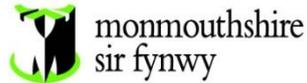


# Public Document Pack



Neuadd y Sir  
Y Rhadyr  
Brynbuga  
NP15 1GA

Dydd Mercher, 2 Rhagfyr 2020

## Hysbysiad a gyfarfod

### Cyd-Pwyllgor Dethol

Dydd Iau, 10fed Rhagfyr, 2020 at 10.00 am  
Remote Meeting

#### AGENDA

Item No.	Item	Pages
1.	Ethol Cadeirydd.	
2.	Penodi Is-gadeirydd.	
3.	Ymddiheuriadau am absenoldeb	
4.	Datganiadau o Fuddiant	
5.	Craffu cyn penderfynu ar Asesiad Llety Sipsiwn, Teithwyr a Phobl Sioeau 2021 - 2033.	1 - 54
6.	Craffu cyn penderfynu ar yr Asesiad Marchnad Dai Leol, cyn ei gyflwyno i Lywodraeth Cymru.	55 - 116
7.	Ystyried Twf y Cynllun Datblygu Lleol a'r Opsiynau Gofodol (atodiad 3 i ddilyn).	117 - 342
8.	Blaen-raglen Waith y Pwyllgor Dethol Oedolion.	343 - 344
9.	Blaenraglen Waith Pwyllgor Dethol yr Economi a Datblygu	345 - 348

**Paul Matthews**

**Prif Weithredwr**

## CYNGOR SIR FYNWY

### MAE CYFANSODDIAD Y PWYLLGOR FEL A GANLYN:

Y Cynghorwyr Sirol:

J.Becker  
D. Blakebrough  
L.Brown  
A.Davies  
D. Dovey  
L.Dymock  
R. Edwards  
D. Evans  
M.Feakins  
M.Groucutt  
R. Harris  
S. Howarth  
P.Pavia  
M. Powell  
R.Roden  
B. Strong  
S. Woodhouse  
  
C. Bowie  
T. Crowhurst

## Gwybodaeth I'r Cyhoedd

### **Mynediad i gopïau papur o agendâu ac adroddiadau**

Gellir darparu copi o'r agenda hwn ac adroddiadau perthnasol i aelodau'r cyhoedd sy'n mynychu cyfarfod drwy ofyn am gopi gan Gwasanaethau Democrataidd ar 01633 644219. Dylid nodi fod yn rhaid i ni dderbyn 24 awr o hysbysiad cyn y cyfarfod er mwyn darparu copi caled o'r agenda hwn i chi.

### **Edrych ar y cyfarfod ar-lein**

Gellir gweld y cyfarfod ar-lein yn fyw neu'n dilyn y cyfarfod drwy fynd i [www.monmouthshire.gov.uk](http://www.monmouthshire.gov.uk) neu drwy ymweld â'n tudalen Youtube drwy chwilio am MonmouthshireCC. Drwy fynd i mewn i'r ystafell gyfarfod, fel aelod o'r cyhoedd neu i gymryd rhan yn y cyfarfod, rydych yn caniatáu i gael eich ffilmio ac i ddefnydd posibl y delweddau a'r recordiadau sain hynny gan y Cyngor.

**Y Gymraeg** Mae'r Cyngor yn croesawu cyfraniadau gan aelodau'r cyhoedd drwy gyfrwng y Gymraeg neu'r Saesneg. Gofynnwn gyda dyledus barch i chi roi 5 diwrnod o hysbysiad cyn y cyfarfod os dymunwch siarad yn Gymraeg fel y gallwn ddarparu ar gyfer eich anghenion.

## Canllawiau Fforwm Agored Cyhoeddus

Bydd y Pwyllgor Craffu Dethol Cymunedau Cryf yn cael ei gynnal yn rhithwir ac yn cael ei ffrydio'n fyw. Bydd dolen i ffrwd fyw'r cyfarfod ar gael ar dudalen gyfarfod gwefan Cyngor Sir Fynwy yma:

<https://democracy.monmouthshire.gov.uk/ieListDocuments.aspx?CId=139&MId=4614>

Rydym wedi arwain y ffordd o ran dychwelyd i gyfarfodydd cwbl fyw ond mae cyfyngiadau'r dechnoleg yn ei gwneud yn anodd cynnal fforwm agored cyhoeddus confensiynol.

Byddwn yn defnyddio'r un dull â phroses siarad cyhoeddus pwyllgor cynllunio'r awdurdodau i alluogi'r rhai sy'n dymuno siarad ar y pwnc i fynegi eu barn i'r pwyllgor.

Gwahoddir preswylwyr i rannu eu barn ar y cynigion a gallant eu cyflwyno i'r pwyllgor yn un o'r ffyrdd canlynol:

### Fideo

Gallwch recordio fideo gyda sain nad yw'n fwy na 4 munud o hyd a fydd yn cael ei chwarae i bawb sy'n cymryd rhan a'r cynghorwyr yn y pwyllgor wrth ystyried yr eitem berthnasol.

### Sain

Gallwch gofnodi ffeil sain yn unig nad yw'n fwy na 4 munud o hyd a fydd yn cael ei chwarae i bawb sy'n cymryd rhan a'r cynghorwyr yn y pwyllgor wrth ystyried yr eitem berthnasol.

### Sylwadau Ysgrifenedig

Os nad ydych yn gallu defnyddio'r opsiynau uchod neu os nad ydych yn dymuno defnyddio'r opsiynau uchod, gallwch gyflwyno sylwadau ysgrifenedig i'r cyngor a fydd yn cael eu darllen i'r pwyllgor wrth ystyried yr eitem berthnasol. Rhaid i sylwadau ysgrifenedig fod nid yn fwy na 500 gair.

Gallwch gyflwyno cynrychiolaeth i ni drwy ddefnyddio'r ddolen ganlynol:

[https://iweb.itouchvision.com/portal/f?p=customer:category\\_link:::::CUID,LANG:A8FACFF3E01C14610361E05361401A8C0F7AE41B,EN&P\\_LANG=en](https://iweb.itouchvision.com/portal/f?p=customer:category_link:::::CUID,LANG:A8FACFF3E01C14610361E05361401A8C0F7AE41B,EN&P_LANG=en). Bydd angen i chi gofrestru ar gyfer cyfrif Fy Sir Fynwy er mwyn cyflwyno'r ymateb neu ddefnyddio eich manylion mewngofnodi os ydych wedi cofrestru o'r blaen.

Mae'r ffurflen gyflwyno wedi'i sefydlu i adlewyrchu proses ein pwyllgorau cynllunio ac felly gellir anwybyddu unrhyw gyfeiriad at geisiadau cynllunio. Gellir disodli unrhyw gyfeiriad neu gais am wybodaeth i geisiadau cynllunio gyda'r geiriad 'Pwyllgor Craffu Dethol'.

Os bydd y cyflwyniad fideo yn fwy nag awr o hyd, bydd fideos yn cael eu rhannu fesul thema (ni chaiff eu chwarae'n gyfan gwbl), er y bydd yr holl gynrychiolaethau a dderbynnir ar gael i gynghorwyr cyn y pwyllgor.

## Canllawiau Fforwm Agored Cyhoeddus

Bydd y Pwyllgor Craffu Dethol Cymunedau Cryf yn cael ei gynnal yn rhithwir ac yn cael ei ffrydio'n fyw. Bydd dolen i ffrwd fyw'r cyfarfod ar gael ar dudalen gyfarfod gwefan Cyngor Sir Fynwy yma:

<https://democracy.monmouthshire.gov.uk/ieListDocuments.aspx?CId=139&MId=4614>

Rydym wedi arwain y ffordd o ran dychwelyd i gyfarfodydd cwbl fyw ond mae cyfyngiadau'r dechnoleg yn ei gwneud yn anodd cynnal fforwm agored cyhoeddus confensiynol. Byddwn yn defnyddio'r un dull â phroses siarad cyhoeddus pwyllgor cynllunio'r awdurdodau i alluogi'r rhai sy'n dymuno siarad ar y pwnc i fynegi eu barn i'r pwyllgor. Gwahoddir preswylwyr i rannu eu barn ar y cynigion a gallant eu cyflwyno i'r pwyllgor yn un o'r ffyrdd canlynol:

### Fideo

Gallwch recordio fideo gyda sain nad yw'n fwy na 4 munud o hyd a fydd yn cael ei chwarae i bawb sy'n cymryd rhan a'r cynghorwyr yn y pwyllgor wrth ystyried yr eitem berthnasol.

### Sain

Gallwch gofnodi ffeil sain yn unig nad yw'n fwy na 4 munud o hyd a fydd yn cael ei chwarae i bawb sy'n cymryd rhan a'r cynghorwyr yn y pwyllgor wrth ystyried yr eitem berthnasol.

### Sylwadau Ysgrifenedig

Os nad ydych yn gallu defnyddio'r opsiynau uchod neu os nad ydych yn dymuno defnyddio'r opsiynau uchod, gallwch gyflwyno sylwadau ysgrifenedig i'r cyngor a fydd yn cael eu darllen i'r pwyllgor wrth ystyried yr eitem berthnasol. Rhaid i sylwadau ysgrifenedig fod nid yn fwy na 500 gair.

Gallwch gyflwyno cynrychiolaeth i ni drwy ddefnyddio'r ddolen ganlynol:

[https://iweb.ityouvision.com/portal/f?p=customer:category\\_link:::::CUID,LANG:A8FACFF3E01C14610361E05361401A8C0F7AE41B,EN&P\\_LANG=en](https://iweb.ityouvision.com/portal/f?p=customer:category_link:::::CUID,LANG:A8FACFF3E01C14610361E05361401A8C0F7AE41B,EN&P_LANG=en). Bydd angen i chi gofrestru ar gyfer cyfrif Fy Sir Fynwy er mwyn cyflwyno'r ymateb neu ddefnyddio eich manylion mewngofnodi os ydych wedi cofrestru o'r blaen.

Mae'r ffurflen gyflwyno wedi'i sefydlu i adlewyrchu proses ein pwyllgorau cynllunio ac felly gellir anwybyddu unrhyw gyfeiriad at geisiadau cynllunio. Gellir disodli unrhyw gyfeiriad neu gais am wybodaeth i geisiadau cynllunio gyda'r geiriad 'Pwyllgor Craffu Dethol'.

Os bydd y cyflwyniad fideo yn fwy nag awr o hyd, bydd fideos yn cael eu rhannu fesul thema (ni chaiff eu chwarae'n gyfan gwbl), er y bydd yr holl gynrychiolaethau a dderbynnir ar gael i gynghorwyr cyn y pwyllgor.

# Nodau a Gwerthoedd Cyngor Sir Fynwy

## Cymunedau Cynaliadwy a Chryf

### Canlyniadau y gweithiwn i'w cyflawni

#### Neb yn cael ei adael ar ôl

- Gall pobl hŷn fyw bywyd da
- Pobl â mynediad i dai addas a fforddiadwy
- Pobl â mynediad a symudedd da

#### Pobl yn hyderus, galluog ac yn cymryd rhan

- Camddefnyddio alcohol a chyffuriau ddim yn effeithio ar fywydau pobl
- Teuluoedd yn cael eu cefnogi
- Pobl yn teimlo'n ddiogel

#### Ein sir yn ffynnu

- Busnes a menter
- Pobl â mynediad i ddysgu ymarferol a hyblyg
- Pobl yn diogelu ac yn cyfoethogi'r amgylchedd

### Ein blaenoriaethau

- Ysgolion
- Diogelu pobl agored i niwed
- Cefnogi busnes a chreu swyddi
- Cynnal gwasanaethau sy'n hygyrch yn lleol

### Ein gwerthoedd

- **Bod yn agored:** anelwn fod yn agored ac onest i ddatblygu perthnasoedd ymddiriedus
- **Tegwch:** anelwn ddarparu dewis teg, cyfleoedd a phrofiadau a dod yn sefydliad a adeiladwyd ar barch un at y llall.
- **Hyblygrwydd:** anelwn fod yn hyblyg yn ein syniadau a'n gweithredoedd i ddod yn sefydliad effeithlon ac effeithiol.
- **Gwaith tîm:** anelwn gydweithio i rannu ein llwyddiannau a'n methiannau drwy adeiladu ar ein cryfderau a chefnogi ein gilydd i gyflawni ein nodau.

## Canllawiau Pwyllgorau Craffu Sir Fynwy

### Rôl y Rhag-gyfarfod

1. Pam mae'r Pwyllgor yn craffu ar hyn? (cefndir, materion allweddol)
2. Beth yw rôl y Pwyllgor a pha ganlyniad y mae Aelodau am eu cyflawni?
3. A oes digon o wybodaeth i gyflawni hyn? Os na, pwy allai ddarparu hyn?
  - Cytuno ar y drefn holi a pha Aelodau fydd yn arwain
  - Cytuno ar gwestiynau i swyddogion a chwestiynau i'r Aelod Cabinet

### Cwestiynau ar gyfer y Cyfarfod

#### Craffu ar Berfformiad

1. Sut mae perfformiad yn cymharu â blynyddoedd blaenorol? A yw'n well neu'n waeth? Pam?
2. Sut mae perfformiad yn cymharu â pherfformiad cynghorau eraill/darparwyr gwasanaethau eraill? A yw'n well neu'n waeth? Pam?
3. Sut mae perfformiad yn cymharu â thargedau penodol? A yw'n well neu'n waeth? Pam?
4. Sut y pennwyd targedau perfformiad? Ydyn nhw'n ddigon heriol/realistig?
5. Sut mae defnyddwyr gwasanaeth/y cyhoedd/partneriaid yn gweld perfformiad y gwasanaeth?
6. A fu unrhyw archwiliadau ac arolygiadau diweddar? Beth oedd y canfyddiadau?
7. Sut mae'r gwasanaeth yn cyfrannu at gyflawni amcanion corfforaethol?
8. A yw'r gwelliant/dirywiad o ran perfformiad yn gysylltiedig â chynnydd/gostyngiad mewn adnoddau? Pa gapasiti sydd i wella?

#### Craffu ar Bolisiau

1. Ar bwy mae'r polisi'n effeithio ~ yn uniongyrchol ac yn anuniongyrchol? Pwy fydd yn elwa fwyaf/lleiaf?
2. Beth yw barn defnyddwyr gwasanaeth/rhanddeiliaid? A ydynt yn credu y bydd yn cyflawni'r canlyniad a ddymunir?
3. Beth yw barn y gymuned gyfan - safbwynt y 'trethdalwr'?
4. Pa ddulliau a ddefnyddiwyd i ymgynghori â rhanddeiliaid? A wnaeth y broses alluogi pawb sydd â buddiant i ddweud eu dweud?
5. Pa arferion a dewisiadau a ystyriwyd wrth ddatblygu/adolygu'r polisi hwn? Pa dystiolaeth sydd ar gael i lywio'r hyn sy'n gweithio?
6. A yw'r polisi hwn yn cyd-fynd â'n hamcanion corfforaethol, fel y'u diffinnir yn ein cynllun corfforaethol?
7. A ystyriwyd yr holl oblygiadau datblygu cynaliadwy, cydraddoldeb a diogelu perthnasol? Er enghraifft, beth yw'r *gweithdrefnau y mae angen eu rhoi ar waith i amddiffyn plant*?
8. Faint fydd y gost hon i'w gweithredu a pha ffynhonnell ariannu sydd wedi'i nodi?
9. Sut bydd perfformiad y polisi'n cael ei fesur a'r effaith yn cael ei gwerthuso.

### Cwestiynau i'r Pwyllgor, i orffen ...

A oes gennym y wybodaeth angenrheidiol i ffurfio casgliadau/gwneud argymhellion i'r weithrediaeth, y Cyngor, partneriaid eraill? Os nac oes, a oes angen i ni:

- (i) Ymchwilio i'r mater yn fanylach?
- (ii) Cael rhagor o wybodaeth oddi wrth dystion eraill – Aelod Gweithredol, arbenigwr annibynnol, aelodau o'r gymuned leol, defnyddwyr gwasanaethau, cyrff rheoleiddio ...
- (iii) Cytuno ar gamau pellach i'w cymryd o fewn amserlen/adroddiad monitro yn y dyfodol...



This page is intentionally left blank

<b>SUBJECT:</b>	<b>Gypsy and Traveller Accommodation Assessment</b>
<b>MEETING:</b>	<b>Joint Adults Select Committee and Economy and Development Select Committee</b>
<b>DATE:</b>	<b>10<sup>th</sup> December 2020</b>
<b>DIVISION/WARDS AFFECTED:</b>	<b>All</b>

## 1. PURPOSE:

- 1.1 To provide information regarding the Monmouthshire Gypsy and Traveller Accommodation Needs Assessment (GTAA) 2021 – 2033 (Appendix 1)
- 1.2 To seek scrutiny and provide amendment or endorsement to the recommendation prior to reporting to Cabinet.

## 2. RECOMMENDATIONS:

- 2.1 To recommend that Cabinet adopts the Gypsy, Traveller and Showpersons Accommodation Assessment (GTAA) 2021 – 2033.

## 3. KEY ISSUES:

### 3.1 Summary

3.1.1 The report identifies a need for 13 pitches by 2033 comprising 8 pitches in current need, 1 newly arising 2020-2025 (child growing up) and 4 newly arising 2026-2033 (children growing up).

3.1.2 The current need for 8 pitches comprises 5 pitches on an unauthorised site at Llanccayo, 1 on an unauthorised site at Llanvetherine, 1 overcrowded in Portskewett and 1 overcrowded dealt with via recent planning permission in Crick.

3.2 Under Part 3 of the Housing (Wales) Act 2014, all local authorities must undertake a Gypsy & Traveller Accommodation Assessment every five years and to make provision where assessments identify an unmet need for mobile home pitches

3.3 The Council conducted a previous assessment in 2015 covering the period 2016 – 2021. This is the Council's second assessment and it will run concurrently with the Replacement Local Development Plan (LDP) 2018 – 2033, providing a robust and up to date evidence base.

3.4 The process of undertaking the Assessment followed the guidance contained in the Welsh Government's document, 'Undertaking Gypsy & Traveller Accommodation Assessments' published in May 2015.

3.5 The following paragraphs provides a brief summary of the Assessment process and its findings. For detailed information, please refer to the Assessment report.

### 3.6 Process:

3.6.1 Steering Group: Due to the time constraints involved in meeting the LDP timeframe, the small number of Gypsy, Traveller and Showpeople households in the county and

the COVID 19 pandemic it was agreed that the steering group convened for the 2016 assessment would reconvene as a “virtual group” for the present assessment. Its responsibilities remained the same, that is:

- Helping to identify households living within the community to contact;
- To help scrutinise and provide feedback on the results;
- To sign off the report to be submitted for scrutiny and adoption by the Council and its subsequent submission to Welsh Government for approval.

3.6.2 Household Questionnaire: Gypsy and Traveller households identified through the forum completed the standard questionnaire as per the 2015 Guidance during October, November and December 2019.

3.6.3 The “Pitch Need” Calculation:

3.6.3.1 Welsh Government GTAA Guidance requires an assessment of current and future pitch needs and sets out a prescribed framework for undertaking a GTAA assessment. This GTAA follows the proscribed framework contained in Guidance.

3.6.3.2 As with any assessment of housing need the underlying calculation can be broken down into a relatively small number of factors. In this case, the key issue for residential pitches is to compare the supply that is available for occupation with the current and future needs of the households. The “need” for Gypsy and Traveller pitches consists of the following components:

1) Current Residential Supply:

- Occupied local authority pitches - there are no public sites in Monmouthshire;
- Occupied authorised private pitches - there are three in Monmouthshire;
- Vacant local authority pitches and available private pitches - there are no vacant local authority pitches and five unimplemented private pitches;
- Vacant pitches expected in the near future – there are no vacant pitches expected in the future in Monmouthshire;
- New local authority pitches and private pitches with planning permission - there is one pitch with planning permission.

2) Current Residential Demand: Assessing current need by the following method

- Households on unauthorised encampments;
- Households on unauthorised developments;
- Concealed /over-crowded/doubled-up households;
- Conventional housing – movement from bricks and mortar;
- New households to arrive from waiting lists/in-migration.

3) Future Demand: The formation of new households during the study period.

3.6.3.3 Normally, the household growth rate used for an assessment of future needs is informed by local demographic evidence which is used to adjust the national growth rate of 1.50% up or down based on the proportion of those aged under 18 (by travelling status).

3.6.3.4 The approach taken for this GTAA is to treat need as:

- Only those households on unauthorised and tolerated sites that are already in the planning system (i.e. sites/pitches for which a planning application has been made or is likely to be made)

- Those otherwise known to the Council as being resident in the area;
- Those identified through the household survey as requiring pitches.

### 3.7. Findings:

3.7.1 The assessment identified thirteen households in total as being from the Gypsy, Traveller and Showpeople community in Monmouthshire. Seven households completed the questionnaire. Four household had their applications completed by proxy that is, using household composition details from previous planning applications. Two households declined to participate in the Assessment.

3.7.2 There is an estimated unmet need for nine pitches to 2025, with a further unmet need of four pitches from 2026 to the end of the Replacement LDP Plan period in 2033;

3.7.3 There is not a need for a permanent transit / stopping pitch in Monmouthshire.

3.7.4 No additional households who wanted or needed to live in Monmouthshire have been drawn to the attention of the Council from other Welsh authorities.

## 4 SUSTAINABLE DEVELOPMENT AND EQUALITY IMPLICATIONS:

4.1 The Gypsy and Traveller communities are recognised in law as an ethnic minority and the Council is required by law to address identified housing need. The communities are often subject to prejudice and statistically have lower outcomes in health and education than the settled community. Not having a safe and authorised place to call home reduces the likelihood of those outcomes being positive. This report seeks to positively address this issue by identifying the level of accommodation need to 2033. In terms of sustainable development, this would be considered via land use planning decisions. The Equalities Impact and Sustainable development assessments are attached (See Appendix 2).

