

# Monmouthshire Replacement Local Development Plan

## DRAFT ISSUES, VISION AND OBJECTIVES PAPER

January 2019

# CONTENTS

	<b>Page</b>
<b>1. Introduction</b>	1
<b>2. Replacement LDP Draft Issues</b>	5
<b>3. Replacement LDP Draft Vision</b>	15
<b>4. Replacement LDP Draft Objectives</b>	16
 Appendices:	
<b>1. Seven Well-being Goals of the Well-being of Future Generations (Wales) Act 2015</b>	20
<b>2. Monmouthshire's Key Issues, Challenges and Drivers</b>	21

## **1. Introduction**

### **Purpose of this paper**

- 1.1 This Paper will play a key role in informing the Replacement Local Development Plan (LDP) Preferred Strategy which will be made available for consultation towards the end of 2019. It sets out the key issues, challenges and drivers facing the County informed by a range of evidence, including the Monmouthshire Public Service Board (PSB) Well-being Plan (February 2018), Monmouthshire Corporate Business Plan 2017-2022 (February 2018), LDP Review Report (March 2018), LDP Annual Monitoring Reports (2015-2018) and Replacement LDP Sustainability Appraisal Scoping Report (December 2018), along with wider contextual factors. It also sets out the Replacement LDP draft vision and objectives to address the issues, challenges and drivers identified.

### **Background**

- 1.2 A full review of the Monmouthshire Local Development Plan (LDP) commenced in 2017, with the final Review Report published in March 2018. Based on the evidence contained in the Review Report, it was concluded that the LDP should be revised and that this should take the form of a full revision procedure. The publication of the LDP Review Report triggered the process through which a replacement LDP will be prepared and adopted for the County.
- 1.3 The Council is currently in the process of preparing a Replacement LDP for the County (excluding the area within the Brecon Beacons National Park) which will cover the period 2018-2033. The Replacement LDP will set out land use development proposals for the County and will identify where and how much new development will take place over the replacement plan period. It will also identify areas to be protected from development.
- 1.4 The Replacement LDP will be prepared in accordance with the Delivery Agreement (DA) which was agreed by WG in May 2018. The DA sets out the proposed approach, timescales and consultation arrangements for the Replacement LDP. The agreed timetable will see the Replacement LDP being adopted at the end of 2021/early 2022. Work has commenced on the Replacement LDP with the initial call for Candidate Sites and a targeted consultation on the draft Sustainability Appraisal Scoping Report both having recently closed.
- 1.5 The preparation of the Issues, Vision and Objectives is one of the first key stages in Replacement Plan preparation process. This Paper identifies the key issues, challenges and drivers facing the County and sets out the draft vision and objectives for the Replacement LDP. It should be noted that there are some elements of the current adopted LDP that are still considered relevant and as such this is a review process as opposed to writing a completely new Plan.

- 1.6 As part of the LDP pre-deposit proposals, a Preferred Strategy must be prepared<sup>1</sup>. The LDP Manual (Edition 2, August 2015) notes that strategic issues, a vision and objectives should be included within the Preferred Strategy. This Paper will play a key role in informing the Replacement LDP Preferred Strategy. The Preferred Strategy will be made available for consultation at the end of 2019. This paper sets out the key issues, challenges and drivers for the County informed by a range of evidence including the PSB Well-being Plan, Corporate Business Plan 2017-2022, LDP Review Report, LDP Annual Monitoring Reports and Replacement LDP Sustainability Appraisal Scoping Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal. It also sets out the Replacement LDP draft vision and objectives to address the key issues, challenges and drivers identified. In accordance with Welsh Government guidance this stage of the plan preparation process draws heavily on and reflects the PSB Well-being Plan (paragraphs 1.6 and 1.27 Planning Policy Wales (PPW) Edition 10, December 2018).

### What are the Issues, Vision and Objectives?

- 1.7 The **issues** relate to the key issues, challenges and drivers that the Replacement Plan is seeking to address (economic, environmental, social and cultural aspects) and form the basis of the LDP objectives. As noted above, the issues are informed by a wide range of evidence, including the Monmouthshire PSB Well-being Plan, Corporate Business Plan 2017-2022, LDP Annual Monitoring Reports (2015 – 2018) and LDP Review Report, along with wider contextual factors such as national guidance/legislation and the Cardiff Capital Region City Deal. The issues, challenges and drivers are also informed by key sustainability matters which must be developed as part of the Sustainability Appraisal/Strategic Environmental Assessment (SA/SEA) of the Replacement LDP. The sustainability issues must be addressed in order for the Plan as a whole to be considered sustainable. The sustainability issues are developed utilising baseline information, which describes the position of a number of different economic, social, cultural and environmental characteristics relating to the County at a set point in time (the baseline). This information is set out in the Replacement LDP SA Scoping Report (December 2018).
- 1.8 The role of the LDP **vision** is to clarify the core purpose of the Replacement Plan and provide a framework for developing the Preferred Strategy and future detailed policies. It should set out how Monmouthshire will develop, change or be conserved and provide the land use expression of this (Paras 6.1.1 and 5.2.3.1 respectively, LDP Manual Edition 2, 2015). However, the spatial element of the vision cannot be determined at the current stage as the Preferred Strategy is not yet established.
- 1.9 The LDP **objectives** reflect/elaborate on the Plan's Vision and set out how the issues, challenges and drivers identified as facing the area will be addressed through the LDP. The objectives identified should be capable of being addressed through the land use planning system. The objectives have regard to those set out in the Monmouthshire PSB Well-being Plan<sup>2</sup> and other corporate plans and are formed having undertaken a

---

<sup>1</sup> In accordance with Regulation 2 of The Town and Country Planning (Local Development Plan) (Wales) Regulations 2015

<sup>2</sup> Paras 1.6 and 1.27 of Planning Policy Wales edition 10

review of the wider national, regional and local policy context, baseline evidence and SA Scoping Report. This has enabled us to understand the wider context and identify the main issues facing the County and set out objectives to address the issues. This should identify how economic, social, cultural and environmental considerations are balanced to deliver sustainable development in Monmouthshire over the replacement plan period.

### **Replacement LDP Proposed Issues, Vision and Objectives**

- 1.10 The Issues, Vision and Objectives have been updated since the Adopted LDP (2011 – 2021) to reflect the current position within Monmouthshire. Of note, a review of the adopted LDP Issues, Vision and Objectives was undertaken to support the LDP Review Report. The Monmouthshire PSB Well-being Plan and Monmouthshire Corporate Business Plan 2017-2022 (Incorporating Well-being Objectives) were both published in February 2018. Both of these documents provide well-being objectives and are key contributors to the update of the issues, vision and objectives for the Replacement LDP. Planning Policy Wales Edition 10 (December 2018) supports this approach, recognising the significance of local well-being plans as a key evidence source for LDPs (paragraphs 1.6 and 1.27).
- 1.11 The Monmouthshire Well-being Plan was prepared by the Public Service Board (PSB) which is made up of four statutory members namely; Monmouthshire County Council, Aneurin Bevan University Health Board, South Wales Fire and Rescue Service and Natural Resources Wales. Other organisations are also invited, in Monmouthshire this includes; Public Health Wales, Gwent Police, Police and Crime Commissioner for Gwent, Monmouthshire Housing Association, Melin Homes and voluntary organisations represented through the Gwent Association of Voluntary Organisations. While this work has been carried out on behalf of the Public Service Board rather than Monmouthshire County Council specifically, it surfaces important issues for the County as a whole that must be considered.
- 1.12 The Corporate Business Plan is produced by Monmouthshire County Council. This utilises the contributions made to the Well-being Plan along with issues raised most frequently to County Councillors and issues reported to Community Hubs, the contact centre and on the My Monmouthshire App. The Corporate Business plan 2017-2022 sets out the Council's four Well-being Objectives:
  - Provide children and young people with the best possible start in life.
  - Develop opportunities for communities and businesses to be part of a thriving and well-connected County.
  - Maximise the potential of the natural and built environment for the well-being of current and future generations.
  - Maximise the potential in our communities to develop the well-being of people throughout their lives.
- 1.13 The Adopted LDP Sustainability Issues have also been updated and are published in the Replacement LDP Sustainability Appraisal (SA) Scoping Report. The SA Scoping

Report includes a wide range of social, cultural, environmental and economic baseline data. The Sustainability Issues have also been considered and incorporated as appropriate in this document, but are not repeated in their entirety.

- 1.14 The Issues and Objectives have been grouped in accordance with the Seven Well-being Goals as set out in the Well-being of Future Generations (Wales) Act 2015. The Well-being Goals are set out in Appendix 1. It should be noted that many of the issues and objectives cross a number of well-being goals, and have, therefore, been grouped as a best fit with the goals. However, the cross-cutting themes should not be overlooked.

#### **Consultation on Replacement LDP Proposed Issues, Vision and Objectives**

- 1.15 As stated above, the proposed issues, vision and objectives are heavily drawn from and reflect the PSB Well-being Plan which was extensively consulted upon by the Public Service Board in 2017 and resulted in contributions from more than 1,400 people. This approach reflects Welsh Government guidance which recognises the significance of local well-being plans as a key evidence source for LDP preparation (paragraphs 1.6 and 1.27, PPW10, Edition 10, December 2018). In view of this, and given that it is not a statutory requirement to consult on the LDP issues, vision and objectives, it is not considered necessary to undertake a full public consultation exercise on this initial stage of the plan preparation process. Discussions on the draft issues, vision and objectives will, however, take place through the Area Committee and Area Cluster meetings in January 2019, where views will be sought on the Draft Paper. A LDP Member Workshop will also take place in January 2019 to seek views on the draft issues, vision and objectives. Feedback from these meetings will be noted and considered, and where appropriate, will inform the final issues, vision and objectives. The Replacement LDP issues, vision and objectives will be reported Economy and Development Select Committee on 14th February 2019, and subsequently finalised prior to inclusion in the Preferred Strategy (autumn 2019). Any comments received at the Area Committee and Area Cluster meetings/by 14th February will be reported to the Economy and Development Select Committee.

