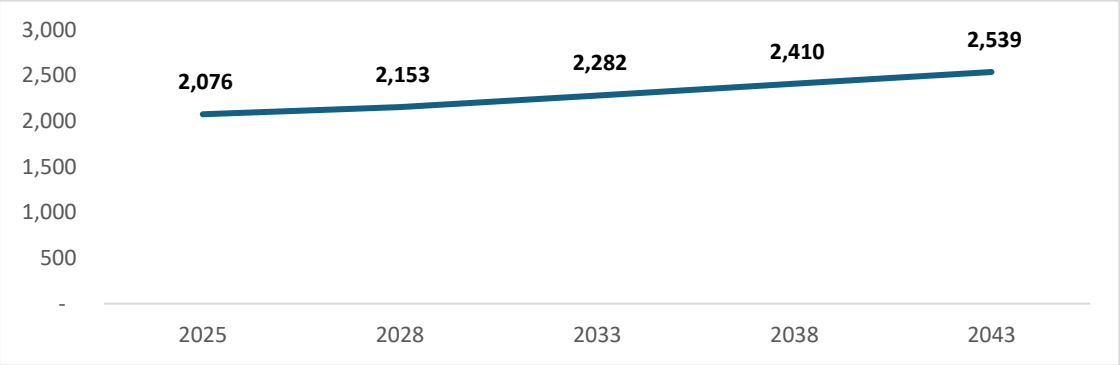
Year	Estimated no. of people living with dementia aged 65+
2021	1,975
2022	1,975

2023	2,025
2024	2,050

Source: North Wales Regional Innovation Coordination Hub
NB: These are estimated/projected numbers not diagnosed people living with dementia

3.21 To estimate the change in the number of people living with dementia to 2043, the average annual growth rate between 2021 and 2024 (c.1%) has been applied. By 2043, the estimated number of people in Gwynedd who are aged 65 plus with dementia is estimated to increase by c.22% to 2,539.

Figure 7. Estimated/projected number of people living with dementia aged 65+ in Gwynedd to 2043



Source: North Wales Regional Innovation Coordination Hub and HLIN
NB: These are estimated/projected numbers not diagnosed people living with dementia

3.22 The severity profile of dementia shows that the majority of individuals are living with moderate to severe dementia, with severe dementia consistently accounting for the largest share of cases over the period 2021–2024. On average, of people living with dementia, 57% were classified as having severe dementia, while a further 28% were assessed as having moderate dementia. Only 15% were estimated to have mild dementia.

Table 22. Number of people 65+ with dementia in Gwynedd by severity

Year	Mild	Moderate	Severe
2021	15%	28%	57%
2022	15%	28%	57%
2023	15%	28%	57%
2024	14%	29%	57%
Average	**15%**	**28%**	**57%**

Source: North Wales Regional Innovation Coordination Hub

3.23 Estimates of dementia severity to 2043 have been derived by applying the average severity distribution observed between 2021 and 2024 to the projected total number of people aged 65+ with dementia to 2043. This approach assumes a stable proportion of mild, moderate and severe dementia over the projection period and provides an indicative estimate of future severity-related need.

Table 23. Estimated of people with dementia 65+ in Gwynedd by severity to 2043

Year	Estimated no. of people with dementia (65+)	Mild	Moderate	Severe
2025	2,076	303	587	1,186
2028	2,153	314	609	1,230
2033	2,282	333	645	1,304

2038	2,410	352	681	1,377
2043	2,539	370	718	1,451

Source: North Wales Regional Innovation Coordination Hub and HLIN

3.24 The projected increase to 2043 in the number of people 65+living with dementia, particularly with severe dementia suggests a likely increasing need for supported and specialist types of housing and accommodation for older people over the period to 2043.

3.25 The total number of older people aged 65+ receiving Adult Social Care (ASC) services from Gwynedd Council has remained broadly stable over the past five years. Overall numbers decreased slightly from 3,175 in 2020/21 to 3,127 in 2024/25, representing a reduction of around 2%. While the total fell steadily between 2021/22 and 2023/24, there was a modest recovery in 2024/25.

3.26 The majority of ASC support continues to be provided to older people living in mainstream housing. Mainstream housing accounted for 2,276 people in 2024/25, representing around 73% of all older ASC service users. Numbers declined from 2,411 in 2021/22 to 2,200 in 2023/24 before increasing slightly in the most recent year. Despite this fluctuation, mainstream housing remains by far the predominant setting for support.

3.27 Residential and nursing care provision has increased steadily over the period. Placements rose from 694 in 2020/21 to 769 in 2024/25, an increase of 11%. This growth contrasts with the slight decline in overall ASC numbers and means that residential and nursing care now accounts for a larger proportion of ASC support than at the start of the period. When the use of care homes for people 65+ is measured per 100,000 head of population, Gwynedd has the highest use of care homes of all local authorities in Wales (this is addressed as part of this assessment in relation to the increased need for extra care housing to enable more people to avoid a care home placement).

3.28 Use of extra care housing has grown significantly over the five-year period, increasing from 28 people in 2020/21 to 48 in 2024/25. Although the overall numbers remain relatively small, this represents a 71% increase.

3.29 Supported living provision has remained limited and broadly stable, with numbers decreasing slightly from 38 people in 2020/21 to 30 in 2024/25. Shared Lives provision remains very small, declining from seven placements in 2020/21 to four placements in 2024/25 and accounting for only a negligible proportion of the overall ASC population.

3.30 Overall, the data indicates a gradual shift in the balance of ASC provision. While mainstream housing continues to accommodate the vast majority of older people receiving support, there has been growth in residential and nursing care and, to a lesser extent, extra care housing.

Table 24. Accommodation types: older people 65+ eligible for Adult Social Care support from Gwynedd Council from 2020/21 to 2024/25

Accommodation type	2020/21	2021/22	2022/23	2023/24	2024/25
Mainstream Housing	2,408	2,411	2,294	2,200	2,276
Residential/Nursing	694	714	716	733	769
Shared Lives	7	6	4	4	4
Extra Care	28	30	34	38	48
Supported Living	38	36	33	33	30

Total	**3,175**	**3,197**	**3,081**	**3,008**	**3,127**

Source: Gwynedd Council (2025)

4. Current supply of specialist housing for older people

4.01 To identify the current supply of older persons' specialist age designated housing in Gwynedd, the Elderly Accommodation Counsel's (EAC) national database[10] of specialist accommodation for older people has been used as a baseline and then 'sense checked' for accuracy with Gwynedd Council. The current supply of older persons' specialist housing has been categorised into the following types:

- *Sheltered housing*: These homes typically offer self-contained accommodation available. They are usually supported by a part-time/visiting scheme manager and 24-hour emergency help via an alarm. There are often communal areas and some offer activities. In the social sector, most accommodation is offered for social or affordable rent, based on need, by local councils or housing associations. In the private sector, it is usually built by private developers for market sale (and sometimes for market rent). Once all the properties have been sold, the scheme is sometimes run by a separate management company that employ a scheme manager that organises maintenance and other services.
- Age-designated housing: as distinct from sheltered housing, i.e. age designated housing does not have the communal facilities and staff support usually associated with sheltered housing.
- *Extra care housing*: Often referred to as 'extra care housing' when provided by housing associations and local authorities (for affordable rent and shared ownership) and 'assisted living' or 'retirement villages' or 'integrated retirement communities' by private sector providers for market sale (and sometimes for market rent). Extra care housing is designed for older people, some with higher levels of care and support needs. Residents live in self-contained homes. It typically has more communal facilities and offers access to onsite 24/7 care services, which includes assistance with meal preparation, washing and other daily duties (some private extra care housing schemes may offer access to care services as distinct from onsite 24/7 care staff). Often includes a 24/7 alarm system, presence of a scheme manager and a team of support staff.

4.02 Figure 8 shows the current supply of specialist and supported housing for older people across Gwynedd's. This includes sheltered housing and extra care housing

Figure 8. Current supply of older people housing in Gwynedd

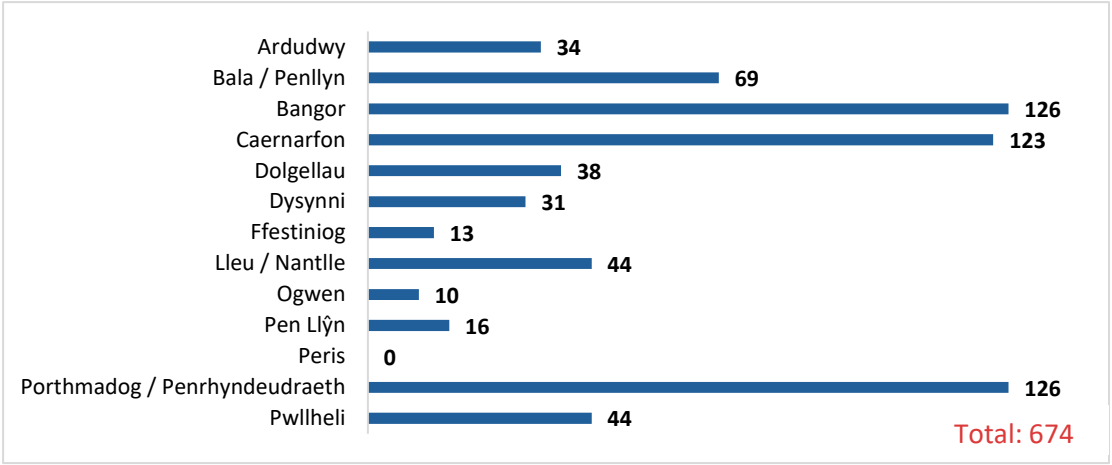


Source: Gwynedd Council (2025)

[10] https://housingcare.org/

4.03 There are currently 674 units of sheltered housing in Gwynedd. The largest concentrations are located in Bangor (126 units) and Porthmadog / Penrhyndeudraeth (126 units), closely followed by Caernarfon (123 units).

Figure 9. Current supply of sheltered housing in Gwynedd by sub area



Source: Gwynedd Council (2025)

4.04 Extra care housing provision in Gwynedd is limited to three schemes providing a total of 113 units in Bangor, Bala/Penllyn and Porthmadog / Penrhyndeudraeth.

Figure 10. Current supply of extra care housing



Source: Gwynedd Council (2025)

Table 25. Current supply of older people housing in Gwynedd

Sub area	Retirement/sheltered housing	Extra care housing
Ardudwy	34	0
Bala / Penllyn	69	30
Bangor	126	43
Caernarfon	123	0
Dolgellau	38	0
Dysynni	31	0
Ffestiniog	13	0
Lleu / Nantlle	44	0
Ogwen	10	0
Pen Llŷn	16	0
Peris	0	0
Porthmadog / Penrhyndeudraeth	126	40
Pwllheli	44	0
Total	**674**	**113**

Source: Gwynedd Council (2025)

4.05 The supply of care homes for older people (65+) is set out in section 7.

5. Stakeholder and older persons' perspectives

Professional stakeholders

5.01 To provide expert qualitative insights in relation to the local supply of and need for supported and specialist housing and accommodation for older people, we spoke with:

- Officers from Gwynedd Council
- Representatives from a sample of providers of sheltered and extra care housing and providers of care homes for older people (these were informal discussions conducted as part of visits to a sample of services for older people).

5.02 The population of 'older, older'' people is increasing significantly. The most prevalent needs amongst older people that affect their need for care are frailty, falls and dementia.

5.03 The Council's objective is to support older people to live well at home for as long as possible and maintain their independence. However, there are challenges in achieving this including difficulties in securing domiciliary care in some parts of the county.

5.04 There is a need to increase the provision of extra care housing so that this option is available in all communities in Gwynedd over time.

5.05 The Council could better utilise the potential of the existing extra care schemes. There is a need to identify older people who would benefit from moving to extra care housing, particularly as an alternative to residential care

5.06 The Council Officers are keen to see at least 10% of older people per annum who would otherwise enter residential care move into extra care housing as a genuine alternative.

5.07 In the future the Council wants to see greater use made of extra care housing as part of the pathways in relation to hospital discharge services. This would require an expansion of the number of extra care housing schemes in the county

5.08 There is a desire to see an ongoing role for sheltered housing, particularly in rural areas, as a housing option that can provide an element of support to enable older people to remain living independently for as long as possible. In the context of small settlements and rural communities in Gwynedd, it is possible that the provision of sheltered housing may need to be combined with, for example, the delivery of care from nearby care homes in order to make all of these services sustainable and to enable older people to remain living in smaller towns and rural communities.

5.09 In relation to care homes for older people, whilst care home providers can manage older people with complex care and health needs, this is a challenge for the local authority as external providers seek higher fees and in-house provision seeks higher staffing levels. This is also a challenge because the predominant and increasing need profile of older people who require a place in a care home is complex care and health needs, often associated with dementia.

5.10 Council officers' assessment in relation to the need for care home bed capacity is that there is little requirement for additional residential care beds; rather there is a need for existing residential care services to be able to accommodate older people with more complex care and health needs. However, due to the increasing 'older, older' population and the increasing

prevalence of older people with complex care and health needs, there is likely to be an increased need for nursing care provision in the future.

5.11 Given the rural nature of Gwynedd, it may be necessary to develop a Gwynedd specific model of housing and accommodation for older people which can provide, for example, extra care housing and care home facilities on the same site, as well as providing a base for domiciliary care in the community, in order to provide a viable business opportunity for housing and care providers. This is what is currently in development at Penrhos and this may help to form a 'blueprint' for other housing and care developments on the same site.

Older persons' perspectives

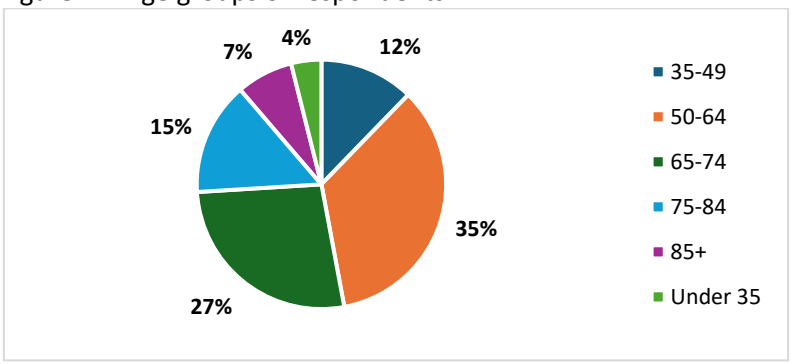
5.12 We have summarised here key messages from a survey of older people conducted by Gwynedd Council in autumn 2025 in relation to people's housing needs.

5.13 Over two-thirds of respondents (69%) were aged 50 and over, including 49% aged 65 and above. The largest single age group was those aged 50–64 (35%), followed by 65–74 year olds (27%).

5.14 A smaller proportion of responses were received from younger age groups, with 12% aged 35–49 and 4% under 35. While the survey was open to all residents, the age profile indicates that the findings are particularly reflective of the views of older households and those approaching retirement age groups most likely to consider downsizing, accessible housing or specialist accommodation in the future.

5.15 The relatively high proportion of respondents aged 75+ (22% combined aged 75–84 and 85+) provides valuable insight into later-life housing preferences and support needs.