## 5. OPTIONS APPRAISAL:

### 5.1

	Benefit	Risk	Comment
<b>Option 1:</b> The <u>recommended option</u> is to agree the contents and findings of the GTAA.	<p>The Council has to be able to meet the accommodation needs of the Gypsy and Traveller and Showpeople.</p> <p>The GTAA is an up-to-date assessment of the accommodation needs of Gypsy and Traveller and Showpeople households in Monmouthshire. It will inform the Replacement Local Development Plan (RLDP).</p>	There are no risks to this option.	It is a statutory duty that the Council conduct a GTAA every 5 years. It has followed the methodology recommended by Welsh Government Guidance to produce an accurate and robust evidence base of the accommodation needs of Gypsy and Traveller and Showpeople households in Monmouthshire.
<b>Option 2:</b> Not to accept contents and	There are no benefits to this option.	The risk of this option is that the Council will not be able to meet the accommodation needs of	

findings of the GTAA.		Gypsy and Traveller and Showpeople and will be in breach of its statutory duty.	
-----------------------	--	---	--

**6. RESOURCE IMPLICATIONS:**

**6.1. Financial**

Should the Council decide to develop site provision there could be a capital cost including land acquisition and provision of services. It is worth noting that the Council can bid for financial assistance from Welsh Government to assist in meeting the costs of site delivery; but the funds are limited, cannot be used for land purchase, and are subject to a bidding process.

**7. CONSULTEES:**

Enterprise DMT  
Head of Placemaking, Housing, Highways and Flooding  
Head of Planning  
Housing and Communities Manager  
Planning Policy Manager  
MCC Gypsy and Traveller Accommodation Assessment Steering Group

**8. BACKGROUND PAPERS:**

Undertaking Gypsy & Traveller Accommodation Assessments' (May 2015)  
Part 3 Housing (Wales) Act 2014  
Gypsy and Traveller Assessment Report

**9. AUTHOR:** Stephen Griffiths, Strategy & Policy Officer (Housing & Communities)

**10. CONTACT DETAILS:**

**Tel:** 01633 644455  
**E-mail:** stephengriffiths@monmouthshire.gov.uk



MONMOUTHSHIRE COUNTY COUNCIL  
GYPSY AND TRAVELLER ACCOMMODATION  
ASSESSMENT  
2020 - 2025

## Contents

1.0	Executive Summary	3
2.0	Background	4
3.0.	Previous Assessment Findings and Analysis of Existing Data	7
4.0	Methodology	9
5.0.	Survey Findings	11
6.0	Assessing Accommodation Needs	14
7.0	Transit Need / Temporary Stopping Need	15
8.0.	Need for Gypsies and Travellers	15
9.0	Overall Need for Monmouthshire	19
10.0	Transit/Emergency Stopping Site Provision	20
11.0	Need for Travelling Showpeople Plots	21
10.0	Conclusions	21
11.0	Next Step	21

## Appendices

Appendix 1:	Part 3, Housing (Wales) Act 2014	23
Appendix 2:	Part 5, S56, Mobile Homes (Wales) Act 2013	26
Appendix 3:	Policy H8, Gypsy, Traveller and Travelling Showpeople Sites Monmouthshire LDP, adopted 2014	27
Appendix 4:	Definition of Key Terms and Concepts	33
Appendix 5:	GTAA Questionnaire	34
Appendix 6:	ORS Technical Note on Gypsy and Traveller Household Formation and Growth Rates (2020)	35

## List of Tables

Table 1:	Welsh Government Checklist	10
Table 2:	Total number of authorised sites in Monmouthshire as at March 2020	16
Table 3:	Additional Pitches Needed in Monmouthshire from 2020-2033	19

## List of Figures

Figure 1:	Unauthorised Encampments: Number of Occurrences by Month and Year	8
Figure 2:	Unauthorised Encampments: Number of caravans by Month and Year 2013 - 2019	8
Figure 3:	Accommodation at Time of Questionnaire	12

Figure 4:	Household Composition	13
Figure 5:	Household Ethnicity	13
Figure 6:	Respondent by Age Profile	13
Figure 7:	Suitability of Current Accommodation	14

DRAFT

## **1.0 Executive Summary:**

- 1.0.1 Opinion Research Services Ltd. (ORS) assisted the Housing and Communities Department at Monmouthshire with the preparation of this assessment as part of a wider commission to support the preparation of new GTAA's for Blaenau Gwent, Monmouthshire and Torfaen.
- 1.0.2 Part three of the Housing (Wales) Act 2014, requires all Local Authorities in Wales to undertake a Gypsy & Traveller Accommodation Assessment (GTAA) and, where the Assessment identifies an unmet need for pitches, to make provision to meet that need.
- 1.0.3 Under the Act, the Council has to undertake assessments every five years. The Council undertook its first assessment in 2015 covering the period 2016 – 2021. This is the Council's second assessment and it will run concurrently with the Replacement Local Development Plan (RLDP) 2018 – 2033, providing a robust and up-to-date evidence base for the new LDP.
- 1.0.4 The assessment process followed the Welsh Government guidance document, 'Undertaking Gypsy & Traveller Accommodation Assessments' published in May 2015. Due to the time constraints involved in meeting the RLDP timeframe and the small number of Gypsy, Traveller and Showpeople households in the county it was agreed that the steering group that was convened for the 2016 assessment would not be reconvened for the present assessment until a draft became available.
- 1.0.5 However members of the steering Group provided information of known Gypsy & Travellers and where applicable, informed households that an Assessment was being conducted and invited households to participate.
- 1.0.6 Officers from Housing & Communities Service conducted the interviews with the assistance of a family advocate for one of the households. The completion of questionnaires by Gypsy, Traveller and Showpeople households inform the conclusions and recommendations of the Assessment. Households identified by members of the steering group completed the questionnaires during October, November and December 2019.
- 1.0.7 The baseline date for all other data and information is that of the 31<sup>st</sup> March 2020.
- 1.0.8 To the knowledge of the Council, only two known Monmouthshire Gypsy, Traveller and Showpeople households declined to participate in the Assessment.

### **1.1.0 The Summary Conclusions of the Assessment:**

- 1.1.1 The assessment finds that there is an unmet need of nine pitches under the assessment period 2020 to 2025.
- 1.1.2 Beyond 2025, there is a further unmet need of four pitches over the remaining length of the Replacement Local Development Plan (2026 – 2033).
- 1.1.3 There is not a need for a permanent transit / stopping pitch in Monmouthshire.
- 1.1.4 The Council should consider the use of short-term toleration or negotiated stopping arrangements to deal with short-term encampments.

### **1.2.0 Next Steps:**

- 1.2.1 The Council will seek to make provision for appropriate sites to meet identified unmet need by working proactively with the Gypsy and Traveller households to establish their preference for site provision, that is, private or public sites.
- 1.2.2 The findings of the GTAA process suggest there is an aspiration within much of the Gypsy Traveller community for private site provision in Monmouthshire. The Council will therefore work with and support Gypsy Traveller households to identify and develop viable private sites to address the identified unmet need in accordance with the RLDP policy framework.
- 1.2.3 The identification and allocation of local authority Gypsy Traveller site(s) would need to be considered through the RLDP review process, should the need for a public site become apparent because the Community's preference for private sites cannot be achieved.
- 1.2.4 The identified need for temporary stopping places will be considered on a regional basis as part of the emerging Strategic Development Plan (SDP) process.

## **2.0 Background:**

- 2.0.1 Part three of the Housing (Wales) Act 2014 placed a number of statutory duties on local authorities to determine the accommodation needs of their Gypsy & Traveller community. S101 of the Act requires local authorities to conduct a review every five years. During the review period, local authorities must carry out an assessment and report its findings to Welsh Ministers for approval. The report must contain a summary of the consultation process; the responses received and any accommodation need identified by the assessment (Appendix 1).
- 2.0.2 Should a need be identified, s103 of the Act places a duty on the local authority to exercise its powers under Part five of the Mobile Homes (Wales) Act 2013 to provide sites on which mobile homes may be stationed (Appendix 2).
- 2.0.3 Under S104 of the Act, if the Welsh Ministers are satisfied that a local housing authority has failed to comply with their duty under s103, they can direct the authority to exercise those powers under Part five of the Mobile Homes (Wales) Act 2013 to meet the needs identified in the assessment.
- 2.0.4 As a housing authority Monmouthshire County Council's administrative area for includes both the Monmouthshire planning area and part of the Brecon Beacons National Park (BBNP) area of planning jurisdiction. The GTAA will therefore provide evidence to inform the Annual Monitoring Reports (AMRs) and LDP review processes of both Monmouthshire County Council and the BBNP Authority<sup>1</sup>. Where appropriate, Monmouthshire County Council and the BBNP Authority will work collaboratively to address any unmet need identified in the GTAA.

## **2.1 Purpose:**

- 2.1.1 The purpose of a GTAA is for the Council to understand the current and future accommodation needs of Gypsy, Traveller and Showpeople in the County. This in turn will inform the Council's and the BBNP's LDP Annual Monitoring Reports (AMRs) and their

---

<sup>1</sup> Paragraph 54, Undertaking Gypsy and Traveller Accommodation Assessments, Welsh Government

Replacement LDPs. It will also provide any evidence of whether transit sites or emergency stopping places are required.

2.1.2 The Assessment findings will also provide a complementary supplement for future Monmouthshire Local Housing Market Assessments.

## **2.2 Planning Considerations and Guidance Documents:**

2.2.1 The primary piece of guidance for producing a GTAA is “Undertaking Gypsy & Traveller Accommodation Assessments (2015)”.

2.2.2 The guidance includes a universal questionnaire that all local authorities are to use to ensure commonality for comparability purposes across all local authority areas in Wales (See Appendix 3).

2.2.3 The questionnaire comprises of five sections. Sections A to D concern themselves mostly with accommodation needs arising in the area in which the assessment is undertaken. Section E is concerned with the provision of transit sites not only in the area where the assessment is undertaken but also in other local authorities in Wales. The following sub sections give a brief description of the questionnaire:

- Section A – deals with the current accommodation arrangements of community members who partook in the assessment.
- Section B – looks at the family structure.
- Section C – enquires about aspirations and plans.
- Section D – informs the local authority of anticipated family growth and need that is likely to occur within the next five years so that they are able to understand future demand and plan accordingly.
- Section E – is concerned with the need for transit sites and their availability or non-availability throughout Wales.

2.2.4 To avoid any issues of literacy and low participation the guidance recommends that the completion of the questionnaire be on a face-to-face basis rather than using mailshot.

2.2.5 There have been a number of Circular provisions produced by Welsh Government and before devolution by the Welsh Office<sup>2</sup> that provide guidance for local authorities on planning aspects of providing sites, assessing the accommodation needs of Gypsy and Traveller families and to have policies for the provision of Gypsy and Traveller sites in their development plans. The introduction of a circular in 2018 superseded and cancelled the above-mentioned circulars<sup>3</sup>.

2.2.6 Other guidance available to local authorities are “Designing Gypsy and Traveller Sites”, and “Managing Gypsy and Traveller Sites in Wales”, published by Welsh Government in 2015.

---

<sup>2</sup> Circular 30/2007 “Planning for Gypsy and Traveller Caravan Sites”, WAG 2007; Circular 78/91 “Travelling Showpeople”, Welsh Office 1991 ; Circular 76/94

“Gypsy Sites Policy and Unauthorised Camping” Welsh Office 1994

<sup>3</sup> Circular 005/2018 Planning for Gypsy, Traveller Showpeople Sites, WAG 2018

<sup>4</sup> Planning Policy Wales Edition 10 paragraph 4.2.35

- 2.2.7 Planning Policy Wales (PPW) advises that local authorities are required to assess the accommodation needs of Gypsy and Traveller families and to have policies for the provision of Gypsy and Traveller sites in their development plans<sup>4</sup>.
- 2.2.8 Monmouthshire County Council adopted its Local Development Plan (LDP) in February 2014. The LDP sets out the Council's policies for future development and use of land in its area (excluding that part within the Brecon Beacons National Park). The framework for assessing proposals to meet the accommodation needs of Gypsies, Travellers and Travelling Showpeople through the provision of sites, whether for permanent, transit or emergency use can be found in Policy H8 of the LDP (See Appendix 4).
- 2.2.9 The Brecon Beacons National Park Authority adopted its LDP in December 2013. The Plan allocates land adjacent to Brecon Enterprise Park for the provision of a permanent Gypsy and Traveller Site and sets out policy criteria against which all Gypsy and Traveller caravan sites will be considered.
- 2.2.10 In addition to planning consideration and guidance circulars it is pertinent to mention that should a need be identified and a site be required there is a site capital grant available to local authorities to cover the costs involved with site construction. However, the grant cannot cover all costs associated with site construction, such land acquisition, pre planning applications work and feasibility studies.

## **2.3 Definition of Key Terms:**

### **2.3.1 Gypsy, Travellers and Showpeople**

- This assessment adopts the definition found within Section 108 of the Housing (Wales) Act 2014
  - (a) Persons of a nomadic habit of life, whatever their race or origin, including
    - (i) Persons who, on grounds only of their own or their family's or dependant's educational or health needs or old age, have ceased to travel temporarily or permanently, and
    - (ii) Members of an organised group of travelling show people or circus people (whether or not travelling together as such), and
  - (b) All other persons with a cultural tradition of nomadism or of living in a mobile home.
- This definition is sufficiently broad so that not only groups such as Romani Gypsies and Irish Travellers are included but also covers those other groups that follow a nomadic life style such as Travelling Showpeople and New Travellers.
- It is also broad enough to cover those who no longer pursue a nomadic lifestyle and live in bricks and mortar accommodation but due to a cultural aversion would like to return to living in a mobile home if sites became available in the future.

- 2.3.2 Further information is available from the Welsh Government's Guidance for undertaking Gypsy and Traveller Accommodation Assessments.

<https://gov.wales/sites/default/files/publications/2019-03/undertaking-gypsy-and-traveller-accommodation-assessments.pdf>

2.3.3 Refer to Appendix 5 for a description of all other key terms and concepts used within Assessment.

### **3.0 Previous Assessment Findings and Analysis of Existing Data:**

3.0.1 The Council has conducted two previous assessments the first in 2009 and the second in 2015.

3.0.2 The Council commissioned Roger Tym & Partners and Opinion Research Services to provide a Gypsy and Traveller Accommodation Needs and Sites Study in 2009. The study concluded that no additional needs were identified other than those needs known to the Council through an existing private site (one pitch) and a planning application for four pitches that was initially refused but was subsequently granted planning permission on appeal for a revised scheme comprising of two pitches.

3.0.3 Also, given that no other specific need was identified, the study concluded that no other new provision needed to be found through LDP site allocations and that proposals for additional sites could be considered through the LDP criteria based policy H8 Gypsy and Traveller and Showpeople Sites.

3.0.4 The second assessment undertaken 2015 was completed in house. It concluded that:

- There was an identified need for eight pitches to 2021, based on overcrowding, unauthorised occupation and the likelihood of cultural aversion to conventional housing
- An amendment of a lifetime occupation condition attached to the planning permission granted for an existing private site would address one of the unmet need for eight pitches.
- There was not an identified need for a transit site due to the low number of unauthorised encampments in the County (paragraphs 2.18 and 5.20);
- There was not an identified need for a travelling Showpeople yard.

### **3.1 Analysis of Existing Data - Population Data:**

3.1.1 The number of households in Monmouthshire describing themselves as being of Gypsy & Irish Traveller ethnicity is very low. The 2011 census shows that six households identified themselves as Gypsy and Irish Traveller, 0.006% of the population.

3.1.2 It is argued that this figure under-represents the true number of households in Monmouthshire as the census relies on individuals self-classifying their ethnicity. Nationally, there is recognition that there is a reluctance within the Gypsy and Traveller community for households to reveal their ethnicity for fear of hostility or racially abuse behaviour directed at them.

3.1.3 The 2015 Assessment identified eleven households living in Monmouthshire who described themselves as being of Gypsy and Traveller ethnicity, an increase of almost 84% on the 2011 census figure.

### **3.2 Unauthorised Encampments and Current Accommodation Provision:**

3.2.1 A key data source relating to Gypsy and Traveller communities is the All Caravan Count System which is a web-based data collection tool. The system requires Local Authorities to provide details of all Gypsy and Traveller sites in their area, including unauthorised

encampments as they occur. This supersedes the previous caravan count method, which was a count of caravans rather than households. In addition, because the previous count method took place on a designated date it did not record any unauthorised encampments outside this date.

3.2.2 There have been sixteen unauthorised encampments on Council owed land by the travelling community when travelling through the County between the years 2013 - 2020. The following graphs show the number of occurrences by month and year (figure 1) and the total number of caravans per year (figure 2).

Figure 1: Unauthorised Encampments – Number of Occurrences by Month and Year

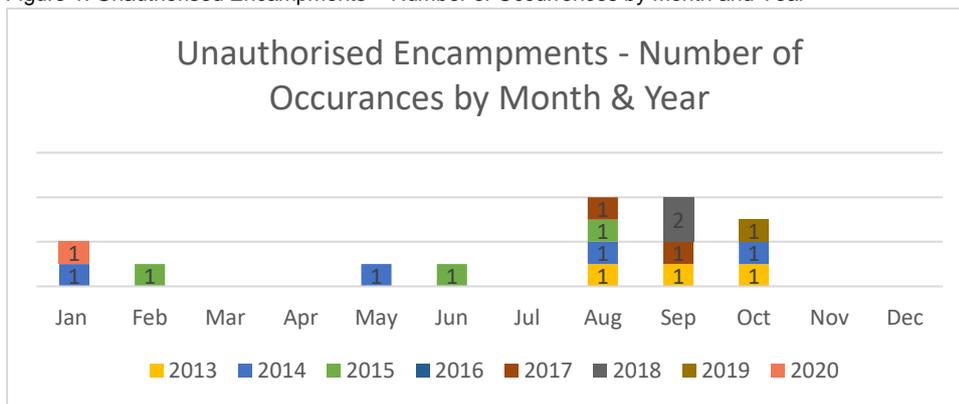
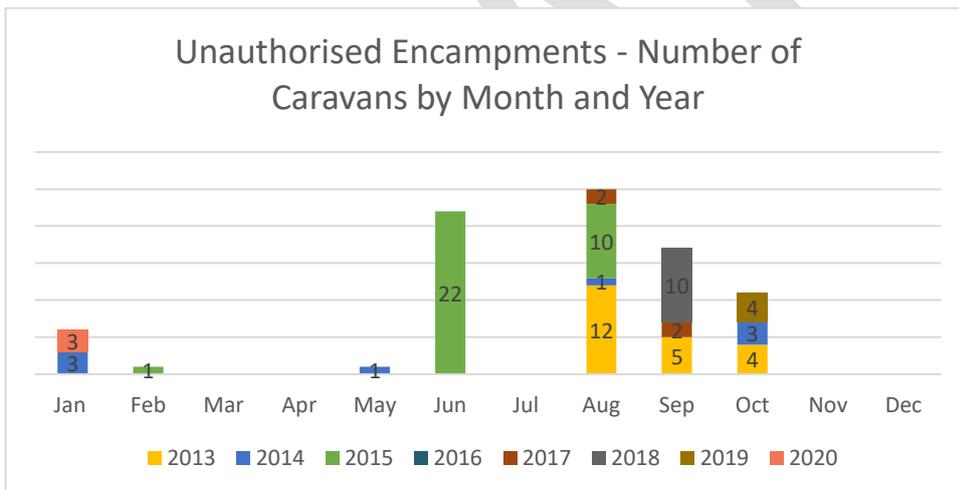


Figure 2: Unauthorised Encampments – Number of Caravans by Month and Year



\* Incomplete data for May & August 2014. This figure is a nominal and is likely to be a under estimation of the true figure.

3.2.3. It is evident from the above graphs that in comparison with other authorities Monmouthshire has a very low Gypsy and Traveller population.

3.2.4 Even though the frequency and number of caravans is low, evidence from the GTAA questionnaire and from discussions with families that have stopped in Monmouthshire suggests there and is a need for a transit / temporary stopping site along the M4 corridor or on a main route going North /South through the County.

3.2.5 Monmouthshire currently has no local authority run sites, either residential or transit.

3.2.6 At March 2020, Monmouthshire has three authorised privately owned sites.

3.2.7 There have been three planning applications since the previous GTAA in 2015 on land owned and occupied by Gypsy and Traveller households. One application has been approved. The other two applications were unsuccessful and enforcement notices served on the households to vacate the land. At the time of writing, both unsuccessful applications were going through the appeals procedure.

3.2.8 At the time of writing there are no temporary planning permissions in place.

## **4.0 Methodology**

### **4.0.1 Project Steering Group**

4.02 In 2016, a project steering group had the responsibility of taking ownership of the Assessment.

4.03 Its key responsibilities were to:

- Identify other relevant agencies who should be asked to participate in the steering group
- To positively promote the Assessment and encourage participation
- Provide local knowledge;
- Help to identify households living within the community
- Publicise the assessment study within their own fields and to households within the respective networks
- To help raise awareness of the Gypsy & Traveller culture and the potential barriers typically experienced
- To help scrutinise and provide feedback on the results:
- To sign off the report to be submitted to Welsh Government.

4.04 The group consisted of representations from the following agencies:

- MCC Elected Members
- SE Wales Regional Equality Council
- Equalities Officer (MCC)
- Adult Social Services (MCC)
- Rural Programmes Manager (MCC)
- Specialist Environmental Health Officer (MCC)
- Monmouthshire Housing Association
- Melin Homes
- Planning Policy Department (MCC)
- Housing Options Team (MCC)
- Children's Services - Safe Guarding in Education (MCC)
- Principal Inclusion Officer - Children and Young People (MCC)
- Deputy Head of Gwent Education Minority Ethnic Service (GEMS)
- Senior Commissioning Officer, Supporting People (MCC)
- Housing & Communities Manager (MCC)
- Project Officer, Monmouthshire Voices
- Waste & Street Services (MCC)
- Regional Community Cohesion Co-ordinator East Gwent

- Gwalia
- Public Health Wales
- Police
- Member of the local Gypsy & Traveller community (x 4)
- Officer from adjoining local authorities.