## 2. Replacement LDP Draft Issues

2.1 In order to assist in the development of the LDP vision and objectives, a number of key issues have been identified that will need to be addressed in the Replacement LDP. The existing LDP issues have been reviewed to determine whether they remain relevant. New issues, challenges and drivers that have arisen since the adoption of the LDP have also been identified, including those contained in the PSB Well-being Plan, as well as wider contextual factors. Accordingly, the issues have been updated, where appropriate, to reflect the current position within Monmouthshire. The Issues have been grouped in accordance with the Seven Well-being Goals as set out in the Well-being of Future Generations (Wales) Act 2015 to ensure that they are framed within this context (Appendix 1 refers). This allows for the appreciation of social, economic and environmental matters to be embedded into the Plan. Further detail/background information on the identified issues, challenges and drivers is set out in Appendix 2.

**Table 2.1: Draft Issues and Opportunities**

Draft Issue	How can the Replacement LDP Influence these Issues?
<b>A Prosperous Wales (Well-being Goal 1)</b>	
<b>Employment &amp; Economy</b>	
<ul style="list-style-type: none"> <li>• There has been a slow uptake of employment land in the past. There is subsequently a need to consider whether existing available land is suitably located and fit for purpose for appropriate growth sectors. There is also a need to consider potential future demand for employment land along with Council aspirations for innovation across Monmouthshire in light of the recent removal of the Severn Bridge tolls and the ambitions and opportunities associated with the Cardiff Capital Region City Deal (CCRC). <b>(Issue 1)</b></li> <li>• While unemployment is low there is a net-outflow of commuters, both levels of out commuting and distances travelled to work are relatively high. There is a need to provide</li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP can encourage a vibrant economy within the County, specifically by ensuring that sufficient employment sites are suitably located in attractive, accessible and sustainable locations and are of an appropriate size and type to meet the needs of the market/key employment/growth sectors, including, through support of start-up and growing businesses to help diversify the economy.</li> <li>• The Replacement LDP can aim to ensure that there is a portfolio of sites available which is appropriate to market conditions and the needs of the Monmouthshire economy along with the wider Cardiff Capital Region. Consideration can be given to using CPO powers to ensure sites come forward.</li> </ul>

Draft Issue	How can the Replacement LDP Influence these Issues?
<p>support for inward investment and local employment growth/opportunities. <b>(Issue 2)</b></p> <ul style="list-style-type: none"> <li>• Wage levels available for local jobs are lower than the average for Wales and the UK. Evidence continues to suggest that the income for economically active women who both live and work within the County is significantly lower than that of men within the same category. This coupled with high property prices makes it difficult for young people and future generations to live and work locally. Additional employment opportunities for young people are required to help reduce the numbers of this age group leaving the County. <b>(Issue 3)</b></li> <li>• Monmouthshire has a dual economy. The qualifications, skills and earnings of the residents are above the regional and national average, however, for those working in the area earnings are lower and employment is relatively less skilled. <b>(Issue 4)</b></li> <li>• The increasing ageing population and shrinking working age population (the relative absence of 20-40 year olds and our median age of 48 years, compared to a median age of 34 years in Cardiff) is limiting employment growth within Monmouthshire and social sustainability of communities. This is exacerbated by limited Job opportunities and affordable housing availability <b>(Issue 5)</b>.</li> <li>• There is a need to sustain and regenerate the County's rural economy. There is current uncertainty regarding the impact of Brexit on agricultural subsidies. <b>(Issue 6)</b></li> <li>• Higher levels of those in employment work at home compared to the Welsh average. Efficient digital infrastructure is</li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP can ensure that, wherever possible, jobs and homes are located in close proximity to each other to provide greater opportunity for people to work and live locally. The Replacement LDP can also ensure a range and choice of homes are available, in new developments, particularly where there is a need for affordable housing, to assist in regaining a balanced population</li> <li>• The Replacement LDP needs to take a role in strengthening the local economy, ensuring an appropriate economic base to enable people to live and work in the County.</li> <li>• The Replacement LDP can contain policies that support the diversification of the rural economy.</li> <li>• The Replacement LDP can help to address digital exclusion by seeking to support the improvement of rural broadband and delivery of high speed connections.</li> <li>• The Replacement LDP must contain policies that protect the vitality and viability of existing town centres, providing additional retail opportunities where appropriate, including in relation to the regeneration of Caldicot and Usk, and ensure that the distribution of development supports these main centres in order to retain retail expenditure.</li> <li>• The Replacement LDP will enable a review of the towns' primary shopping frontages (PSF) and related policies to have regard to the changing role of the high street.</li> <li>• The Replacement LDP can contain policies that encourage tourism development while at the same time ensuring that the natural and built heritage that attracts visitors to the area is preserved and enhanced.</li> </ul>



Draft Issue	How can the Replacement LDP Influence these Issues?
<p>essential to support home working and the general connectivity of the County's rural areas and to support economic growth<sup>3</sup>. <b>(Issue 7)</b></p> <ul style="list-style-type: none"> <li>• The role of high streets is changing due to out of town retail centres, the increase in internet shopping, changing shopping habits (e.g. top-up grocery shopping) and austerity and as a result vacancy rates in some of the County's retail centres have increased. There is a leakage of expenditure out of the County and a need to protect the County's retail centres from out of town developments. <b>(Issue 8)</b></li> <li>• Tourism plays a significant part in the Monmouthshire economy particularly in assisting in the diversification of the rural economy and in sustaining the County's historic town centres. Visitor numbers to both serviced and non-serviced accommodation are significantly higher in Monmouthshire compared to the South East Wales average and have increased by 14.5% since 2012 (Monmouthshire STEAM Report 2017). Staying visitors generate a higher economic impact than day visitors (£146 million compared to £58 million in 2017: Monmouthshire STEAM Report 2017) highlighting the continued need for visitor accommodation. <b>(Issue 9)</b></li> </ul>	

<sup>3</sup> The current situational analysis of Superfast Broadband Next Generation Access (NGA) coverage in the Cardiff Capital Region, based on the OMR/SAPC undertaken prior to the Superfast Cymru Phase 2 (SFC2) Procurement, paints a stark picture in terms of the current lack of coverage in Monmouthshire in comparison to our other nine Local Authority partners - currently 12.56% of premises in Monmouthshire are NOT covered in comparison to 3-4% in the other nine Local Authorities within the region.

Draft Issue	How can the Replacement LDP Influence these Issues?
<b>A Resilient Wales (Well-being Goal 2)</b>	
<b>Air</b>	
<ul style="list-style-type: none"> <li>• While air pollution is not a major problem in Monmouthshire it can cause significant problems for people’s health. The greatest problems associated with air quality in the County are caused by vehicle emissions, this is particularly apparent in the two Air Quality Management Areas in the County at Usk and Chepstow. <b>(Issue 10)</b></li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP can seek to minimise any polluting effects that might arise from new development in the County by encouraging appropriate patterns of development that seek to reduce the usage of private vehicles and to allow for increased walking, cycling and use of public transport (active travel). It can also take measures to ensure that the location of new development does not worsen conditions in existing Air Quality Management Areas or result in new ones.</li> </ul>
<b>Green Infrastructure, Biodiversity &amp; Landscape</b>	
<ul style="list-style-type: none"> <li>• Monmouthshire is renowned for its beautiful landscapes and major biodiversity resources. The best of these assets should be protected, managed and enhanced for future generations. <b>(Issue 11)</b></li> <li>• There is a need to improve connectivity within the landscape through protecting and improving existing wildlife networks and corridors, including both green and blue infrastructure, and creating new linkages to allow species to move and adapt to climate change impacts. GI is also beneficial to human well-being. <b>(Issue 12)</b></li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP should ensure that new development is sustainable, does not cause harm to international, national and locally protected sites and species and, that where appropriate, necessary mitigation measures are taken to avoid any such adverse effects</li> <li>• The Replacement LDP must ensure biodiversity is considered in any development in order to protect any interest on the site and encourage biodiversity enhancements where necessary.</li> <li>• It will be necessary to undertake a Habitats Regulations Assessment of the Replacement LDP to ensure that any cumulative effects of development in Monmouthshire and adjoining areas does not result in harm to internationally designated nature conservation sites.</li> <li>• The Replacement LDP can contain policies to protect and enhance the green and blue infrastructure networks across the County.</li> </ul>

Draft Issue	How can the Replacement LDP Influence these Issues?
<b>Flooding</b>	
<ul style="list-style-type: none"> <li>Parts of the County are vulnerable to flooding. Climate change is likely to increase the risk of flooding, as well as many other risks, so mitigating climate change and building resilience is crucial. <b>(Issue 13)</b></li> </ul>	<ul style="list-style-type: none"> <li>The Replacement LDP must ensure new development is located away from flood risk areas and has a role to play in terms of reducing the risk from present day flood risk, as well as in relation to climate change adaptation and resilience.</li> </ul>
<b>Minerals &amp; Waste</b>	
<ul style="list-style-type: none"> <li>Monmouthshire has made good progress in the promotion of the recycling and composting of waste, and the elimination of waste to landfill. Monmouthshire also has to make an appropriate contribution to the regional requirement for waste management. <b>(Issue 14)</b></li> <li>Mineral extraction plays a limited role in Monmouthshire's economy but there is a need to safeguard the County's resources in order to make an appropriate contribution to the sustainable supply of aggregates to the South Wales economy as a whole. <b>(Issue 15)</b></li> </ul>	<ul style="list-style-type: none"> <li>The Replacement LDP can identify sites that are appropriate for waste management or disposal facilities to meet local or regional requirements.</li> <li>The Replacement LDP can ensure that mineral resources are safeguarded and exploited in a sustainable fashion that also enables Monmouthshire to meet its obligation to make a contribution to the requirements of the South Wales region.</li> </ul>
<b>Land</b>	
<ul style="list-style-type: none"> <li>There are limited opportunities for brownfield development within the County's existing urban areas. <b>(Issue 16)</b></li> <li>Monmouthshire has a significantly high percentage of best and most versatile agricultural land (i.e. Grade 1, 2 or 3a). While there is a need to conserve these resources, there are limited opportunities within the County for brownfield development and development on lower grades of agricultural land (i.e. Grade 3b, 4 and 5). <b>(Issue 17)</b></li> </ul>	<ul style="list-style-type: none"> <li>The Replacement LDP will seek to prioritise the use of previously developed land where opportunities arise.</li> <li>The Replacement LDP should seek to protect best and most versatile agricultural land whilst at the same time recognising that this will not always be possible where there is an overriding need for development.</li> </ul>