Figure 11. Age groups of respondents



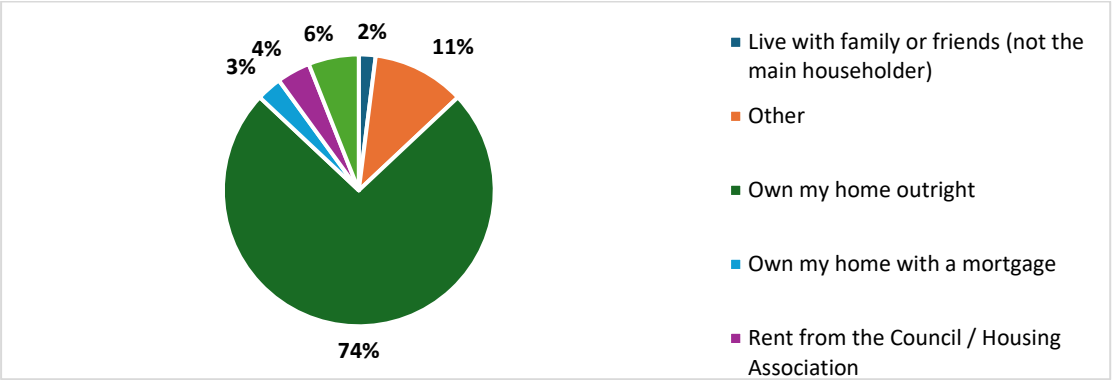
Source: Gwynedd Council survey (2025)

5.16 The tenure profile of respondents is heavily weighted toward owner-occupation. Nearly four in five respondents (79%) own their home, including 60% who own outright and 19% who have a mortgage.

5.17 The tenure profile of respondents aged 65+ is overwhelmingly dominated by owner-occupation. Approximately 74% own their home outright. A further 3% own their home with a mortgage.

5.18 The rented sector represents a small minority of older respondents, with 4% renting from the Council/Housing Association and 6% renting privately.

Figure 12. Current housing situation of respondents aged 65+



Source: Gwynedd Council survey (2025)

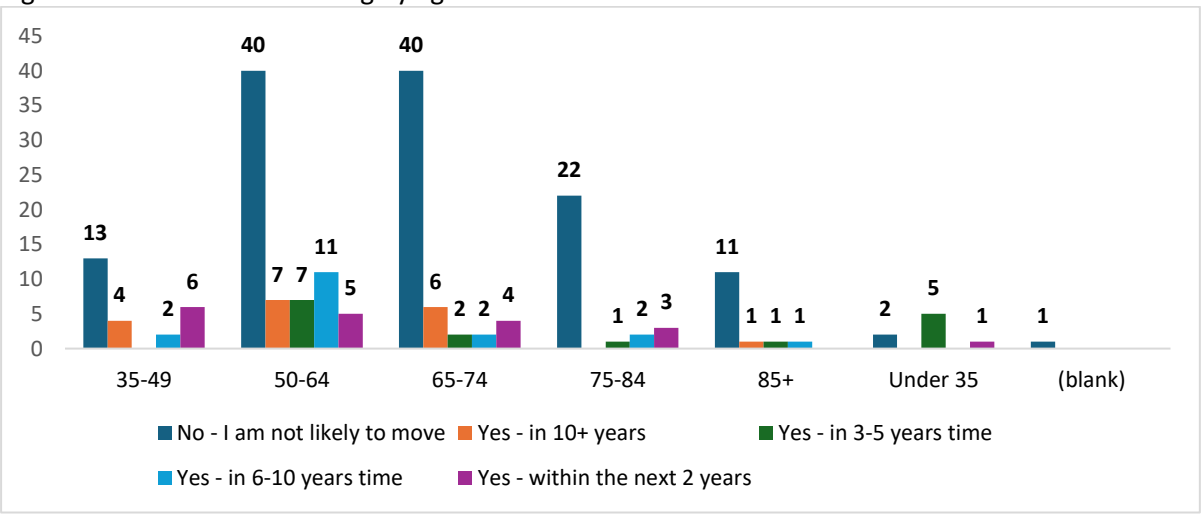
Likelihood of moving

5.19 The findings indicate that the majority of respondents (approximately two-thirds) are not currently likely to move from their existing home. This reflects a strong preference for ageing in place across the sample. However, just over one-third indicate some likelihood of moving in the future.

5.20 Among respondents aged 65–74, approximately three-quarters (74%) report that they are not likely to move from their current home. However, just over one-quarter (26%) indicate some intention to move within the next 10 years or beyond.

5.21 Moving intentions decline further among those aged 75 and over. In both the 75–84 and 85+ groups, around 79% state they are not likely to move, with only around one in five (21%) indicating any likelihood of moving.

Figure 13. Likelihood of moving by age

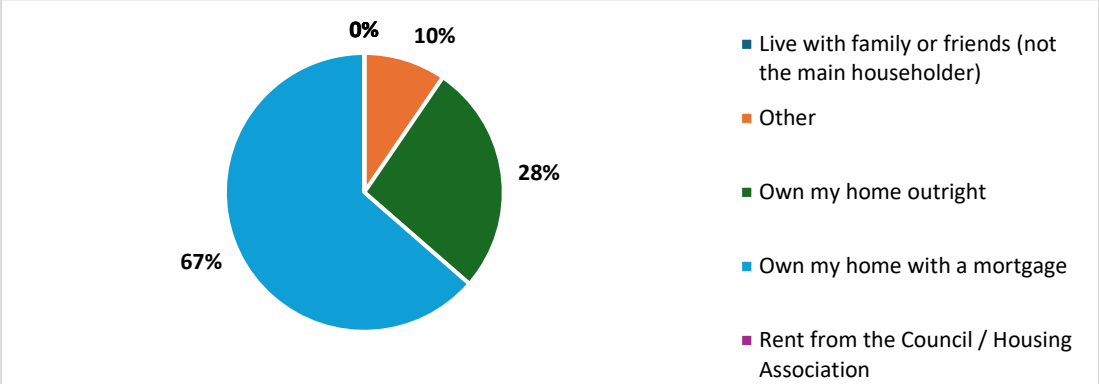


Source: Gwynedd Council survey (2025)

5.22 Moving intentions are concentrated almost entirely among owner-occupiers, particularly those who own their home outright. Around 28% of outright owners indicate some likelihood of moving, accounting for the majority of potential future movers within the 65+ cohort.

5.23 In contrast, no social renters or private renters aged 65+ report an intention to move.

Figure 14. Tenure of respondents with likelihood to move within next years(aged 65+)



Source: Gwynedd Council survey (2025)

Preferred Housing model

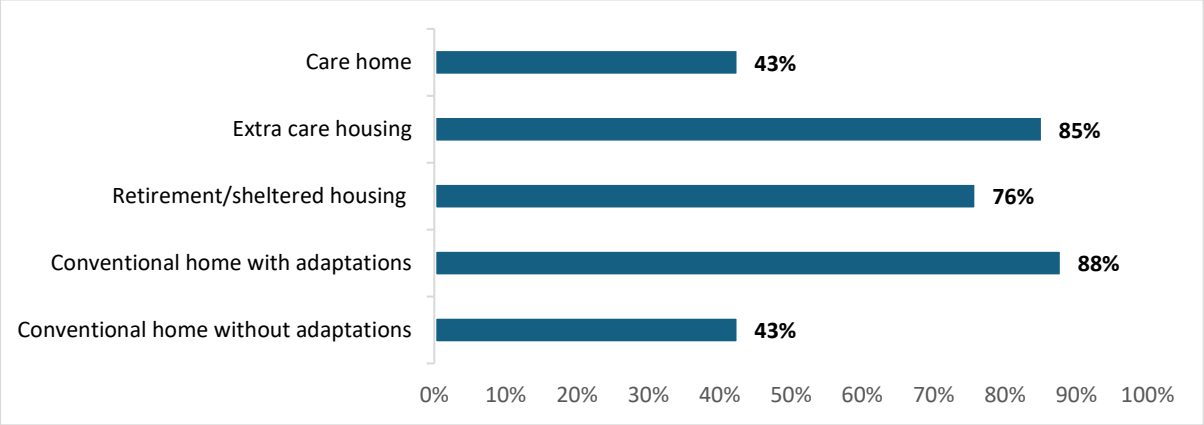
5.24 The strongest preference among respondents aged 65+ is for conventional homes designed or adapted for accessibility (88%), indicating a clear desire to remain in mainstream housing with design features that support ageing in place.

5.25 There is also substantial interest in extra care housing (85%), suggesting that many older residents are open to housing models with on-site care and support available if needed.

5.26 Retirement/sheltered housing (76%) is also widely considered, reinforcing demand for age-designated accommodation that provides some level of communal and staff support.

5.27 In contrast, care homes are less strongly preferred (43%).

Figure 15. Housing model that respondents prefer if not able to stay in your current home, would you consider the following options



Source: Gwynedd Council survey (2025)

NB: As respondents were able to select more than one option, the findings reflect openness to different housing/accommodation models rather than a ranked or mutually exclusive preference. The results therefore indicate potential acceptability rather than definitive first-choice preferences.

Factors influencing moving

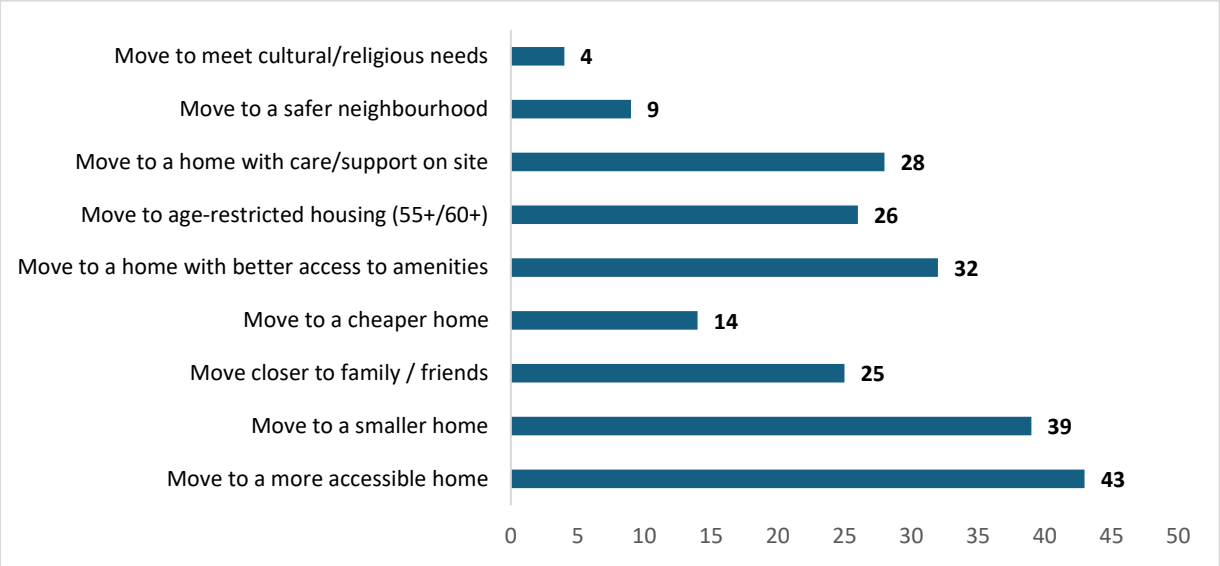
5.28 Among respondents aged 65 and over, the most cited factors relate to the suitability and accessibility of the home. 43% indicated that they would consider moving to a more accessible home, suggesting that the ability of a property to meet changing mobility and health needs is a key driver of potential moves among older people. A similar proportion (39%) reported that they would consider moving to a smaller home, reflecting the role of downsizing in enabling older households to move to more manageable accommodation.

5.29 Other important considerations include better access to amenities (32%), such as shops, services and transport, and moving to a home with care or support on site (28%), indicating that access to support services may influence housing decisions for some older residents. In addition, 26% of respondents aged 65+ indicated an interest in age-designated housing.

5.30 Financial considerations appear less prominent, with 14% indicating a preference for moving to a cheaper home, while relatively smaller proportions cited moving to a safer neighbourhood (9%) or meeting cultural or religious needs (4%) as key factors influencing a move.

5.31 Respondents were able to select multiple factors, meaning that the percentages represent the proportion of respondents identifying each factor.

Figure 16. Factors influencing to move home in the future



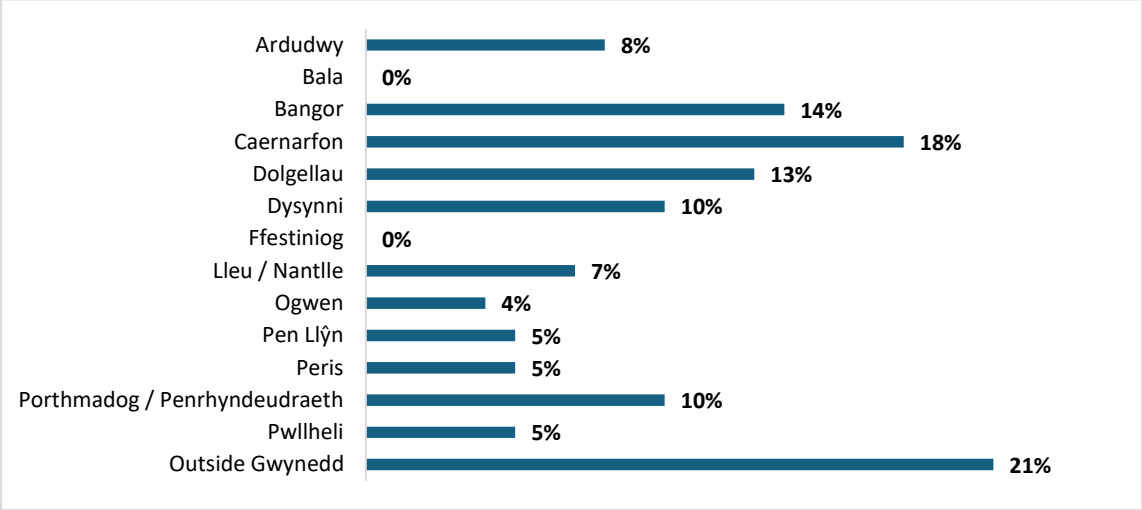
Source: Gwynedd Council survey (2025)

Preferred area to move

5.32 Preferences in terms of preferred locations to move to among those aged 65+ are strongest for Caernarfon (18%), Bangor (14%), and Dolgellau (13%).

5.33 A notable proportion (21%) would consider relocating outside Gwynedd, suggesting that cross-boundary moves may form part of future housing demand patterns for example to places such as Llanrwst, Llandudno, Llangefni, and Machynlleth. However, it is important to note that this trend may also happen in the opposite direction, i.e. with older people moving into Gwynedd from other areas.

Figure 17. Preferred area to move into



Source: Gwynedd Council Survey (2025) NB: Respondents were able to select more than one preferred area. Percentages therefore indicate areas respondents would consider.

6. Estimated need for specialist housing and accommodation for older people

Estimated need for sheltered/retirement housing and extra care housing

6.01 Modelling of estimated need for retirement/sheltered housing and extra care housing suited to older people is based on a recent (published December 2024) large scale nationally representative survey of c.5,600 older people aged 50+ in the UK[11] and a statistical model that applies the survey findings to quantitative demographic data. This work has been jointly undertaken by the Housing LIN and Ipsos.

6.02 In 2024, the Housing LIN received funding from United Kingdom Research & Innovation to undertake large scale primary research with older people and to develop a statistical model to estimate the need for a range of housing options for people as they age.

6.03 The new model estimates the need for a *range* of housing options and types of homes for people aged 65+, including retirement/sheltered housing and extra care housing, as well as the need for mainstream housing.

6.04 Unlike 'prevalence' based models of estimating need for specialist housing for older people, this new statistical model is based on primary research with older people (50+) about housing need and the likelihood of moving in later life. An analysis of the survey data has been undertaken to inform the modelling of future need for retirement/sheltered housing and extra care housing, which takes into account the following survey evidence from the 5,600 respondents:

- Older persons' *housing needs* in relation to different housing types, including extra care housing and retirement/sheltered housing
- Older persons' *likelihood of moving* from their current accommodation within a 12-month period, within 1-2 years, within 3-5 years, and within 5-10 years
- Age of the older people (65+)
- Tenure (socio-economic) status of older people
- Health status of older people

6.05 The survey evidence is then combined with quantitative demographic data from the ONS 2021 Census and SNPP 2022 population projections.