4.0.5 Members of the Steering Group provided information of known Gypsy & Travellers and where applicable, informed households that the Assessment was being conducted and invited households to participate.

#### 4.1. Study Methodology:

4.1.1 As per the Guidance, the completion of the questionnaire was to be by face-to-face interviews. However, in one instance an advocate for a family, who were out of County at the time the interviewing process occurred, completed the questionnaire.

4.1.2 The interviewing of households that agreed to take part in questionnaire took place during October to December 2019.

4.1.3 Due consideration was given to the engagement checklist contained in the WG Guidance document. Table 1 sets out the Guidance checklist and provides comments concerning the Council's application of the checklist. This has to be considered within the context that the Council does not have any local authority run sites in the County:

Table 1: Welsh Government Checklist

1.	<p><b>Visit every Gypsy and Traveller household identified through the data analysis process up to 3 times, if necessary.</b></p> <ul style="list-style-type: none"> <li>• The Council was unable to engage with three household despite repeated visits and leaving promotional material, letters and emails.</li> </ul>
2.	<p><b>Publish details of the GTAA process</b>, including contact details to allow Community members to request an interview, on the Local Authority website, Travellers' Times.</p> <p>The following methods were used to promote MCC's undertaking of the assessment.</p> <ul style="list-style-type: none"> <li>• Promotional Flyer that was used in the following ways <ul style="list-style-type: none"> <li>o Press release</li> <li>o Council web site and social media platforms</li> <li>o Traveller Times &amp; Showpeople Guild web site and social media platforms</li> <li>o Travelling Ahead web site and social media platforms</li> <li>o RSL Web sites</li> </ul> </li> </ul>
3.	<p><b>Consult relevant community support organisations.</b></p> <ul style="list-style-type: none"> <li>• The Council engaged with Travelling Ahead – A Welsh project working with young people and families from Gypsy, Roma and Traveller communities.</li> </ul>

4.	<p><b>Develop a Local Authority waiting list for both pitches and housing, which is accessible and communicated to community members.</b></p> <ul style="list-style-type: none"> <li>Households who engaged in the process were given the opportunity to apply to the Council's Housing Register and the Gypsy and Traveller pitch waiting list.</li> </ul>
5.	<p><b>Endeavour to include Gypsies and Travellers on the GTAA project steering group.</b></p> <ul style="list-style-type: none"> <li>Due to the low numbers of Gypsy and Traveller and Showpeople households in Monmouthshire we were able to discuss directly with individual households outside the formal mechanism of the Steering Group.</li> </ul>
6.	<p><b>Ensure contact details provided to the Local Authority by community members through the survey process are followed up and needs assessed.</b></p> <ul style="list-style-type: none"> <li>All interviews provided the opportunity for other community members to be interviewed through the process.</li> </ul>
7.	<p><b>Consider holding on-site (or nearby) GTAA information events to explain why community members should participate and encourage site residents to bring others who may not be known to the Local Authority.</b></p> <ul style="list-style-type: none"> <li>This wasn't considered appropriate for Monmouthshire due to there being no Council managed sites the County and the low number of Gypsy, Traveller and Showpeople households.</li> </ul>

4.1.4 Raising awareness of the survey internally within the Council and externally has been a priority of the methodology. The following range of mechanisms has been utilised to communicate the implementation of the assessment:

- Press release October 2019;
- The distribution of a Monmouthshire County Council flyer to Gypsy & Traveller households identified through the Steering Group;
- Assessment details published on the Council's website and the social media outlets of the Traveller Times, Travelling Ahead and Showman's Guild.
- Travelling Ahead provided an awareness briefing session to members on the 27<sup>th</sup> November 2019.
- The Assessment was considered and scrutinised by the Council's Adult Select Committee on 10<sup>th</sup> December 2020;
- The Assessment Report was adopted by Cabinet on ??? 2021.

## 5.0. Survey Findings:

### 5.0.1 Households Interviews

5.0.2 The Identification of Gypsy, Traveller and Showpeople households came through the following means and identified thirteen households.

- The housing register.
- From members of the steering group.
- Existing households known to the Council.

5.0.3 Officers from the Council contacted nine of the households of which

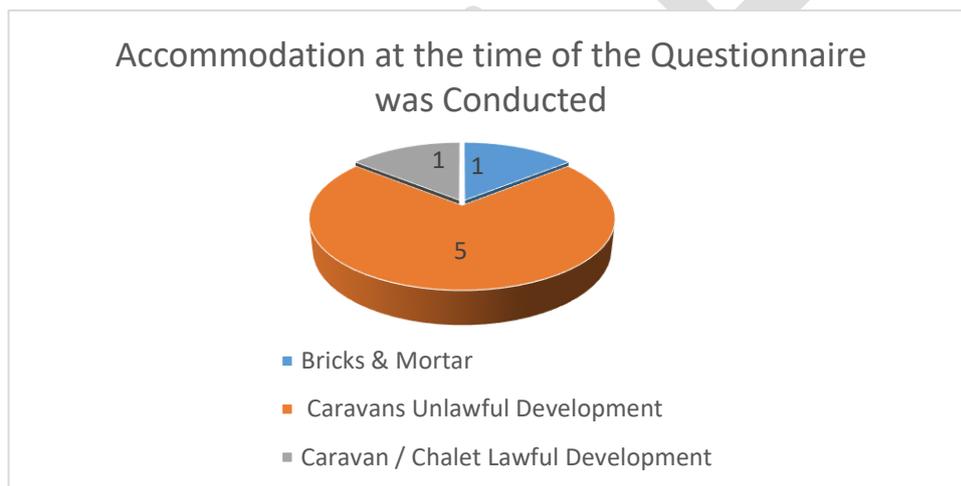
- Seven households completed the questionnaire
- Two households declined to take part in the process

5.0.4 Despite numerous efforts, Council officers were not able to make contact with four of the identified households. However details of the household composition was garnered from their planning application.

### 5.1 Current Accommodation:

5.1.1 The following chart show the type of accommodation the respondent households were residing at the time the questionnaire was completed.

Figure 3: -- Accommodation at the Time of Questionnaire



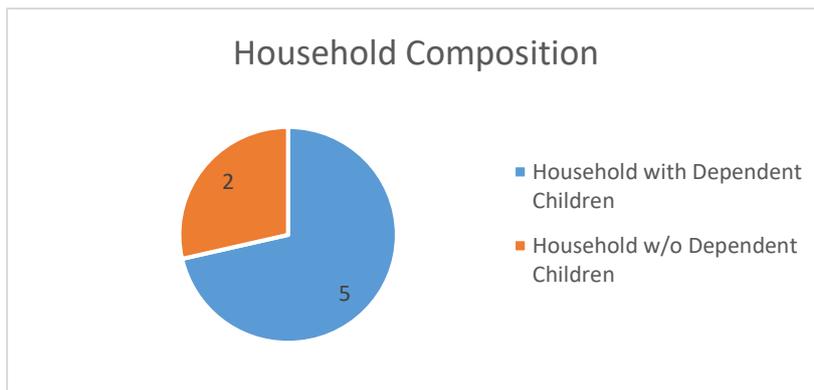
5.1.2 The number of Gypsy, Traveller and Showpeople households that took part in the 2019 Assessment is down on the 2015 figure. This is attributable to the time of the year the assessment took place. For the 2015 assessment, the completion of the questionnaire took place during the summer months when Gypsy & Traveller households visit the County for a religious festival.

5.1.3 For the 2019 assessment, the interviews took place during late autumn when traditionally Gypsy & Traveller households do not travel.

### 5.2. Household Composition Profile:

5.2.1 Five out of the seven respondent households have dependent children. See figure 5, below for a detailed breakdown.

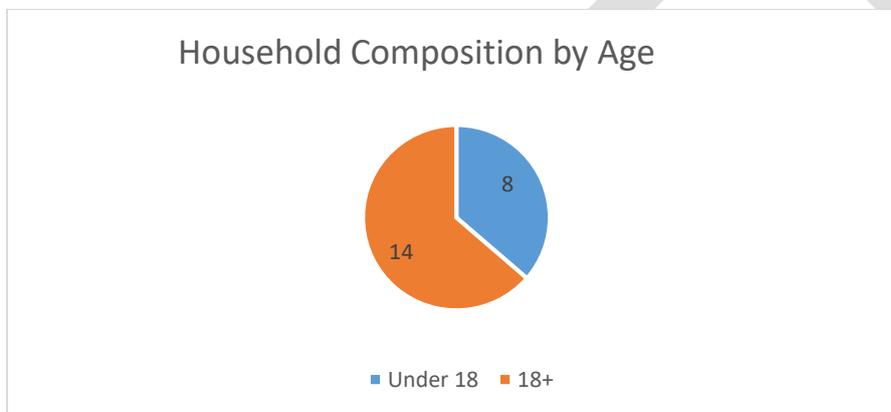
**Figure 4: Household Composition**



### 5.3. Household Age Profile:

5.3.1 The chart below represents the age category of household members.

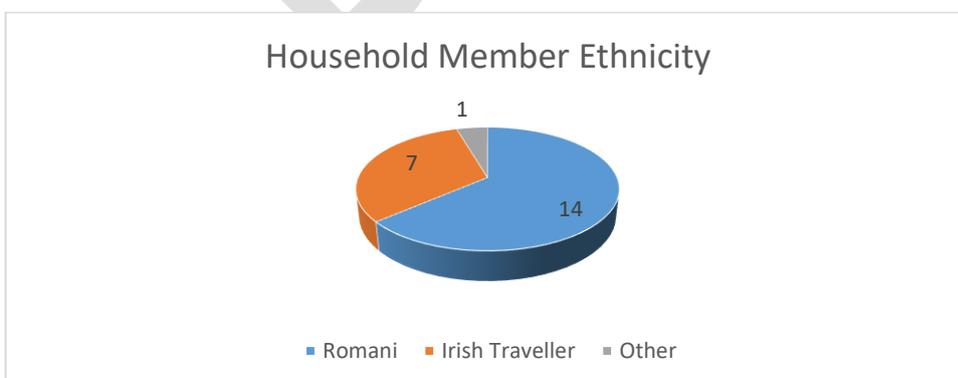
Figure 5: Household composition by Age



### 5.4 Household Ethnicity Profile:

5.4.1. Fourteen household members identified their ethnicity as Romani, while seven household members identified themselves as Irish Traveller. One household member identified themselves as 'other'.

Figure 6: Household Ethnicity



### 5.5 Suitability of Current Accommodation:

5.5.1 Six of the seven household respondents when asked if they were happy with their current accommodation, responded positively despite the fact that four of the households were under threat of eviction from their unlawful encampment.

Figure 7 – Suitability of Current Accommodation



5.5.2. One household responded negatively because they were living in bricks and mortar accommodation when their preference was to live in a caravan.

## 6.0 Assessing Accommodation Needs:

### 6.0.1 Understanding 'Need' and 'Preferences'

6.0.2. When it comes to pitch provision and choice, Gypsy and Traveller households are limited as to where they can choose to live. In contrast, non-travelling households have much wider choices due to the availability of social housing estates in all local authorities, whereas Gypsy and Traveller households encounter local authorities, where there are no authorised public sites at all.

6.0.3. As a result, Gypsy and Traveller households have no choice but to occupy sites in nearby local authorities where sites are available even though their 'preference' or 'need' is to live in the neighbouring local authority.

6.0.4 This can deprive a local Gypsy and Traveller household of a pitch. It can also mean that Gypsy and Traveller households move into bricks and mortar accommodation in their preferred local authority area. For some Gypsy and Traveller households this is an acceptable option choice but for others it is a non-acceptable option choice because there are no other suitable alternative options available to them.

6.0.5. This presents a challenge to a local authority when undertaking the assessments as it will want to distinguish between a need and a preference, this is because it is 'needs' that determine whether the local authority has to provide sites and pitches.

6.0.6. The definition of 'need' for the purpose of the assessment will take the following form:

- Households that have no authorised site on which to reside
- Households that are overcrowded
- Households that have a cultural aversion to living in conventional bricks and mortar housing.

- 6.0.7 Cultural aversion is a condition that many Gypsy and Traveller households in conventional housing may experience. For many Gypsy and Traveller households living in conventional housing can have a detrimental effect on the health and wellbeing of a household member.
- 6.0.8. However, there is not an expectation for local authorities to do an in-depth investigation into an individual's assertion that they are suffering cultural aversion for purposes of an assessment; any in depth investigation should be part of the authority's homelessness or pitch allocation policies. This is because the assessment process aims to give a broad estimation of the likelihood of need in their area. (Paragraph 176 – 178 of the WG Guidance).

## **7.0 Assessing Accommodation Needs in Monmouthshire:**

- 7.0.1 This section focuses on the pitch provision need for Monmouthshire County Council for a short-term period of 5 years and the full Replacement Local Development Plan period to 2033. This includes both current unmet need and future need. This period allows for robust forecasts for future provision, based upon the evidence contained within this study and from secondary data sources.
- 7.0.2 The evidence is a combination of information sources including household interviews, planning records, Steering Group members, and other stakeholders. In many cases, the survey data is not used in isolation, but instead is used to validate information from planning records or other sources.
- 7.0.3 This section concentrates on both the total additional provision of need and whether there is a need for any transit sites and/or emergency stopping place provision.
- 7.0.4 Welsh Government GTAA Guidance requires an assessment of current and future pitch needs and sets out a prescribed framework for undertaking a GTAA assessment. This GTAA follows the proscribed framework contained in Guidance.
- 7.0.5 As with any assessment of housing need the underlying calculation can be broken down into a relatively small number of factors. In this case, the key issue for residential pitches is to compare the supply that is available for occupation with the current and future needs of the households. The key factors in each of these elements are set out in the sections below.

## **8.0 Need for Gypsies and Traveller Pitches:**

- 8.0.1 The need for Gypsy and Traveller pitches is made up of the following components:

### **1) Current Residential Supply**

- Occupied local authority pitches.
- Occupied authorised private pitches.
- Vacant local authority pitches and available private pitches.
- Vacant pitches expected in the near future.
- New local authority pitches and private pitches with planning permission.

### **2) Current Residential Demand**

- Households on unauthorised encampments.
- Households on unauthorised developments.

- Concealed /over-crowded/doubled-up households<sup>4</sup>.
- Conventional housing – movement from bricks and mortar<sup>5</sup>.
- New households to arrive from waiting lists/in-migration.

### 3) Future Demand

- Total future demand is a result of the formation of new households during the study period. Information from the interviews provides details of the gross number of new households expected to form within the first 5 years of the study (although it is important to *net* this off against identifiable supply during the first 5 years of the study). The use of demographic evidence from the interviews informs the *net* compound household formation rate used for years 6-13 of the study.

## 8.1 Current Authorised Residential Supply:

- 8.1.1 To assess the current Gypsy and Traveller provision it is important to understand the total number of existing pitches and their planning status. There are no authorised public sites and three small private sites in Monmouthshire. There is no public or private transit provision and there are no Travelling Showpeople yards.

Table 2: Total number of authorised sites in Monmouthshire as at March 2020

Category	Sites	Pitches	Occupied Pitches
Private sites with permanent planning permission	3	9	3
Private sites with temporary planning permission	0	0	0
Public sites (Council and Registered Providers)	0	0	0
Public transit provision	0	0	0
Private transit provision	0	0	0

- 8.1.2 The next stage of the process is to assess how much space is, or will become, available on existing sites in order to determine the supply of available pitches. The main ways of finding this is through:

- **Current vacant pitches** – There are no vacant pitches in Monmouthshire.
- **Pitches expected to become vacant** – There are no public sites in Monmouthshire.
- **Pitches currently with planning permission** – There are 6 unimplemented pitches with planning permission in Monmouthshire. These are at Craig-yr-Leir, Llangeview (5) and at Sunnybank, Crick (1)

- 8.1.3 This gives a figure for **overall supply of 6 pitches**.

## 8.2 Current Residential Demand:

<sup>4</sup> Following the guidance set out in Paragraphs 195-201 of the GTAA Guidance

<sup>5</sup> Following the guidance set out in Paragraphs 172-183 of the GTAA Guidance

8.2.1 The next stage of the process is to assess current need and determine how many households are currently seeking pitches in the area.

### **8.3 Current Unauthorised and Tolerated Sites:**

8.3.1 A problem with many Gypsy and Traveller Accommodation Assessments is that they often count all caravans on unauthorised developments and encampments as requiring a pitch in the area, when in practice; many households are simply visiting or passing through. Some households may be on tolerated sites for planning purposes. In order to remedy this, the approach taken for this GTAA is

- To treat need as only those households on unauthorised and tolerated sites that are already in the planning system (i.e. sites/pitches for which a planning application has been made or is likely to be made).
- Those otherwise known to the Council as being resident in the area, or
- Those identified through the household survey as requiring pitches.

8.3.2 The study has identified that there are no sites with temporary planning permission; no sites tolerated sites for planning purposes and two unauthorised sites in Monmouthshire. These are at Land Adjacent to Ty Coedwr, Llanvetherine (1 pitch) and at Land opposite Llancayo House, Llancayo (4 pitches). Both sites have had planning applications refused and appeals dismissed, with those decisions being challenged through the Courts as at March 2020

### **8.4 Over-Crowded Pitches:**

8.4.1 The site interviews sought to identify concealed or doubled-up households or single adults on authorised and unauthorised sites that require a pitch immediately.

8.4.2 A concealed household or adult is one living in a multi-family household in addition to the primary family. Examples can include, a young couple living in a mobile home with parents, who need their own separate family accommodation, but are unable to obtain it because of a lack of space on public or private sites; or a single family member or individual living within an existing family unit in need of separate accommodation.

8.4.3 A doubled-up family or single adult is one living in a separate caravan (usually a touring caravan) on a site or pitch where there are more than the permitted number of caravans.

8.4.4 The information collected during the site interviews identified two concealed or doubled-up adults on two sites in Monmouthshire – one at The Old Telephone Exchange and one at Land opposite Llancayo House.

### **8.5 Conventional Housing:**

8.5.1 An issue frequently highlighted when identifying the number of Gypsy and Traveller households in bricks and mortar is their accuracy. The 2011 UK Census of Population identified six households in Monmouthshire that were living in a house or bungalow.

8.5.2 As noted earlier, the assessment sought to identify Gypsies and Travellers living in bricks and mortar to interview. This process resulted in an interview with one household living in bricks and mortar in Monmouthshire having planning consent for a new site at Sunnybank, Crick. The interview identified a concealed adult living in the household, however

accommodating this concealed adult would occur through planning permission if implemented.

## **8.6 New Households to Arrive:**

8.6.1 There is no public site in Monmouthshire. The assessment has also considered in-migration (households requiring accommodation who move into the study area from outside) and out-migration (households moving away from the study area). Site surveys typically identify only small numbers of in-migrant and out-migrant households and the data is not normally robust enough to extrapolate long-term trends. At the national level, there is zero net migration of Gypsies and Travellers across the UK, but this assessment has taken into account local migration effects based on the best local evidence available.

8.6.2 On considering the evidence drawn from household interviews and the desk-based research in Monmouthshire, the GTAA has identified that the proposed households that are seeking to occupy the five unimplemented pitches at Craig-yr-Leir, Llangeview are all currently living on a public site in Cardiff. There were no households identified that were seeking to move away from Monmouthshire.

8.6.3 Beyond this, rather than identify any other in-migrant households seeking to develop new sites in Monmouthshire, the GTAA recommends that the Council continue to follow its existing criteria-based planning policies for any potential new windfall sites that do arise. In addition, none of the other local authorities within Wales has contacted to advise of any Gypsy and Traveller households that may seek to reside or resort to Monmouthshire.

## **8.7 Additional Pitch Provision: Future Need:**

8.7.1 The next stage of the process is to assess future need and determine how many households are likely to be seeking pitches in the area in the future during the first 5 years of the assessment and for the longer 13-year Replacement Local Development Plan period to 2033.

## **8.8 Population and Household Growth:**

8.8.1 Nationally, there is a common assumption of household formation and growth rate of 3.00% net per annum. This has been widely used in local Gypsy and Traveller Accommodation Assessments even though there is no statistical evidence of households growing so quickly. The result has been to inflate both national and local requirements for additional pitches unrealistically. In this context, ORS has prepared a *Technical Note on Household Formation and Growth Rates*. The main conclusions are set out in the following paragraphs. For the full Technical Note see Appendix 6.

8.8.2 Those seeking to provide evidence of high annual net household growth rates for Gypsies and Travellers have sometimes sought to rely on increases in the number of caravans, as reflected in the Caravan Counts. However, Caravan Count Data is unreliable and erratic – so the only proper way to project future population and household growth is through detailed demographic analysis.

8.8.3 The research undertaken by ORS has identified that in fact, the growth in the national Gypsy and Traveller population may be as low as 1.50% per annum – much less than the 3.00% per annum often assumed, but still greater than in the settled community. Even using extreme

and unrealistic assumptions, it is hard to find evidence that net Gypsy and Traveller population and household growth rates are above 2.00% per annum nationally.

- 8.8.4 The site and bricks and mortar interviews identified **1 new household** as a result of family growth over the first 5 years of the assessment – 1 teenager living on a private site and no pitch turnover.
- 8.8.5 Normally, the household growth rate used for an assessment of future needs is informed by local demographic evidence which is used to adjust the national growth rate of 1.50% up or down based on the proportion of those aged under 18 (by travelling status).
- 8.8.6 However, in Monmouthshire there were only 12 children identified aged under 18 and in these circumstances it is not appropriate to apply a percentage rate for new household formation but to take a more pragmatic approach on likely new household formation based on the age and gender of the children identified in the Assessment. This approach assumes that 50% of likely households to form will stay in the area. Previous evidence from other GTAA's that ORS have completed across England and Wales over the years have informed this approach.
- 8.8.7 This has identified new household formation of two for the period from 2025-2029 and new household formation of two for the period 2030-2033.