Draft Issue	How can the Replacement LDP Influence these Issues?
<b>A Healthier Wales (Well-being Goal 3)</b>	
<b>Human Health</b>	
<ul style="list-style-type: none"> <li>• While Monmouthshire performs relatively well on indicators relating to health, there is a need to promote opportunities for healthy living particularly in the context of an ageing population. <b>(Issue 18)</b></li> <li>• While an ageing population brings many opportunities, it also brings challenges and increases in the number of people living with long term conditions can create pressures on existing health care provision. <b>(Issue 19)</b></li> <li>• On the whole Monmouthshire’s residents have good access to public open space, however, there are deficiencies in many of the County’s communities in relation to community and recreational facilities. This can contribute to rural isolation in certain areas. <b>(Issue 20)</b></li> <li>• Obesity is a growing problem throughout Wales. Although obesity rates in Monmouthshire are below the Welsh average consideration should be given to promoting healthy lifestyles. <b>(Issue 21)</b></li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP can assist in creating a healthier Monmouthshire by ensuring sufficient policies are in place to support the provision of blue and green infrastructure and retention of the existing resource.</li> <li>• The Replacement LDP can provide policies to ensure health care provision is supported.</li> <li>• The Replacement LDP can affect the provision of public open space and recreation by protecting, where necessary, existing open space and facilities as well as requiring new development to make a contribution to the provision of additional facilities.</li> </ul>
<b>A More Equal Wales (Well-being Goal 4)</b>	
<b>Population</b>	
<ul style="list-style-type: none"> <li>• Monmouthshire is a predominantly rural county with almost half (47%) of the total population living in wards defined as being in rural areas (i.e. with a population of less than 10,000). <b>(Issue 22)</b></li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP must decide on the level of growth appropriate for Monmouthshire and the spatial distribution of this growth between different urban and rural communities to address the challenges we face (including demography and affordability), balancing the greater sustainability of urban</li> </ul>

Draft Issue	How can the Replacement LDP Influence these Issues?
<ul style="list-style-type: none"> <li>• The population of Monmouthshire has shown a steady increase over a ten year period to 2011, although more recently the rate of growth has slowed. This growth is being fuelled by in-migration. <b>(Issue 23)</b></li> <li>• Monmouthshire has a significantly higher proportion of older age groups (65+) and lower proportion of young adults (16 – 44) compared to the Welsh average, the sharpest decline of which is in the working age population. The relative absence of young adults is often linked to the affordability of housing across the County and has an impact on future prospects of economic growth. <b>(Issue 24)</b></li> </ul>	<p>settlements with the difficulties of maintaining services in rural areas.</p> <ul style="list-style-type: none"> <li>• There is a need to achieve a more balanced population structure to ensure there is a sufficient population of working aged people to support the Monmouthshire economy and to provide more opportunities for young people to both to stay within and move to the area. The Replacement LDP needs to take a role in strengthening the local economy, ensuring an appropriate economic base to enable people to live and work in the County and ensuring that demand for homes is satisfied by providing good quality affordable homes for those who need them.</li> <li>• The Replacement LDP can help to address issues surrounding the ageing population through facilitating the provision of accessible services supported by connective infrastructure to meet local population growth needs.</li> </ul>
<p><b>A Wales of Cohesive Communities (Well-being Goal 5)</b></p>	
<p><b>Housing</b></p>	
<ul style="list-style-type: none"> <li>• Average house prices in the County are high at £302,229 when compared to the Welsh average of £186,256 (Hometrack October 2018). The most significant increases have been experienced in recent years. There is a need to consider the potential impact on house prices arising from the recent removal of the Severn Bridge Tolls, the ambitions and opportunities associated with the Cardiff Capital Region City Deal and the South East Wales Metro, together with the economic growth of the Bristol/SW region and the opportunities for Monmouthshire as a border county and its</li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP will affect the amount of housing to be provided by both deciding on overall levels of growth/spatial options and by setting thresholds and proportions to determine the amount of this residential development that is affordable. It can also ensure a range and choice of homes are available in new developments and influence the type, tenure and nature of housing built within the County.</li> <li>• The Replacement LDP will have to resolve the amount of housing to be built in rural areas, balancing the need to sustain rural settlements by supporting services and enabling people to</li> </ul>

Draft Issue	How can the Replacement LDP Influence these Issues?
<p>location between Bristol and Newport and Cardiff, the ‘Great Western Cities’. <b>(Issue 25)</b></p> <ul style="list-style-type: none"> <li>• House prices are also high in relation to earnings and there is a pressing need for additional affordable housing in the County in both urban and rural areas to assist in ensuring a balanced population. <b>(Issue 26)</b></li> <li>• A range and choice of housing is needed to both meet the needs of an ageing population and to attract and retain the younger age groups. <b>(Issue 27)</b></li> <li>• There is limited scope for significant or long term expansion of the existing urban areas within the County due to a mix of physical, environmental and policy constraints. <b>(Issue 28)</b></li> </ul>	<p>remain in their communities with the need to protect the countryside and ensure sustainable patterns of development.</p> <ul style="list-style-type: none"> <li>• The Replacement LDP process must balance the extent to which the Main Towns and Severnside area can continue to accommodate further growth in the medium to long term against the potential for a new settlement in order to facilitate the creation of sustainable resilient communities.</li> </ul>
Infrastructure	
<ul style="list-style-type: none"> <li>• Poor access to community facilities and declining local service provision is a particular issue for rural communities. <b>(Issue 29)</b></li> <li>• Limited public transport, particularly in rural areas makes it harder to access jobs, services and facilities, which could be exacerbated by rising fuel prices. There are nevertheless future opportunities for investment in public transport through the Cardiff Capital Region City Deal and advances in technology. <b>(Issue 30)</b></li> <li>• There is a need to ensure that adequate physical and digital infrastructure is provided to support new development. This includes: broadband infrastructure, the provision of sufficient water and sewerage infrastructure, transport infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP can consider allocating land for housing and employment in rural areas in an attempt to sustain existing rural community facilities and services, weighing this against the need to avoid unsustainable travel patterns.</li> <li>• The Replacement LDP can help ensure adequate provision of infrastructure to serve new development and can contain support policies to enable improvements or enhancements for existing development, e.g. provision of electric vehicle charging (EVC), broadband connectivity and renewable energy.</li> <li>• The Replacement LDP will contain allocations and policies to support the priorities of the emerging local transport plan and cycling strategy</li> </ul>

Draft Issue	How can the Replacement LDP Influence these Issues?
and active travel to support non-car modes of travel. <b>(Issue 31)</b>	
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>	
<b>Cultural Heritage</b>	
<ul style="list-style-type: none"> <li>• Monmouthshire has a significant built heritage resource in terms of scheduled ancient monuments, listed buildings, conservation areas, historic parks and gardens and archaeologically sensitive sites that, together with their settings, require protection and enhancement. <b>(Issue 32)</b></li> <li>• There is a need to protect, promote and enhance the best of our landscape and heritage which are an important part of our culture and play a key role in tourism and economic growth, along with providing support for the Welsh Language to ensure it is safeguarded and supported. <b>(Issue 33)</b></li> <li>• The distinctive settlement pattern of Monmouthshire relates to historic towns and villages and their relationship with the surrounding rural areas. There has nevertheless been substantial suburban expansion in the South of the County, particularly adjacent to the M4 corridor. This area is likely to receive further pressure for growth due to the recent removal of the Severn Bridge Tolls and the ambitions and opportunities associated with the Cardiff Capital Region City Deal and the South East Wales Metro, together with the economic growth of the Bristol/SW region and the opportunities for Monmouthshire as a border county and its location between</li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP can contain measures to preserve and enhance the built heritage and best of the historic environment of Monmouthshire.</li> <li>• The Replacement LDP can help protect, promote and enhance the best of our landscape and heritage which are an important part of our culture and play a key role in tourism and economic growth, along with providing support for the Welsh Language to ensure it is safeguarded and supported.</li> <li>• Community involvement provides an opportunity to seek views on how Welsh language and culture interact with LDP policies and proposals. The future of the Welsh language depends on a range of factors beyond the planning system, particularly education, demographic change, community activities and a sound economic base to maintain thriving sustainable communities. The planning system can contribute to the future well-being of the Welsh language by creating conditions for well-paid employment opportunities and a range of quality housing options resulting in sustainable communities. Planning policies must not seek to control housing occupancy on linguistic grounds<sup>4</sup>.</li> </ul>

<sup>4</sup> Technical Advice Note 20 paragraphs 1.7.3, 2.2 and 2.6.4

Draft Issue	How can the Replacement LDP Influence these Issues?
<p>Bristol and Newport and Cardiff, the ‘Great Western Cities’. <b>(Issue 34)</b></p>	<ul style="list-style-type: none"> <li>• The Replacement LDP can play a key role in promoting good quality sustainable design that will enable new development and future growth to respect and enhance the existing distinctive character of Monmouthshire.</li> </ul>
<b>Landscape</b>	
<ul style="list-style-type: none"> <li>• Monmouthshire has a rich and diverse landscape that brings wider benefits to the local economy particularly through tourism and health and well-being. Monmouthshire as a whole incorporates parts of the Wye Valley Area of Outstanding Natural Beauty, the Brecon Beacons National Park and the Blaenavon Industrial Landscape World Heritage Site. <b>(Issue 35)</b></li> </ul>	<ul style="list-style-type: none"> <li>• The Replacement LDP must seek to protect high quality landscapes throughout the County, paying particular attention to those contained in the Wye Valley Area of Outstanding Natural Beauty, the Blaenavon World Heritage Site and in the setting of the Brecon Beacons National Park.</li> </ul>
<b>A Globally Responsible Wales (Well-being Goal 7)</b>	
<b>Climatic Factors</b>	
<ul style="list-style-type: none"> <li>• The volume of traffic in the County has continued to increase, up nearly 10% in the seven years to 2017 (<i>StatsWales, August 2018</i>). There is a pattern of relatively long travel to work distances, high levels of car ownership and reliance on the private car. <b>(Issue 36)</b></li> <li>• Small Scale and Local Authority wide Renewable Energy schemes are generally supported across Monmouthshire, however, a more proactive approach should be undertaken for schemes of a local authority scale (i.e. 5MW - 25MW). <b>(Issue 37)</b></li> </ul>	<ul style="list-style-type: none"> <li>• Concerns about climate change require that efforts are made to reduce the reliance on the private car and the consequent impact of carbon dioxide emissions. The Replacement LDP needs to consider appropriate patterns of development that promote a safe, efficient, accessible and sustainable transport system that provides opportunities for walking and cycling and encourages active travel.</li> <li>• A renewable energy assessment will be undertaken to support the Replacement LDP with areas of potential identified in the plan for local authority and strategic renewable energy development, as appropriate.</li> </ul>



### 3. Replacement LDP Draft Vision

- 3.1 The role of the LDP vision is to clarify the core purpose of the Plan and provide a framework for developing the Preferred Strategy and future detailed policies. The vision will set the overarching context for Monmouthshire for the period up to 2033. The vision set out in the adopted LDP has been reviewed and updated to take account of the issues, challenges and drivers facing the County and reflects key elements of the PSB Well-being Plan and Corporate Business Plan.
- 3.2 It is not considered appropriate, at this stage, to provide any detail in relation to the spatial implications of achieving the vision as the spatial distribution of future growth/development is not yet known. This will be determined following consultation on the LDP growth options and will be published as part of the Preferred Strategy.