6.06 An approach to using the survey data to model need for specialist housing for older people has been developed based on the survey findings in relation to the *expressed housing need* of older people and their *most likely housing need* in the future. This modelling has been used to develop estimates of future need for retirement/sheltered housing and for extra care housing.

6.07 Using evidence from the survey, specifically the stated *expressed housing need* of older people and the stated *likelihood of moving* amongst older people, 'Transition Probabilities' (TPs) have been produced to estimate the predicted likelihood of people moving in 5 year periods, based on their age, their current tenure status and health status, to generate a number of moves over the next 5 years, and subsequently the estimated number of moves over the subsequent 10, 15 and 20 years.

[11] Housing LIN (2024) Housing preferences for older people: A survey of 5,600+ older people across the UK carried out by Ipsos for the Housing LIN. Available at: https://www.housinglin.org.uk/Topics/type/Older-Peoples-Housing-Preferences/

6.08 The table below presents estimates of how the housing needs of older people 65+ are estimated to change over time. Rows 3–7 show the projected number of people expected to move from their existing home into different types of housing, based on expressed housing preferences and likelihood of moving from the Ipsos survey. Rows 1–2 indicate the number of older people who are expected to remain in their current home, either with or without adaptations.

6.09 The survey results have shown that amongst older people who express a likelihood to move in the future, there is a greater need for mainstream housing[12] rather than specialist housing such as retirement/sheltered housing and extra care housing. Retirement/sheltered and extra care housing is needed but it is part of a wider need for mainstream housing that suits people as they age.

Table 26. Estimated 'Transition Probabilities' of moves (need) to different housing types amongst the 65+ population of Gwynedd to 2043

Housing types/situations	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
1. Stay in current mainstream home (without adaptations)	25,762	25,528	25,975	25,946	24,526
2. Stay in current mainstream home (with adaptations)	232	331	498	666	829
3. Move to mainstream home (without adaptations)	614	856	1,282	1,689	2,036
4. Move to mainstream home (with adaptations)	405	573	863	1,149	1,410
5. Move to mainstream/age designated home designed to be accessible	1,088	1,532	2,301	3,052	3,732
6. Move to specialist accommodation (sheltered/retirement housing and extra care housing)	368	521	779	1,035	1,276
7. Other	616	874	1,310	1,744	2,155
Total population 65+	**29,085**	**30,215**	**33,009**	**35,282**	**35,964**

Source: Ipsos (2024/5), Housing LIN (2024/25).

NB. Estimates of need are not cumulative.

The total population figures vary slightly to the population estimates in Figure 1 due to the use of different data sources/methods.

6.10 This evidence of need for different types of housing by people aged 65+ indicates the following.

6.11 The majority of older people are estimated to be likely to stay in their existing homes with a minority needing other types of housing. The estimated moves to other types of housing are interpreted as need for these types of housing over time, in this case over the period to 2043 .

6.12 By 2043, approximately 7,180 people aged 65+ are estimated to need other types of mainstream housing (i.e. not specialist housing) and of these approximately 1,410 people are estimated to need another type of mainstream housing and with adaptations to suit their

[12] Mainstream housing is defined as general needs social housing, private rented housing and market housing (i.e. not specialist housing such as sheltered housing and extra care housing or age-designated housing)

needs in later life. These could include both adaptations to a property as well as the use of technology that can enable people to live independently in mainstream housing.

6.13 By 2043, approximately 3,730 people aged 65+ are estimated to need mainstream housing that is designed to be accessible, e.g. to Lifetime Homes standard and/or to M4(2) accessibility standard (or potentially with other adaptations such as wheelchair accessible housing). Of those people aged 65+ who are estimated to move from their existing home, this is the largest cohort.

6.14 A minority of people aged 65+ who are estimated likely to move to meet their housing needs are expected to move to specialist accommodation (sheltered/retirement housing and extra care housing) approximately 1,276 by 2043 (see assessment of need in detail below).

6.15 The implications of these estimates of housing need amongst the 65+ population are:

- The majority of older people do not intend to move from their existing home.
- Of those that do intend to move, the majority need other mainstream housing, particularly housing that is designed to be accessible and that can support ageing in place, e.g. housing that is designed to Lifetime Homes standard.
- Amongst people with care and support needs, the majority are likely to stay in their existing homes and seek care/support services, as well as adaptations and technology, that enable them to remain living in their existing homes.
- There is likely to be growing demand for adaptations, both amongst self-funders and people on low incomes who are eligible for Disabled Facilities Grants, amongst older people who stay in their existing homes or who need other mainstream housing.
- There is likely to be increasing demand for technology, including care enabled technology, that can assist older people to remain living independently in mainstream housing.
- A minority of older people are likely to need specialist housing such as retirement/sheltered housing and extra care housing.

6.16 The model (as shown in the table above) amalgamates the 'transition probability' of moves to 'specialist accommodation' which includes moves to retirement/sheltered housing and to extra care housing.

6.17 To disaggregate the estimated moves to 'specialist accommodation' i.e. to retirement/sheltered housing and extra care housing the Ipsos survey data has been analysed as follows.

6.18 The survey findings indicate that when considering their future housing needs, the *expressed housing need* and *most likely housing need* amongst older people in relation to specialist accommodation are:

- 10% of respondents expressed a need to move to retirement/sheltered housing and 7% think that it is likely
- 5% of respondents expressed a need to move to extra care housing and 4% think that it is likely

6.19 To balance the difference between *expressed housing need* and *most likely housing need* a median value for each housing and accommodation type is calculated:

- 8.5% of moves to retirement/sheltered housing
- 4.5% of moves to extra care housing

6.20 Using evidence from the survey, based on evidence of older people's *expressed housing need* and *most likely housing need*, moves to 'specialist accommodation' (shown in Table 26) as moves to retirement/sheltered housing and to extra care housing, is disaggregated as follows:

- 65% of moves are estimated to be to retirement/sheltered housing
- 35% of moves are estimated to be to extra care housing

6.21 The estimated need for retirement/sheltered housing and extra care housing to 2043 is shown in the table below; estimated need for 1,409 units of retirement/sheltered housing and estimated need for 746 units of extra care housing.

Table 27. The initial estimated need for retirement/sheltered housing and extra care housing in Gwynedd to 2043 (in addition to existing supply) (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/ sheltered housing	403	571	857	1,140	1,409
Extra care housing	213	302	454	604	746
Total	**616**	**874**	**1,310**	**1,744**	**2,155**

Source: IPSOS (2025) and HLIN (2025). NB estimates of need are not cumulative.

6.22 To adjust the estimated need for extra care housing in Table 27 a 10% annual turnover rate in the existing/forthcoming supply of retirement/sheltered housing and 15% turnover for extra care housing in Gwynedd has been applied to the estimated need based on Gwynedd Council extra care turnover data, commissioner intelligence and the Housing LIN's experience. With 674 units in retirement/sheltered housing and 113 units in extra care housing available in Gwynedd this equates to 67 units in retirement/sheltered housing and 17 units in extra care housing schemes becoming available per annum on average.

6.23 The turnover calculation allows for 10% of the estimated need for retirement/sheltered housing and 15% for extra care housing to be met from the existing supply and has been subtracted from the estimated need in Table 27. The adjusted estimates of additional need for extra care housing are shown below.

Table 28. Estimated additional need for retirement/sheltered and extra care housing for people over the age of 65 in Gwynedd to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	336	504	789	1,073	1,341
Extra care housing	196	286	437	587	729

Source: IPSOS (2025) and HLIN (2025). Estimates of need are not cumulative.

6.24 The estimated additional need for retirement/sheltered housing and extra care housing by tenure is shown for 2025, 2028, 2032, 2038 and 2043 in Table 29. Estimated need is not cumulative. The estimated need for retirement/sheltered housing and extra care housing is for all people over the age of 65, not just those that are who draw on adult social care support from Gwynedd Council.

6.25 It has been assumed initially that estimates of future need are based on the current tenure split amongst people aged 65+, i.e. 78% home ownership and 22% social rent (including people currently living in private rented housing) (Figure 5). On this basis, the tenure split for

future projected retirement/sheltered housing and extra care housing need to 2035 is assumed to be:

- 78% of the estimated need for market housing
- 22% of the estimated need for social housing

6.26 Given the differing tenure breakdown of the current population group aged 45-64 years compared with the current 65+ population (i.e. lower levels of home ownership amongst the 45-64 years cohort), the current tenure split for 45-64 aged population is used for future projected housing need from 2035 onwards is:

- 71% of the estimated need will be for market housing
- 29% of the estimated need will be for social housing

6.27 However, evidence in relation to the potential affordability of market tenures of retirement and extra care housing indicates that these tenure splits of estimated future need should be adjusted further. In December 2025, average house prices in Gwynedd were £196,000[13]. More specifically, evidence from the ONS shows that for each property type, average prices as of December 2025 in Gwynedd were:

- Detached properties: £300,000
- Semi-detached properties: £202,000
- Terraced properties: £156,000
- Flats and maisonettes: £112,000

6.28 There are currently no market retirement housing or extra care housing schemes in Gwynedd. A McCarthy Stone retirement living development relatively close to Gwynedd at Benllech in Anglesey, has resale values in the period 2023-2024 of £185,000 to £285,000. This indicates that older homeowners in Gwynedd occupying flats, terraced properties and semi-detached properties either may not be able to afford an equivalent market retirement housing product if it was to be developed in Gwynedd or may not feel that they can afford it.

6.29 Discussions with Council Officers and Registered Social Landlords corroborate this evidence, i.e. in their experience the majority of older homeowners in Gwynedd are unlikely to be in a position to afford market retirement housing and extra care housing products; rather a minority of older homeowners are potentially to be in position to be able to afford to purchase market retirement housing or extra care housing.

6.30 On the basis of this evidence the proposed tenure split for future projected retirement/sheltered housing and extra care housing need to 2043 is assumed to be:

- 30% of the estimated need for market housing
- 70% of the estimated need for social housing

6.31 In this context market housing could include market sale and market rent homes and social housing could include homes that are available for affordable or social rent or as shared ownership. The consideration of shared ownership for older people will be dependent on localised demand and viability considerations.

[13] https://www.ons.gov.uk/visualisations/housingpriceslocal/W06000002/

Table 29. Estimated additional need for retirement/sheltered and extra care housing for Gwynedd by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**336**	**504**	**789**	**1,073**	**1,341**
Market housing	101	151	237	322	402
Social housing	235	353	553	751	939
Extra care housing	**196**	**286**	**437**	**587**	**729**
Market housing	59	86	131	176	219
Social housing	138	200	306	411	510

Source: IPSOS and HLIN (2025), Estimates of need are not cumulative.

6.32 The estimated additional need for retirement/sheltered housing by 2033 is c.790 homes of which c.240 are estimated to be required as market housing, and c.550 are estimated to be required as social housing.

6.33 The estimated additional need for retirement/sheltered housing by 2043 is c.1,340 homes of which c.400 are estimated to be required as market housing, and c.940 are estimated to be required as social housing.

6.34 The estimated additional need for extra care housing by 2033 is c.435 homes of which c.180 are estimated to be required as market housing, and c.305 are estimated to be required as social housing.

6.35 The estimated additional need for extra care housing by 2043 is c.730 homes of which c.220 are estimated to be required as market housing, and c.510 are estimated to be required as social housing.

6.36 To distribute estimated housing demand across Gwynedd's sub-areas, a composite weighting approach was applied. First, the proportion of the 65+ population in each sub-area was calculated using ONS population estimates. Second, preferences expressed by the Gwynedd Council survey respondents regarding their preferred locations were analysed. As respondents could select multiple areas, preference percentages were normalised to create relative shares. A combined weighting was then calculated using a 70:30 balance between population distribution (demographic demand) and survey preferences (behavioural demand). The resulting weights were re-scaled to sum to 100% and used to disaggregate Gwynedd level estimates to the locality based sub areas.

6.37 The estimated additional need for retirement/sheltered and extra care housing by sub areas is given in below tables

Table 30. Ardudwy: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**26**	**39**	**61**	**83**	**103**
Market housing	8	12	18	25	31
Social housing	18	27	43	58	72
Extra care housing	**15**	**22**	**34**	**45**	**56**
Market housing	5	7	10	14	17
Social housing	11	15	24	32	39

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 31. Bala / Penllyn: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**9**	**13**	**21**	**28**	**35**
Market housing	3	4	6	8	11
Social housing	6	9	15	20	25
Extra care housing	**5**	**8**	**11**	**15**	**19**
Market housing	2	2	3	5	6
Social housing	4	5	8	11	13

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 32. Bangor: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**38**	**58**	**90**	**123**	**153**
Market housing	11	17	27	37	46
Social housing	27	40	63	86	107
Extra care housing	**22**	**33**	**50**	**67**	**83**
Market housing	7	10	15	20	25
Social housing	16	23	35	47	58

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 33. Caernarfon: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**38**	**58**	**90**	**123**	**153**
Market housing	12	17	27	37	46
Social housing	27	40	63	86	107
Extra care housing	**22**	**33**	**50**	**67**	**83**
Market housing	7	10	15	20	25
Social housing	16	23	35	47	58

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 34. Dolgellau: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**26**	**39**	**60**	**82**	**103**
Market housing	8	12	18	25	31
Social housing	18	27	42	58	72
Extra care housing	**15**	**22**	**33**	**45**	**56**
Market housing	5	7	10	13	17
Social housing	11	15	23	31	39

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 35. Dysynni: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**31**	**47**	**73**	**99**	**124**
Market housing	9	14	22	30	37
Social housing	22	33	51	70	87
Extra care housing	**18**	**26**	**40**	**54**	**68**
Market housing	5	8	12	16	20
Social housing	13	19	28	38	47

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 36. Ffestiniog: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**12**	**18**	**28**	**38**	**47**
Market housing	4	5	8	11	14
Social housing	8	12	19	26	33
Extra care housing	**7**	**10**	**15**	**21**	**26**
Market housing	2	3	5	6	8
Social housing	5	7	11	14	18

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 37. Lleu / Nantlle: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**26**	**39**	**61**	**83**	**103**
Market housing	8	12	18	25	31
Social housing	18	27	42	58	72
Extra care housing	**15**	**22**	**34**	**45**	**56**
Market housing	5	7	10	14	17
Social housing	11	15	24	32	39

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 38. Ogwen: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**18**	**27**	**42**	**56**	**71**
Market housing	5	8	12	17	21
Social housing	12	19	29	40	49
Extra care housing	**10**	**15**	**23**	**31**	**38**
Market housing	3	5	7	9	12
Social housing	7	11	16	22	27

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 39. Pen Llŷn: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**24**	**36**	**57**	**77**	**96**
Market housing	7	11	17	23	29
Social housing	17	25	40	54	67
Extra care housing	**14**	**21**	**31**	**42**	**52**
Market housing	4	6	9	13	16
Social housing	10	14	22	30	37

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 40. Peris: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**26**	**38**	**60**	**82**	**102**
Market housing	8	11	18	24	31
Social housing	18	27	42	57	71
Extra care housing	**15**	**22**	**33**	**45**	**55**
Market housing	4	7	10	13	17
Social housing	10	15	23	31	39

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 41. Porthmadog / Penrhyndeudraeth: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**36**	**54**	**85**	**116**	**145**
Market housing	11	16	26	35	43
Social housing	25	38	60	81	101
Extra care housing	**21**	**31**	**47**	**63**	**79**
Market housing	6	9	14	19	24
Social housing	15	22	33	44	55

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Table 42. Pwllheli: Estimated additional need for retirement/sheltered and extra care housing by tenure to 2043 (units)

Specialist housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Retirement/sheltered housing	**26**	**39**	**62**	**84**	**105**
Market housing	8	12	19	25	32
Social housing	18	28	43	59	74
Extra care housing	**15**	**22**	**34**	**46**	**57**
Market housing	5	7	10	14	17
Social housing	11	16	24	32	40

Source: IPSOS, ONS 2021 and HLIN (2025), Estimates of need are not cumulative.