## 9.0 Overall Need for Monmouthshire:

- 9.0.1 After examining each element of the calculation for the need, the next stage of the assessment is to balance current and future need against supply to provide an overall need for Monmouthshire following the approach that is set out in the Welsh Government GTAA Guidance.
- 9.0.2 The Welsh Government Guidance requires two assessments of need – for the first 5 years of the plan period and for the full 13-year Replacement Local Development Plan period. Following this approach, the expected need in Monmouthshire for the first 5 years is for **nine (9) pitches**. The expected need for the remainder of the Replacement Local Development Plan period (years 6-13) is for **four (4) pitches**. This equates to **thirteen (13) pitches** for the 13-year Replacement Local Development Plan period. This will address the needs of all identifiable Gypsy and Traveller households from the expected growth in household numbers due to new household formation.
- 9.0.3 The table below sets out how this is calculated.

Table 3: Additional Pitches Needed in Monmouthshire from 2020-2033

Current Residential Supply	Number of Pitches	Notes
<b>A. Occupied Local Authority Pitches</b>	0	No public sites in Monmouthshire
<b>B. Occupied authorised private pitches/tolerated pitches</b>	3	3 occupied private pitches (Old Telephone Exchange (1) and Llangeview (2) Para 8.1.1)
<b>Total</b>	<b>3</b>	
Planned Residential Supply	Number of Pitches	Notes
<b>C. Vacant Local Authority pitches and available vacant pitches</b>	0	No public sites

<b>D. Pitches expected to become vacant in near future</b>	0	No public sites
<b>E. New Local Authority and private pitches with planning permission</b>	6	6 unimplemented pitches on 2 private sites (Crick (1) and Llangeview (5) Para 8.1.2)
<b>Total</b>	<b>6</b>	
<b>Current Residential Demand</b>	<b>Pitch Demand</b>	<b>Notes</b>
<b>F. Unauthorised encampments</b>	0	No encampments
<b>G. Unauthorised development</b>	5	5 unauthorised pitches on 2 private sites (Llancayo (4) and Llanvetherine (1) Para 8.3.2)
<b>H. Overcrowded pitches/Unsuitable accommodation</b>	2	2 doubled-up adults - 1 on a private site (Old Telephone Exchange) and 1 on an unauthorised site (Llancayo). (Para 8.4.4)
<b>I. Conventional housing</b>	2	1 household and 1 adult child in bricks and mortar <sup>6</sup> (Para 8.5.2)
<b>J. New households to arrive</b>	5	Identified in-migration for 5 households <sup>7</sup> (Para 8.6.2)
<b>Total</b>	<b>14</b>	
<b>Current Households</b>	<b>Future Households (at year 5)</b>	<b>Future Households (years 6 to 13)</b>
<b>K. 17</b>	<b>18</b>	<b>22</b>
<b>L. Additional household pitch need<sup>8</sup></b>	<b>1</b>	<b>4</b>
<b>Unmet Need</b>	<b>Need Arising</b>	<b>Need Accommodated</b>
<b>M. Current residential demand (Rows F to J)</b>	<b>14</b>	
<b>N. Future residential demand (year 5)</b>	<b>1</b>	
<b>O. Future residential demand (years 6 to 15)</b>	<b>4</b>	
<b>P. Planned residential supply (Row E)</b>		<b>6</b>
<b>Q. Unmet need (5 year) (Rows M+N-P)</b>	<b>9</b>	
<b>R. Unmet need (Replacement Local Development Plan period) (Rows M+N+O-P)</b>	<b>13</b>	

## 10. Transit/Emergency Stopping Site Provision:

10.0.1 Transit sites serve a specific function of meeting the needs of Gypsy and Traveller households who are visiting an area or who are passing through. A transit site typically has a restriction on the length of stay of around 13 weeks and can have a range of facilities such as water supply, electricity and amenity blocks. An alternative to a transit site is an Emergency Stopping Place. These also have restrictions on the length of time for which a Traveller can stay on it but have more limited facilities with typically only a source of water and chemical toilets provided. Some Local Authorities also operate an accepted or negotiated stopping

<sup>6</sup> These households are seeking to move to one of the unimplemented pitches referred to in line E.

<sup>7</sup> These households are seeking to move 5 of the unimplemented pitches referred to in line E.

<sup>8</sup> 1 teenager in years 0-5 and new household formation of 4 in years 6-13.

policy where households are provided with access to lighting, drinking water, refuse collection and hiring of portable toilets at a cost to the Travellers.

- 10.0.2 The Criminal Justice and Public Order Act 1994 is particularly important with regard to the issue of Gypsy and Traveller transit site provision. Section 62A of the Act allows the Police to direct trespassers to remove themselves, their vehicles and their property from any land where a suitable pitch on a relevant caravan site is available within the same Local Authority area (or within the county in two-tier Local Authority areas). A suitable pitch on a relevant caravan site is one which is situated in the same Local Authority area as the land on which the trespass has occurred, and which is managed by a Local Authority, a Registered Provider or other person or body as specified by order by the Secretary of State. Case law has confirmed that a suitable pitch must be somewhere where the household can occupy their caravan. Bricks and mortar housing is not a suitable alternative to a pitch.
- 10.0.3 Therefore, transit arrangements provide a place for households in transit to an area and a mechanism for greater enforcement action against inappropriate unauthorised encampments.
- 10.0.4 Analysis of the frequency of unlawful stopping in paragraph 3.2.4 above, show instances of unauthorised caravans on two unauthorised sites. In addition, discussions with Officers from the Council have identified that there a few instances of unauthorised encampments on land not owned by Travellers and these are from families passing through the county.
- 10.0.5 As such, the Assessment recommends that there is not a need for the Council to provide a permanent transit site in Monmouthshire. However, the Council should continue to monitor the number of unauthorised encampments and continue to use their current approaches when dealing with encampments. The Council could also consider the use of short-term toleration or Negotiated Stopping Arrangements to deal with short-term encampments.

## **11. Need for Travelling Showpeople Plots:**

- 11.0.1 One Household identified as Travelling Showpeople but declined to take part in the Assessment therefore there is no current or future need for a “plot” in Monmouthshire.

## **12. Conclusions:**

- 12.0.1 The key conclusions that came out of the assessment process can be summarised as follows:
- The assessment finds that there is an unmet need of nine pitches under the assessment period 2020 to 2025.
  - There is a further unmet need of four pitches over the remaining length of the Replacement Local Development Plan (2026 – 2033).
  - There is not a need for a permanent transit / stopping pitch.
  - The Council should consider the use of short-term toleration or negotiated stopping arrangements to deal with short-term encampments.

## **13. Next Steps:**

- 13.0.1 The Council seek to make provision for appropriate sites to meet identified unmet need by working proactively with the Gypsy and Traveller households to establish their preference for site provision, that is, private or public sites.

- 13.0.2 The findings of the GTAA process suggest there is an aspiration within much of the Gypsy Traveller community for private site provision in Monmouthshire. The Council will therefore work with and support Gypsy Traveller households to identify and develop viable private sites to address the identified unmet need in accordance with the LDP policy framework. To date, no candidate sites have been submitted by the Gypsy and Traveller community for pitches to be allocated in the Replacement LDP.
- 13.0.3 The identification and allocation of local authority Gypsy Traveller site(s) would need to be considered through the LDP review process, should the need for a public site become apparent because the Community's preference for private sites cannot be achieved.
- 13.0.4 The identified need for temporary stopping places will be considered on a regional basis as part of the emerging Strategic Development Plan (SDP) process.

DRAFT

*Housing (Wales) Act 2014 (anaw 7) 72***PART 3****GYPSIES AND TRAVELLERS***Meeting accommodation needs***101 Assessment of accommodation needs**

- (1) A local housing authority must, in each review period, carry out an assessment of the accommodation needs of Gypsies and Travellers residing in or resorting to its area.
- (2) In carrying out an assessment under subsection (1) a local housing authority must consult such persons as it considers appropriate.
- (3) In subsection (1), “review period” means—
  - (a) The period of 1 year beginning with the coming into force of this section, and
  - (b) Each subsequent period of 5 years.
- (4) The Welsh Ministers may amend subsection (3) (b) by order.

**102 Report following assessment**

- (1) After carrying out an assessment a local housing authority must prepare a report which—
  - (a) Details how the assessment was carried out;
  - (b) contains a summary of—
    - (i) the consultation it carried out in connection with the assessment, and
    - (ii) the responses (if any) it received to that consultation;
  - (c) details the accommodation needs identified by the assessment.
- (2) A local housing authority must submit the report to the Welsh Ministers for approval of the authority’s assessment.
- (3) The Welsh Ministers may—
  - (a) approve the assessment as submitted;
  - (b) approve the assessment with modifications;
  - (c) reject the assessment.
- (4) If the Welsh Ministers reject the assessment, the local housing authority must—
  - (a) revise and resubmit its assessment for approval by the Welsh Ministers under subsection (3), or
  - (b) conduct another assessment (in which case section 101(2) and this section apply again, as if the assessment were carried out under section 101(1)).
- (5) A local housing authority must publish an assessment approved by the Welsh Ministers under this section.

**103 Duty to meet assessed needs**

- (1) If a local housing authority’s approved assessment identifies needs within the authority’s area with respect to the provision of sites on which mobile homes may be stationed the authority must exercise its powers in section 56 of the Mobile Homes (Wales) Act 2013 (power of authorities to provide sites for mobile homes) so far as may be necessary to meet those needs.
- (2) But subsection (1) does not require a local housing authority to provide, in or in connection with sites for the stationing of mobile homes, working space and facilities for the carrying on of activities normally carried out by Gypsies and Travellers.
- (3) The reference in subsection (1) to an authority’s approved assessment is a reference to the authority’s most recent assessment of accommodation needs approved by the Welsh Ministers under section 102(3).

**104 Failure to comply with duty under section 103**

- (1) If the Welsh Ministers are satisfied that a local housing authority has failed to comply with the duty imposed by section 103 they may direct the authority to exercise its powers under section 56 of the Mobile Homes (Wales) Act 2013 so far as may be necessary to meet the needs identified in the authority’s approved assessment.
- (2) Before giving a direction the Welsh Ministers must consult the local housing authority to which the direction would relate.
- (3) A local housing authority must comply with a direction given to it.
- (4) A direction given under this section—

- (a) must be in writing;
- (b) may be varied or revoked by a subsequent direction;
- (c) is enforceable by mandatory order on application by, or on behalf of, the Welsh Ministers.

**105 Provision of information upon request**

- (1) A local housing authority must provide the Welsh Ministers with such information (and at such times) as they may require in connection with the exercise of their functions under this Part.
- (2) The Welsh Ministers may exercise their powers under this section generally or in relation to a particular case.

**106 Guidance**

- (1) In exercising its functions under this Part, a local housing authority must have regard to any guidance given by the Welsh Ministers.
- (2) The Welsh Ministers may—
  - (a) give guidance either generally or to specified descriptions of authorities;
  - (b) revise the guidance by giving further guidance under this section;
  - (c) withdraw the guidance by giving further guidance under this section or by notice.
- (3) The Welsh Ministers must publish any guidance or notice under this section.

**107 Duties in relation to housing strategies**

- (1) This section applies where a local housing authority is required under section 87 of the Local Government Act 2003 to have a strategy in respect of meeting the accommodation needs of Gypsies and Travellers residing in or resorting to its area.
- (2) The local housing authority must—
  - (a) have regard to any guidance given by the Welsh Ministers in preparing its strategy;
  - (b) take the strategy into account in exercising its functions (including functions exercisable other than as a local housing authority).

*General*

**108 Interpretation**

In this Part—

“accommodation needs” (*“anghenion llety”*) includes, but is not limited to, needs with respect to the provision of sites on which mobile homes may be stationed;

“Gypsies and Travellers” (*“Sipsiwn a Theithwyr”*) means—

- (a) persons of a nomadic habit of life, whatever their race or origin, including—
  - (i) persons who, on grounds only of their own or their family’s or dependant’s educational or health needs or old age, have ceased to travel temporarily or permanently, and
  - (ii) members of an organised group of travelling show people or circus people (whether or not travelling together as such), and
- (b) all other persons with a cultural tradition of nomadism or of living in a mobile home;

“mobile home” (*“cartref symudol”*) has the meaning given by section 60 of the Mobile Homes (Wales) Act 2013.

**109 Power to amend definition of Gypsies and Travellers**

- (1) The Welsh Ministers may by order amend the definition of Gypsies and Travellers in section 108 by—
  - (a) adding a description of persons;
  - (b) modifying a description of persons;
  - (c) removing a description of persons.
- (2) An order under this section may also make such amendments of the Mobile Homes (Wales) Act 2013 as the Welsh Ministers consider necessary or appropriate in consequence of a change to the definition mentioned in subsection (1).

**110 Consequential amendments**

Part 2 of Schedule 3 makes consequential amendments relating to this Part.

DRAFT

## Mobile Homes (Wales) Act 2013

### PART 5

#### POWERS OF LOCAL AUTHORITIES

##### 56 Power to provide sites for mobile homes

(1) A local authority may within its area provide sites where mobile homes may be brought, whether for holidays or other temporary purposes or for use as permanent residences, and may manage the sites or lease them to another person.

(2) A local authority has power to do anything appearing to it desirable in connection with the provision of such sites and the things which it has power to do include (but are not limited to)—

(a) acquiring land which is in use as a mobile home site or which has been laid out as a mobile home site,

(b) providing for the use of those occupying mobile home sites any services for their health or convenience, and

(c) providing, in or in connection with sites for the accommodation of Gypsies and Travellers, working space and facilities for the carrying on of activities normally carried on by them.

(3) In exercising its powers under this section a local authority must have regard to any standards specified by the Welsh Ministers under section 10.

(4) Before exercising the power under subsection (1) to provide a site the local authority must consult the fire and rescue authority—

(a) as to measures to be taken for preventing and detecting the outbreak of fire on the site, and

(b) as to the provision and maintenance of means of fighting fire on it.

(5) A local authority must make in respect of sites managed by it, and of any services or facilities provided or made available under this section, such reasonable charges as it may determine.

(6) A local authority may make available the services and facilities provided under this section for persons whether or not they normally reside in its area.

(7) A local authority may, where it appears to it that—

(a) a mobile home site or an additional mobile home site is needed in its area, or

(b) that land which is in use as a mobile home site should in the interests of the users of mobile homes be taken over by the local authority, acquire land, or any interest in land, compulsorily.

(8) The power conferred by subsection (7) is exercisable in any particular case only if the local authority is authorised by the Welsh Ministers to exercise it.

(9) The Acquisition of Land Act 1981 has effect in relation to the acquisition of land, or an interest in land, under subsection (7).

(10) A local authority does not have power under this section to provide mobile homes.

Questionnaire

**SECTION A – YOUR HOME**

**A1 Where do you live now?**

Local Authority (“Council”) residential site	
Council transit site	
Private site with planning permission	
Private site currently without planning permission	
Unauthorised encampment	
Bricks and Mortar – Socially Rented	
Bricks and Mortar – Privately Rented	
Bricks and Mortar – Owner Occupied	

**A2 Are you satisfied with your current accommodation?**

Yes	
No	
Prefer not to say	

If ‘no’ please explain what could be improved:

**A3 Can you tell me why you live here?**

Local connections (family or work)	
No alternative authorised pitch	
Can't find a house to move into	
Health or age reasons	
Prefer houses to caravans	
Other:	

**A4 How long have you lived here?**

Less than 1 month	1–6 months	7 – 12 months	1 - 2 years	2-5 years	Over 5 years

**A5 If you have moved within the last year, was your last home in this Local Authority?**

**YES / NO**

Please give details below:

Type of accommodation	Did it have planning permission?	Which Local Authority was it in?	Why did you leave?

**A6 How long do you think you'll stay here?**

1 or 2 days	3 – 28 days	1 – 3 months	3 months – 2 years	2 – 5 years	Over 5 years	Do not intend to move	Don't know

**A7 Would you stay longer if changes or improvements were made to your current accommodation?**

*(Note: The Local Authority may not be able to make these improvements but understanding the problems with your accommodation may help)*

**YES**

**NO**

Reason	Tick
Repairs needed	
Site made bigger	
Accommodation made safer	
Planning permission granted	
Adaptations needed (please state below)	

Other:

Reason	Tick
Just passing through	
Want authorised pitch in other area	
Want to move into housing	
Relationships broken down	
Prefer living in caravan	

**SECTION B – YOUR FAMILY**

	Relationship to respondent (eg. Spouse, son/daughter etc)	Age	Gender	Romani / Irish Traveller / New Traveller / Showperson / Roma / Other (Self-ascribed)	Are there any reasons why you cannot continue to live in this accommodation? (give details)
Respondent					
Person 2					

Person 3					
----------	--	--	--	--	--

If not living in caravans proceed to B4.

**B2 If living in caravans, are there enough sleeping areas for all residents?**

**YES / NO**

**B3 Is there room on the pitch for additional trailers to prevent overcrowding?**

*(Note: guidance suggests that there should be 6 metre gap between trailers and 3 metre gap to boundaries to be safely accommodated on pitch)*

**YES / NO**

**If yes, how many additional sleeping areas can be added?**

**B4 Would anyone in your family like to join the Local Authority waiting list for pitches or housing?**

**YES / NO**

**Please provide address for application pack to be posted to below:**

*Please state if already on a waiting list and which.*

**SECTION C – YOUR PLANS**

**C1 Are you planning to move into other accommodation?**

Yes	<i>Go to C2</i>
No	<i>Go to D1</i>
Prefer not to say	<i>Go to D1</i>

**C2 Where are you planning to move to?**

Within the Local Authority	
Another Local Authority in Wales – please state which:	
Somewhere else in the UK	

**C3 Why are you planning to move?**

Need more space	
Need different facilities	
Local connection (family or work)	

Need to be closer to services – schools etc (Please give details below)	
Employment opportunities	
Other (Please specify below)	

Services:

Other:

--	--

**C4 What type of accommodation are you planning to move to?**

1. Site	
Council / Social rented	
Private site owned by self	
Private site owned by other	

2. Bricks and Mortar	
Owner / occupied	
Rent from Council / Housing Association	
Rent from private landlord	

**C5 Do you own land in the Local Authority, which you would like to be considered as a possible future site?**

*(Note: Interviewer to explain that there is no guarantee that the site will be allocated or developed but planning officers may contact respondent to discuss their situation and offer support)*

Yes	<b>Give details below</b>
No	<b>Go to C6</b>
Prefer not to say	<b>Go to C6</b>

If you like the Local Authority to discuss these plans with you, provide contact details below:

--

		YES	NO
<b>C6</b>	<b>If you are looking for an authorised pitch, would you live on a site managed by the Local Authority if offered one?</b>		
<b>C7</b>	<b>If an authorised pitch was available in another Local Authority, would you consider moving there? If 'yes', which Local Authorities?</b>		

**SECTION D - FAMILY GROWTH**

**D1 Is anyone in your household likely to want to move to their own home in the next 5 years?**

Yes	<b>Go to D2</b>	
-----	-----------------	--

No	<i>Go to D4</i>	
Don't know	<i>Go to D4</i>	
Prefer not to say	<i>Go to D4</i>	

**D2 Will this be in this Local Authority?**

Yes	<i>Go to D3</i>	
No	<i>Go to D4</i>	
Prefer not to say	<i>Go to D4</i>	

**D3 How many new households will there be and when will these be needed?**

	Type of accommodation (LA site; private site; B&M housing)	No. of people	Now	Within a year	1-2 years	2-5 years
Household 1						
Household 2						
Household 3						
Household 4						

**D4 Do you have family members living outside this area who camp in this Local Authority regularly?**

Yes	<i>Go to D5</i>	
No	<i>Go to E1</i>	
Don't know	<i>Go to E1</i>	
Prefer not to say	<i>Go to E1</i>	

**D5 If they would like to be interviewed about the need for pitches, provide their contact details and Local Authority where they currently live below:**

**SECTION E - TRANSIT SITES**

**E1 Have you camped by the roadside / on an unauthorised encampment / on a transit site in Wales while travelling in the past year?**

*(Prompt: this information is only to be used to understand if more transit sites are needed)*

Yes	<i>Go to E2</i>	
No	<i>Go to E4</i>	
Prefer not to say	<i>Go to E4</i>	

**E2 In which Local Authority areas have you camped?**

Prefer not to say	

**E3 How long would you usually stay in one place whilst travelling?**

1 – 2 days	3 days – 1 week	1 – 2 weeks	2 weeks – 1 month	1 – 3 months

**E4 Do you think there is a need for more transit sites in Wales?**

Yes	<b>Go to E5</b>	
No	<b>Questionnaire ends</b>	
Prefer not to say	<b>Questionnaire ends</b>	

**E5 Where are they needed?**

*(Probe for Local Authorities and specific locations)*

Prefer not to say	

**Questionnaire ends.**

**Local Development Plan, Policy H8, Gypsy, Traveller and Travelling Showpeople Sites****Policy H8 – Gypsy, Traveller and Travelling Showpeople Sites**

Where a need is identified for transit or permanent pitches/ plots for the accommodation needs of Gypsies, Travellers and Travelling Showpeople, they will be permitted provided they:

- a) Would enable the established need to be met at a location that is accessible to schools, shops and health care, by public transport, on foot or by cycle;
- b) Have a safe and convenient access to the highway network and will not cause traffic congestion or safety problems;
- c) Are of a suitable size to allow for the planned number of caravans, amenity blocks, a play area (for children on sites housing multiple families), the access road and include sufficient space for the parking and safe circulation of all vehicles associated with occupiers within the site curtilage;
- d) Do not occupy a prominent location and are consistent with LDP policies for protecting and enhancing character and distinctiveness of the landscape and environment. Where necessary the proposal will include mitigating measures to reduce the impact, and assimilate the proposal into its surroundings e.g. screening and landscaping;
- e) Avoid areas at high risk of flooding and proximity to uses with potential sources of pollution or emissions;
- f) Are of an appropriate scale to their location and do not have an unacceptable impact on the amenities of neighbouring land uses;
- g) Are served, or can be served, by adequate on-site services for water supply, power, drainage, sewage disposal and waste disposal (storage and collection), and for Travelling Showpeople that there is a level area for outdoor storage and maintenance of equipment.