#### 3.3 The Proposed Monmouthshire Replacement LDP Vision

**By 2033 Monmouthshire will be a place where:**

- (1) People are living in sustainable, resilient communities that support the well-being of current and future generations and are more inclusive, cohesive, prosperous, vibrant and balanced demographically. Both urban and rural communities are well-connected with better access to local services and facilities, open space and employment opportunities.**
- (2) Communities and businesses are part of an economically thriving and well-connected County.**
- (3) The best of the County's built heritage, countryside, landscape and environmental assets has been protected and enhanced to retain its distinctive character.**
- (4) People enjoy healthier, more sustainable lifestyles with improved access to public transport and active travel opportunities and have a minimised impact on the global environment.**

**The spatial implications of achieving this Vision will be that by 2033: *As noted above this will be completed following consultation on the LDP options and published as part of the Preferred Strategy.***

## 4. Replacement LDP Draft Objectives

4.1 In order to achieve the vision and address the key issues a number of draft objectives have been produced for the Replacement LDP (as set out in Table 4.1), building upon the Adopted LDP objectives and the well-being objectives set out in the Monmouthshire Local Well-being Plan. As with the issues, the draft objectives have been grouped in accordance with the Seven Well-being Goals as set out in the Well-being of Future Generations (Wales) Act 2015. The table also sets out the links between the draft objectives and the LDP issues and the main policy themes identified in Planning Policy Wales (PPW) Edition 10. Table 4.2 further demonstrates the alignment of the draft objectives with the Seven Well-being Goals.

**Table 4.1 – Replacement LDP Draft Objectives**

Headline	LDP Objective	LDP Issues addressed	Main PPW10 theme
<b>A Prosperous Wales (Well-being Goal 1)</b>			
Economic Growth/ Employment	To support a thriving, well-connected, diverse economy, which provides a range of good quality employment opportunities to enable and encourage indigenous business growth and attract inward investment and competitive innovative businesses in appropriate growth sectors, including through the provision of start-ups and grow on spaces.	1, 2, 3, 4, 5, 6, 7, 24	Productive and enterprising places
Retail centres	To sustain and enhance the main County towns of Abergavenny, Chepstow, Monmouth and Caldicot as vibrant and attractive retail centres serving their own populations and those of their surrounding hinterlands, along with increasing the potential customer base through future growth whilst recognising that the role of these centres is evolving.	8	Active and social places
<b>A Resilient Wales (Well-being Goal 2)</b>			
Green Infrastructure, Biodiversity and Landscape	To protect, enhance and manage Monmouthshire's natural environment and ecosystems. This includes, the Wye Valley Area of Outstanding Natural Beauty, the County's other high quality and distinctive landscapes, protected sites, protected species and other biodiversity interests, along with the connectivity between them by creating new linkages for them to adapt while at the same time maximising benefits for the economy, tourism, health and well-being.	11, 12, 35	Distinctive and natural places

Headline	LDP Objective	LDP Issues addressed	Main PPW10 theme
Flood risk	To ensure that new development takes account of the risk of flooding, both existing and in the future, including the need to avoid inappropriate development in areas that are at risk from flooding or that may increase the risk of flooding elsewhere and the need to design development to appropriately manage surface water run-off.	12, 13	Distinctive and natural places
Minerals and Waste	To meet the County's regional and local obligations to manage and dispose of its waste and to safeguard and exploit its mineral resource in a sustainable fashion.	14, 15	Productive and enterprising places
Land	To promote the efficient use of land, including the need to maximise opportunities for development on previously developed land, whilst recognising that brownfield opportunities are limited in Monmouthshire.	16, 17	Strategic and spatial choices
Natural resources	To promote the efficient use of natural resources including providing increased opportunities for water efficiency, energy efficiency, renewable energy, recycling and waste reduction.	14, 15, 31, 37	Productive and enterprising places
<b>A Healthier Wales (Well-being Goal 3)</b>			
Health and Well-being	To improve access for all ages to recreation, sport, leisure activities, open space and the countryside and to enable healthier lifestyles.	18, 20, 21, 33, 35	Active and social places
<b>A More Equal Wales (Well-being Goal 4)</b>			
Demography	To increase opportunities for the younger population to both live and work within Monmouthshire to assist in ensuring a balanced demography.	2, 3, 4, 5, 24	Active and social places
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>			
Housing	To provide a level of housing that is sufficient to provide a wide ranging choice of homes both for existing and future residents, while ensuring that local needs for appropriate, affordable and accessible housing are met as far as possible, particularly in towns but also in rural areas, so long as such housing can assist in building sustainable balanced communities.	23, 25, 26, 27, 28	Active and social places
Place-making	To promote good quality sustainable design and layouts that enhance the character and identity of Monmouthshire's settlements and countryside; create attractive, safe and	1, 11, 12, 18, 20, 27, 28, 29, 30,	Strategic and spatial choices

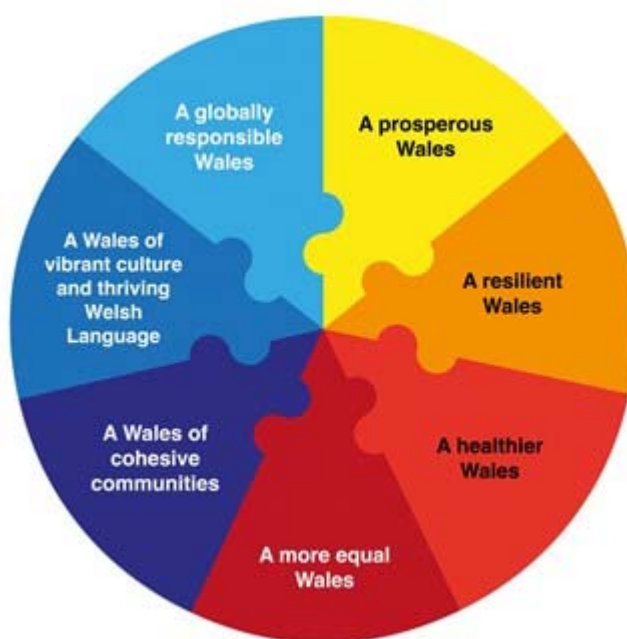
Headline	LDP Objective	LDP Issues addressed	Main PPW10 theme
	accessible places to live, work and visit; and promote people's prosperity, health, happiness and well-being.	31, 32, 34, 35	
Communities	To build sustainable resilient communities where people have good access to employment, shops, housing, public transport, active travel, healthcare, community and cultural facilities.	1, 5, 7, 8, 9, 18, 20, 25, 26, 27, 29, 30, 31, 33, 35	Strategic and spatial choices
Rural Communities	To sustain existing rural communities as far as possible by providing development opportunities of an appropriate scale and location in rural areas in order to assist in building sustainable rural communities and strengthening the rural economy.	6, 7, 20, 22, 26, 29, 30, 34	Productive and enterprising places
Infrastructure	To ensure that appropriate physical and digital infrastructure (including community and recreational facilities, sewerage, water, transport, schools, health care and broadband etc.) is in place or can be provided to accommodate new development.	12, 19, 20, 31	Productive and enterprising places
Accessibility	To seek to reduce the need to travel by promoting a mix of land use allocations and improved internet connectivity, and where travel is required, to provide opportunities for active travel and integrated sustainable transport.	10, 30, 36	Active and social places
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>			
Culture, Heritage and Welsh Language	To protect and enhance the built environment, culture and heritage of Monmouthshire for the future while maximising benefits for the economy, tourism and social well-being, including supporting and safeguarding the Welsh Language.	9, 32, 33, 34, 35	Distinctive and natural places
<b>A Globally Responsible Wales (Well-being Goal 7)</b>			
Climate Change	To ensure that new development can adapt to the impacts of a changing climate, promote opportunities for carbon reduction and decrease impact on air quality in order to reduce the contribution made by residents, businesses and industry in Monmouthshire to climate change.	10, 12, 36, 37	Distinctive and natural places

**Table 4.2 – Matrix of Replacement LDP Draft Objectives against the Well-being Goals**

	Prosperous Wales	Resilient Wales	Healthier Wales	More equal Wales	Wales of cohesive communities	Wales of vibrant culture and thriving Welsh Language	Globally responsible Wales
Housing							
Economic Growth/Employment							
Demography							
Place-making							
Retail centres							
Communities							
Rural Communities							
Accessibility							
Health and Well-being							
Culture, Heritage and Welsh Language							
Infrastructure							
Green Infrastructure, Biodiversity and Landscape							
Flood risk							
Climate Change							
Natural resources							
Minerals and Waste							
Land							

## APPENDIX 1

### Seven well-being goals of the Well-being of Future Generations (Wales) Act 2015



Goal	Description of the goal
<b>A prosperous Wales</b>	An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work
<b>A resilient Wales</b>	A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).
<b>A healthier Wales</b>	A society in which people’s physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
<b>A more equal Wales</b>	A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).
<b>A Wales of cohesive communities</b>	Attractive, viable, safe and well-connected communities.
<b>A Wales of vibrant culture and thriving Welsh language</b>	A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.
<b>A globally responsible Wales</b>	A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