Estimated need for accessible housing for older people

6.38 The estimated additional need for accessible homes for older people (65+), i.e. housing designed to meet the needs of disabled people and older people (but which is not age designated), e.g. designed to Lifetime Homes standards and/or M4(2) accessibility standard (which are separate to the estimates above for sheltered housing and extra care housing), are based on the 'transition probabilities' model derived from Ipsos survey evidence shown in Table 26.

6.39 Based on this modelling, it is estimated that by 2043 approximately 3,730 people aged 65 and over will need accessible homes.

Table 43. Estimated need for accessible homes in Gwynedd to 2043 (people 65+)

Housing type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Accessible housing	1,088	1,532	2,301	3,052	3,732

Source: Ipsos (2024/5), Housing LIN (2024/25).
NB. Estimates of need are not cumulative.

6.40 The same tenure assumptions described above (see para 6.25 to 6.31) have been applied in estimating demand for accessible housing. On this basis, it is assumed that 30% of the estimated need will be for market housing and 70% for social housing.

Table 44. Estimated need for accessible homes in Gwynedd by tenure (people 65+)

Housing / accommodation type	Estimated need at 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Accessible housing	**1,088**	**1,532**	**2,301**	**3,052**	**3,732**
Market housing	326	460	690	916	1,120
Social housing	761	1,073	1,610	2,136	2,613

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

6.41 Estimated need is disaggregated to locality based sub area following the combined weighting between population and the Gwynedd Council survey preferences (see paragraph 6.36)

Table 45. Estimated need for accessible home in Gwynedd by sub areas to 2043 (people 65+)

Locality based sub area	Estimated need at 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Ardudwy	84	118	177	235	288
Bala / Penllyn	29	40	61	80	98
Bangor	124	175	263	349	426
Caernarfon	124	175	263	349	427
Dolgellau	83	117	176	234	286
Dysynni	101	142	213	283	346
Ffestiniog	38	54	81	107	131
Lleu / Nantlle	84	118	177	235	287
Ogwen	57	81	121	161	196
Pen Llŷn	78	110	165	219	268
Peris	83	116	175	232	284
Porthmadog / Penrhyndeudraeth	117	165	248	330	403
Pwllheli	85	120	180	239	292
Gwynedd	**1,088**	**1,532**	**2,301**	**3,052**	**3,732**

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

Table 46. Estimated need for accessible home in Gwynedd by sub areas and tenure to 2043 (people 65+)

Locality based sub area	Market sale					Social housing				
	2025	2028	2033	2038	2043	2025	2028	2033	2038	2043
Ardudwy	25	35	53	71	86	59	83	124	165	201
Bala / Penllyn	9	12	18	24	29	20	28	42	56	69
Bangor	37	53	79	105	128	87	123	184	244	298
Caernarfon	37	53	79	105	128	87	123	184	244	299
Dolgellau	25	35	53	70	86	58	82	123	164	200
Dysynni	30	43	64	85	104	71	99	149	198	242
Ffestiniog	11	16	24	32	39	27	38	57	75	92
Lleu / Nantlle	25	35	53	70	86	59	82	124	164	201
Ogwen	17	24	36	48	59	40	56	85	112	137
Pen Llŷn	23	33	50	66	80	55	77	116	153	188
Peris	25	35	52	70	85	58	82	122	162	199
Porthmadog / Penrhyndeudraeth	35	50	75	99	121	82	116	174	231	282
Pwllheli	26	36	54	72	88	60	84	126	167	205
Gwynedd	**326**	**460**	**690**	**916**	**1,120**	**761**	**1,073**	**1,610**	**2,136**	**2,613**

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

Estimated need for age designated accessible housing (subset of estimated need for accessible housing)

6.42 The baseline for estimating need for age-designated housing is the transition probability model derived from Ipsos survey evidence (see Table 26), which estimates the number of households aged 65+ who need homes designed to be accessible. These estimates represent the potential need for accessible housing among older households in Gwynedd. This is distinct and separate to estimated need for specialist housing such as sheltered/retirement housing and extra care housing.

6.43 To estimate the proportion of these households that may need accessible *age-designated housing* (e.g. accommodation restricted to residents aged 55+ or 60+), responses from the Gwynedd Council's resident survey were analysed (see Figure 16). The survey asked respondents about factors influencing a potential move, including accessibility, downsizing, affordability, proximity to amenities, and preferences for age-restricted housing or housing with care or support. Among respondents aged 65+, 26% indicated that moving to age-restricted housing would be a factor influencing their decision to move. A similar proportion was observed when analysing responses for those aged 50 and over, with around 27% identifying age-designated housing as a factor influencing a move.

6.44 As respondents were able to select multiple factors, this percentage represents the proportion expressing an interest in age-designated housing rather than an exclusive preference and therefore should be interpreted as an indication of potential need.

6.45 On this basis, it is assumed that approximately 25% of older people who need accessible homes may require age-designated accessible housing. This proportion has been applied to the estimated need for accessible homes derived from the transition probability model to

produce an estimate of demand for accessible age-designated accessible housing over the projection period.

Table 47. Estimated need for age designated accessible housing in Gwynedd to 2043

Housing types/situations	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Accessible age designated housing	272	383	575	763	933

Source: Ipsos (2024/5), Housing LIN (2024/25).
NB. Estimates of need are not cumulative.

6.46 The same tenure assumptions described above (see para 6.25 to 6.31) have been applied in estimating need for accessible housing. On this basis, it is assumed that 30% of the estimated need will be for market housing and 70% for social housing.

Table 48. Estimated need for age designated accessible housing in Gwynedd by tenure to 2043

Housing type	Estimated need at 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Accessible age-designated housing	**272**	**383**	**575**	**763**	**933**
Market housing	82	115	173	229	280
Social housing	190	268	403	534	653

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

6.47 Estimated need is disaggregated to locality based sub area following the combined weighting between population and survey preferences (see paragraph 6.36)

Table 49. Estimated need for age designated accessible housing in Gwynedd by sub areas to 2043

Locality based sub area	Estimated need at 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Ardudwy	21	30	44	59	72
Bala / Penllyn	7	10	15	20	25
Bangor	31	44	66	87	107
Caernarfon	31	44	66	87	107
Dolgellau	21	29	44	58	71
Dysynni	25	36	53	71	87
Ffestiniog	10	13	20	27	33
Lleu / Nantlle	21	29	44	59	72
Ogwen	14	20	30	40	49
Pen Llŷn	20	28	41	55	67
Peris	21	29	44	58	71
Porthmadog / Penrhyndeudraeth	29	41	62	82	101
Pwllheli	21	30	45	60	73
Gwynedd	**272**	**383**	**575**	**763**	**933**

Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

Table 50. Estimated need for age designated accessible housing in Gwynedd by sub areas and tenure to 2043

Locality based sub area	Market sale					Social housing				
	2025	2028	2033	2038	2043	2025	2028	2033	2038	2043
Ardudwy	6	9	13	18	22	15	21	31	41	50
Bala / Penllyn	2	3	5	6	7	5	7	11	14	17
Bangor	9	13	20	26	32	22	31	46	61	75

Locality based sub area	Market sale					Social housing				
	2025	2028	2033	2038	2043	2025	2028	2033	2038	2043
Caernarfon	9	13	20	26	32	22	31	46	61	75
Dolgellau	6	9	13	18	21	15	21	31	41	50
Dysynni	8	11	16	21	26	18	25	37	50	61
Ffestiniog	3	4	6	8	10	7	9	14	19	23
Lleu / Nantlle	6	9	13	18	22	15	21	31	41	50
Ogwen	4	6	9	12	15	10	14	21	28	34
Pen Llŷn	6	8	12	16	20	14	19	29	38	47
Peris	6	9	13	17	21	14	20	31	41	50
Porthmadog / Penrhyndeudraeth	9	12	19	25	30	21	29	43	58	71
Pwllheli	6	9	14	18	22	15	21	32	42	51
Gwynedd	**82**	**115**	**173**	**229**	**280**	**190**	**268**	**403**	**534**	**653**

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

6.48 As a consequence, the estimated demand for accessible housing can be interpreted as comprising two distinct components. Of the total estimated need for 3,732 accessible homes for older people by 2043, approximately 933 homes (around 25%) are estimated to be age-designated accessible housing, while the remaining approximately 2,799 homes (around 75%) are likely to be accessible mainstream homes that are not age-designated.

Table 51. Estimated need for accessible homes (not age designated) in Gwynedd by tenure (people 65+)

Housing / accommodation type	Estimated need at 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Accessible housing	**816**	**1,149**	**1,726**	**2,289**	**2,799**
Market housing	245	345	518	687	840
Social housing	571	805	1,208	1,602	1,959

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

6.49 Estimated need is disaggregated to locality based sub area following the combined weighting between population and the Gwynedd Council survey preferences (see paragraph 6.36)

Table 52. Estimated need for accessible home in Gwynedd by sub areas to 2043 (people 65+)

Locality based sub area	Estimated need at 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Ardudwy	63	89	133	176	216
Bala / Penllyn	21	30	45	60	74
Bangor	93	131	197	261	320
Caernarfon	93	131	197	262	320
Dolgellau	62	88	132	175	214
Dysynni	76	107	160	212	259
Ffestiniog	29	40	61	81	99
Lleu / Nantlle	63	88	133	176	215
Ogwen	43	60	91	120	147
Pen Llŷn	59	83	124	164	201
Peris	62	87	131	174	213
Porthmadog / Penrhyndeudraeth	88	124	186	247	302
Pwllheli	64	90	135	179	219
Gwynedd	**816**	**1,149**	**1,726**	**2,289**	**2,799**

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

Table 53. Estimated need for accessible home in Gwynedd by sub areas and tenure to 2043 (people 65+)

Locality based sub area	Market sale					Social housing				
	2025	2028	2033	2038	2043	2025	2028	2033	2038	2043
Ardudwy	19	27	40	53	65	44	62	93	123	151
Bala / Penllyn	6	9	14	18	22	15	21	32	42	52
Bangor	28	39	59	78	96	65	92	138	183	224
Caernarfon	28	39	59	78	96	65	92	138	183	224
Dolgellau	19	26	40	53	64	44	62	93	123	150
Dysynni	23	32	48	64	78	53	75	112	149	182
Ffestiniog	9	12	18	24	30	20	28	43	56	69
Lleu / Nantlle	19	27	40	53	65	44	62	93	123	151
Ogwen	13	18	27	36	44	30	42	64	84	103
Pen Llŷn	18	25	37	49	60	41	58	87	115	141
Peris	19	26	39	52	64	43	61	92	122	149
Porthmadog / Penrhyndeudraeth	26	37	56	74	91	62	87	130	173	212
Pwllheli	19	27	41	54	66	45	63	95	125	153
Gwynedd	**245**	**345**	**518**	**687**	**840**	**571**	**805**	**1,208**	**1,602**	**1,959**

Source: Ipsos (2024/5), Housing LIN (2024/25). NB. Estimates of need are not cumulative.

Estimated care home capacity requirements for people 65+

6.50 This part of the assessment covers estimated need for care home capacity for older people (aged 65+).

6.51 It draws on evidence in relation to:

- The current supply of residential care and nursing care home provision for older people (65+) in Gwynedd
- Current utilisation of this 65+ care home capacity
- Gwynedd Council's use of this care home capacity
- Demographic projections of the 65+ population to 2043
- Evidence and expert intelligence from Council Officers about the local care home market and likely trends in future need for care home bed capacity

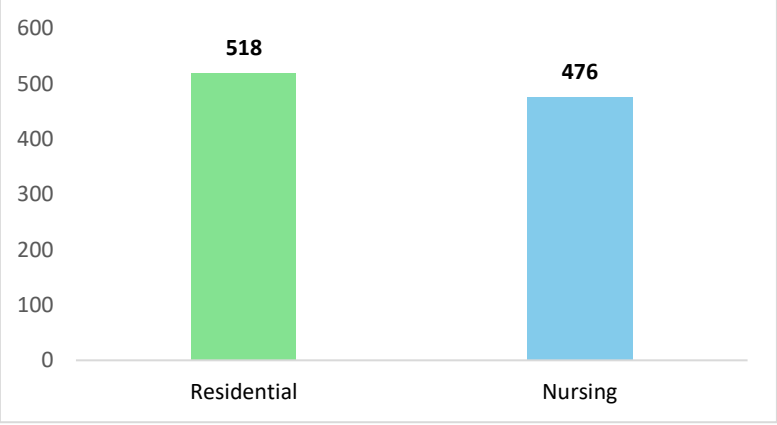
Supply of care homes for people 65+

6.52 To identify the care home capacity in Gwynedd, care home provision data was provided by Gwynedd Council including local care capacity tracker data. The types of care homes include:

- *Residential care home* provides accommodation, meals, wellbeing activities and support for multiple people, with access to personal care and support 24 hours a day, seven days a week. Personal care activities can include support with washing, dressing, taking medicines, going to the toilet etc
- *Nursing care home*[14] similar to a residential care home but additionally providing care from qualified nurses. There will always be 1 or more qualified nurses on duty to provide nursing care. These are sometimes called 'care homes with nursing'

6.53 There is a total of 994 care home beds in Gwynedd that Gwynedd Council has categorised as being for older people (65+). This includes both residential and nursing care home beds. Of these, 52% are residential care beds and 48% are nursing care beds.

Figure 18. Care home beds supply in Gwynedd



Source: Gwynedd Council (2025)

[14] NHS: Care homes

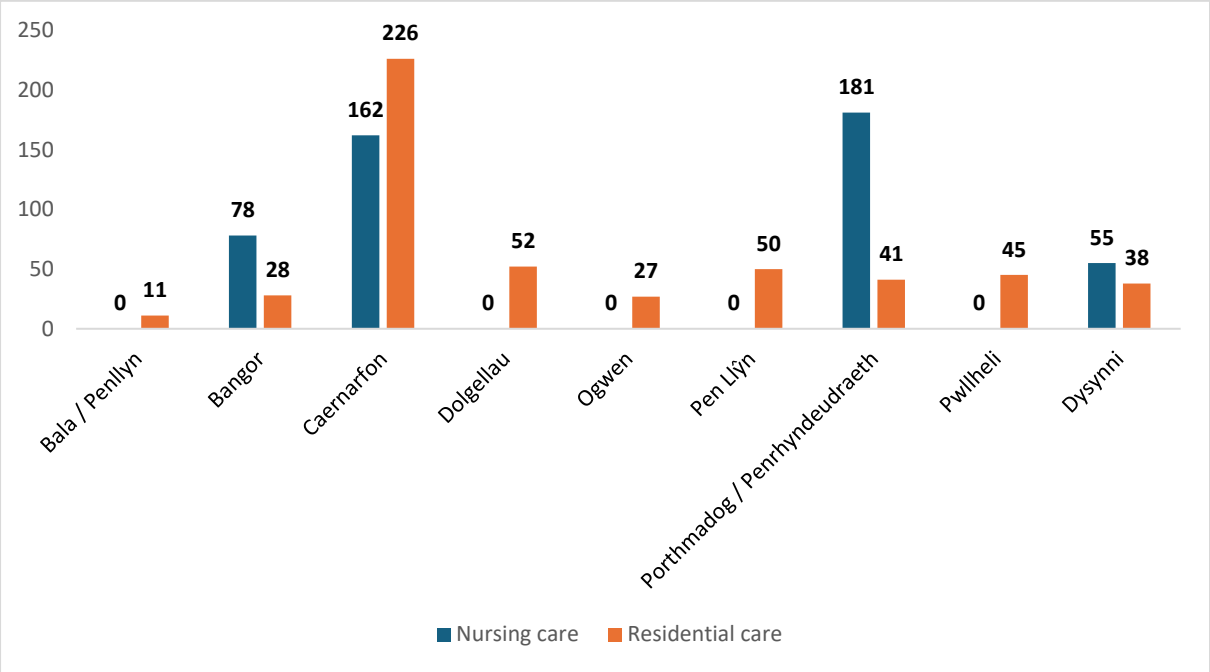
6.54 Caernarfon contains the largest volume of provision, with 388 bedspaces (39% of the county total), including 162 nursing care beds and 226 residential care beds.