Proposals for the use of land for emergency pitches<sup>1</sup> to meet proven need for use by gypsies and travellers will provide basic facilities, meet criteria b, d, e and f of this policy, and the location should be within reasonable travelling distance of a settlement with services and community facilities, including health and education.

## Definition of Key Terms and Concepts\*

\*Source - Welsh Government's 'Undertaking Gypsy and Traveller Accommodation Assessments' Guidance Booklet (May 2015)

**Residential site** - A permanent residential site can be privately owned or owned by the Local Authority. This site will be designated for use as a Gypsy and Traveller site indefinitely. Residents on these sites can expect to occupy their pitches for as long as they abide by the terms of their pitch agreements, under the Mobile Homes (Wales) Act 2013. Working space may also be provided on, or near, sites for activities carried out by community members.

**Temporary residential site** - These sites are residential sites which only have planning permission or a site licence for a limited period. Residents on these sites can expect to occupy their pitches for the duration of the planning permission or site licence (or as long as they abide by the terms of their pitch agreements, under the Mobile Homes (Wales) Act 2013 – whichever is sooner).

**Transit site** - Transit sites are permanent facilities designed for temporary use by occupiers. These sites must be designated as such and provide a route for Gypsies and Travellers to maintain a nomadic way of life. Individual occupiers are permitted to reside on the site for a maximum of 3 months at a time. Specific terms under the Mobile Homes (Wales) Act 2013 apply on these sites. Working space may also be provided on, or near, sites for activities carried out by community members.

**Temporary Stopping Place** - Also known as a 'stopping place', 'Atchin Tan', or 'green lane', amongst other names. These are intended to be short-term in nature to assist Local Authorities where a need for pitches is accepted, however, none are currently available. Pro-actively identified temporary stopping places can be used to relocate inappropriately located encampments, whilst alternative sites are progressed. Temporary stopping places must make provision for waste disposal, water supply and sanitation at a minimum.

**Residential pitch** - Land on a mobile home site where occupiers are entitled to station their mobile homes indefinitely (unless stated in their pitch agreement). Typically includes an amenity block, space for a static caravan and touring caravan and parking.

**Transit pitch** - Land on a mobile home site where occupiers are entitled to station their mobile homes for a maximum of 3 months. Transit pitches can exist on permanent residential sites, however, this is not recommended.

**Unauthorised encampment** - Land occupied without the permission of the owner or without the correct land use planning permission. Encampments may be tolerated by the Local Authority, whilst alternative sites are developed.

**Unauthorised development** - Land occupied by the owner without the necessary land use planning permission.

**Current residential supply** - The number of authorised pitches which are available and occupied within the Local Authority or partnership area. This includes pitches on Local Authority or private sites.

**Current residential demand** - Those with a need for authorised pitches for a range of reasons, including:

- An inability to secure an authorised pitch leading to occupation of unauthorised encampments;
- An inability to secure correct planning permission for an unauthorised development;
- Households living in overcrowded conditions and want a pitch;
- Households in conventional housing demonstrating cultural aversion;
- New households expected to arrive from elsewhere.
- Future residential demand - The expected level of new household formation which will generate additional demand within the 5 year period of the accommodation assessment and longer LDP period.

**Overall residential pitch need** - The ultimate calculation of unmet accommodation need, which must be identified through the Gypsy and Traveller accommodation assessment process. This figure can be found by adding the immediate residential need to the future residential demand. The overall residential need will capture the needs across the 5 year period within which the accommodation assessment is considered to be robust.

**Planned residential pitch supply** - The number of authorised pitches which are vacant and available to rent on Local Authority or private sites. It also includes pitches which will be vacated in the near future by households moving to conventional housing or in other circumstances. Additional pitches which are due to open or private sites likely to achieve planning permission shortly should be included as planned residential supply.

Household In this guidance this refers to individuals from the same family who live together on a single pitch / house / encampment.

**Concealed or 'doubled up' household** - This refers to households which are unable to achieve their own authorised accommodation and are instead living within authorised accommodation (houses or pitches) assigned to another household. This may include adult children who have been unable to move home or different households occupying a single pitch.

**Household growth** - In this guidance household growth is defined by the number of new households arising from households which are already accommodated in the area.



**Technical Note**

**Gypsy and Traveller Household  
Formation and Growth Rates**

June 2020

**Opinion Research Services**



As with all our studies, this research is subject to Opinion Research Services' Standard Terms and Conditions of Contract.

Any press release or publication of this research requires the advance approval of ORS. Such approval will only be refused on the grounds of inaccuracy or misrepresentation.

© Copyright June 2020

# Contents

Contents.....	36
Household Growth Rates.....	37
Abstract and Conclusions.....	37
Introduction.....	37
Modelling Population and Household Growth Rates.....	37
Migration Effects.....	37
Population Profile.....	37
Birth and Fertility Rates.....	38
Death Rates.....	39
Modelling Outputs.....	39
Household Growth.....	39
Summary Conclusions.....	41

# Household Growth Rates

## Abstract and Conclusions

1. National and local household formation and growth rates are important components of Gypsy and Traveller accommodation assessments, but until 2013 little detailed work had been done to assess their likely scale. ORS undertook work in 2013 to assess the likely rate of demographic growth for the Gypsy and Traveller population and concluded that the figure could be as low 1.25% per annum, but that best available evidence supports a national net household growth rate of 1.50% per annum.
2. This analysis was produced as a separate document in 2013 and then updated in 2015 ([www.opinionresearch.co.uk/formation2015](http://www.opinionresearch.co.uk/formation2015)) in light of comments from academics, planning agents and local authorities. The 2015 document was complex because there was still serious dispute as to the level of demographic growth for Gypsies and Travellers in 2015. However, ORS now consider these disputes have largely been resolved at Planning Appeals and Local Plan Examinations, so we consider that much of the supporting evidence is now no longer required to be in the document.
3. This current document represents a shortened re-statement to our findings in 2015 to allow for easier comprehension of the issues involved. It contains no new research and if reader wishes to see further details of the supporting information, they should review the more detailed 2015 report.

## Introduction

<sup>4</sup> Compared with the general population, the relative youthfulness of many Gypsy and Traveller populations means that their birth rates are likely to generate higher-than-average population growth, and proportionately higher *gross* household formation rates. However, while their *gross* rate of household growth might be high, Gypsy and Traveller communities' future accommodation needs are, in practice, affected by any reduction in the number of households due to dissolution and/or by movements in/out of the area and/or by transfers into other forms of housing. Therefore, the *net* rate of household growth is the *gross* rate of formation *minus* any reductions in households due to such factors.

## Modelling Population and Household Growth Rates

<sup>5</sup> The basic equation for calculating the rate of Gypsy and Traveller population growth seems simple: start with the base population and then calculate the average increase/decrease by allowing for births, deaths, in-/outmigration and household dissolution. Nevertheless, deriving satisfactory estimates is difficult because the evidence is often tenuous – so, in this context in 2013, ORS modelled the growth of the national Gypsy and Traveller population based on the most likely birth and death rates, and by using PopGroup (the leading software for population and household forecasting). To do so, we supplemented the available national statistical sources with data derived from our own surveys.

## Migration Effects

<sup>6</sup> Population growth is affected by national net migration and local migration (as Gypsies and Travellers move from one area to another). In terms of national migration, the population of Gypsies and Travellers is relatively fixed, with little international migration. It is in principle possible for Irish Travellers (based in Ireland) to move to the UK, but there is no evidence of this happening to a significant extent and the vast majority of Irish Travellers were born in the UK or are long-term residents.

## Population Profile

<sup>7</sup> The main source for the rate of Gypsy and Traveller population growth is the UK 2011 Census. The ethnicity question in the 2011 Census included for the first time 'Gypsy and Irish Traveller' as a specific

category. While non-response bias probably means that the size of the population was underestimated, the age profile the Census provides is not necessarily distorted and matches the profile derived from ORS's extensive household surveys.

Table 1 - Age Profile for the Gypsy and Traveller Community in England (Source: UK Census of Population 2011)

Age Group	Number of People	Cumulative Percentage
Age 0 to 4	5,725	10.4
Age 5 to 7	3,219	16.3
Age 8 to 9	2,006	19.9
Age 10 to 14	5,431	29.8
Age 15	1,089	31.8
Age 16 to 17	2,145	35.7
Age 18 to 19	1,750	38.9
Age 20 to 24	4,464	47.1
Age 25 to 29	4,189	54.7
Age 30 to 34	3,833	61.7
Age 35 to 39	3,779	68.5
Age 40 to 44	3,828	75.5
Age 45 to 49	3,547	82.0
Age 50 to 54	2,811	87.1
Age 55 to 59	2,074	90.9
Age 60 to 64	1,758	94.1
Age 65 to 69	1,215	96.3
Age 70 to 74	905	97.9
Age 75 to 79	594	99.0
Age 80 to 84	303	99.6
Age 85 and over	230	100.0

### Birth and Fertility Rates

8. The table above provides a way of understanding the rate of population growth through births. The table shows that surviving children aged 0-4 years comprise 10.4% of the Gypsy and Traveller population – which means that, on average, 2.1% of the total population was born each year (over the last 5 years). The same estimate is confirmed if we consider that those aged 0-14 comprise 29.8% of the Gypsy and Traveller population – which also means that almost exactly 2% of the population was born each year.
9. The total fertility rate (TFR) for the whole UK population is just below 2 – which means that on average each woman can be expected to have just less than two children who reach adulthood. We know of only one estimate of fertility rates of the UK Gypsy and Traveller community, in *'Ethnic identity and inequalities in Britain: The dynamics of diversity'* by Dr Stephen Jivraj and Professor Ludi Simpson (published May 2015). The authors use the 2011 Census data to estimate the TFR for the Gypsy and Traveller community as 2.75.
10. ORS used our own multiple survey data to investigate the fertility rates of Gypsy and Traveller women. The ORS data shows that on average Gypsy and Traveller women aged 32 years have 2.5 children (but,

because the children of mothers above this age point tend to leave home progressively, full TFRs were not completed). On this basis it is reasonable to infer an average of 3 children per woman during her lifetime, which is broadly consistent with the estimate of 2.75 children per woman derived from the 2011 Census.

### Death Rates

11. Although the above data imply an annual growth rate through births of about 2%, the death rate has also to be taken into account. Whereas the average life expectancy across the whole population of the UK is currently just over 80 years, a Sheffield University study found that Gypsy and Traveller life expectancy is about 10-12 years less than average (Parry et al (2004) *'The Health Status of Gypsies and Travellers: Report of Department of Health Inequalities in Health Research Initiative'*, University of Sheffield).
12. Therefore, in our population growth modelling we used a conservative estimate of average life expectancy as 72 years – which is entirely consistent with the lower-than-average number of Gypsies and Travellers aged over 70 years in the 2011 Census (and also in ORS's own survey data).

### Modelling Outputs

13. If we assume a TFR of 3 and an average life expectancy of 72 years for Gypsies and Travellers, then the modelling, undertaken in PopGroup, projects the population to increase by 66% over the next 40 years – implying a population compound growth rate of 1.25% per annum. If we assume that Gypsy and Traveller life expectancy increases to 77 years by 2050, then the projected population growth rate rises to nearly 1.50% per annum. To generate an 'upper range' rate of population growth, we assumed an implausible TFR of 4 and an average life expectancy rising to 77 over the next 40 years – which then yields an 'upper range' growth rate of 1.90% per annum.

### Household Growth

14. In addition to population growth influencing the number of households, the size of households also affects the number. Hence, population and household growth rates do not necessarily match directly, mainly due to the current tendency for people to live in smaller childless or single person households.
15. Because the Gypsy and Traveller population is relatively young and has many single parent households, a 1.25%-1.50% annual population growth could yield higher-than-average household growth rates, particularly if average household sizes fall or if younger-than-average households form. However, while there is evidence that Gypsy and Traveller households already form at an earlier age than in the general population, the scope for a more rapid rate of growth, through even earlier household formation, is limited.
16. Based on the 2011 Census, the table below compares the age of household representatives in English households with those in Gypsy and Traveller households – showing that the latter has many more household representatives aged under-25 years. In the general English population 3.60% of household representatives are aged 16-24, compared with 8.70% in the Gypsy and Traveller population. ORS's survey data shows that about 10% of Gypsy and Traveller households have household representatives aged under-25 years.

Table 2 - Age of Head of Household (Source: UK Census of Population 2011)

Age of household representative	All households in England		Gypsy and Traveller households in England	
	Number of households	Percentage of households	Number of households	Percentage households
Age 24 and under	790,974	3.6%	1,698	8.7%

Age 25 to 34	3,158,258	14.3%	4,232	21.7%
Age 35 to 49	6,563,651	29.7%	6,899	35.5%
Age 50 to 64	5,828,761	26.4%	4,310	22.2%
Age 65 to 74	2,764,474	12.5%	1,473	7.6%
Age 75 to 84	2,097,807	9.5%	682	3.5%
Age 85 and over	859,443	3.9%	164	0.8%
<b>Total</b>	<b>22,063,368</b>	<b>100%</b>	<b>19,458</b>	<b>100%</b>

<sup>17</sup> The following table shows that the proportion of single person Gypsy and Traveller households is not dissimilar to the wider population of England; but there are more lone parents, fewer couples without children, and fewer households with non-dependent children amongst Gypsies and Travellers

**Table 3 - Household Type (Source: UK Census of Population 2011)**

Household Type	All households in England		Gypsy and Traveller households in England	
	Number of households	Percentage of households	Number of households	Percentage households
Single person	6,666,493	30.3%	5,741	29.5%
Couple with no children	5,681,847	25.7%	2345	12.1%
Couple with dependent children	4,266,670	19.3%	3683	18.9%
Couple with non-dependent children	1,342,841	6.1%	822	4.2%
Lone parent: Dependent children	1,573,255	7.1%	3,949	20.3%
Lone parent: All children nondependent	766,569	3.5%	795	4.1%
Other households	1,765,693	8.0%	2,123	10.9%
<b>Total</b>	<b>22,063,368</b>	<b>100%</b>	<b>19,458</b>	<b>100%</b>

<sup>18</sup> The key point, though, is that since 20% of Gypsy and Traveller households are lone parents with dependent children, and up to 30% are single persons, there is limited potential for further reductions in average household size to increase current household formation rates significantly – and there is no reason to think that earlier household formations or increasing divorce rates will in the medium term affect household formation rates. While there are differences with the general population, a 1.25%-

1.50% per annum Gypsy and Traveller population growth rate is likely to lead to a household growth rate of 1.25%-1.50% per annum

### Summary Conclusions

19. The best available evidence suggests that the net annual Gypsy and Traveller household growth rate is 1.50% per annum. Some local authorities might allow for a household growth rate of up to 2.50% per annum, to provide a 'margin' if their populations are relatively youthful; but in areas where on-site surveys indicate that there are fewer children in the Gypsy and Traveller population, lower estimates should be used.
20. The outcomes of this Technical Note can be used to provide an estimate of local new household formation rates by adjusting the upper national growth rate of 1.50% based on local demographic characteristics.
21. In addition, in certain circumstances where the numbers of households and children are higher or lower than national data has identified, or the population age structure is skewed by certain age groups, it may not be appropriate to apply a percentage rate for new household formation. In these cases, a judgement should be made on likely new household formation based on the age and gender of the children identified in local household interviews. This should be based on the assumption that 50% of households likely to form will stay in any given area and that 50% will pair up and move to another area, while still considering the impact of dissolution. This is based on evidence from over 140 GTAAAs that ORS have completed across England and Wales involving over 4,300 household interviews.



monmouthshire  
sir fynwy

## Equality and Future Generations Evaluation

<p><b>Name of the Officer</b> completing the evaluation: Stephen Griffiths</p> <p><b>Phone no:</b> 01633 644455 <b>E-mail:</b> stephengriffiths@monmouthshire.gov.uk</p>	<p><b>Please give a brief description of the aims of the proposal:</b> To provide sufficient suitable sites to unmet the identified need of Gypsies and Travellers and Travelling Showpeople in Monmouthshire.</p>
<p><b>Name of Service area:</b> housing &amp; Communities</p>	<p><b>Date:</b> 25<sup>th</sup> November 2020</p>

Page 47. **Are your proposals going to affect any people or groups of people with protected characteristics?** Please explain the impact, the evidence you have used and any action you are taking below.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	Although this proposal does not impact disability directly, it will be addressed in the next stage of the process, that is, the identification of suitable land and its development.		
Disability	Although this proposal does not impact disability directly, it will be addressed in the next stage of the process, that is, the identification of suitable land and its development.		
Gender reassignment	A neutral Impact		

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Marriage or civil partnership	A neutral impact		
Pregnancy or maternity	A neutral Impact		
Race	The provision of Gypsy and Traveller sites is likely to have a positive impact by seeking to reduce inequalities in the provision of appropriate accommodation in sustainable locations, and access to facilities, for Gypsy and Traveller communities.		
Religion or Belief	A neutral Impact		
Sex	A neutral impact		
Sexual Orientation	A neutral Impact		
Welsh Language	A neutral Impact		

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Poverty	The provision of Gypsy and Traveller sites is likely to have a positive impact on poverty by seeking to provide better access to services such as education and health, while at the same time through greater intergration within the wider community can lead to better work opportunites.		

2. **Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!

Page 49

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<b>A prosperous Wales</b> Efficient use of resources, skilled, educated people, generates wealth, provides jobs	The provision of Gypsy and Traveller sites is likely to have a positive impact by seeking to provide better access to services such as education and health, while at the same time through greater intergration within the wider community can lead to better work opportunites.	
<b>A resilient Wales</b> Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)	Not applicable at this stage	

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood	The provision of Gypsy and Traveller sites is likely to have a positive impact by seeking to provide better access to services such as education and health, while at the same time through greater intergration within the wider community can lead to better work opportunities.	
<b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected	The provision of Gypsy and Traveller sites is likely to have a positive impact by seeking to reduce inequalities in the provision of appropriate accommodation in sustainable locations, and access to facilities, for Gypsy and Traveller communities.	
<b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing		
<b>A Wales of vibrant culture and thriving Welsh language</b> Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation	N/A	
<b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances	The provision of Gypsy and Traveller and Showpeople (GTAA) sites is likely to have a positive impact by seeking to reduce inequalities in the provision of appropriate accommodation in sustainable locations, and access to facilities, for Gypsy and Traveller communities.	

### 3. How has your proposal embedded and prioritised the sustainable governance principles in its development?

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Long Term</p> <p>Balancing short term need with long term and planning for the future</p>	<p>The proposal meets this objective because it is a statutory requirement that a Gypsy and Traveller and Showpeople Accommodation Assessment (GTAA) is conducted every every 5 years. In addition meeting this need would be considered via land use planning decisions.</p>	
 <p>Collaboration</p> <p>Working together with other partners to deliver objectives</p>	<p>Not applicable at this stage</p>	
 <p>Involvement</p> <p>Involving those with an interest and seeking their views</p>	<p>For the purposes of conducting the GTAA members of the Gypsy and Traveller community and organisations with experience of Gypsy and Traveller related issues were consulted through a forum group. For future work such as use of potential land to develop the wider community will be brought into the consultation process.</p>	

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p><b>Prevention</b></p> <p>Putting resources into preventing problems occurring or getting worse</p>	No resources are required at this stage	
 <p><b>Integration</b></p> <p>Considering impact on all wellbeing goals together and on other bodies</p>	Not applicable at this stage	

**4. Council has agreed the need to consider the impact its decisions has on the following important responsibilities: Social Justice, Corporate Parenting and Safeguarding. Are your proposals going to affect any of these responsibilities?**

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Social Justice	The provision of Gypsy and Traveller sites is likely to have a positive impact by seeking to provide better access to services such as education and health, while at the same time through greater intergration within the wider community can lead to better work opportunites.		

Safeguarding	The proposal is not going to affect the Council's Safeguarding responsibilities		
Corporate Parenting	The proposal is not going to affect the Council's Safeguarding responsibilities		

**5. What evidence and data has informed the development of your proposal?**

- The Gypsy and Traveller and Showpeople Accommodation Assessment (GTAA)  
Gypsy and Traveller and Showpeople Forum

Page 53

**SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?**

The provision of Gypsy and Traveller sites is likely to have a positive impact by seeking to provide better access to services such as education and health, while at the same time through greater intergration within the wider community can lead to better work opportunites.

**7. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.**

What are you going to do	When are you going to do it?	Who is responsible

--	--	--

**8. VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.**

<b>Version No.</b>	<b>Decision making stage</b>	<b>Date considered</b>	<b>Brief description of any amendments made following consideration</b>
	DMT	30 <sup>th</sup> November 2020	

**SUBJECT: LOCAL HOUSING MARKET ASSESSMENT**

**MEETING: JOINT ADULTS AND ECONOMY & DEVELOPMENT SELECT**

**DATE: 10<sup>th</sup> December 2020**

**DIVISION/WARDS AFFECTED: All**

**1. PURPOSE:**

1.1 The purpose of this report is to brief the Select Committee on the completion of the Local Housing Market Assessment (LHMA) (**Appendix 1**) December 2020 and to seek approval for submission of the LHMA to Welsh Government.