Source: Well-being of Future Generations (Wales) Act 2015

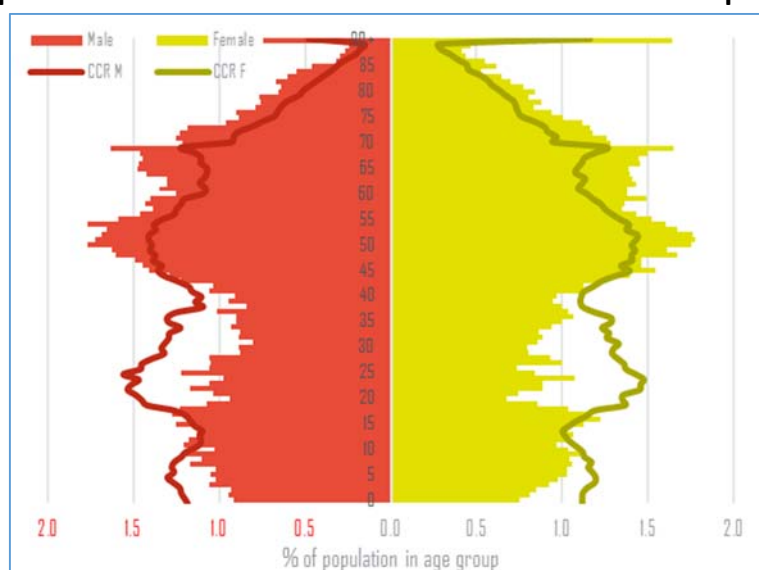
## APPENDIX 2

### Monmouthshire's Key Issues, Challenges and Drivers

#### Demography

- The population of Monmouthshire has shown a steady increase over the ten year period to 2011, increasing from 84,885 to 91,323 (7.58%) over the period 2001 - 2011 (Census 2011). The population has continued to grow since 2011, albeit at a slower rate. This growth is being fuelled by in-migration.
- Whilst the rate of population growth has slowed compared to the relatively high levels experienced in the 10 years to 2011, population levels continue to exceed those anticipated from the 2008-based projections which were used as the starting point for assessing the adopted LDP housing requirement. The latest Mid-Year Estimates (2017) give Monmouthshire a population of 93,590 in 2017. This latest population estimate for 2017 is higher than the earlier 2021 population estimates from both the 2008-based projections (91,923) and the most recent 2014-based projections (93,341).
- Monmouthshire has a significantly higher proportion of older age groups (65+) and lower proportion of young adults (16 – 44) compared to the Welsh and Cardiff Capital Region (CCR) average. The age structure of Monmouthshire's population and its relation to the rest of CCR is illustrated in the chart below. This clearly indicates the low presence of people aged 20-40 in the County, which are usually correlated to dynamic economies. On the other hand, there is a significant proportion of population in older age groups, particularly between the age of 50 and 70, indicating that the County is largely home to a population in retirement age and are not economically active.

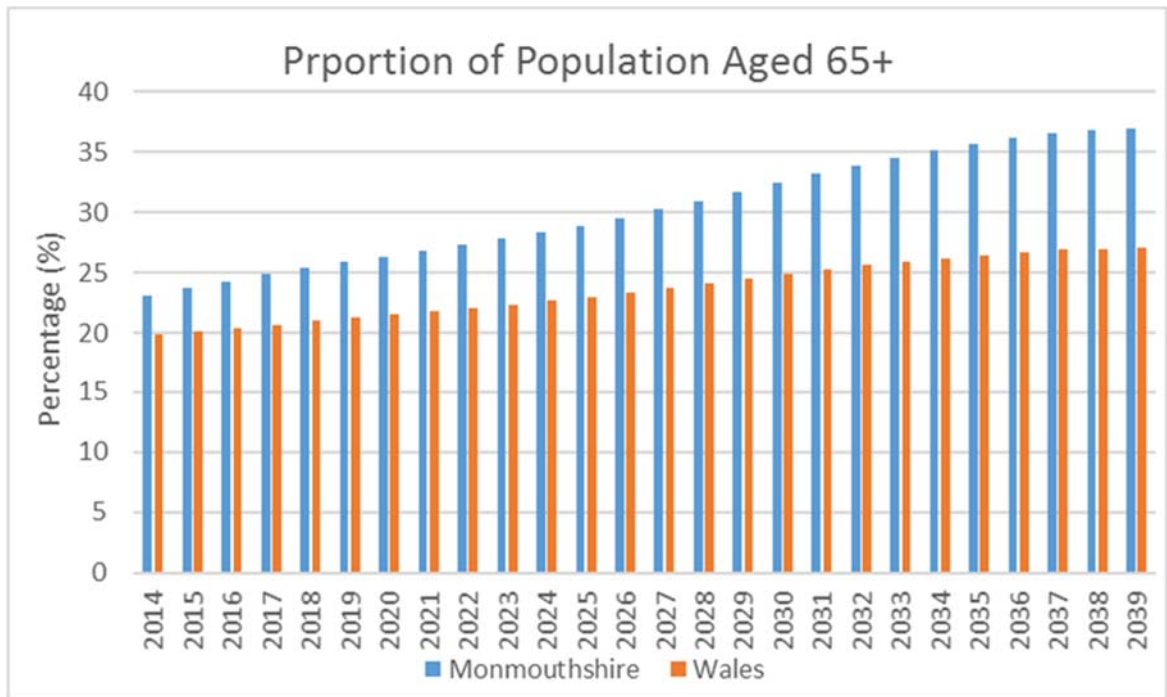
Figure 1: Population Structure 2016 - Monmouthshire vs Cardiff Capital Region



Source: ONS Population Estimates

- Monmouthshire has a median age of 48, compared to a median age of 34 in Cardiff (ONS population estimates). The increasing ageing population and shrinking working age population is limiting employment growth within Monmouthshire and the social sustainability of communities. The relative absence of young adults is often linked to the affordability of housing across the County and has an impact on future prospects of economic growth.
- This trend is projected to continue as shown in the graphs below.

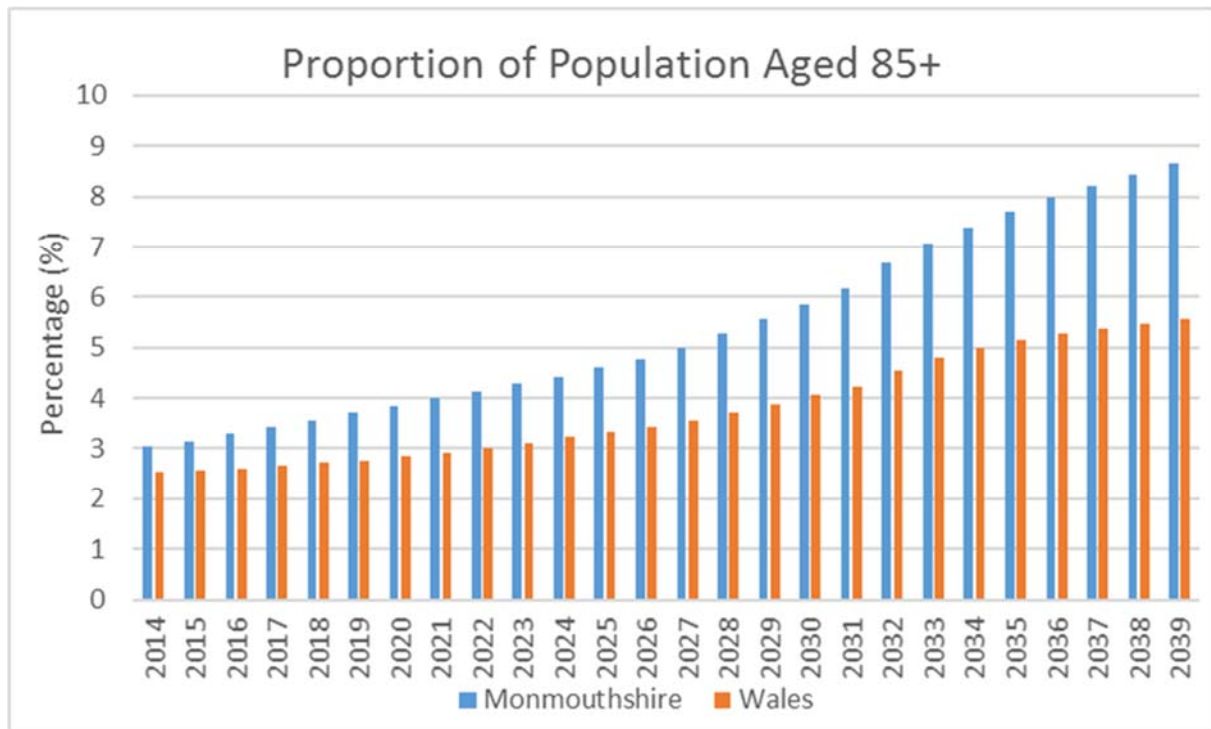
**Figure 2: Population Estimates Ages 65+ in Wales and Monmouthshire**