6.55 Porthmadog/Penrhyndeudraeth has the second largest supply, with 222 bedspaces (22% of the total). The locality has the highest concentration of nursing care provision in the county, accounting for 181 nursing beds, equivalent to around 38% of all nursing care capacity in Gwynedd.

6.56 Provision in the remaining localities is more limited. Bangor provides 106 bedspaces, of which the majority are nursing care beds (78), while Pen Llŷn offers 50 residential beds and no nursing care provision. Similarly, Pwllheli contains 45 residential care beds and no nursing capacity.

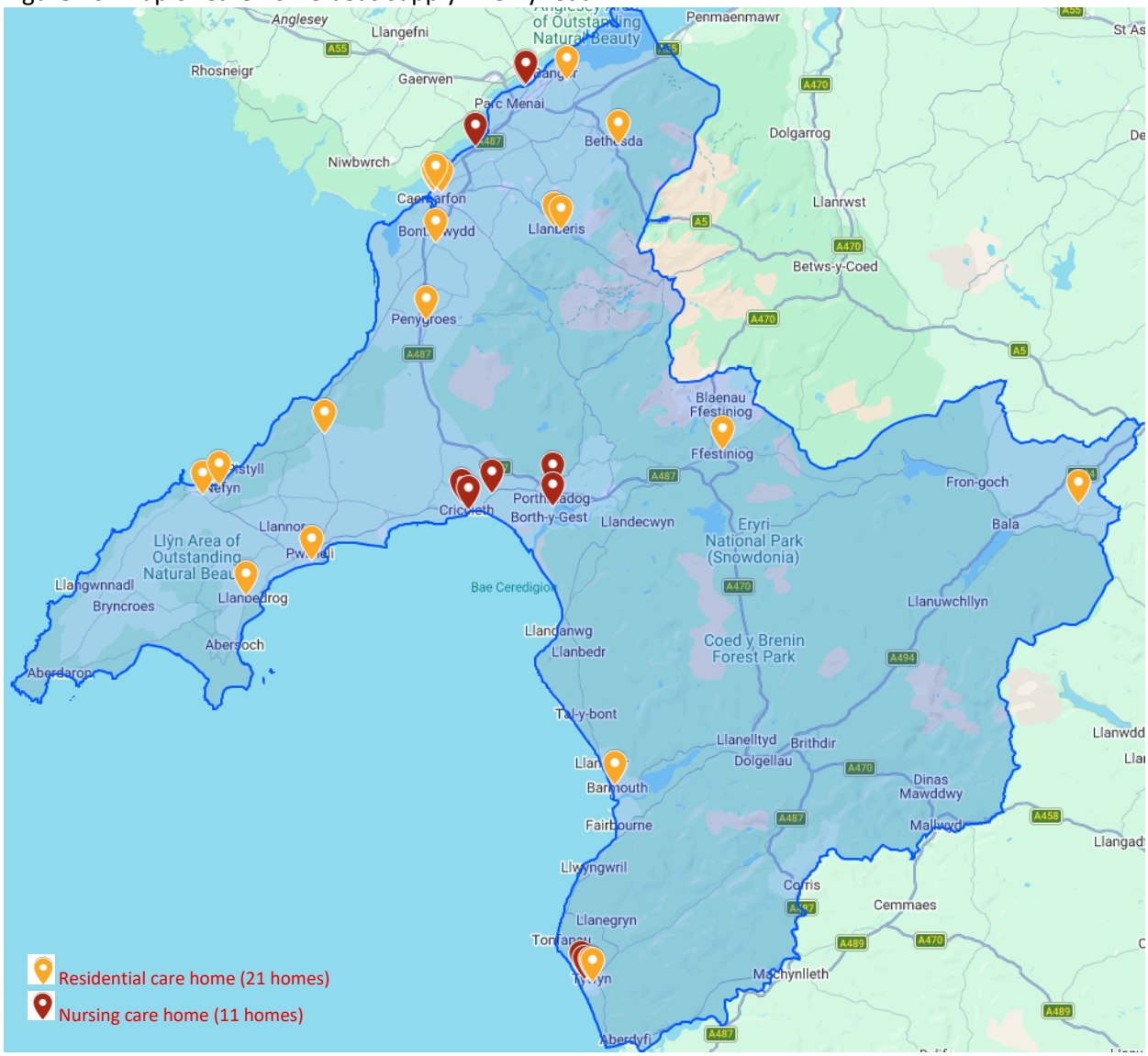
6.57 In the southern parts of the county, supply is comparatively modest. Dysynni provides 93 bedspaces, including 55 nursing beds and 38 residential beds, while Dolgellau and Ogwen contain only residential provision, with 52 and 27 beds respectively. Bala/Penllyn has the smallest overall supply, with just 11 residential care beds.

Figure 19. Care home beds supply in Gwynedd by sub area



Source: Gwynedd Council (2025)

Figure 20. Map of Care home beds supply in Gwynedd



Source: My Maps, HLIN

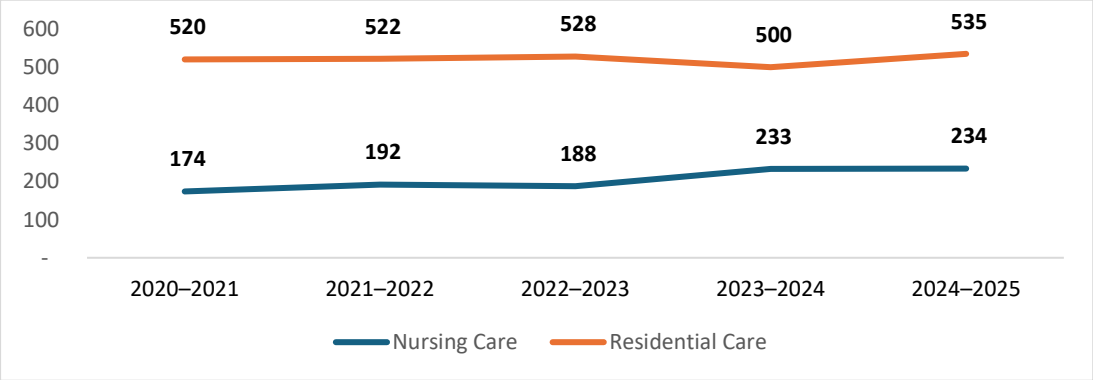
Trends in older persons aged 65+ living in residential and nursing care homes who are eligible for adult social care (ASC) from Gwynedd Council

6.58 Analysis of trends in placements for people aged 65+ in residential and nursing care in Gwynedd between 2020/21 and 2024/25 shows:

- Residential care placements have remained broadly stable over the five-year period. There were 520 placements in 2020/21 and increased slightly to 535 in 2024/25, representing a 2.9% overall rise. The highest level of placements was recorded in 2022/23 (528), followed by a dip in 2023/24 (500), before increasing again in 2024/25.
- Nursing care placements show a clearer upward trajectory. Placements increased from 174 in 2020/21 to 234 in 2024/25, representing a 34% overall increase over the period. The most significant growth occurred between 2022/23 and 2023/24, when placements rose from 188 to 233 (a 24% increase in a single year). Growth continued more modestly into 2024/25.

6.59 When combined, total residential and nursing placements for people aged 65+ increased from 694 in 2020/21 to 769 in 2024/25. This equates to an 11% overall increase. This growth has been driven primarily by increases in placements into nursing care rather than residential care. This pattern suggests a shift in the profile of need among older people supported by Gwynedd Council, with a growing proportion requiring more complex health and care interventions consistent with nursing care provision.

Figure 21. Trends in care home placements



Source: Gwynedd Council (2025)

Estimated future care home capacity need for people 65+ to 2043

6.60 A range of evidence and data has been analysed and used to produce estimates of future need for care home capacity for people 65+ in Gwynedd over the period to 2043.

6.61 Evidence reviewed includes:

- Current supply of care home beds for people 65+ capacity in Gwynedd
- Evidence from Council Officers knowledgeable about the care home market in Gwynedd
- Evidence from the most recent ONS census in relation to the proportion of older people (65+) usually living in care homes
- Evidence from local NHS/Gwynedd Council care home capacity tracker data in relation to actual occupancy levels in care homes for people 65+ in Gwynedd

6.62 The method used for assessing future need for care home bed capacity is:

- Using data in relation to the current percentage of people aged 65+ usually residing in care homes drawn from the ONS 2021 census[15]
- Disaggregating data on people residing in care homes by the following population groups: 65-74 years; 75-84 years; 85+ years
- Applying this evidence of the percentage of older people from these population groups living in care homes to the projected population for these age cohorts in Gwynedd over the period to 2043
- Net from estimated future care bed capacity requirements, current care bed capacity

[15] ONS 2021; https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/ageing/articles/olderpeoplelivingincarehomesin2021andchangessince2011/2023-10-09

- Make the following adjustments to estimates of need for care home bed capacity for people 65+localised to Gwynedd (*based on assumptions checked with Council Officers)*
    - Consider and apply Gwynedd Council Officer/stakeholder knowledge of the care home (65+) market in Gwynedd
    - Based on the current distribution of total care home beds between residential and nursing care home beds, drawing on Council Officer knowledge and trends in the care needs of older people, apply assumptions about the likely future trend of need between residential care provision and nursing care provision
    - Make adjustment/s in relation to placements in care homes in Gwynedd from other local authorities
    - Make adjustment/s to allow for anticipated care home closures over next 10-15 years
    - Triangulate initial estimates of need for residential care beds and nursing care beds with evidence from local NHS/Gwynedd Council capacity tracker data regarding actual occupancy levels in care homes for people 65+ in Gwynedd
- Make adjustment/s (if appropriate) to allow for care home rooms without full ensuite facilities

Current use of care home bed capacity

6.63 The care home bed capacity tracker provides real time intelligence about the utilisation of bed capacity in local care home markets. This evidence and intelligence are available to the NHS and councils but is not publicly available.

6.64 The evidence from the capacity tracker data for the care home market in Gwynedd for 2022 to 2025 is that on average c.93% of available beds were being occupied at any given time in the local 65+ care home market. Vacancy rates are not consistent across all care homes with variation evident between residential and nursing provision.

6.65 In the context of the overall number of beds in the Gwynedd care home market, this suggests an under-utilisation rate of c.7%. However, based on the Housing LIN's experience of undertaking similar assessments of need for 65+ care home capacity for other local authorities, it is assumed that it is necessary for the local care home 'system' to have some available capacity, for example to manage spikes in demand during the period of hospital 'winter pressures', say of 5%. On this basis, 65+ care home capacity does not appear to be significantly underutilised. This suggests limited scope for further absorption of demand without additional capacity, changes to the level and type of care needs that existing care home operators will accommodate and/or changes in flow through the system.

6.66 For residential care, capacity tracker evidence indicates average occupancy of approximately 91% across the period from 2022-2025. This equates to an under-utilisation rate of approximately 9% of available residential beds. Allowing for the local system requirement of c.5% spare capacity to manage fluctuations in demand, this suggests the market is operating approximately 4% below this equilibrium (i.e. supply and demand, at least in terms of the bed capacity – not necessarily the type of beds – is relatively balanced).

6.67 For nursing care, average occupancy was higher, at around 96% across the period. 2022-2025. This represents an under-utilisation rate of c.4%. After taking account of the estimated 5%

'buffer' required for local system flexibility, this implies that there is currently likely to be insufficient nursing care bed capacity to meet demand.

Council Officer/stakeholder knowledge of the care home (65+) market

Evidence and intelligence from Gwynedd Council Officers who purchase care home beds on behalf of the Council and who support self-funders to purchase care home beds indicates the following.

Care home stock for people 65+

6.68 Much of the care home stock for people aged 65+ is made up of older, converted properties.

6.69 Many of the older properties that have been converted in the past for use as care home homes are increasingly not fit for purpose in accommodating older people with significant mobility and care/health needs.

6.70 The majority of the care home market in Gwynedd for people aged 65+ is operated by smaller businesses.

6.71 There are fewer of the larger and regional/national care home operators running and developing care homes for people 65+in Gwynedd.

6.72 Approximately half the market (around 330 beds) is supplied internally by Cyngor Gwynedd. All residential currently.

Need profile of older people using care homes

6.73 There is a deficit in the current care home market in relation to catering for people 65+ with more complex care and health needs, including dementia related needs. Other complex needs that are currently difficult for many care home operators to meet include:

- Mental health needs
- Drug/alcohol related needs
- Acquired brain injury
- Bariatric needs

6.74 The predominant need is for both residential and nursing care beds for older people with complex care and health needs associated with dementia, frailty and long term conditions.

Provision of full ensuite facilities

6.75 Some of the older care home stock, derived from conversions of existing properties, do not have full en-suite facilities (and are unlikely to be able to introduce these facilities often due to space constraints).

6.76 Gwynedd Council Officers note that some of these homes will close as a result of, for example, owners retiring, however other care homes without full en-suite facilities will remain in operation and will continue to form an important part of the, often more affordable, care home market.

6.77 To address these issues (above), current and additional care home bed capacity:

- Should be targeted at older people living with complex dementia related care needs and for people with other complex health and care needs
- Will need to be, in relation to both nursing care beds and residential care beds, for older people with the most complex care and health needs
- Should be affordable to enable the Council to purchase care home bed capacity and for less affluent self-funders

Minimising the use of care homes for people 65+: preventative approaches used by Gwynedd Council

6.78 Gwynedd Council has a policy intention and supporting operational practice to minimise, reduce and delay the use of care home placements for people 65+ through a range of 'preventative' services.

6.79 This is preventative care consists of support for carers, short breaks, and used of care enabled technology. The intention of all these service interventions is to support older people to remain living in their own homes and to avoid completely or delay any permanent move into a care home.

6.80 Another strand of Gwynedd Council policy and operational practice is to seek to use extra care housing as an alternative to the use of residential care for people 65+. However, there is considered to be a need for additional extra care housing to support this policy intention in practice.

6.81 Preventative care services and extra care housing have the potential to reduce the number of older people moving into residential and nursing care homes, or to at least delay the point of admission, both for older people placed by Gwynedd Council and for self-funders. The impact of these preventative services is anticipated to be a reduction in the number of people aged 65+ entering residential care. On this basis the modelling of future need for care home bed capacity allows for approximately 20% of people 65+ who would otherwise been placed into residential care to be 'diverted' into extra care housing as well as older people who would otherwise have been placed into residential care to remain living in their own homes due to the effect of preventative care services, (i.e. adjust downwards estimated future need by 10%).

Distribution of total care home beds between residential and nursing care home beds

6.82 According to Gwynedd Council data on the overall care home market, there are a total of 994 care home beds in Gwynedd that have been categorised as being for older people (65+). This figure includes both residential and nursing care beds. Of these, 52% are residential care beds, 48% are nursing care beds

6.83 Drawing on capacity tracker evidence for 2022–2025 and allocating dual-registered beds equally between residential and nursing care, the distribution adjusts to an average of 53% residential care beds and 47% nursing care beds.