**2. RECOMMENDATION:**

2.1 To provide scrutiny of the Local Housing Market Assessment

2.2 To recommend that Cabinet adopts the Local Housing Market Assessment, December 2020.

**3. KEY ISSUES:**

3.1 All local authorities have a requirement to consider the housing accommodation needs of their localities under section 8 of the Housing Act 1985. Local Housing Market Assessments are a crucial part of the evidence base for preparing Local Development Plans and Local Housing Strategies.

3.2 This LHMA has identified the potential need for 467.81 affordable homes per year over the next 5 years. This number can be further broken down as:

<b>Tenure</b>	<b>Number of Dwellings</b>
Social Rent	319.61
Low Cost Home Ownership	115.20
Intermediate Rent	33
<b>Total</b>	<b>467.81</b>

This provides a tenure split of 68% social rent and 32% intermediate (LCHO and intermediate rent) need.

3.3 It is important to note that these figures are not an annual delivery target as new build homes are not the total solution to the supply of affordable homes in the county. The Council's target remains 960 affordable homes (96 per year) over the period of the current Local Development Plan (LDP) 2011 – 2021. The LHMA will form part of the evidence base for the replacement LDP and a new delivery target.

3.4 Housing's Private Sector Housing Team has a lettings agency, Monmouthshire Lettings Service (MLS), and is working with private sector landlords to increase the availability of homes for private rent. This work has continued throughout the COVID-19 period with both the Private Sector Liaison Officer and Strategy & Policy Homelessness Officer working to support existing landlords and recruit additional landlords through a repeated marketing plan.

**4. EQUALITY AND FUTURE GENERATIONS EVALUATION (INCLUDES SOCIAL JUSTICE, SAFEGUARDING AND CORPORATE PARENTING) (Appendix 2)**

4.1 The LHMA provides an assessment of the current housing market and helps to identify emerging trends in house prices and affordability. In addition to assessing the need for all types of affordable housing, the report also assesses housing need against the committed supply of affordable housing over the next 5 years. Information contained in the LHMA will be used in the preparation of the replacement LDP.

4.2 There are no negative implications with this proposal. Understanding affordable housing need and then taking steps to deliver affordable housing has a positive impact on equalities and future generations, with particular regard to reduced poverty and improved health and educational attainment associated with having a safe, secure and suitable home. However, should it not be possible to implement the proposed recommendation it could possibly impact on the Council's abilities to meet its safeguarding responsibilities. **See Appendix 2**

**5. OPTIONS APPRAISAL**

The following options are available.

	Benefit	Risk	Comment
<b>Option 1:</b> The <u>recommended option</u> is to agree the contents of the LHMA.	<p>An up to date assessment of affordable housing need which has been undertaken with due regard to Welsh Government guidance.</p> <p>An assessment that has been reviewed within the recommended time scale (2 years) and meets the Council's statutory duties.</p> <p>An up to date and accurate assessment of affordable housing need which will form part of a robust evidence base for a range of Council plans and policies.</p>	There are no risks to this proposal.	The LHMA is a complex piece of research, which has been undertaken using the suggested Welsh Government methodology and is the most accurate indicator of affordable housing need within Monmouthshire.
<b>Option 2:</b> Do nothing and	There are no benefits to this option.	The LHMA is an integral part of the evidence base	The LHMA is a complex piece of

<p>rely on the existing LHMA.</p>		<p>for a range of housing and planning related policies. To ensure the policies are fit for purpose and meet local need, the evidence base must be robust and up to date. It is a requirement to review the LHMA every two years, to disregard the findings of the most recent assessment could leave the Council at odds with Welsh Government recommendations.</p>	<p>research, which has been undertaken using the suggested Welsh Government methodology and is the most accurate indicator of affordable housing need within Monmouthshire.</p>
-----------------------------------	--	--	---

**6. EVALUATION CRITERIA**

It is a requirement to update the Local Housing Market Assessment and submit the document to the Welsh Government every two years

**7. REASONS:**

7.1 Under the Housing Act 1985, Local Authorities have a statutory duty to assess the County’s housing need. The authority must submit the LHMA to Welsh Government.

- The production of the LHMA has been specified by the Welsh Government in two main documents: ‘The Local Housing Market Assessment Guide’, produced in March 2006 and ‘Getting Started with your LHMA’, produced in March 2014
- The guidance enables authorities to derive overall figures for the number of households requiring additional housing in their areas and to determine what this means in terms of affordable housing provision.
- The information in the LHMA will allow the authority to develop sound planning policies to deliver the right mix of housing in terms of tenure and house type.
- The analysis takes account of household projections, homeless data, housing register data, house prices, rental prices, household incomes, dwelling stock turnover and housing supply data

**8. RESOURCE IMPLICATIONS:**

8.1 There are no resource implication associated with completion of the LHMA. Delivery of affordable housing is primarily achieved via planning permissions requiring a proportion of new homes approved to be affordable homes, or securing commuted sums from small-scale developments to provide affordable housing elsewhere. The Council works with Registered Social Landlords to deliver additional affordable housing via their development programmes often with Welsh Government funding such as Social Housing Grant or the Innovative Housing Fund. Delivering on this Council’s ambitions and those of the Welsh Government will undoubtedly need public sector subsidy to supplement delivery via the housebuilding industry.

**9. CONSULTEES:**

Head of Placemaking, Housing, Highways & Flooding; Housing & Communities Manager; Head of Planning; Planning Policy Manager; Chief Officer Enterprise.

**10. BACKGROUND PAPERS:**

- Local Housing Market Assessment Report; Getting Started with your Local Housing Market Assessment, Welsh Government, November 2014.
- Local Market Housing Assessment guide, Welsh Government, March 2006
- Housing Act 1985
- Housing (Wales) Act 2014
- The Well-being of Future Generations (Wales) Act 2015

**11. AUTHOR:** Strategy & Policy Officer – Affordable Housing

**12. CONTACT DETAILS:** Louise Corbett

**Tel:** 07970 957039

**E-mail:** [LouiseCorbett@monmouthshire.gov.uk](mailto:LouiseCorbett@monmouthshire.gov.uk)

2020 - 2025

# Local Housing Market Assessment



## Summary

The Local Housing Market Assessment utilises the Welsh Government's guidance documents *Local Housing Market Assessment Guide, March 2016* and *Getting Started with your Local Housing Market Assessment, March 2012*.

This LHMA estimates a net need of **468** additional affordable homes per annum up until 2025, however, this figure is not an annual delivery target. The figure is simply an indication of current and projected need for affordable housing within the county.

This is a headline figure for the whole County and a more detailed assessment is contained within the report.

Housing and Communities have undertaken the assessment with the assistance of David James, Rural Housing Enabler for Monmouthshire.

If you any queries regarding this LHMA, please contact.

Strategy and Policy Officer – Affordable Housing  
Housing and Communities  
Monmouthshire County Council  
County Hall  
Rhadyr  
Usk  
NP15 1GA

Tel: 07970 957 039

# Contents

<b>1. Introduction</b> .....	5
<b>1.1 Housing Act 1985</b> .....	5
<b>1.2 Housing (Wales) Act 2014</b> .....	5
<b>1.3 The Well-being of Future Generations (Wales) Act 2015</b> .....	5
<b>1.4 National Housing Strategy (2010)</b> .....	6
<b>1.5 Planning Policy Wales (PPW)</b> .....	6
<b>1.6 Local Development Plan (LDP)</b> .....	7
<b>2. Housing Market Analysis</b> .....	9
<b>2.1 Monmouthshire Average Property Price</b> .....	9
<b>2.2 Housing Market Indicators</b> .....	10
<b>2.3 Tenure</b> .....	13
<b>2.4 Types of Property</b> .....	14
<b>2.5 Private Rented Sector</b> .....	18
<b>2.6 Affordability</b> .....	28
<b>2.7 Entry Level Property Price</b> .....	28
<b>3. Monmouthshire Housing Market Areas</b> .....	30
<b>3.1 Abergavenny Housing Market Area</b> .....	32
<b>3.2 Chepstow Housing Market Area</b> .....	32
<b>3.3 Monmouth Housing Market Area</b> .....	33
<b>4. Methodology and Data Sources for Assessing Housing Need</b> .....	35
<b>4.1 Backlog of Housing Need</b> .....	38
<b>4.2 Newly Arising Need</b> .....	39
<b>4.3 Existing Households Falling into Housing Need</b> .....	40
<b>4.4 Affordable Housing Supply</b> .....	41
<b>4.5 Committed Supply of New Affordable Homes</b> .....	42
<b>5. Key Findings</b> .....	44
<b>5.1 Social Rent</b> .....	44
<b>5.2 Low Cost Home Ownership (LCHO)</b> .....	44
<b>5.3 Intermediate Rent</b> .....	44
<b>5.4 Gypsy and Travellers</b> .....	45
<b>5.5 Summary of Annual Affordable Housing Shortfall</b> .....	45
<b>6. Conclusion</b> .....	47

## List of Tables

Table 1 Breakdown of Tenure .....	14
Table 2 Breakdown of Property Type .....	15
Table 3 Housing Stock by Number of Bedrooms .....	18
Table 4 Monthly Rental Values .....	24
Table 5 Local Housing Allowance Rates - 2020/2021 .....	25
Table 6 Number of Properties at LHA Rate .....	25
Table 7 Affordability – Net Median Wage Based on Median Rents by Bedroom Category.....	27
Table 8 Gross Annual Affordable Housing Need.....	38
Table 9 Net Household Growth 2020 - 2025 .....	39
Table 10 Households priced out of the Market.....	40
Table 11 Existing Households Falling into Need .....	40
Table 12 Existing Housing Stock – General Needs.....	42
Table 13 Existing Housing Stock – Older Persons Housing.....	42
Table 14 Lettings Data 2017 - 2020 .....	42
Table 15 Committed Supply of New Affordable Homes (5 years) .....	43

## List of Figures

Figure 1 Monmouthshire Average House Price.....	9
Figure 2 Comparison of Average House Price – Neighbouring Welsh Local Authorities .....	10
Figure 3 Total Property Sales in Monmouthshire by Year and Type as 30 <sup>th</sup> September 2020 .....	11
Figure 4 Average Time to Sell a Property in Monmouthshire .....	11
Figure 5 Current Average Price of Monmouthshire and Neighbouring Local Authorities .....	13
Figure 6 Tenure of Households.....	14

Figure 7 Breakdown of Property Type.....	15
Figure 8 Comparison of Wales and Monmouthshire Property Type.....	16
Figure 9 Average Monmouthshire Property Price by Property Type .....	17
Figure 10 Existing Housing Stock by Number of Bedrooms.....	17
Figure 11 Number of Properties by Bedroom Count .....	19
Figure 12 Number of Properties by Rental Area .....	19
Figure 13 Number of Properties Advertised by Area.....	20
Figure 14 Property Mix by Bedroom Count .....	20
Figure 15 Rental Listings by Bedroom Count.....	21
Figure 16 Rental Market Activity .....	21
Figure 17 Market Activity by Rental Area .....	22
Figure 18 Monmouthshire Travel to Work Areas.....	31
Figure 19 Average House Prices in Monmouthshire's Housing Market Areas .....	34
Figure 20 Bathtub Analogy.....	35
Figure 21 Map of Monmouthshire Housing Market Areas .....	37
Figure 22 Annual Affordable Housing Shortfall .....	46

## **1. Introduction**

Local Housing Market Assessments (LHMA) play an important part in the evidence base local authorities in Wales will use for preparing local development plans and local housing strategies. They also inform the production of programme development plans for the allocation of social housing grant which local authorities submit to Welsh Government. The LHMA also aids negotiations on Section 106 agreements between local authorities and private sector developers.

Local authorities have an important strategic housing role and statutory responsibilities in relation to the functioning of the housing market. For the purposes of the local housing market assessment, the following pieces of legislation and strategic documents are key:

### **1.1 Housing Act 1985**

Section 8 of the Housing Act 1985 requires local authorities to consider the housing need within their areas with respect to the provision of further housing accommodation. This local housing market assessment review provides a comprehensive understanding of the local housing market and a robust evidence base for effective strategic housing and planning services.

### **1.2 Housing (Wales) Act 2014**

Part 3 of the Housing (Wales) Act 2014 requires local authorities in Wales to carry out an assessment of the accommodation needs of Gypsies and Travellers within their area. This should be kept up-to-date every 5 years.

### **1.3 The Well-being of Future Generations (Wales) Act 2015**

The Well-being of Future Generations (Wales) Act 2015 seeks to improve the social, economic, environmental and cultural well-being of Wales in order to create a Wales that all want to live in, now and in the future. The Act sets out seven well-being goals:

1. A prosperous Wales;
2. A resilient Wales;
3. A healthier Wales;
4. A more equal Wales;
5. A Wales of cohesive communities;
6. A Wales of vibrant culture and thriving Welsh Language; and
7. A globally responsible Wales.

The provision of sufficient good quality housing for people's needs, including affordable housing is a cross-cutting theme that will help deliver many of the well-being goals, including a more equal Wales, a Wales of cohesive communities, a prosperous Wales and a healthier Wales.

## **1.4 National Housing Strategy (2010)**

Welsh Government's approach to housing, as outlined in Improving Lives & Communities – Homes in Wales, is to:

- provide more housing of the right type and offer more choice
- improve homes and communities, including the energy efficiency of new and existing homes
- improve housing-related services and support, particularly for vulnerable people and people from minority groups.

The Strategy highlights that local authorities have a role in assessing the need for housing and planning where it should be built. It also recognises the role of housing associations and the private sector in delivering quality homes and supporting thousands of jobs in construction and related industries.

It identifies the key factors influencing the demand for housing, including an ageing population, an increase in single person households and economic factors affecting affordability. It highlights the priorities for the future, which includes the need to increase the number of affordable homes for purchase or rent in the right location.

## **1.5 Planning Policy Wales (PPW)**

Planning Policy Wales (PPW10) updated in December 2018 by the Welsh Government (WG) provides the overarching national strategic guidance with regard to land use planning matters in Wales. Paragraphs 4.2.1-4.2.2 of PPW10 state:

'New housing development in both urban and rural areas should incorporate a mix of market and affordable house types, tenures and sizes to cater for the range of identified housing needs and contribute to the development of sustainable and cohesive communities.

The planning system must:

- identify a supply of land to support the delivery of the housing requirement to meet the differing needs of communities across all tenures;
- enable provision of a range of well-designed, energy efficient, good quality market and affordable housing that will contribute to the creation of sustainable places; and
- focus on the delivery of the identified housing requirement and the related land supply.'

In terms of LHMA's, PPW10 notes:

The latest Welsh Government local authority level Household Projections for Wales, alongside the latest Local Housing Market Assessment (LHMA) and the Well-being plan for a plan area, will form a fundamental part of the evidence base for development plans.

The relevant planning and housing authorities should work in partnership with local stakeholders, including private house builders, to produce LHMA's. These

assessments allow authorities to develop a detailed understanding of the nature and level of market and affordable housing demand and need in their communities' (paragraphs 4.2.6 and 4.2.8).

For clarification, PPW10 defines affordable housing as:

'Affordable housing includes social rented housing owned by local authorities and RSLs and intermediate housing where prices or rents are above those of social rent but below market housing prices or rents. All other types of housing are referred to as 'market housing', that is private housing for sale or rent where the price is set in the open market and occupation is not subject to control by the local authority. It is recognised that some schemes may provide for staircasing to full ownership and where this is the case there must be secure arrangements in place to ensure the recycling of capital receipts to provide replacement affordable housing.

To support policies and decisions on planning applications, planning authorities should refer to their LHMA to help determine the need for affordable housing.

Development plans must include an authority-wide target for affordable housing (expressed as numbers of homes). The authority-wide target for affordable housing should be based on the LHMA and identify the expected contributions that the policy approaches identified in the development plan (for example, site thresholds, site specific targets, commuted sums and affordable housing exception sites) will make to meeting this target. The target should take account of deliverability and viability which will be influenced by the anticipated levels of finance available for affordable housing, including public subsidy, and other community benefit contributions being sought by the planning authority.'(paragraphs 4.2.26 - 28)

## **1.6 Local Development Plan (LDP)**

### **Adopted LDP**

Monmouthshire County Council's Local Development Plan (LDP) was adopted on 27<sup>th</sup> February 2014. The chosen level of housing provision in the LDP is 4,500 dwellings over the Plan period 2011-2021. It accommodates the level of growth indicated by the 2008-based Welsh Government Household projections. It projected an increase for the County of 3,969 households between 2011-2021 (or about 4,100 dwellings), with a small allowance (10 dwellings per year) to be met in that part of Monmouthshire included in the Brecon Beacons National Park, together with an additional requirement for the period 2006-2011.

### **Replacement LDP**

The Council is preparing a Replacement Local Development Plan for the County (excluding the area within the Brecon Beacons National Park) to cover the period 2018-2033. Progress has been delayed by Covid-19 and was further affected by the publication of corrected 20178 population projections in August 2020. The RLDP issues, vision, objectives and evidence base have been reviewed in terms of sensitivity to the consequences of the current pandemic. The Welsh Government published a

correction to the 2018-based population and household projections in August 2020. These projections form the starting point for the Plan's evidence base on growth levels and comprise important new evidence that requires consideration. In order to ensure that the evidence base for the RLDP is robust and based on the most up to date information, the decision was made to revisit both the Growth and Spatial Options and Preferred Strategy stages of the RLDP process.

These unavoidable delays have necessitated a further revision to the RLDP Delivery Agreement timetable and community involvement scheme which was approved by Welsh Government in October 2020. Work on the Plan will progress in accordance with the revised timetable, the next key stage being the Growth and Spatial Options which will be subject to non-statutory consultation in early 2021.

A significant issue for Monmouthshire is the fact that house prices are high in relation to earnings so there is a significant need for additional affordable housing in the County in both urban and rural areas. It is an objective of the Plan to provide a level of housing that is sufficient to deliver a wide-ranging choice of homes, both for existing and future residents, while ensuring local needs for appropriate, affordable and accessible housing are met as far as possible.

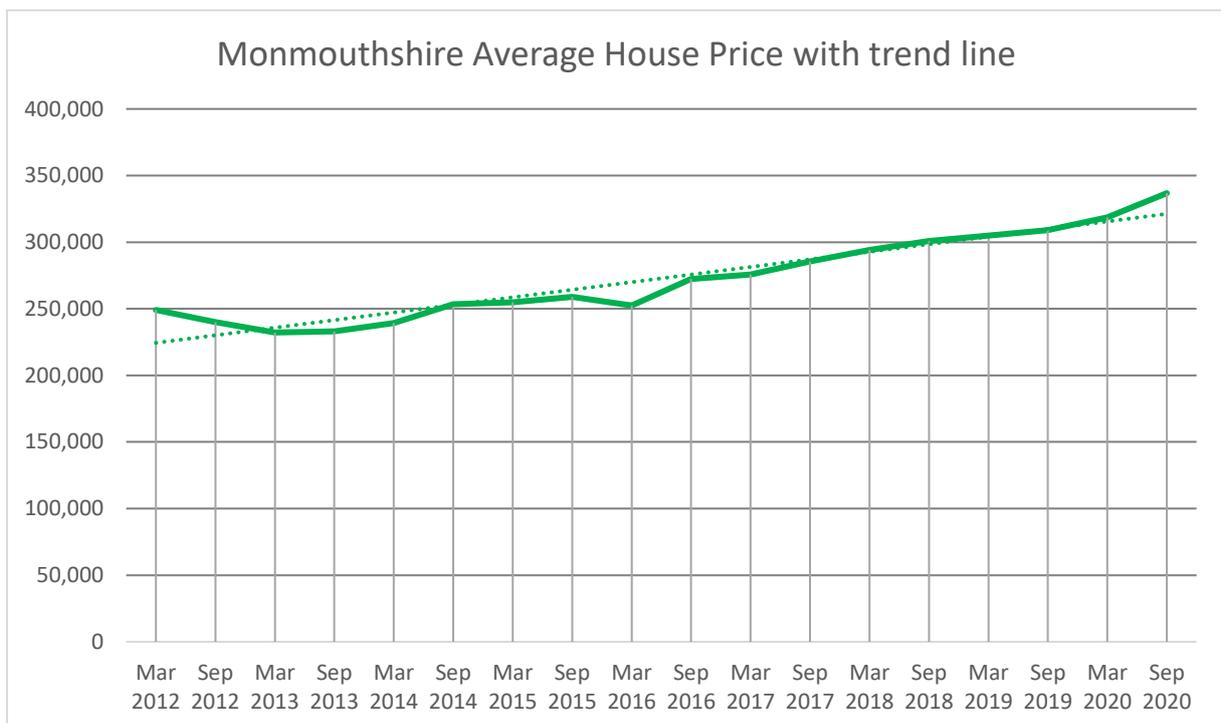
## 2. Housing Market Analysis

Monmouthshire is a predominantly rural county situated in south east Wales and is noted for its rich and diverse landscape. It covers an area of approximately 88,000 hectares and shares a border with the neighbouring counties of Newport, Torfaen and Powys in Wales and Gloucestershire and Herefordshire in England. The estimated population is 94,950 (Source: ONS, April 2020). The main towns in the county are Abergavenny, Monmouth, Chepstow and Caldicot.

### 2.1 Monmouthshire Average Property Price

The average property price in Monmouthshire currently stands at £336,760. Figure 1 shows the trajectory of the Monmouthshire average house price since March 2012 and evidences an increase of just over 35% in the average property price. From the end of 2019 to date, the housing market throughout the UK has been unpredictable and the sparsity of data has made it more difficult than ever to analyse, especially at smaller geographies.