Source: StatsWales

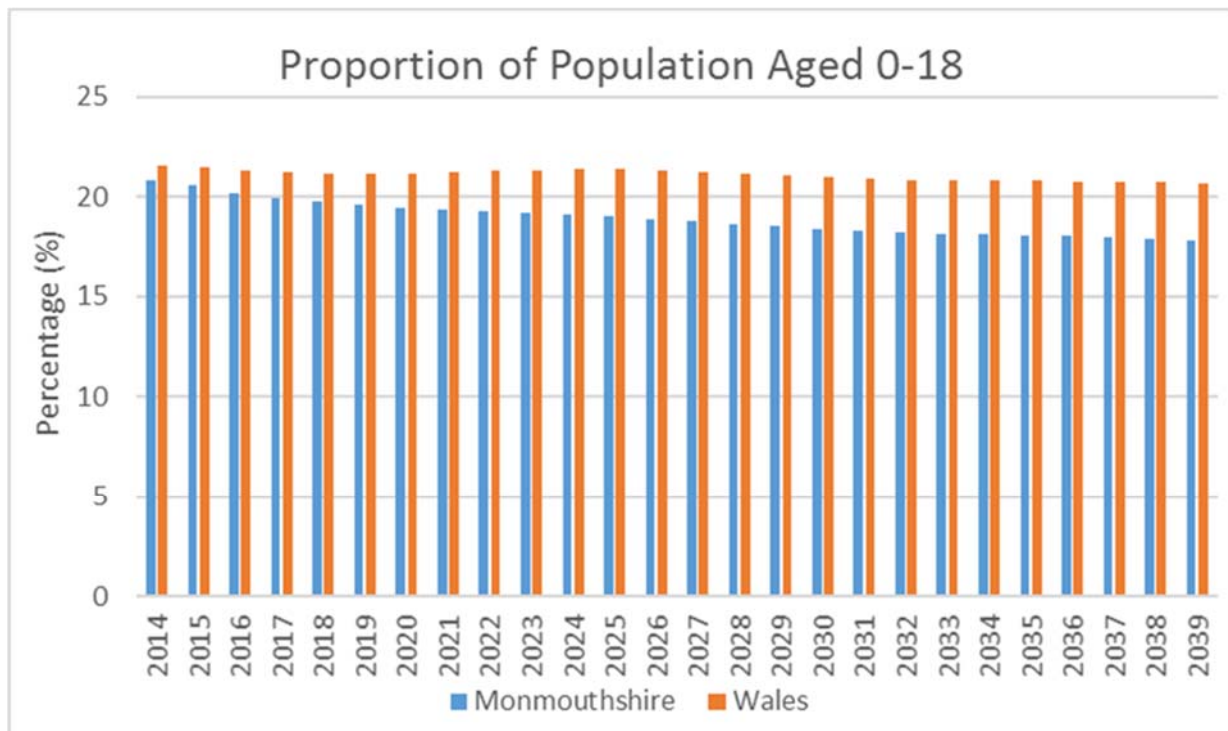


**Figure 3: Population Estimates Ages 85+ in Wales and Monmouthshire**



Source: StatWales

**Figure 4: Population Estimates Aged 0-18 in Wales and Monmouthshire**



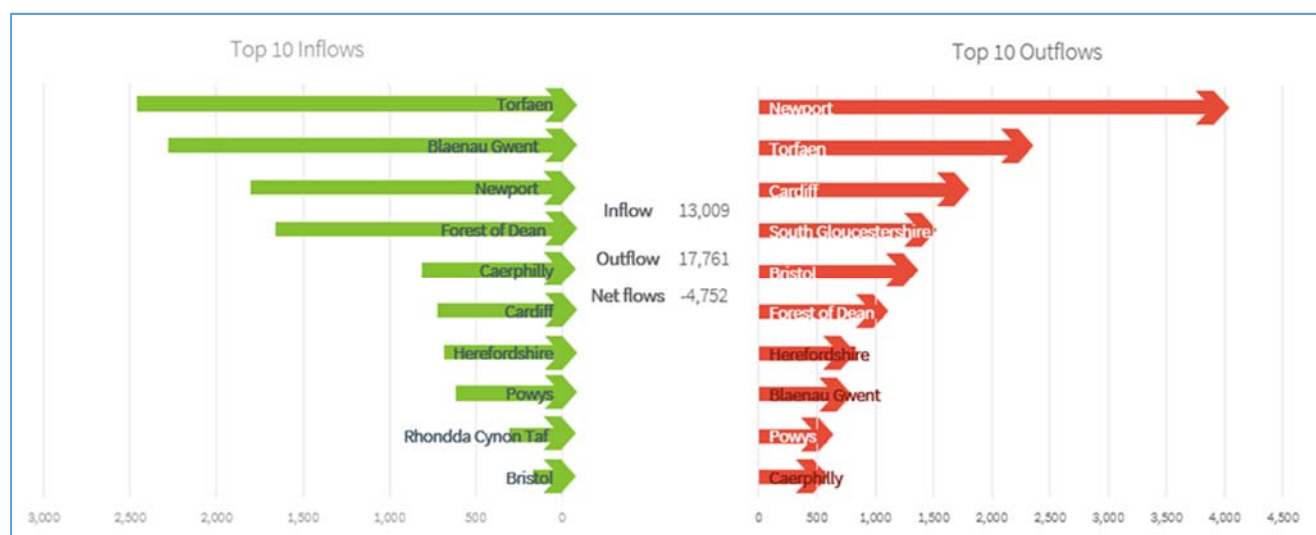
Source: StatsWales

## Economy

### Employment and Commuting

- The labour market profile of Monmouthshire's residents is healthy despite its high economic inactivity levels. Unemployment rate stood at 2.2% 2016/17 which is 3 percentage points below the Cardiff Capital Region (CCR) average, and is also lower than the national average (ONS, Annual Population Survey - July 2016 to June 2017). The economic inactivity rate in Monmouthshire stood at 39% in 2016/17, which is a reflection of its population structure where many are of retirement age (ONS, Annual Population Survey - July 2016 to June 2017).
- Levels of out commuting and distances travelled to work are relatively high. Around 40% of Monmouthshire's residents who are in employment work outside the County (Census, 2011). The charts below show the top 10 inflow and outflow commuting destinations for Monmouthshire.

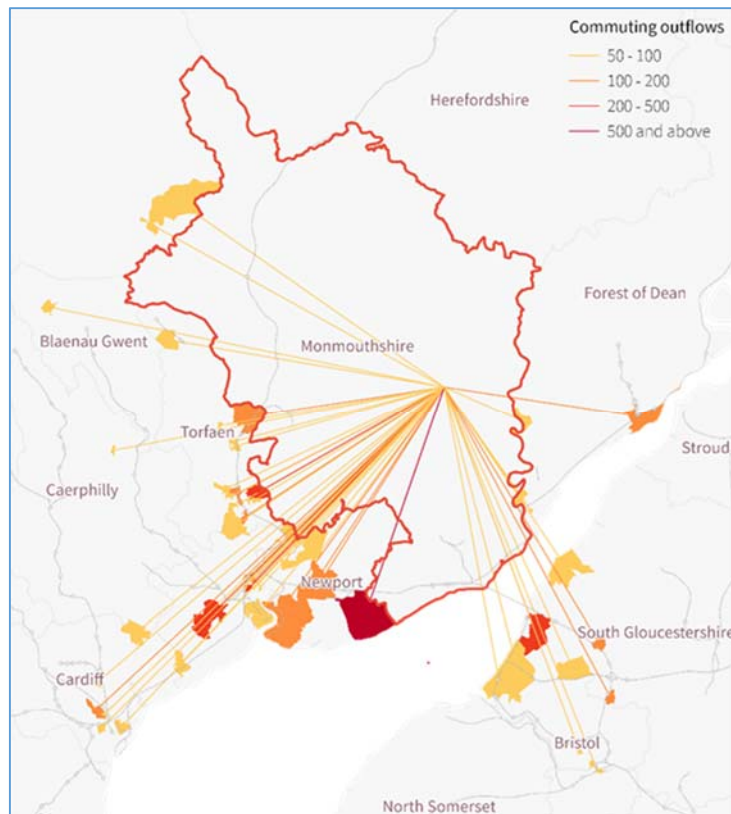
**Figure 5: Commuting Flows**



Source: ONS, Census 2011

- Figure 6 below maps the direction of the most significant commuting outflows from Monmouthshire (50 moves and above) which shows some key employment centres in Cardiff, Newport, Bristol and South Gloucestershire.

**Figure 6: Commuting Outflows from Monmouthshire – flows of 50 and above**



Source: ONS, Census 2011

Map contains OS data © Crown copyright and database right 2017

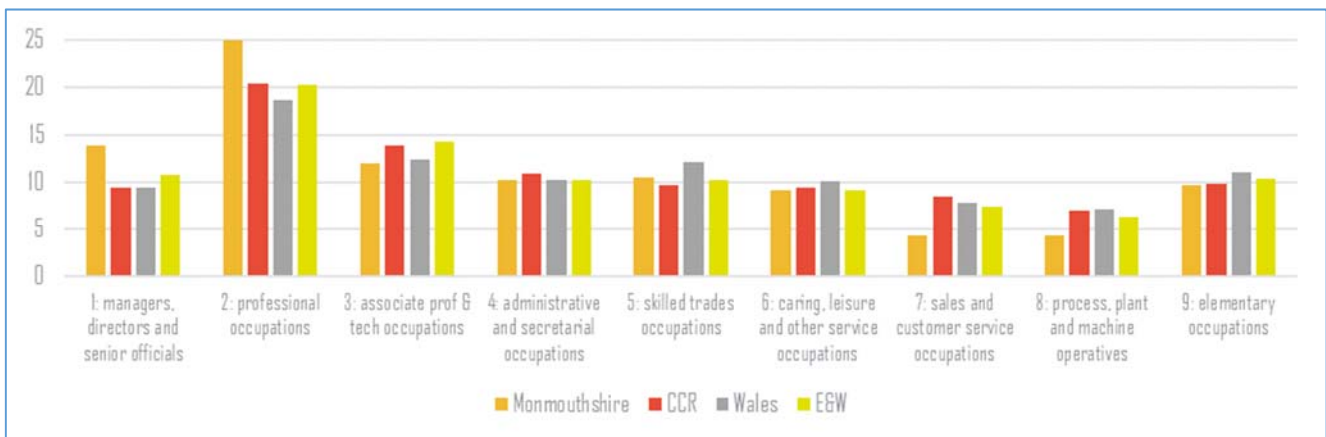
- There is a need to provide support for inward investment and local employment growth/opportunities to reduce out commuting, retain young people, and increase prosperity.