6.84 Based on evidence of the increasing complexity and acuity of care and health needs amongst older people needing to use a care home and local care market trend evidence from Gwynedd Council Officers, it is assumed that over the next 10-15 years there is likely to be a trend towards the percentage of overall care beds in the market that are for nursing care increasing and the percentage of the overall beds in the market that are for residential care decreasing. On this basis the modelling of future need for care home bed capacity assumes that the

current balance of 53% residential care beds and 47% nursing care beds is anticipated to change over time to a balance of 45% residential care beds and 55% nursing care beds by 2043.

Capacity tracker evidence

6.85 Capacity Tracker evidence provides the most up-to-date record of care home capacity and occupancy in Gwynedd, including residential and nursing provision (with dual-registered homes split equally). As at the end of 2024/25 there were 962 people living in care homes in Gwynedd with 498 people are in residential care and 464 people in nursing care.

6.86 The 2022 figures reflect a period during which care home services were still experiencing the effects of the COVID-19 pandemic. As a result, occupancy levels in 2022 may not be fully representative of typical demand or utilisation patterns.

Table 54. Capacity tracker snapshot evidence (31st March each year), 2022–2025

Year	Care Type	Beds occupied	Unused beds	Occupancy rate
2022	Residential care	532	62	88%
2023	Residential care	555	31	94%
2024	Residential care	538	71	87%
2025	Residential care	525	27	95%
			Average	**91%**
2022	Nursing care	487	37	92%
2023	Nursing care	476	21	96%
2024	Nursing care	476	4	99%
2025	Nursing care	476	12	97%
			Average	**96%**

Source: Gwynedd Council (2025)
NB: the impact of COVID-19 on year 2022.

6.87 The evidence shows that in recent years:

- Residential care capacity has ranged between 525 and 555 beds over the period 2022–2025, with between 463 and 524 residents in occupation. Occupancy rates have generally remained high, fluctuating between 87% and 95%, with an average occupancy of 91%.
- Nursing care capacity has ranged between 476 and 487 beds, with between 450 and 472 residents in occupation. Occupancy rates have consistently been very high, varying between 92% and 99%, with an average of 96%, suggesting a tightly constrained market with limited spare capacity.

6.88 The capacity tracker evidence has been used to calibrate and then amend as necessary initial estimates of need based on ONS evidence of the likely number of people aged 65+ anticipated to be living in care homes.

Placements in Gwynedd 65+ care homes by other local authorities.

6.89 Gwynedd Council does not have definitive evidence in relation to the percentage of care home beds that are occupied by non-Gwynedd residents, but a conservative estimate based on experience from working with other authorities and local stakeholders is that it is likely to be between 5% and 8% of beds.

6.90 This in effect means that a percentage of 65+ care home bed capacity is meeting need from outside of Gwynedd.

6.91 On this basis the modelling of future need for care home bed capacity allows for at least 5% of care home beds being occupied by people aged 65+ who were not previously residents of Gwynedd and therefore are occupying beds that could meet the needs of Gwynedd residents (i.e. adjust upwards estimated future need by 5%)

Care home rooms without ensuite facilities.

6.92 Assessments of need for care home bed capacity are typically carried out by a small number of private consultants on behalf of care home developers. These assessments typically contain very similar evidence and often make the following types of assumptions in relation to estimating need for care home bed capacity:

- They assume that existing care home provision which does not have full ensuite bedrooms is effectively redundant and should not be included within the current supply of care home beds for the purpose of 'netting off' from overall estimated need for future care home bed capacity
- They typically use Laing and Buisson estimated prevalence rates for the use of care home beds amongst the 65 to 74 years population group, the 75 to 84 years population group, and the 85 plus population group. These prevalence rates typically assume that:
  - 0.54% of the 65 to 74 years population group will need a care home bed
  - 3.3% of the 75 to 84 years population group will need a care home bed
  - 13.4% of the 85 plus years population group will need a care home bed

6.93 It should be noted that:

- Local evidence and intelligence indicate that care home beds without ensuite facilities continue to be used and purchased. It is not reasonable or realistic to assume that all these non ensuite rooms are redundant and should be discounted as part of the current supply of care home beds for the purposes of assessing future need for care home bed capacity. Discounting all beds that do not currently have full ensuite facilities will have the effect of inflating estimates of need for future care home bed capacity
- The Laing and Buisson estimated prevalence rates (above) for the use of care home beds (above) are higher than the most recent evidence for these older population groups usually resident in care homes from the ONS 2021 census

6.94 It is assumed that existing care home rooms without full ensuite facilities will continue to be used and that the current care home beds with non ensuite facilities will likely reduce over time as operators upgrade their facilities and there is a group of older people who have a need for the most affordable care beds, which is likely to include residual rooms without ensuite facilities. It is also assumed that some of the current non ensuite room beds will be taken out of the market as some care home operators, typically smaller operators, exit the market over the next 10-15 years (see assumption below).

Anticipated care home closures over next 10-20 years

6.95 Based on evidence from Gwynedd Council Officers, exits from the 65+ care home market by operators are relatively low. There is some evidence of existing care homes being acquired by other operators.

6.96 On this basis the modelling of future need for care home bed capacity allows for approximately 2% bed capacity loss per annum due to providers exiting the market (assuming there are no new replacement beds), i.e. adjust upwards estimated future need by 2% .

Estimated need for care home 65+ bed provision

6.97 Estimated need for 65+ care home bed provision in Gwynedd to 2043 based on the method and assumptions above, is set out below. Table 55 shows the current percentage of people aged 65+ usually residing in care homes drawn from the ONS 2021 census.

Table 55. Percentage of people aged 65+ usually residing in care homes

Population group	Percentage usually residing in a care home
65-74 years	0.63%
75-84 years	2.38%
85+ years	11.07%

Derived from ONS 2021[16]

6.98 Table 56 shows the projected population for the following population groups: 65-74 years; 75-84 years; 85+ years in Gwynedd to 2043.

Table 56. Projected population for Gwynedd for 65+ population groups to 2043

Population group	2025	2028	2033	2038	2043
Gwynedd 65-74	14,128	14,951	16,250	16,381	14,980
Gwynedd 75-84	10,253	10,418	10,221	11,111	12,223
Gwynedd 85+	3,870	4,084	4,975	5,306	5,630

Source: 2022 sub national population projections

6.99 Table 57 shows initial estimated need for care home beds by applying the evidence of the percentage of older people from these population groups usually resident in care homes (from Table 55) to the projected population for these population groups in Gwynedd over the period to 2043 (from Table 56). This produces initial estimates of need for care home beds in Gwynedd to 2043 as shown in the below table.

Table 57. Initial estimated need of care home beds in Gwynedd to 2043

Age population group	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
65-74	89	94	102	103	94
75-84	244	248	243	264	291
85+	428	452	551	587	623
Total	**761**	**794**	**896**	**955**	**1,009**

Source: Gwynedd Council and HLIN. NB estimates of need are not cumulative. Totals may not sum due to rounding.

6.100 The overall estimated need for care home beds in Table 57 is distributed between residential and nursing care based on the assumptions set out in paragraph 6.62. This is shown in the table below.

[16] https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/ageing/articles/olderpeoplelivingincarehomesin2021andchangessince2011/2023-10-09

Table 58. Estimated need for residential care and nursing care beds to 2043

Care type	Estimated need in 2025	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Residential care (beds)	403	404	438	448	453
Nursing care (beds)	359	390	458	507	556
Total	**761**	**794**	**896**	**955**	**1,009**

Source: Gwynedd Council and HLIN. NB estimates of need are not cumulative. Totals may not sum due to rounding.

6.101 When compared to modelled estimates based on national prevalence rates, capacity tracker evidence for 2024/25 (Table 54) show consistently higher resident numbers. To reconcile this difference, a calibration factor (actual ÷ estimated) is calculated for residential and nursing care separately, using the ratio of actual care home residents to estimate care home need across the period 2022–2025.

6.102 Table 59 and Table 60 shows the effect of netting off from estimates of future need (from Table 58), the current supply of residential care home beds (518 beds) and nursing care beds (476 beds). This is then checked against and adjusted in relation to evidence from local capacity tracker data, the other assumptions set out in paragraphs 6.68 to 6.96 and triangulated with local knowledge and expertise in relation to 65+ care homes in Gwynedd.

Table 59. Adjusted estimated need for residential care home beds in Gwynedd to 2043

Year	Gross estimated care home bed need	Gross estimated care home bed need (adjusted for capacity tracker evidence)	Adjust for use of beds by non-Gwynedd residents (+5%)	Adjust for potential care home closures (+2%)	Adjustment for diversion to ECH and replacement care services (-20%)	Initial estimated care home need	Current supply of beds	Available supply (95% of supply to allow for demand 'spikes')	Total adjusted estimated care home bed need
2025	403	515	26	10	−103	448	518	492	−44
2028	404	517	26	10	−103	450	518	492	−42
2033	438	561	26	10	−112	485	518	492	−7
2038	448	573	26	10	−115	494	518	492	2
2043	453	579	26	10	−116	500	518	492	10

Source: Gwynedd Council and HLIN. NB estimates of need are not cumulative

Table 60. Adjusted estimated need for nursing care home beds in Gwynedd to 2043

Year	Gross estimated care home bed need	Gross estimated care home bed need (adjusted for capacity tracker evidence)	Adjust for use of beds by non-Gwynedd residents (+5%)	Adjust for potential care home closures (+2%)	Initial estimated care home need	Current supply	Available supply (95% of supply to allow for demand 'spikes')	Total adjusted estimated care home bed need
2025	359	459	24	10	492	476	452	40
2028	390	499	24	10	532	476	452	80
2033	458	586	24	10	619	476	452	167
2038	507	649	24	10	682	476	452	230
2043	556	711	24	10	744	476	452	292

Source: Gwynedd Council and HLIN. NB estimates of need are not cumulative

6.103 In summary, this evidence indicates that:

- There is estimated to be a very modest need for additional residential care beds in Gwynedd currently and over the period to 2043; an additional 10 residential care beds are estimated to be required by 2043.
- There is estimated to be a significant need for additional nursing care bed capacity over the period to 2043; an additional 290 nursing care beds are estimated to be required by 2043. Some of this estimated additional capacity may be met by residential beds specifically for people living with dementia.
- This is consistent with evidence from Council Officers which indicates that there will need to be some restructuring in the local market i.e. that existing care home provision shifts to be able to support older people with increasing complexity and acuity of care and health needs.

6.104 To distribute estimated care home capacity need across Gwynedd's sub-areas, a composite weighting approach was applied. First, the proportion of the 65+ population in each sub-area was calculated using ONS population estimates. Second, preferences expressed by Gwynedd Council survey respondents regarding their preferred locations were analysed. As respondents could select multiple areas, preference percentages were normalised to create relative shares. A combined weighting was then calculated using a 70:30 balance between population distribution (demographic demand) and survey preferences (behavioural demand). The resulting weights were re-scaled to sum to 100% and used to disaggregate county-level estimates to sub area level.

Table 61. Estimated need for care home beds in Gwynedd by sub areas to 2043

Locality based sub area	Residential care					Nursing care				
	2025	2028	2033	2038	2043	2025	2028	2033	2038	2043
Ardudwy	-3	-3	-1	0	1	3	6	13	18	23
Bala / Penllyn	-1	-1	0	0	0	1	2	4	6	8
Bangor	-5	-5	-1	0	1	5	9	19	26	33
Caernarfon	-5	-5	-1	0	1	5	9	19	26	33
Dolgellau	-3	-3	-1	0	1	3	6	13	18	22
Dysynni	-4	-4	-1	0	1	4	7	16	21	27
Ffestiniog	-2	-1	0	0	0	1	3	6	8	10
Lleu / Nantlle	-3	-3	-1	0	1	3	6	13	18	22
Ogwen	-2	-2	0	0	0	2	4	9	12	15
Pen Llŷn	-3	-3	-1	0	1	3	6	12	17	21
Peris	-3	-3	-1	0	1	3	6	13	17	22
Porthmadog / Penrhyndeudraeth	-5	-5	-1	0	1	4	9	18	25	32
Pwllheli	-3	-3	-1	0	1	3	6	13	18	23
Gwynedd	**-44**	**-42**	**-7**	**2**	**10**	**40**	**80**	**167**	**230**	**292**

Source: Gwynedd Council and HLIN. NB estimates of need are not cumulative

7. Summary

7.01 The implications of the estimates of housing need amongst the 65+ population are:

- The majority of older people do not intend to move from their existing home
- Of those that do intend to move, the majority need other mainstream housing, particularly housing that is designed to be accessible and that can support ageing in place, e.g. housing that is designed to Lifetime Homes standard
- There is likely to be growing demand for adaptations, both amongst self-funders and people on low incomes who are eligible for Disabled Facilities Grants, amongst older people who stay in their existing homes or who need other mainstream housing
- There is likely to be increasing demand for technology, including care enabled technology, that can assist older people to remain living independently in mainstream housing.
- A minority of older people are likely to need specialist housing such as retirement/sheltered housing and extra care housing.

7.02 The estimated need for specialist housing and accommodation by 2043 for Gwynedd is summarised below in Table 62 for:

- Sheltered housing
- Extra care housing
- Age-designated housing (as distinct from sheltered housing, i.e. age designated housing does not have the communal facilities and staff support usually associated with sheltered housing)
- Accessible housing, i.e. housing designed to meet the needs of disabled people and older people (but which is not age designated), e.g. designed to Lifetime Homes standards and/or M4(2) accessibility standard.
- Residential care (including for people with dementia)
- Nursing care (including for people with dementia)

7.03 The estimated need summarised in Table 62 is consistent with the evidence in the Llechen Lân report, i.e. a radical shift towards housing models that have the potential to mitigate increasing care/support needs and that support older people to live independently for as long as possible, including the need for extra care housing and other housing models that support older people to age in place in appropriate accommodation that suits their needs:

- A significant estimated increase in the need for extra care housing (of all tenures) both to meet the needs of an ageing population and to mitigate and divert demand away from the use of (residential) care homes.
- A significant increase in the need for contemporary sheltered housing[17] (of all tenures) to meet the needs of older people who require housing suited to ageing and with access to a degree of support.

[17] Adra's new housing scheme, Plas Leiod in Caernarfon, is an example of this type of contemporary sheltered housing/age-designated housing

- A significant increase in the need for housing designed to be accessible (such as to Lifetimes Homes standard) that enables older people to live in a home that better suits ageing in place.
- An increase in the provision of nursing care home beds that can accommodate people with complex health and care needs, including people with dementia related needs. There is estimated to be a far more modest additional need for residential care beds, which has the potential to be mitigated in full through the estimated need for growth in the provision of extra care housing.
- It should be note that these trends do have staffing implications, particularly in relation to the recruitment and retention of nursing staff to work in nursing care home provision.