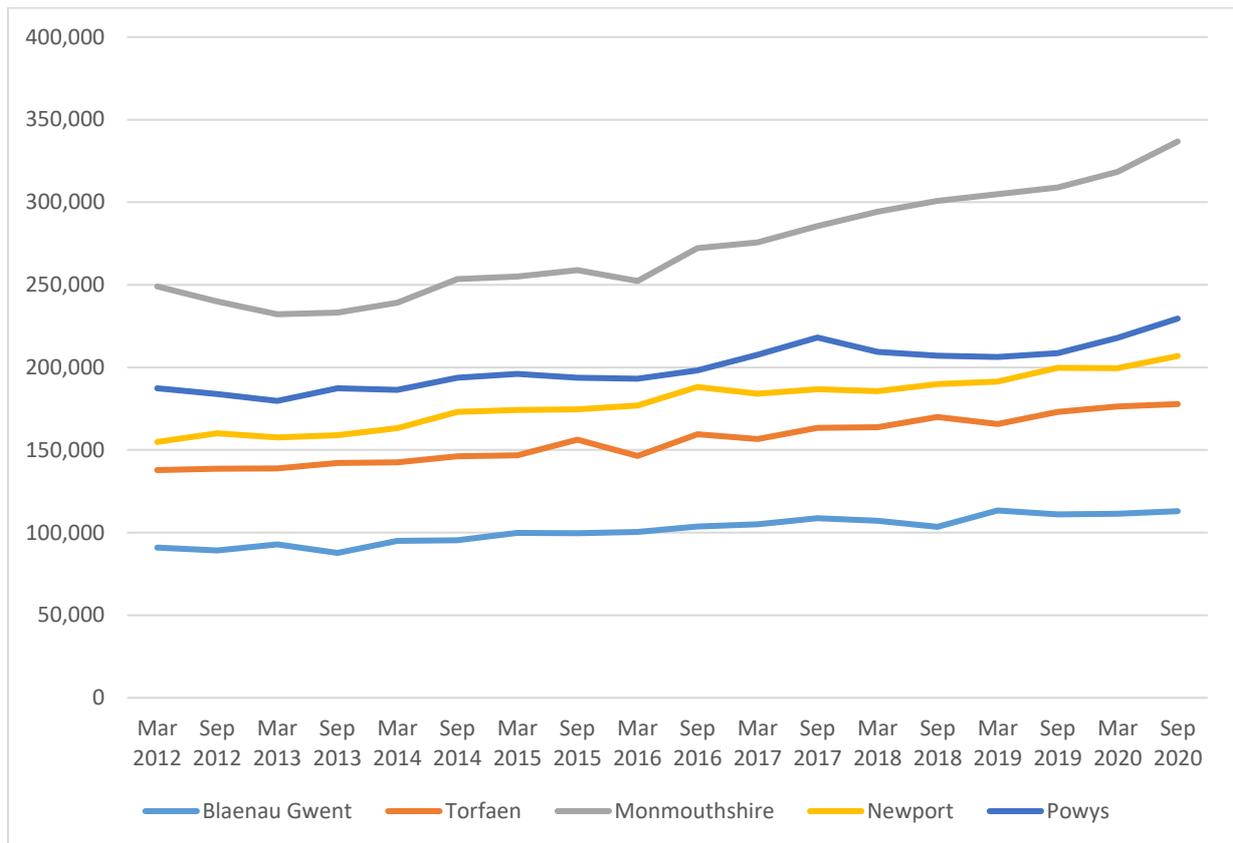
Figure 1 Monmouthshire Average House Price



Source: Hometrack

The graph in Figure 2 shows how the average Monmouthshire house price compares with our neighbouring Welsh local authorities. Monmouthshire has consistently outperformed others with a higher average house price and higher rate of growth in house prices.

Figure 2 Comparison of Average House Price – Neighbouring Welsh Local Authorities



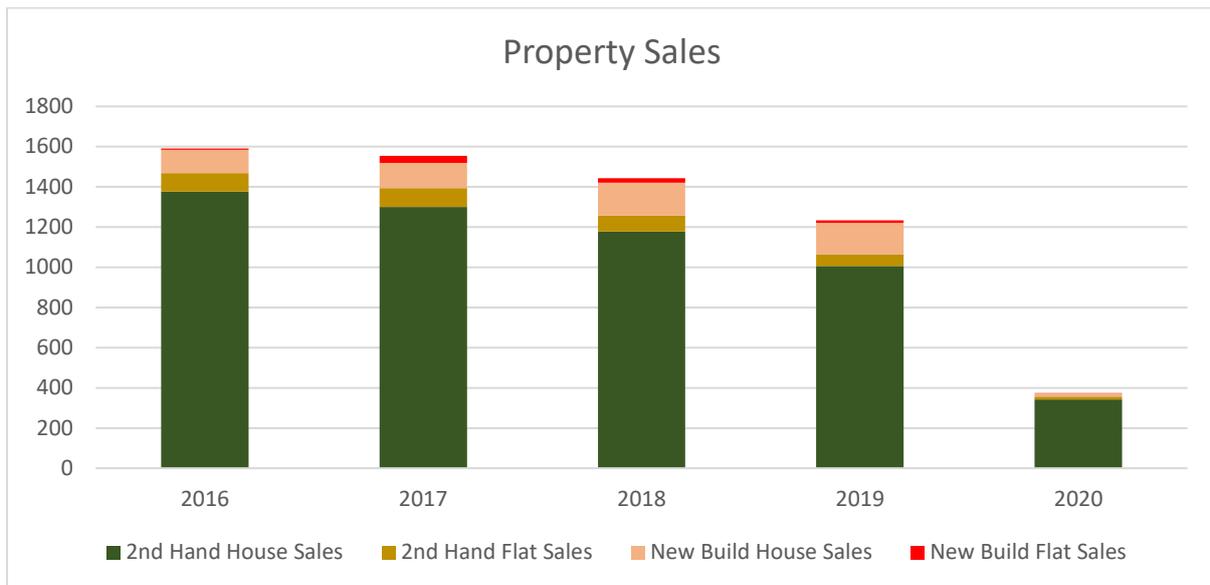
Source: Hometrack

## 2.2 Housing Market Indicators

Since 2016 the number of properties sold in Monmouthshire has declined year on year, despite an increase in the numbers of new build property sales. From a high of 1,591 sales in 2016, there were 1,234 sales in 2019 and only 374 sales as at 30<sup>th</sup> September 2020 (Figure 3). House sales data from 2019, show that 29.9% or 370 of 1,234 sales were sold at a higher value than the average Monmouthshire property price of £336,000, however, this data includes 5 properties which were sold for over £1million pounds each.

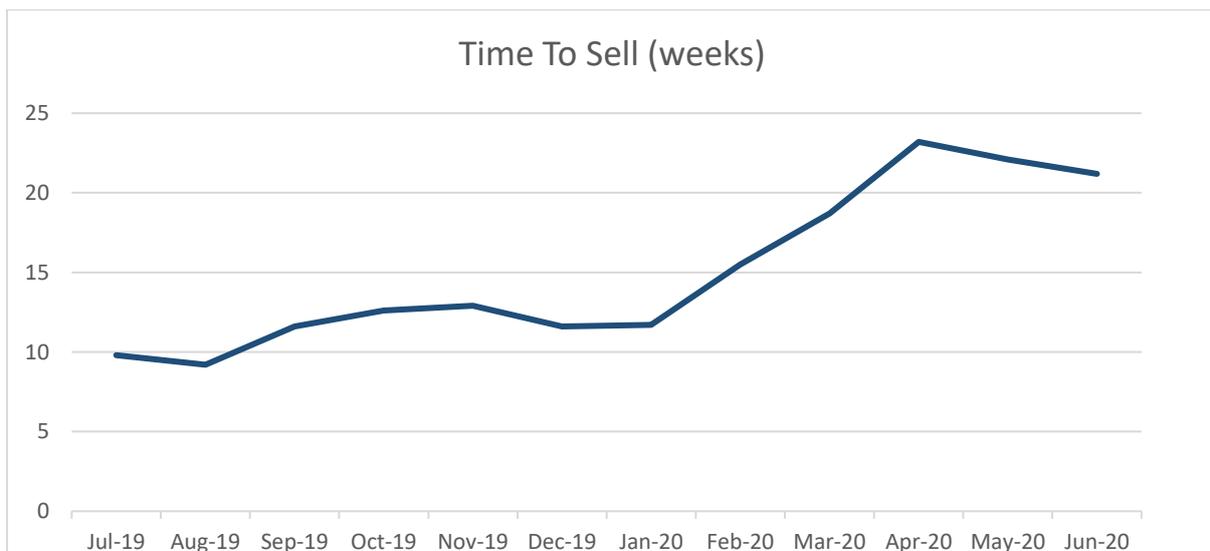
There is no doubt that the pandemic has impacted significantly on the local housing market, because the length of time it has taken to complete the sale of properties has also increased. In July 2019 the average time it took to sell a property in Monmouthshire was 9.8 weeks, whereas by June 2020 the average time had increased to 21.2 weeks (Figure 4).

Figure 3 Total Property Sales in Monmouthshire by Year and Type as 30<sup>th</sup> September 2020



Source: Hometrack

Figure 4 Average Time to Sell a Property in Monmouthshire



Source: Hometrack

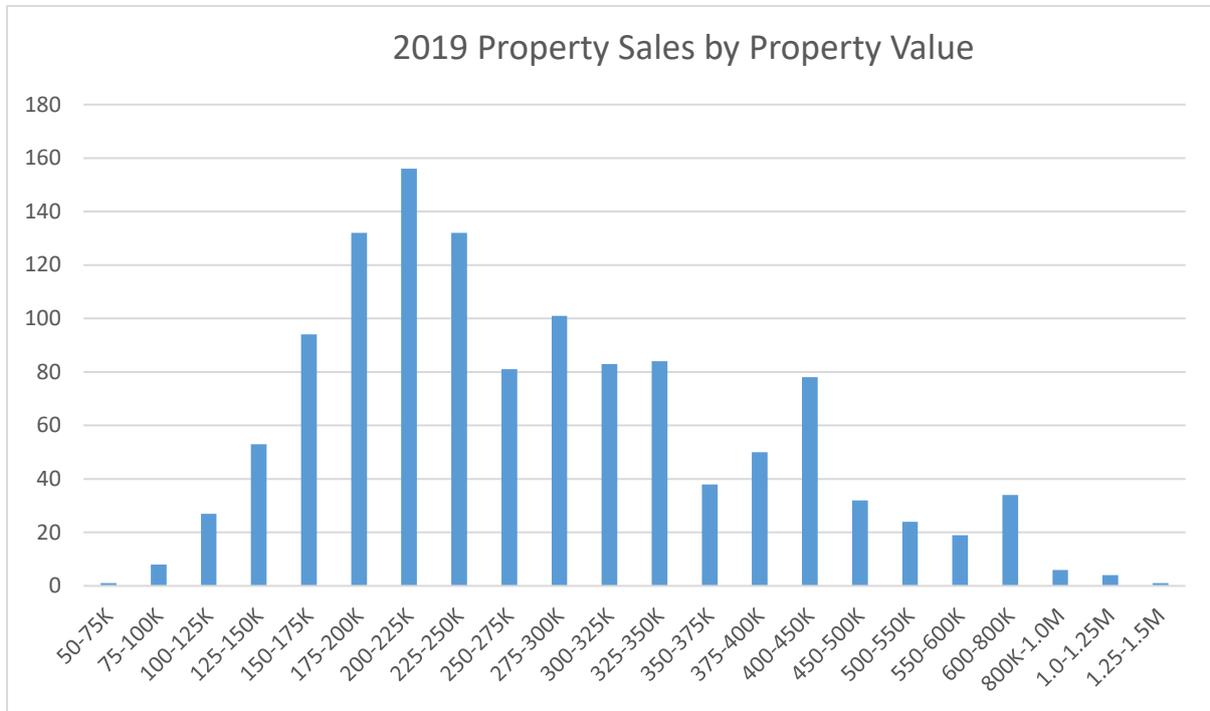
The majority of sales in Monmouthshire are of detached properties, followed by semi-detached and then terraced properties.

The length of time it takes to sell a property has also appeared to impact on the sale to asking price of properties. In August 2019 the average sale to asking price in Monmouthshire was a fraction over 97%, whereas in June 2020, that figure was 94% (Figure 4).

In 2019 there were 1,234 properties sold in Monmouthshire, with just over a third of the total being properties priced between £175,000 and £250,000. As the majority of properties sold in the county are detached, there is still quite a high proportion of sales

at higher prices. For example, 29.9% of property sales were sold at values above the Monmouthshire average property price (Figure 5).

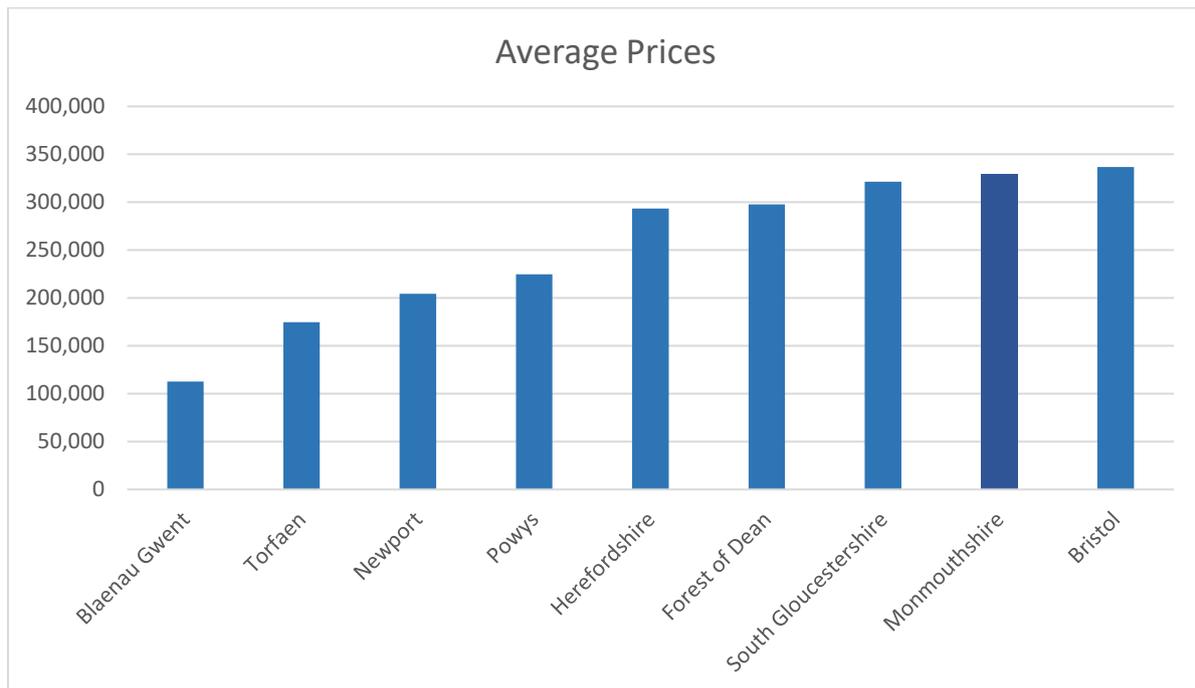
Figure 5 2019 Property Sales by Property Value



Source: Hometrack

Monmouthshire’s housing market has a range of competition from the neighbouring counties, both in Wales and England. For example, Blaenau Gwent has some of the lowest property prices in the UK with a current average price of £112,619. The three other neighbouring Welsh local authorities have much lower average prices than Monmouthshire, although the current average price for Powys of £224,681 hides the fact that close to the Monmouthshire border around Crickhowell house prices are particularly high. There is much more similarity in Monmouthshire’s housing market with the neighbouring English counties and only the City of Bristol has a higher average house price currently at £336,695 (Figure 6). This means people seeking to purchase a home are likely to need to leave Monmouthshire in order to afford suitable accommodation for their needs.

Figure 6 Current Average Price of Monmouthshire and Neighbouring Local Authorities



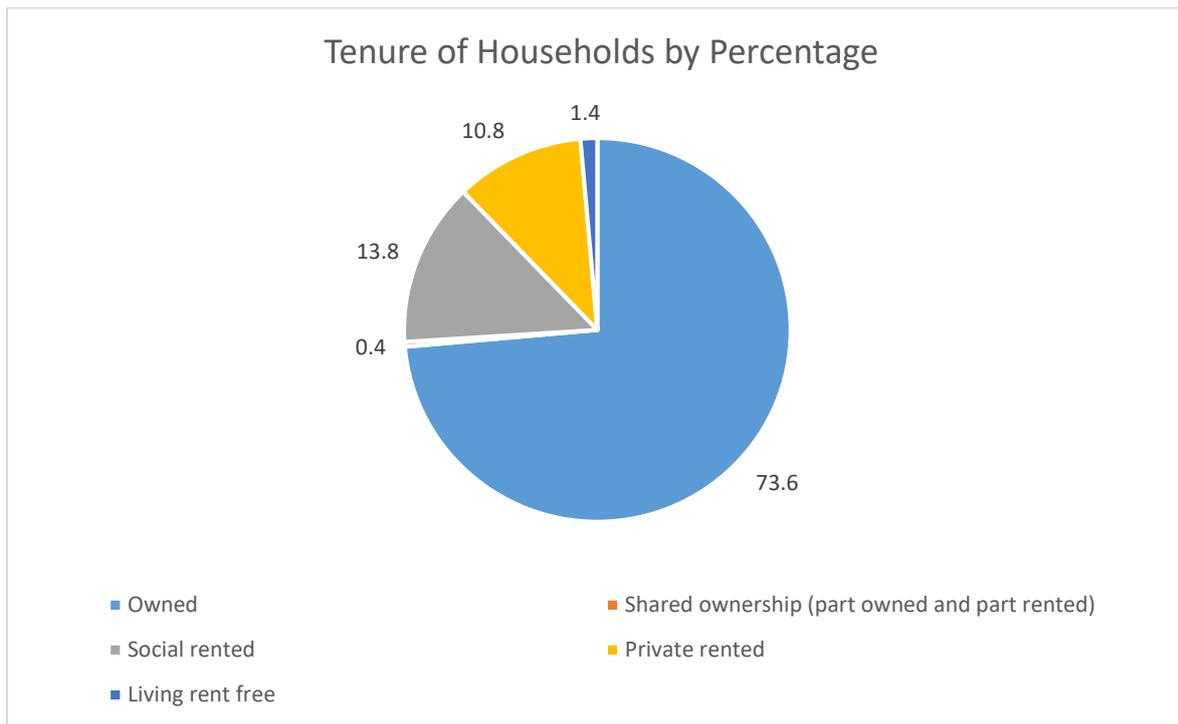
Source: Hometrack

In terms of rurality, Powys and Forest of Dean are quite similar and it is these two areas which have seen the highest prices increases over the last twelve months of 15.4% and 21.8% respectively. This appears to confirm the current trend of counter-urbanisation and a strong demand for property in the more rural areas, which will very likely continue. Initial evidence suggests that purchasers are prioritising space, quality of life and access to green open spaces over commuting time, with a significant increase in home working due to COVID-19.

### 2.3 Tenure

At the time of the 2011 Census, there were 38,233 households in the borough. Figure 7 shows the tenure of residents in Monmouthshire.

Figure 7 Tenure of Households



Source: Census 2011

Table 1 below provides a breakdown of tenure. It shows that homeownership (with or without a mortgage and shared ownership) is the most popular form of tenure, with 74% of Monmouthshire residents, either fully or in part, owning their own home.

Table 1 Breakdown of Tenure

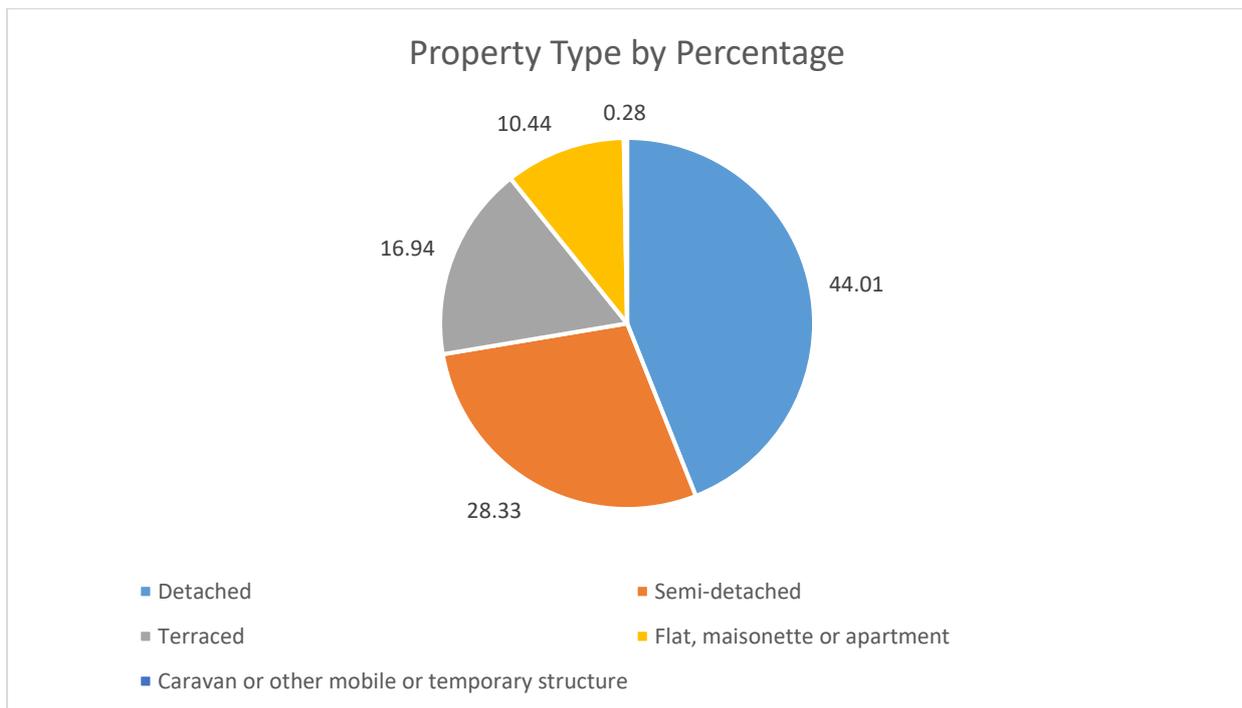
Tenure	Number	Percentage
<b>Owned Outright</b>	15,269	39.9%
<b>Owned with a Mortgage or Loan</b>	12,873	33.7%
<b>Shared Ownership (part owned part rented)</b>	141	0.4%
<b>Social Rented</b>	5,288	13.8%
<b>Private Rented</b>	4,130	10.8%
<b>Living Rent Free</b>	532	1.4%
<b>Total</b>	38,233	100%

Source: Office of National Statistics

## 2.4 Types of Property

As illustrated in Figure 8 and Table 2 below, the majority of properties in the county borough are detached homes (44.01%) with next most popular property type being semi-detached (28.33%) properties.