### Occupation and Earnings

- There is a dual labour market in Monmouthshire, meaning that the people who live in Monmouthshire have a different profile from those who work in Monmouthshire. The qualifications, skills and earnings of the residents are above the regional and national average, however, for those working in the area earnings are lower and employment is relatively less skilled:
  - The resident profile is markedly skewed towards high-skills/high-earning occupations, while the workplace profile presents a relatively higher proportion of people employed in low-skill and routine occupations, as shown in figures 7 and 8 below.
  - Residents' earnings are higher than workplace earnings. Residents (and those who can afford to buy a house in Monmouthshire) are likely to be earning their relatively higher wages in higher skills jobs outside Monmouthshire. Wage levels available for local jobs are lower than the average for the UK and

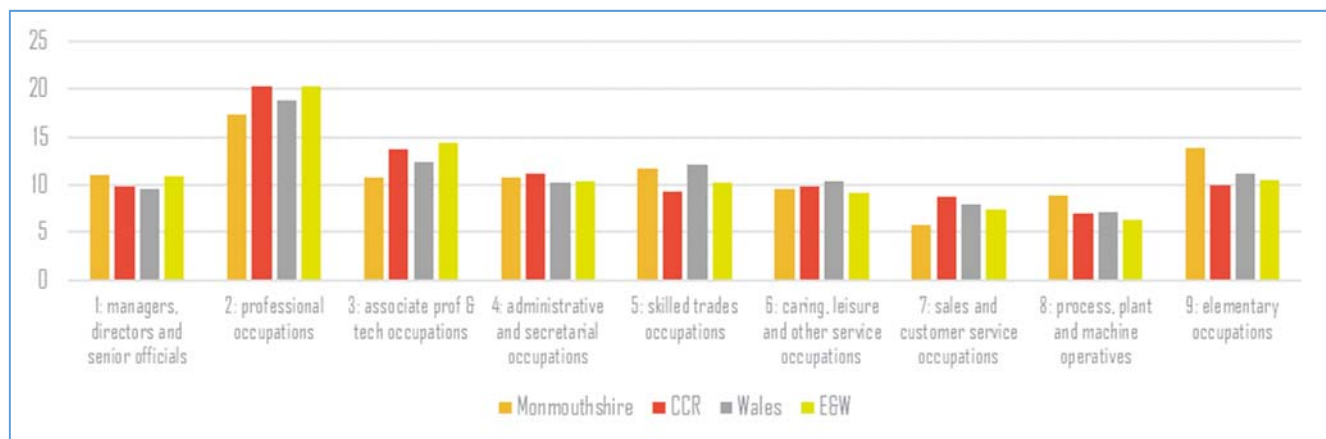
Wales. The gross annual mean pay for people working in Monmouthshire stood at £30,001 in 2018, compared with £36,611 in the UK and £30,357 in Wales (ONS, ASHE, 2018). This coupled with high property prices makes it difficult for young people and future generations to live and work locally. Additional employment opportunities for young people are required to help reduce the numbers of this age group leaving the County.

**Figure 7: Occupational Profile – Resident Analysis (%) 2016/17**



Data Source: ONS, Annual Population Survey - July 2016 to June 2017

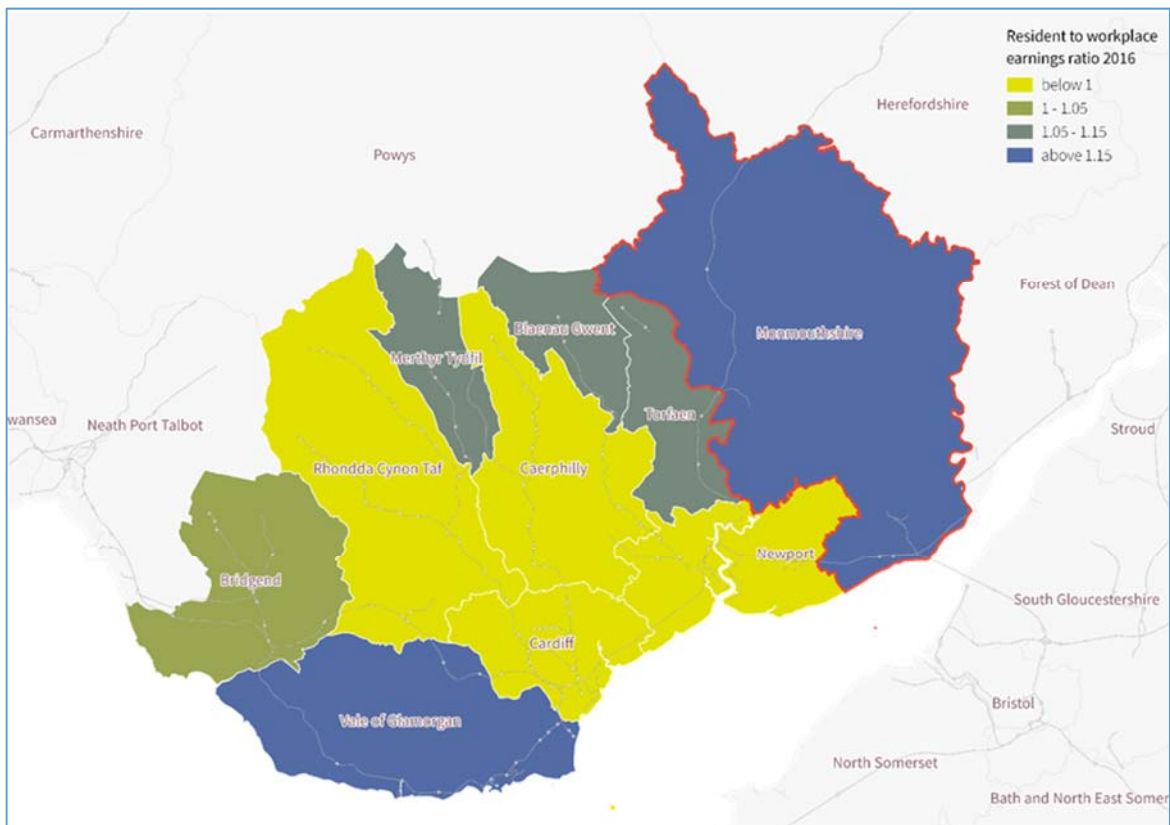
**Figure 8: Occupational Profile – Workplace Analysis (%) 2016/17**



Data Source: ONS, Annual Population Survey - July 2016 to June 2017

- Figure 9 below presents the ratio between median earnings of residents, who are not necessarily working in the local authority they reside in, against earnings of people working in the given local authority. A ratio above one indicates that resident earnings are higher than workplace earnings. This, coupled with the occupational analysis, suggests that Monmouthshire residents must be earning their relatively higher wages in higher skilled jobs outside Monmouthshire.

**Figure 9: Resident to workplace median earnings ratio 2016**



Data Source: ONS, ASHE

Map contains OS data © Crown copyright and database right 2017

- Evidence continues to suggest that the income for economically active women who both live and work within the County is significantly lower than that of men within the same category, as indicated in Figure 10 below.

**Figure 10: Median Gross Weekly Earnings (2018)**

Indicator	Earnings
Monmouthshire - Resident (Male)	£690.90
Great Britain (Male)	£612.00
Monmouthshire - Workplace (Male)	£578.90
Monmouthshire - Resident (Female)	£567.50
Great Britain (Female)	£510.00
Monmouthshire - Workplace (Female)	£469.30

Source: ONS, ASHE

## Employment land

- There has been a slow uptake of employment land in the past (2014-15: 0.38ha; 2015-16: 1.13ha; 2016-17: 3.21ha; 2017-18: 5ha, LDP Annual Monitoring Reports 2015-18). There is subsequently a need to consider whether existing available land is suitably located, fit for purpose and readily available for appropriate growth sectors.
- There is also a need to consider potential future demand for employment land along with Council aspirations for innovation across Monmouthshire in light of the recent removal of the Severn Bridge tolls and the ambitions and opportunities associated with the Cardiff Capital Region City Deal (CCRCDD).

## Home Working and Digital Connectivity

- Higher levels of those in employment in Monmouthshire work at home compared to the Welsh average i.e. 35% in Monmouthshire compared to the Welsh average of 12% (Census, 2011). Efficient digital infrastructure is essential to support home working and the general connectivity of the County's rural areas and to support economic growth. This could also improve quality of life and reduce commuting.
- The current situational analysis of Superfast Broadband Next Generation Access (NGA) coverage in the Cardiff Capital Region, based on the OMR/SAPC undertaken prior to the Superfast Cymru Phase 2 (SFC2) Procurement, paints a stark picture in terms of the current lack of coverage in Monmouthshire in comparison to our other nine Local Authority partners - currently 12.56% of premises in Monmouthshire are NOT covered in comparison to 3-4% in the other nine Local Authorities within the region.

## Retail and Town Centres

- The role of high streets is changing due to out of town retail centres, the increase in internet shopping, changing shopping habits (e.g. top-up grocery shopping) and austerity and as a result vacancy rates in some of the County's retail centres have increased. There is a leakage of expenditure out of the County and a need to protect the County's retail centres from out of town developments. (Monmouthshire Retail Background Paper, 2018; Monmouthshire Retail Expenditure Forecasts Update, 2017).

## Tourism

- Tourism plays a significant part in the Monmouthshire economy particularly in assisting in the diversification of the rural economy and in sustaining the County's historic town centres.
- Visitor numbers in Monmouthshire over the 2016-17 period are set out in Figure 11 below. Visitor numbers to both serviced and non-serviced accommodation are significantly higher in Monmouthshire compared to the South East Wales average and have increased by 14.5% since 2012. Staying visitors generate a higher economic

impact than day visitors i.e. £146 million compared to £58 million in 2017 (Monmouthshire STEAM Report 2017) highlighting the continued need for visitor accommodation.

- Visitor numbers to serviced accommodation increased by 8.1% and those to non-serviced accommodation by 7.0% - both of these are significantly higher than the South East Wales averages of 3.4% for serviced and 5.1% for non-serviced accommodation. Since 2012, the annual number of staying visitors to Monmouthshire has increased by 14.5% - over 64,000 extra visitors in 2017 compared with 2012 (Monmouthshire STEAM Report 2017).
- Day visitors continue to be important to Monmouthshire, with the 1.8 million day visits accounting for 78% of all visits to the County in 2017. Day visits decreased by 0.1% from 2016 levels, but 2016 was a particularly strong year for day visitors and the 2017 figure is still 6.0% higher than that for 2015 (Monmouthshire STEAM Report 2017).