Table 62. Current provision and estimated future need for supported and specialist housing and accommodation in Gwynedd to 2043

Types of supported and specialist housing and accommodation	Current provision	Estimated need by 2028	Estimated need by 2033	Estimated need by 2038	Estimated need by 2043
Extra care housing (units)	***113***	**286**	**437**	**587**	**729**
Market housing		*86*	*131*	*176*	*219*
Social housing		*200*	*306*	*411*	*510*
Sheltered housing (units)	***674***	**504**	**789**	**1,073**	**1,341**
Market housing		*151*	*237*	*322*	*402*
Social housing		*353*	*553*	*751*	*939*
Accessible housing (units)		**1,149**	**1,726**	**2,289**	**2,799**
Market housing		*345*	*518*	*687*	*840*
Social housing		*805*	*1,208*	*1,602*	*1,959*
Accessible age designated housing (social housing for people 55+) (units)		**383**	**575**	**763**	**933**
Market housing		*115*	*173*	*229*	*280*
Social housing		*268*	*403*	*534*	*653*
Residential care homes (beds)	***518***	**-42**	**-7**	**2**	**10**
Nursing care homes (beds)	***476***	**80**	**167**	**230**	**292**

Source: Ipsos, Gwynedd Council and HLIN (2025)
NB: Estimated needs are not cumulative

7.04 **Extra care housing**: There are currently 113 extra care housing units in Gwynedd. The modelling indicates that significant additional provision will be required to meet the needs of older people who require housing with care while maintaining independent living. The estimated additional need is:

- 437 additional units by 2033
- 729 additional units by 2043

7.05 **Sheltered housing**: Current provision of sheltered housing is estimated at 674 units across Gwynedd. The analysis indicates that demand for this type of accommodation will increase substantially over the projection period. The estimated additional need is:

- 789 additional units by 2033
- 1,341 additional units by 2043

7.06 **Accessible housing**: Accessible homes./Lifetime Homes play an important role in enabling older people to remain living independently in mainstream housing. While current supply is not quantified, the modelling estimates that the following number of accessible homes will be required to meet future demand:

- 1,726 homes by 2033
- 2,799 homes by 2043

7.07 **Accessible age designated housing (social housing for people 55+)**: Current supply of age designated housing is estimated at 899 units. In addition to specialist accommodation, there is also projected demand for age designated housing specifically for older people. The modelling estimates that the following provision will be required:

- 575 units by 2033
- 933 units by 2043

7.08 **Care homes**: The analysis indicates that while there are currently provision of 476 nursing care beds and 518 residential care beds, additional provision will be required over the projection period as the population ages and levels of care and health need increase.

- Nursing care beds (including dementia care)
    - 167 additional beds by 2033
    - 292 additional beds by 2043
- Residential care beds (including dementia care)
    - no additional beds by 2033
    - 10 additional beds by 2043

8. Trends in contemporary housing for older people

8.01 This section is intended to provide examples of contemporary practice in relation to the provision of housing and accommodation for older people that may influence future development in Gwynedd.

8.02 Examples are provided in relation to housing and accommodation specifically designed to meet the needs of older people, including contemporary practice examples from Gwynedd.

Age designated housing

8.03 Several providers are developing contemporary housing for older people that is focused on providing good quality and accessible housing with more limited staffing models. The intention is to create communities that support each other with support from the housing provider when needed. The focus is still on providing good quality, accessible homes that enable people to live independently.

Age-friendly housing, Ireland (Clann Housing)

8.04 Clann Housing's[18] 'age-friendly housing' is a model developed by Clúid Housing in Ireland to support older people to live independently for longer. It was created to address the gap between mainstream housing and institutional care, as many older residents were moving into nursing homes not because of clinical need but because their housing was unsuitable.

8.05 Clann Housing's 'age-friendly housing' schemes provide accessible, purpose-designed homes that enable people to age in place while maintaining their independence.

8.06 What differentiates it from sheltered/retirement housing is the philosophy and staffing approach. Clann found that having staff on site daily sometimes encouraged residents to rely on them too much, which conflicted with the goal of independence. Clann scheme managers therefore may cover several schemes and focus on community development rather than daily support. A major aim is building community networks between residents to reduce isolation and delay care needs.

8.07 On the left below is Maydenhayes Lawn which provides 12 age-friendly bungalows in Meath, on the right below is Fernwood which provides 17 age-friendly bungalows in Dublin.





[18] https://clannhousing.ie/schemes/

Bruyn's Court, Thurrock (Thurrock Council)

8.08 Bruyn's Court in Thurrock has 25 flats, all of which are flexibly designed to adapt to meet the changing needs of residents as they grow older. The scheme does not provide care and support services; however, the aim of the scheme is to radically improve the standard of living for older people in Thurrock, taking account of their social and physical needs, and encouraging social interaction and mutual support.

8.09 The development has also been designed to help revitalise the town centre, modernising the local built environment while adding further commercial viability to the town centre shops. It has been designed to HAPPI standards[19], Lifetime Homes[20] standards and Sustainable Code Level 4.



Sheltered and retirement housing

Contemporary new build

8.10 Several social housing providers are developing contemporary versions of sheltered housing to broaden the range of housing options available to older people and create attractive housing choices that can encourage 'rightsizing'.

8.11 Developments increasingly incorporate the HAPPI design principles that enable residents to age in place by providing accessible homes including features such as step-free access, adaptable interiors, smart home technologies, and dual aspect homes.

8.12 A key trend is providing environments that promote social connection and active ageing but including shared lounges and landscaped attractive outdoor spaces. Sustainability and energy efficiency are also shaping contemporary sheltered housing. New developments often incorporate high environmental standards, recognising the need to reduce running costs for residents while contributing to broader climate goals.

[19] Housing our Ageing Population Panel for Innovation (HAPPI). A set of design principles for housing suited to older persons. https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/

[20]. Housing designed to be flexible, accessible, and adaptable, allowing residents to remain in their homes comfortably as their needs change. These standards focus on inclusivity, sustainability, and affordability, often with minimal extra cost. While largely replaced by the optional building regulations standard M4(2) in 2015, they remain a benchmark for accessible design. https://www.housinglin.org.uk/Topics/browse/Design-building/AccessibleDesign/LifetimeHomes/

Plas Leiod, Caernarfon, Gwynedd (Adra)

8.13 Adra recognised a need for more affordable housing in Gwynedd for older people. Plas Leiod[21] is on the former Lleiod Garage brownfield site and comprises 21 self-contained one- and two-bedroom flats, all provided at social rent and designed primarily for people aged 55 and over or those with disabilities.

8.14 The apartments are built to Welsh Government Development Quality Requirements and Lifetime Homes standards and to very high-level insulation specification and modern heating facilities such as Solar PV and air source heating equipment. The building also includes communal spaces, landscaped outdoor areas and on-site parking. It is in a central, accessible location close to Caernarfon town centre.



Ty Darren, Risca (Caerphilly Homes, Caerphilly County Borough Council)

8.15 Ty Darren is Caerphilly Home's flagship scheme in Risca which is referred to as 'later living'. The scheme has been developed on the site of a former care home and provides modern, energy-efficient accommodation designed for older residents who wish to live independently while having access to support and communal facilities.

8.16 The development includes 45 one-bedroom apartments alongside shared indoor and outdoor spaces such as communal lounges and a central garden, which are designed to encourage social interaction and support residents' wellbeing. It also forms part of the Council's wider programme to deliver new low-carbon, affordable housing across the borough. (see a video of the scheme here[22])

[21] https://www.adra.co.uk/en/developments/lleoid-garages-caernarfon-gwynedd/

[22] https://www.caerphilly.gov.uk/news/news-bulletin/march-2026/from-vision-to-vibrant-community-official-opening



Addison House, Rumney (Cardiff City Council)

8.17 Although an urban context example compared to Gwynedd, Cardiff City Council has possibly the most ambitious development programme in the UK for new build contemporary 'sheltered housing', providing 574 new homes for older persons in the city across 11 new 'Community Living' schemes by March 2028. Each site offers something different, from contemporary sheltered housing to extra care housing models as well as a wellbeing village and intergenerational housing.

8.18 Addison House is the first that opened and provides 44 self-contained flats, including 32 one-bedroom flats, and 12 two-bedroom flats. The scheme has been designed to RNIB Platinum standards and is designed to meet the HAPPI standards. As such the flats are dual aspect, spacious and open plan and have large private balconies to create a light and airy space.

8.19 A scheme manager is available during office hours from Monday to Friday to offer advice on day-to-day issues and to help in an emergency. Each flat also has an alarm linked to Telecare offering 24-hour support and reassurance when the scheme manager is not on site.



Refurbished sheltered housing

8.20 In the social housing sector, the majority of 'sheltered housing' consists of dated housing stock. Many social landlords are starting to address the fitness for purpose and future viability of this stock, much of which was developed in the 1970s/80s and is not consistent with modern standards i.e. HAPPI standards or TAPPI (Technology for an Ageing Population: Panel for Innovation)[23] principles. Most providers are relinquishing the 'sheltered housing' terminology in favour of more age-positive terminology, e.g. Retirement Housing, Independent Living, Later Living.

[23] https://www.housinglin.org.uk/tappi/

8.21 A number of social housing providers have embarked on remodelling/redevelopment programmes, which have modernised their sheltered schemes and created more accessible homes. These have been relatively cost-effective ways of revitalising schemes, although it is not always possible to reach modern accessibility standards.

8.22 To demonstrate what some social landlords have achieved with refurbishment/renovation, some examples have been provided below.

Wrexham Borough Council

8.23 Wrexham Borough Council has an ambitious Sheltered Housing Remodelling and Refurbishment Programme, which has involved the remodelling and refurbishment of two sheltered housing schemes at Llys y Mynydd, Rhos and Tir y Capel, Llay, and complementary new build apartments to the rear of the existing scheme at Llay.

8.24 The new assisted living apartments are designed to be 'care-ready', with the latest technology intended to support improved health and wellbeing. The council aims to help older people remain independent in their own home for longer by investing in the upgrades.

8.25 The main works that have been carried out include, remodelling the existing layout to increase the sizes of the flats, providing better storage facilities within the flats, refurbishing the communal lounges, improving the energy efficiency of the scheme, including the provision of 2 EV chargers and increasing the car parking provision around the schemes.



Eccles Grange, Backworth, North Tyneside (North Tyneside Council)

8.26 The refurbishment of Eccles Grange in Backworth, North Tyneside was part of the council's £300m North Tyneside Living project, which saw more than 920 modern, independent living homes created or refurbished at 26 sites across the borough.

8.27 The refurbishment involved creating a new, relocated spacious front entrance with modern automatic doors and space for seating that created an attractive and obvious entrance way. All flats were refurbished which involved installing new kitchens and bathrooms. The communal lounge, corridors and garden areas were also modernised with new furnishings and residents' kitchen. From the outside, the previous exposed brickwork was rendered to change the external look and feel.

8.28 Total refurbishment costs were c.£2.1m with funding from a Private Financial Investor contract.



Extra care housing

8.29 Extra care housing is a type of specialist housing that has been in existence for approximately 25 years. The term extra care housing is typically used to describe developments that comprise self-contained homes with design features to support independence and the availability of care on-site. The terminology used by the social housing and private sector differs. Whilst social landlords tend to use the extra care housing terminology, private developers tend to avoid reference to 'extra care' and tend to use 'retirement living/village'. However, some social landlords have made the deliberate decision to refrain from using 'extra care' in favour of terms such as 'retirement living plus'; Housing LIN research with older people has shown that the term 'extra care' can be off-putting and can suggest a care home to some people.

8.30 Extra care housing was originally built to accommodate an older customer with 'age-related needs', particularly as an alternative to residential care. In recent years, extra care housing across the UK has experienced a more diverse customer cohort as a result of increasing pressures for local authorities to find accommodation for older people with a range of support needs and well as an increase in older people living with dementia.

Hafan Cefni, Anglesey (ClwydAlyn)

8.31 Hafan Cefni extra care housing scheme consists of 63 high quality extra care apartments for rent; of which 15 are specifically designed and adapted for older people living with dementia. The apartments are available for individuals aged 60 years and over with an assessed care and support need.

8.32 Hafan Cefni acts as a hub for the local area, a trend that is increasingly being implemented across extra care housing. Communal facilities include a café, restaurant, hairdressers and multi-purpose rooms that can be used as a small cinema, to hold workshops and as an IT space, which are open to the local community.



Dora Matthews House, Coleford (Ambient)

8.33 Dora Matthews House offers 44 one and two bedroom apartments for older people with a care need and is designed to support those living with dementia. At the rear of the site 5 two bed chalet bungalows for adults with learning disabilities complement the main use and those residents may take up associated job opportunities.

8.34 A key part of the development is a wellbeing centre and 'Sixteen' the community café, which is situated on the street frontage, linked to the accommodation by an enclosed bridge sheltering a public courtyard with outdoor seating. This focal point for residents is where they can go to socialise and meet friends.



Hafod Y Parc, Abergele, Conwy (North Wales Housing Association)

8.35 Hafod Y Parc[24] comprises 49 self-contained apartments (44 two bedroom, 5 one bedroom flat) for persons aged 60 and over with care and support needs. One apartment is utilised as a short term apartment.

8.36 The apartments were designed in accordance with the Development Quality requirements of the Welsh Government and Lifetime Homes standards. The main aim was to create a "home from home", designing a building which is sympathetic to its neighbours and residential in appearance rather than institutional as displayed by the curved design of the building. This has eliminated the sometimes institutional feel of long straight corridors.

[24] https://www.housinglin.org.uk/_assets/Resources/Housing/Practice_examples/Housing_LIN_case_studies/HLIN_CaseStudy_154_HafodYGest.pdf



Hafod y Gest, Gwynedd (Grŵp Cynefin)

8.37 Hafod y Gest is Grŵp Cynefin's fourth extra care scheme and was developed in partnership with Gwynedd Council. It includes 40 apartments; 26 two bedroom and 14 one bedroom and is located in the centre of the town in Porthmadog so it is in the heart of the community and close to the shops and other facilities. It incorporates a very high standard of interior design.

8.38 Various communal and social activities are held regularly, including coffee mornings, arts and crafts sessions, book club, Dementia Go activities, music sessions and a very popular Intergenerational Project with a local primary school.



Quayside, Totnes (Guinness)

1.01 Quayside is Guinness's latest extra care housing development, located in Totnes close to the River Dart, for people aged over fifty-five. The development has 30 apartments for shared ownership and 30 for affordable rent. The communal facilities include a café bistro, activity areas, and a 'pamper suite' where residents can arrange haircuts, manicures and beauty treatments. There is no large communal lounge; rather, smaller sitting areas take advantage of the views from the site. The internal decor and layout are designed to be dementia friendly but in a way that is attractive and luxurious.



Intergenerational communities

8.39 The 2026 All-Party Parliamentary Group on Housing and Care for Older People Inquiry of the UK parliament report (*to be published 17th March 2026*) explored how organisations are considering how they create intergenerational communities through the provision of a mix of housing types to support people of different ages to live alongside each other.

Penrhos Polish Village, Penrhos, Gwynedd (ClwydAlyn Housing)

8.40 As part of a merger with the Polish Housing Society, ClwydAlyn Housing is redeveloping a site which has been a housing scheme for the Polich community since the end of the second world war.

8.41 The new village will provide 112 new homes, with a mixture of bungalows and general needs homes as well as a block of age designated apartments that will be linked to a nursing care home so that the communal facilities can be used by tenants of the older persons' housing and care home residents.

8.42 The development includes accessible homes for people with learning disabilities and family homes, which could be for people with a family member with disabilities. All homes will be designed to be energy efficient as well as complying with Welsh Housing Quality standards and Lifetime Home standards to support people to age in place.

8.43 All partners, Gwynedd Council, Betsi Cadwaladr University Health Board and ClwydAlyn, are continuing to work together on this innovative new housing and care model for the Penrhos site, with the first homes due to be completed during 2026.



Wellbeing Village, Ely (Cardiff City Council)

8.44 As part of Cardiff City Council's delivery programme to provide c.600 new homes across the city for older people, it is redeveloping a former college and pub site in Ely as a 'Wellbeing Village'.

8.45 The Wellbeing Village will see 265 new homes built, with 107 1 & 2 bedroom apartments designated for older people designed to HAPPI principles. Decisions are still being made about whether the housing for older people will be provided as housing with or without care onsite

but this will provide contemporary, accessible housing that is intended to encourage rightsizing.

8.46 As part of the aspiration towards integrated services, the Wellbeing Village will also include a GP surgery, pharmacy, community centre, council hub, respite centre and supported accommodation for adult services, as well as public gardens and café.

8.47 The intention behind integrating a variety of health and wellbeing services on the same site is to enable joined up working between services and a holistic service for residents and local people. As well as providing a neighbourhood that enables residents to live and age well.