**Figure 11: Monmouthshire Visitor Numbers 2016-17**

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2017 (Millions)	M	0.287	0.077	0.143	0.507	1.798	2.304
2016 (Millions)	M	0.265	0.072	0.143	0.480	0.800	2.280
Change 16/17 (%)	%	+8.1	+7.0	+0.4	+5.7	-0.1	+1.1
Share of Total (%)	%	12.5	3.3	6.2	22.0	78.0	100.0

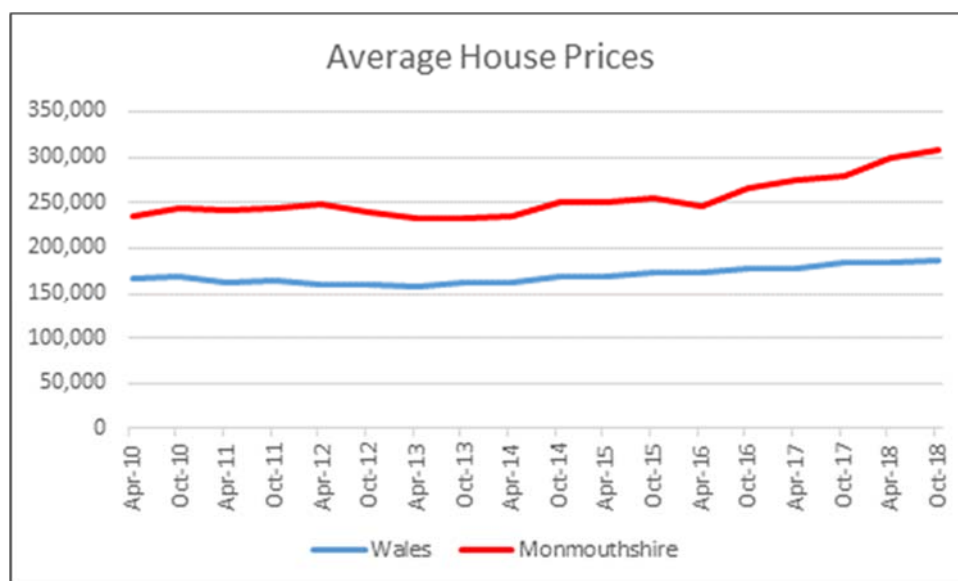
Data Source: Monmouthshire STEAM Tourism Economic Impacts 2017 Year in Review Summary

## HOUSING

### Housing Market and House Prices

- Average house prices in the County are high at £302,229 when compared to the Welsh average of £186,256 (Hometrack October 2018). The most significant increases have been experienced in recent years as indicated in figure 12.

**Figure 12: Average House Prices in Monmouthshire and Wales March 2010 – October 2018**



Source: Hometrack

- House prices are also high in relation to earnings. The lower quartile house price to income ratio in the County is 9:1 (Hometrack, September 2018). This ratio varies across Monmouthshire and is significantly higher in some rural areas, as indicated in Figure 13.

**Figure 13: Lower Quartile House Price to Income Ratios for a Sample of Rural Wards**

Ward	Lower Quartile House Price to Income Ratio
Crucorney	10:1
Llanbadoc	6:1
Raglan	7:1
Mitchel Troy	16:1
Trellech	11:1
St Arvans	9:1
Portskewett	6:1
Goytre	7:1
Llanfoist	7:1
Llanelly Hill	7:1



- The number of households in affordable housing need (Bands 1-4) currently stands at 2,021 (Monmouthshire Common Housing Register, January 2019). There is a pressing need for additional affordable housing in the County in both urban and rural areas to assist in ensuring a more balanced population.
- There is a need to consider the potential impact on house prices arising from the recent removal of the Severn Bridge Tolls, the ambitions and opportunities associated with the Cardiff Capital Region City Deal and the South East Wales Metro.
- To address the demographic imbalance in the County and support economic prosperity a range and choice of housing is needed to both meet the needs of an ageing population and to attract and retain the younger age groups.
- There is limited scope for significant or long term expansion of the existing urban areas within the County due to a mix of physical, environmental and policy constraints.

## **ENVIRONMENT**

### **Green Infrastructure, Biodiversity & Landscape**

- Monmouthshire is renowned for its beautiful landscapes and major biodiversity resource that bring wider benefits to the local economy particularly through tourism. Monmouthshire as a whole incorporates parts of the Wye Valley Area of Outstanding Natural Beauty, the Brecon Beacons National Park and the Blaenavon Industrial Landscape World Heritage Site. The best of these assets must be protected, managed and enhanced for future generations.
- There is a need to improve connectivity within the landscape through protecting and improving existing wildlife networks and corridors, including both green and blue infrastructure, and, creating new linkages to allow species to move and adapt to climate change impacts. Green Infrastructure is also beneficial to human well-being.

### **Flooding**

- Parts of the County are vulnerable to flooding. Climate change is likely to increase the risk of flooding, as well as many other risks, so mitigating climate change and building resilience is crucial.

### **Minerals & Waste**

- Monmouthshire has made good progress in the promotion of the recycling and composting of waste, and the elimination of waste to landfill. Monmouthshire also has to make an appropriate contribution to the regional requirement for waste management.

- Mineral extraction plays a limited role in Monmouthshire's economy but there is a need to safeguard the County's resources in order to make an appropriate contribution to the sustainable supply of aggregates to the South Wales economy as a whole.

### Air

- While air pollution is not generally a significant problem in Monmouthshire, there are two Air Quality Management Areas in the County at Usk and Chepstow where there is a link between this issue and traffic congestion.

### Land

- There are limited opportunities for brownfield development within the County's existing urban areas. The proportion of land area defined as 'built on' stands at 3% in Monmouthshire (Corine Landcover Inventory, 2018).
- Monmouthshire has a significantly high percentage of best and most versatile agricultural land (Grade 1, 2 and 3) at 69% (Welsh Government – Agricultural Land Classification Maps, November 2017). While there is a need to conserve these resources, there are limited opportunities within the County for brownfield development and development on lower grades of agricultural land (i.e. Grade 3b, 4 and 5).

### Climatic Factors

- The volume of traffic in the County has continued to increase, up nearly 10% in the seven years to 2017 (StatsWales, August 2018). There is a pattern of relatively long travel to work distances (as detailed above), high levels of car ownership (45% of households have 2 or more cars (Census 2011)) and reliance on the private car.
- Small Scale and Local Authority wide Renewable Energy schemes are generally supported across Monmouthshire, however, a more proactive approach should be undertaken for schemes of a local authority scale (i.e. 5MW - 25MW).

## HEALTH AND WELL-BEING

### Human Health

- While Monmouthshire performs relatively well on indicators relating to health, there is a need to promote opportunities for healthy living particularly in the context of an ageing population.
- While an ageing population brings many opportunities, it also brings challenges and increases in the number of people living with long term conditions can create pressures on existing health care provision.

- On the whole Monmouthshire's residents have good access to public open space, however, there are deficiencies in many of the County's communities in relation to community and recreational facilities. This can lead to rural isolation in certain areas.
- Obesity is a growing problem throughout Wales. Although obesity rates in Monmouthshire are below the Welsh average consideration should be given to promoting healthy lifestyles. Figure 14 below sets out key indicators of health related lifestyle which indicates that obesity rates in Monmouthshire are below the Welsh and Aneurin Bevan Health Board figures. However, it should be noted that this is based on a very small sample size and is therefore not entirely representative.

**Figure 14: Health Related Lifestyle 2017/18**

<b>Health Related Lifestyle Indicator</b>	<b>Monmouthshire %</b>	<b>Aneurin Bevan Health Board %</b>	<b>Wales %</b>
<b>Smoker</b>	13	19	19
<b>E-Cigarette User</b>	5	8	7
<b>Weekly Alcohol Consumption &gt;14 Units</b>	24	18	19
<b>Ate 5 Portions of Fruit &amp; Vegetables</b>	29	21	24
<b>Active &lt;30 Minutes a Week</b>	24	33	33
<b>Overweight or Obese</b>	55	65	60
<b>Obese</b>	17	26	22

Source: National Survey for Wales 2017/18

### **Infrastructure**

- Poor access to community facilities and declining local service provision is a particular issue for rural communities.
- The Welsh Index of Multiple Deprivation (WIMD) 2014 geographical access to services domain captures the accessibility of a range of services for households, looking specifically at inaccessibility of services that are considered key to day to day living. Both tangible (inaccessibility to a supermarket) and social deprivation (isolation from

community activities) are considered. The WIMD shows that of the 56 lower super output areas (LSOAs) in Monmouthshire, 38 fall within the 50% most deprived, with 26 in the 30% most deprived and 12 in the 10% most deprived. Of the 1909 LSOAs in Wales, the lowest ranks recorded in Monmouthshire for access to services were in Llantillio Crosenny (12), Crucorney (43), Llanover 1 (70), and Trellech United 1 and 2 which ranks 82 and 95 respectively (StatsWales).

- Limited public transport, particularly in rural areas makes it harder to access jobs, services and facilities, which could be exacerbated by rising fuel prices. There are nevertheless future opportunities for investment in public transport through the Cardiff Capital Region City Deal and advances in technology.
- There is a need to ensure that adequate physical and digital infrastructure is provided to support new development. This includes:
  - Broadband infrastructure
  - The provision of sufficient water and sewerage infrastructure
  - Transport infrastructure and active travel to support non-car modes of travel.

## CULTURAL HERITAGE

- As detailed in Figure 15, Monmouthshire has a significant built heritage resource in terms of scheduled ancient monuments, listed buildings, conservation areas, historic parks and gardens and archaeologically sensitive sites that, together with their settings require protection and enhancement.

**Figure 15: Monmouthshire’s Heritage Assets (number)**

	<b>2017</b>
<b>Listed Buildings</b>	2152
<b>Scheduled Ancient Monuments</b>	164
<b>Historic Parks and Gardens</b>	45
<b>Archaeologically Sensitive Areas</b>	10
<b>Landscapes of Outstanding Historic Interest</b>	3

Source: MCC Heritage Team/ Cadw

- There is a need to protect, promote and enhance the best of our landscape and heritage which are an important part of our culture and play a key role in tourism and economic growth, along with providing support for the Welsh Language to ensure it is safeguarded and supported.
- The distinctive settlement pattern of Monmouthshire relates to historic towns and villages and their relationship with the surrounding rural areas. There has nevertheless been substantial suburban expansion in the South of the County, particularly adjacent to the M4 corridor. This area is likely to receive further pressure for growth due to the recent removal of the Severn Bridge Tolls and the ambitions and opportunities

associated with the Cardiff Capital Region City Deal and the South East Wales Metro, together with the economic growth of the Bristol/SW region and the opportunities for Monmouthshire as a border county and its location between Bristol and Newport and Cardiff, the 'Great Western Cities'.