Melfield Gardens, Lewisham, London (Phoenix Community Housing)

8.48 Melfield Gardens is the UK's first intentionally designed intergenerational housing scheme. It includes 30 'one-bed plus' affordable apartments for residents aged 55+ designed to HAPPI principles and two four-bedroom apartments for Goldsmith University students. In return for a reduced market rent student tenants commit to spending time with their neighbours, building relationships and supporting community activities.

8.49 Melfield Gardens built on the learning from Hazelhurst Court, Phoenix's 2018 extra care scheme which created a series of 'chain lettings' when residents from Phoenix's family homes moved in. With 703 of Phoenix's family homes occupied by one person, Melfield Gardens has so far enabled ten larger family homes to be released, and subsequent 'chain lettings' have directly benefited 22 people.

8.50 This has involved an agreed local lettings plan with London Borough of Lewisham prioritising Phoenix residents 'under occupying' their home.

8.51 Designed by Levitt Bernstein Architects to Passivhaus Standard, the scheme is split into two buildings that partially enclose a public route and pedestrian-prioritised central green space. Residents front doors overlook this space creating opportunities for people to naturally come together, increasing the chance of interaction and overall sense of community.



Care homes

8.52 Contemporary care homes (both residential care homes and nursing care homes) provide a high quality of care in attractive and purpose designed accommodation to suit the needs of older people with complex care and health needs. This is a very different care home model to a more traditional care home often based on conversion and adaption of existing buildings. Contemporary person centred care homes have a 'homely feel' and the design avoids looking institutional.

Speedwell Court, Southampton (Abbeyfield)

8.53 Abbeyfield's Speedwell Court is a purpose built Abbeyfield care home in Southampton. The care home provides a high-quality residential and residential dementia friendly care services. Speedwell Court provides 80 en-suite rooms arranged over 5 households of 16 rooms in total, helping to create a more intimate setting for residents. Each household benefits from their own lounge and dining suite.



Winnerish, Wokingham (Abbeyfield)

8.54 Abbeyfield's Winnish is a purpose built, dementia focussed residential care home. This is a 60 bed residential care home separated into 4 circular courts that look onto private gardens. Whilst each room has its own en-suite, the home also has separate spa-bathrooms with sensory lighting and the technology to be able to play favourite relaxing music. A beauty salon,

communal and private lounges, a cinema, shop and café complete the home and are available for residents and visiting friends and family to use at their leisure. The large garden and roof terrace has been designed to encourage outside living with lots of areas for activity or relaxation.



Saffron Gardens, Bristol (Brunelcare)

8.55 Brunelcare's Saffron Gardens in Bristol provides five care home courts that are centred around their own gardens and have homely open-plan kitchens with comfortable seating areas. This innovative care home design provides 70 rooms, all en-suite, and includes many features to maximise independence and opportunities for people living with a dementia or with high nursing and end-of-life care needs. The care home is situated on the same site as 14 independent living flats.



Belong Atherton, Manchester (Belong Villages)

1.02 Belong (a charity,) at Atherton, has 26 self-contained apartments for independent living and six supported 'households' with modern en-suite bedrooms and open plan lounge and kitchen areas (a care home). Belong households represent an alternative to conventional care homes. They operate with a higher-than-average staffing ratio and a maximum of 12 residents per household, offering a family atmosphere. It is described as a 'care village' with independent living apartments which do not form part of the registered care home service but are central to the care village and its design. There is a range of one or two bedroom apartments, available for market rent or purchase, for individuals or couples.



Penrhos Polish Village, Penrhos, Gwynedd (ClwydAlyn Housing)

8.56 As mentioned above, the redevelopment of the Penrhos Polish Village will see a nursing care home situated on the same site as a range of housing typologies.

8.57 The mix of housing and accommodation types will mean that people are able to age in place should their needs change over time.

Annexe 1 : Supporting evidence

Table 63. Supply details of care homes in Gwynedd

Care home	Care type	sub area	Internal/Private	Capacity
Alexandra	Nursing	Tywyn / Dysynni	Private	25
The Bay	Nursing	Tywyn / Dysynni	Private	30
Bodawen	Nursing	Porthmadog / Penrhyndeudraeth	Private	36
Bryn Awelon	Nursing	Porthmadog / Penrhyndeudraeth	Private	28
Bryn Seiont	Nursing	Caernarfon	Private	107
Ceris Newydd	Nursing	Bangor	Private	44
Glyn Menai	Nursing	Bangor	Private	34
Cerrig yr Afon	Nursing	Caernarfon	Private	55
MC Porthmadog	Nursing	Porthmadog / Penrhyndeudraeth	Private	42
MC Criccieth	Nursing	Porthmadog / Penrhyndeudraeth	Private	38
Plas Gwyn	Nursing	Porthmadog / Penrhyndeudraeth	Private	37
Total nursing care beds				**476**
Bryn Meddyg	Residential	Caernarfon	Private	33
Dolwar	Residential	Pwllheli	Private	17
Gwynfa Lodge	Residential	Caernarfon	Private	20
Hillsboro	Residential	Tywyn / Dysynni	Private	5
Marbryn	Residential	Caernarfon	Private	18
Snowdon	Residential	Caernarfon	Private	27
Tirionfa	Residential	Bala / Penllyn	Private	11
Willow Hall	Residential	Caernarfon	Private	24
Plas Madryn	Residential	Pen Llŷn	Private	20
Plas Pengwaith	Residential	Caernarfon	Internal	31
Plas Hafan	Residential	Pen Llŷn	Internal	30
Hafod Mawddach	Residential	Dolgellau	Internal	31
Llys Cadfan	Residential	Tywyn / Dysynni	Internal	33
Plas Hedd	Residential	Bangor	Internal	28
Bryn Blodau	Residential	Porthmadog / Penrhyndeudraeth	Internal	41
Plas Gwilym	Residential	Caernarfon	Internal	27
Plas Maesincla	Residential	Caernarfon	Internal	23
Cefn Rodyn	Residential	Dolgellau	Internal	21
Plas y Don	Residential	Pwllheli	Internal	28
Plas Ogwen	Residential	Ogwen	Internal	27
Gwynfa	Residential	Caernarfon	Private	23
Total residential care beds				518
			Total care home beds	**994**

Source: Gwynedd Council, HLIN (2025)

Table 64. Supply details of sheltered housing in Gwynedd

Housing Association	Sub area	Address	Town	Units
North Wales Housing	Bangor	Y Gorlan, High St	Bangor	30
Grŵp Cynefin	Dysynni	Rhos Ddyfi	Aberdyfi	6
Grŵp Cynefin	Bangor	Llys Cadwaladr	Bangor	8
Grŵp Cynefin	Bangor	Carreg Y Garth	Bangor	10
Grŵp Cynefin	Caernarfon	Cae Morys	Beddgelert	6
Grŵp Cynefin	Ffestiniog	Fron Fawr	Blaenau Ffestiniog	1
Grŵp Cynefin	Ffestiniog	Trem Y Bwlch	Blaenau Ffestiniog	10
Grŵp Cynefin	Dysynni	Llain Yr Eglwys	Corris	4
Grŵp Cynefin	Dolgellau	Meyrick Square	Dolgellau	25
Grŵp Cynefin	Porthmadog / Penrhyndeudraeth	Bro Gwgan	Garndolbenmaen	4
Grŵp Cynefin	Bala / Penllyn	Maes Y Priordy	Llandderfel	3
Grŵp Cynefin	Lleu / Nantlle	Bryn Rhedyw	Llanllyfni	7
Grŵp Cynefin	Pwllheli	Penlleiniau	Llannor	2
Grŵp Cynefin	Caernarfon	Cefn Elan	Llanrug	4
Grŵp Cynefin	Porthmadog / Penrhyndeudraeth	Trem Y Moelwyn	Penrhyndeudraeth	4
Grŵp Cynefin	Lleu / Nantlle	Cae Capel Bach	Penygroes	3
Grŵp Cynefin	Porthmadog / Penrhyndeudraeth	Stryd Fawr	Porthmadog	40
Grŵp Cynefin	Porthmadog / Penrhyndeudraeth	Tai'r Felin	Porthmadog	10
Grŵp Cynefin	Porthmadog / Penrhyndeudraeth	Cerrig Yr Afon	Porthmadog	9
Grŵp Cynefin	Pwllheli	Glan Rhyd	Pwllheli	2
Grŵp Cynefin	Pwllheli	Cefn Traeth	Pwllheli	2
Grŵp Cynefin	Pwllheli	Llys Madryn	Pwllheli	10
Grŵp Cynefin	Ffestiniog	Hafan Deg	Tanygrisiau	2
Grŵp Cynefin	Pen Llŷn	Bryn Meillion	Trefor	2
Grŵp Cynefin	Pen Llŷn	Hen Ysgol	Trefor	8
Grŵp Cynefin	Porthmadog / Penrhyndeudraeth	Maes Y Môr	Tremadog	38
Grŵp Cynefin	Pen Llŷn	Cae Capel	Tudweiliog	2
Grŵp Cynefin	Pen Llŷn	Bro Dwylan	Tudweiliog	4
Grŵp Cynefin	Bala / Penllyn	Awel Y Coleg	Y Bala	30
Grŵp Cynefin	Bala / Penllyn	Plas y Ddôl	Y Bala	10
Adra	Dysynni	Morfa Cadfan	Tywyn	21
Adra	Dolgellau	Ffynhonnau	Dolgellau	13
Adra	Ardudwy	Hafan Deg	Barmouth	23
Adra	Ardudwy	Pentre Uchaf	Dyffryn Ardudwy	11
Adra	Porthmadog / Penrhyndeudraeth	Bro Llewelyn	Penrhyndeudraeth	21
Adra	Bala / Penllyn	Cysgod Y Coleg	Bala	26

Housing Association	Sub area	Address	Town	Units
Adra	Pwllheli	Frondeg	Pwllheli	28
Adra	Caernarfon	Plas Leiod	Caernarfon	21
Adra	Bangor	Plas Penrhos	Bangor	39
Adra	Caernarfon	Tan Y Mur	Caernarfon	22
Adra	Caernarfon	Hafan Elan	Llanrug	25
Adra	Caernarfon	Tre Gôf	Caernarfon	2
Adra	Caernarfon	Wesley Street	Caernarfon	2
Adra	Ogwen	Rhydfadog	Deiniolen	4
Adra	Lleu / Nantlle	Trem Yr Wyddfa	Penygroes	11
Adra	Lleu / Nantlle	Bryn Llwyn	Penygroes	9
Adra	Lleu / Nantlle	Lôn Yr Eglwys	Penygroes	2
Adra	Lleu / Nantlle	Gwelfor	Rhosgadfan	5
Adra	Lleu / Nantlle	Cae Catrin	Penygroes	7
Adra	Bangor	Llys Dewi Sant	Bangor	21
Adra	Bangor	Craig Menai	Bangor	18
Adra	Ogwen	Maes Y Garnedd	Bethesda	6
Adra	Caernarfon	Llys Yr Eifl	Caernarfon	25
Adra	Caernarfon	Llys Y Foel	Caernarfon	8
Adra	Caernarfon	Cae Corn Hir	Caernarfon	8
			Total	**674**

Table 65. Weighted distribution of 65+ demand by sub-area

Sub-area	65+ pop	Pop %	Survey preference %	Normalised preference share	Weighted score (70/30)
Ardudwy	2,067	8%	8%	8%	8%
Bala / Penllyn	1,031	4%	0%	0%	3%
Bangor	2,812	10%	14%	14%	11%
Caernarfon	2,340	9%	18%	18%	11%
Dolgellau	1,455	5%	13%	13%	8%
Dysynni	2,444	9%	10%	10%	9%
Ffestiniog	1,377	5%	0%	0%	4%
Lleu / Nantlle	2,180	8%	7%	7%	8%
Ogwen	1,585	6%	4%	4%	5%
Pen Llŷn	2,219	8%	5%	5%	7%
Peris	2,382	9%	5%	5%	8%
Porthmadog / Penrhyndeudraeth	3,041	11%	10%	10%	11%
Pwllheli	2,474	9%	5%	5%	8%
Gwynedd	**27,408**	**100%**	**99%**	**100%**	**100%**

Source: Gwynedd Council survey (2025), HLIN
NB: Multiple responses were permitted; preferences were normalised to 100% for modelling.

Annexe 2 : Glossary

Affordable housing

Housing that is provided for rent or shared ownership for people who cannot afford to rent or purchase a property on the open market.

Care Technology

The term used to describe digital or smart devices and services that can support a person's independence; to help them/others to better self-manage and monitor their health and wellbeing and/or provide peace of mind. Services include telecare (long distance monitoring), assistive technology, such as digital assistants, and telehealth (remote health monitoring).

Extra care housing

Self-contained homes with design features and support services available to enable self- care and independent living.

General Needs Housing

Housing that is not purpose built, adapted or managed for a particular client/care group.

Housing Association

An organisation that provides houses and flats to people on low incomes or with needs. Also known as 'registered provider'.

Housing Related Support (HRS)

A service provided to help vulnerable people regain, maintain or achieve independent living.

Housing register

A register or list of people who are seeking social and affordable housing in a LHMA, city or borough council area. Most councils have local rules about who can join their housing register.

Integrated Care Systems (ICSs)

Partnerships of organisations that come together to plan and deliver joined up health and care services, and to improve the lives of people who live and work in their area

Local Plan

A document produced by LHMA, city, borough or unitary councils to set the framework and policies for decisions on future development proposals and to address the development needs and opportunities of the area for a 15-20 year period. Local Plans identify specific sites for development and their development principles to demonstrate it can meet the local housing need. Topics that Local Plans usually cover include housing, employment, retail and the infrastructure needed to support any new development (such as schools, health facilities, transport). The Local Plan will also identify where development should take place and areas where development should be restricted given local, national and international environmental constraints.

Nursing care

Long-term personal and medical care provided in a care home.

Residential care

Long-term personal care provided in a care home instead of a person's own home.

Sheltered housing

These homes typically offer self-contained accommodation available. They are usually supported by a part-time/visiting scheme manager and 24-hour emergency help via an alarm. There are often communal areas and some offer activities. In the social sector, most accommodation is offered for social or affordable rent, based on need, by local councils or housing associations. In the private sector, it is usually built by private developers for market sale (and sometimes for market rent). Once all the properties have been sold, the scheme is sometimes run by a separate management company that employ a scheme manager that organises maintenance and other services.

Age-designated housing

As distinct from sheltered housing, i.e. age designated housing does not have the communal facilities and staff support usually associated with sheltered housing.

Extra care housing:

Often referred to as 'extra care housing' when provided by housing associations and local authorities (for affordable rent and shared ownership) and 'assisted living' or 'retirement villages' or 'integrated retirement communities' by private sector providers for market sale (and sometimes for market rent). Extra care housing is designed for older people, some with higher levels of care and support needs. Residents live in self-contained homes. It typically has more communal facilities and offers access to onsite 24/7 care services, which includes assistance with meal preparation, washing and other daily duties (some private extra care housing schemes may offer access to care services as distinct from onsite 24/7 care staff). Often includes a 24/7 alarm system, presence of a scheme manager and a team of support staff.

Social housing

Housing provided by either local councils or housing associations. Social homes have rents set to reflect local incomes. The providers of the homes are independently monitored by a national regulator.

Supported and Specialist Housing and Accommodation

Specialist and Supported Accommodation is where housing, support and/or care services are provided to help people with a particular need to live as independently as possible. Supported accommodation provides homes for a wide range of people including older people, people with a disability or autism, people with mental health related needs, and vulnerable young people.

Tenure

The conditions under which land or buildings are held or occupied, for example, owned outright, secured on a mortgage, rented from a private landlord or rented from the or a Housing Association.