Figure 8 Breakdown of Property Type



Source: Census 2011

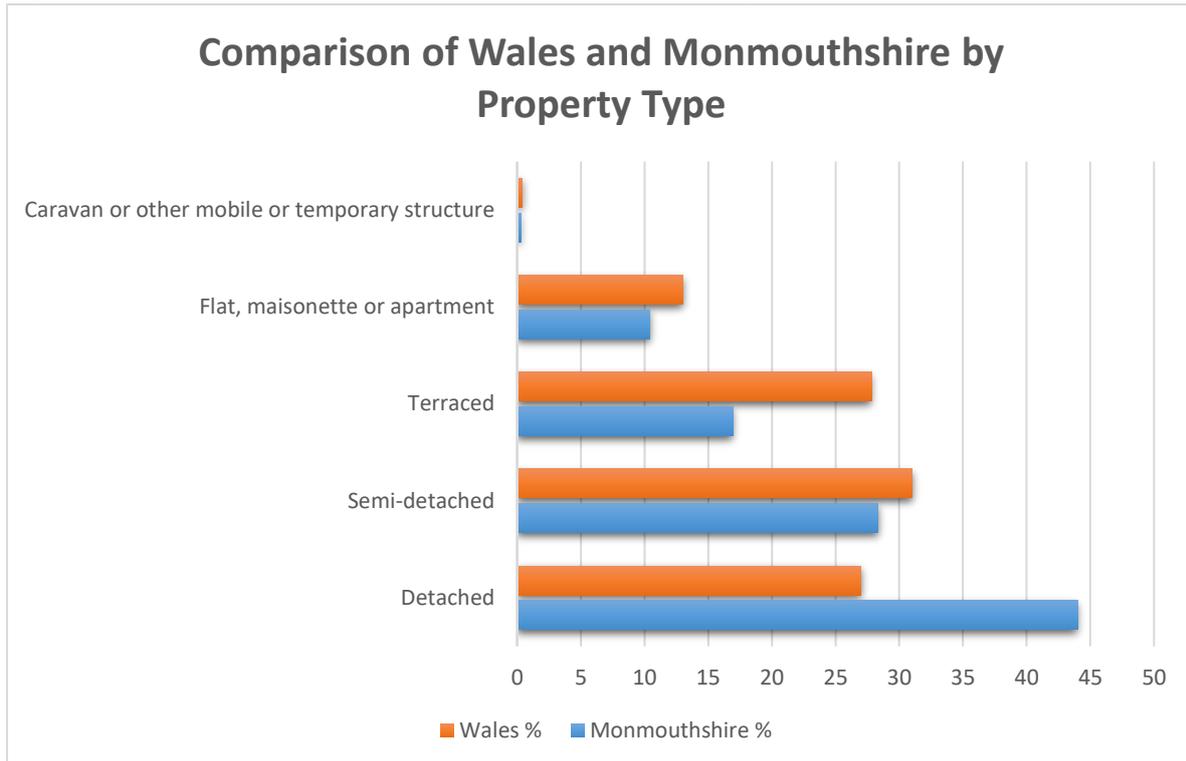
Table 2 Breakdown of Property Type

Property Type	Number	Percentage
<b>Detached</b>	17,638	44.01%
<b>Semi-detached</b>	11,354	28.33%
<b>Terraced</b>	6,789	16.94%
<b>Flat, maisonette or apartment</b>	4,186	10.44%
<b>Caravan or other mobile or temporary structure</b>	111	0.28%
<b>Total</b>	40,078	100%

Source: Office of National Statistics

As shown in Figure 9 below, a comparison between Monmouthshire property types and Wales as a whole shows there is a higher proportion of detached and semi detached properties (72.34% combined) in Monmouthshire when compared to the Wales number (58.73% combined) and a lower proportion of terraced properties and flats (27.38% combined for Monmouthshire and 40.85% for Wales). In Monmouthshire, there is limited availability of terraced homes or apartments which are often a traditional way of people taking their first step into homeownership.

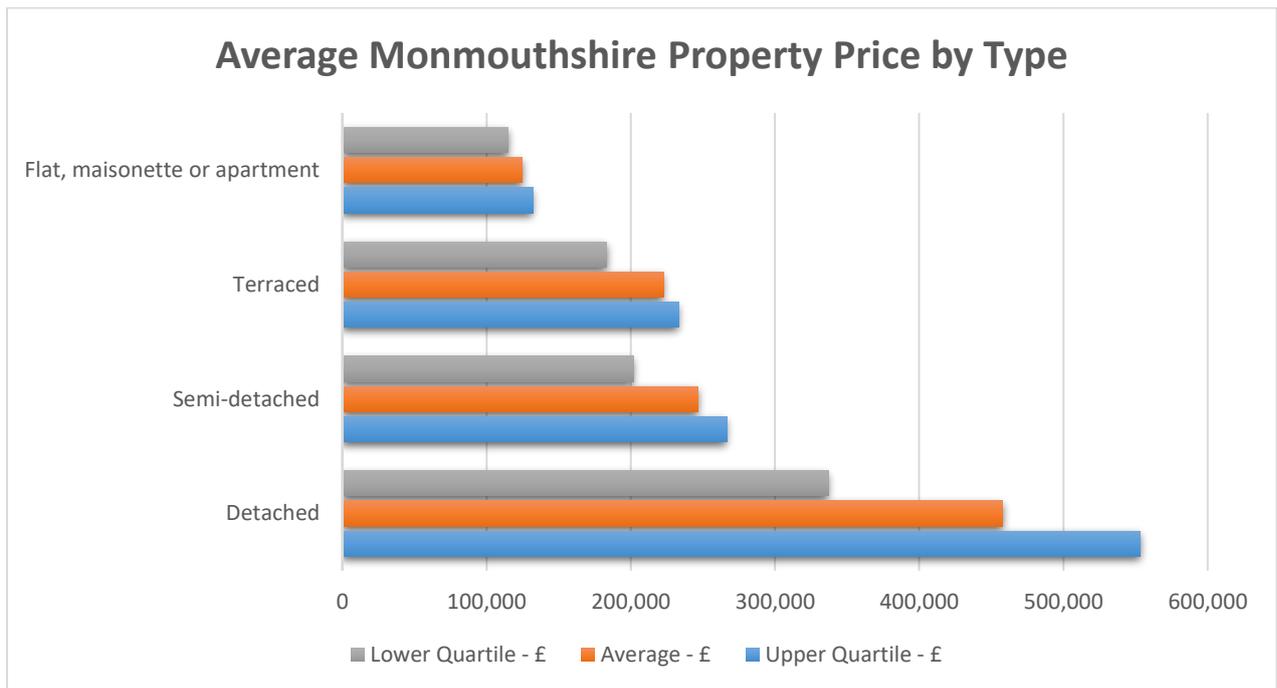
Figure 9 Comparison of Wales and Monmouthshire Property Type



Source: Census 2011

Figure 10 below illustrates the average price of each property type in Monmouthshire. This is important to acknowledge as it impacts on the availability of suitable accommodation for first time buyers and those on lower incomes trying to access the Monmouthshire Housing Market. Of particular note, the average price of a flat, maisonette or apartment in Monmouthshire (£124,666) exceeds the average price of all property types in Blaenau Gwent (£112,619), and the average price of a terraced home in Monmouthshire (£222,814) exceeds the average price of all property types in Torfaen (£174,670) or Newport (£204,283).

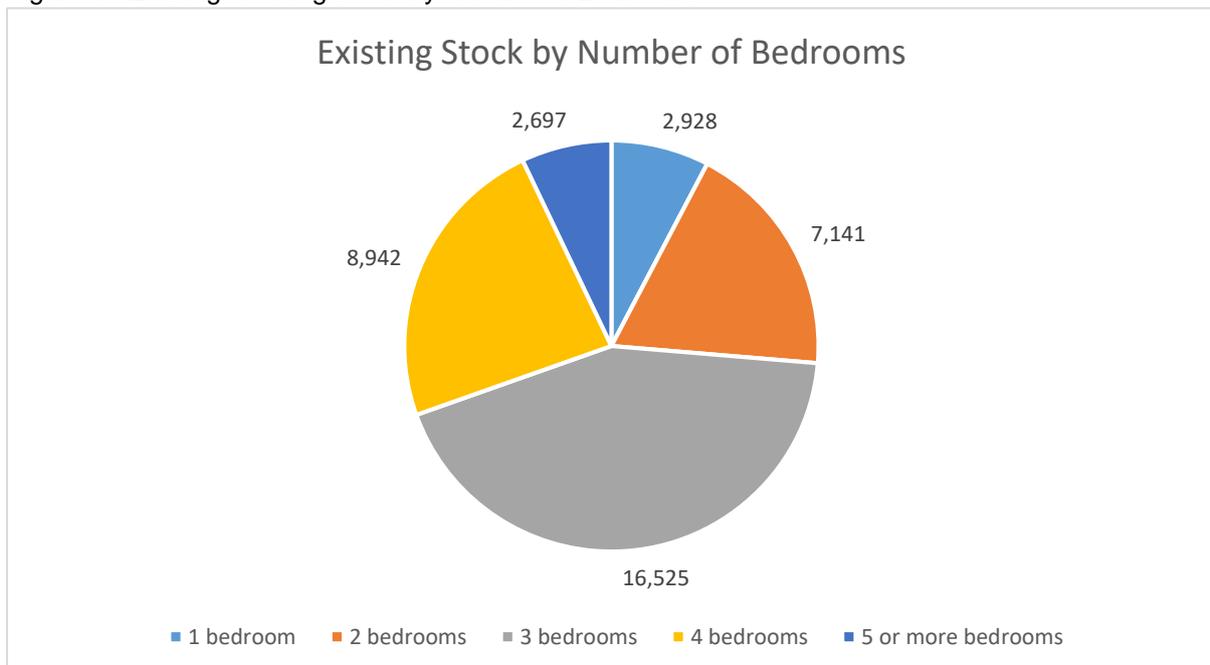
Figure 10 Average Monmouthshire Property Price by Property Type



Source: Hometrack, November 2020

As seen in Figure 11 below the majority of homes in Monmouthshire have 3, 4 or 5 or more bedrooms, this is to be expected given the number of detached and semi-detached properties and the mix of urban and rural locations within the county.

Figure 11 Existing Housing Stock by Number of Bedrooms



Source: Census 2011

Table 3 Housing Stock by Number of Bedrooms

Number of Bedrooms	Number	Percentage
1 Bedroom	2,928	7.66%
2 Bedrooms	7,141	18.68%
3 Bedrooms	16,525	42.33%
4 Bedrooms	8,942	23.39%
5 or more Bedrooms	2,697	7.05%
<b>Total</b>	<b>38,233</b>	<b>100%</b>

Source: Census 2011

## 2.5 Private Rented Sector

The private rented sector is important in meeting the housing requirements of those who are in housing need but cannot access social rented housing and those who cannot afford to purchase on the open market. Since the change in legislation allowing local authorities to utilise the private rented sector to house homeless applicants it has become an increasingly important sector for Monmouthshire.

During July 2020, a desktop study of the residential rental market was undertaken. The study was an historical analysis of rental activity from 2010 to 2020 using Hometrack's comprehensive database of properties advertised to let and looked at the following:

- Rental market and activity within Monmouthshire
- Distribution of properties and rental values by bedroom category
- Rental values and Local Housing Rates
- Affordability

This chapter reflects the study but the following statements caveat the findings:

- The collation of information and data on private rental activity, costs and affordability is not as reliable as collating data on housing sales due to the lack of data currently available. As a result the data is not robust and, therefore, only for a very broad analysis of the rental market in Monmouthshire.
- The data does not differentiate between rents for furnished/unfurnished properties, nor for whether utility bills and council tax are included/not included within the value of rent.
- The study concentrates on properties where the bedroom category is known as this demonstrates the issue of affordability especially when referring to Local Housing Allowance (LHA) rates.

## Rental Market and Activity

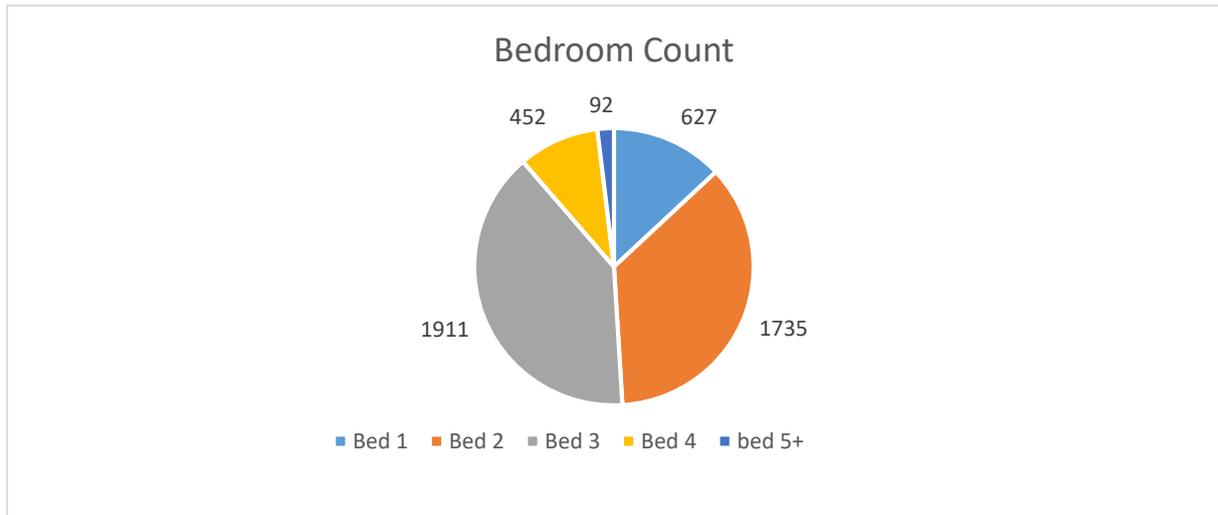
### Current Rental Market

As of July 2020 there are 3,200 Landlords registered with Rent Smart Wales representing 4,817 properties spread throughout the five rental areas of Monmouthshire, which are, Abergavenny and Monmouth in the north of the County, Usk in the centre and Chepstow and Caldicot in the south. It should be noted that

these five areas relate to postcode areas in the county and the Hometrack system provides a breakdown only for these areas below the county as a whole. It was therefore not possible to correlate the rental analysis with the three housing market areas for Monmouthshire.

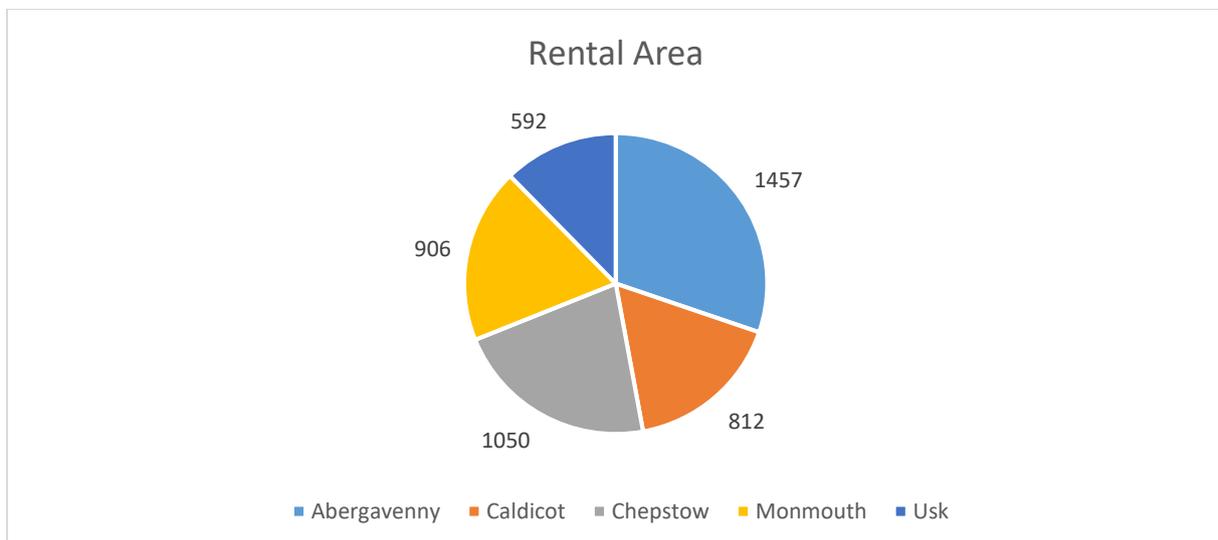
The following figures show the distribution of rental properties by bedroom count and rental area.

Figure 12 Number of Properties by Bedroom Count



Source: Hometrack

Figure 13 Number of Properties by Rental Area



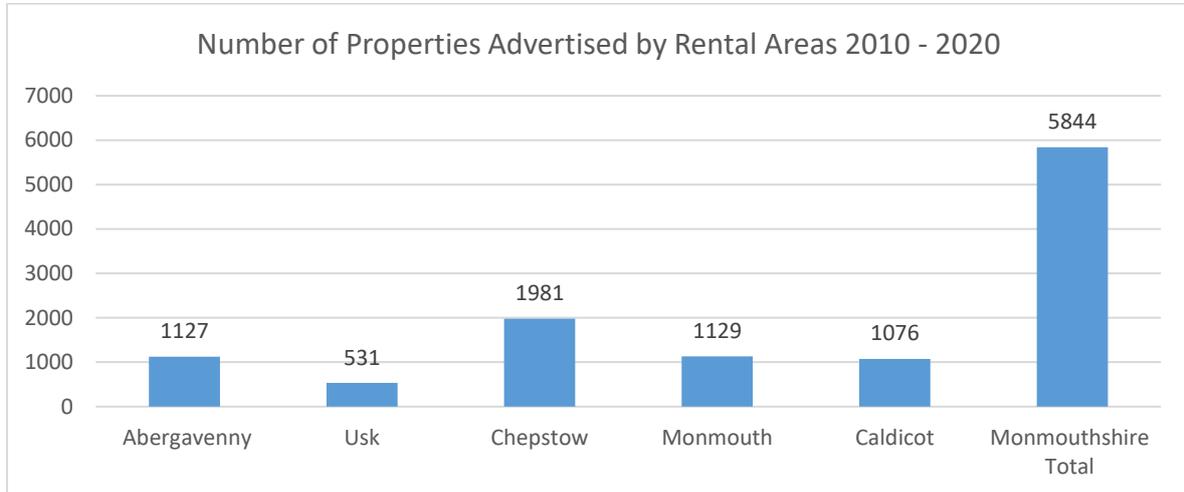
Source: Hometrack

### Historical Market Activity

The following paragraphs analyse market activity over the last ten years 2010 to 2020 using Hometrack's comprehensive database of properties advertised, which is a sample size of 5,844 properties.

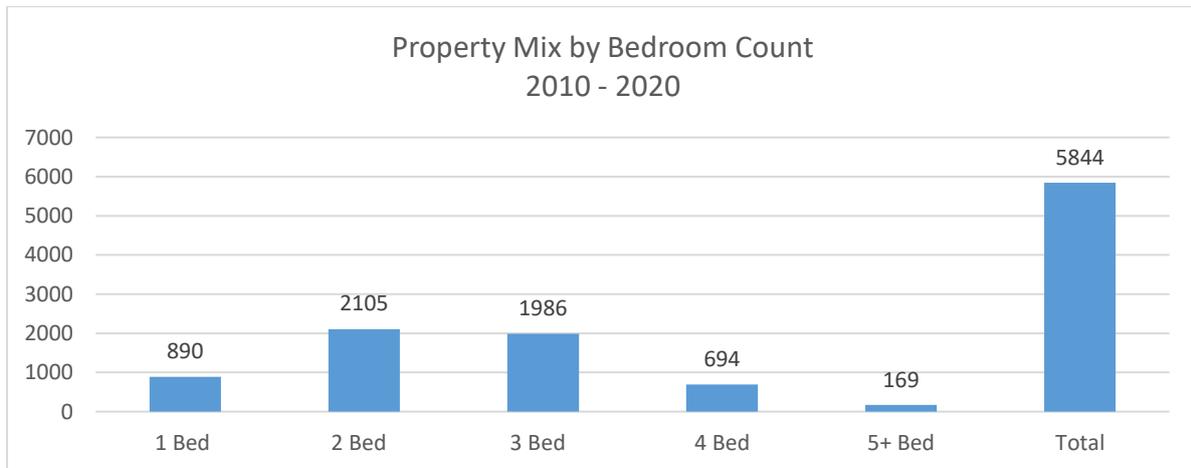
The following graphs shows the spread of the properties within the five main rental areas of Monmouthshire and by bedroom count.

Figure 14 Number of Properties Advertised by Area



Source: Hometrack

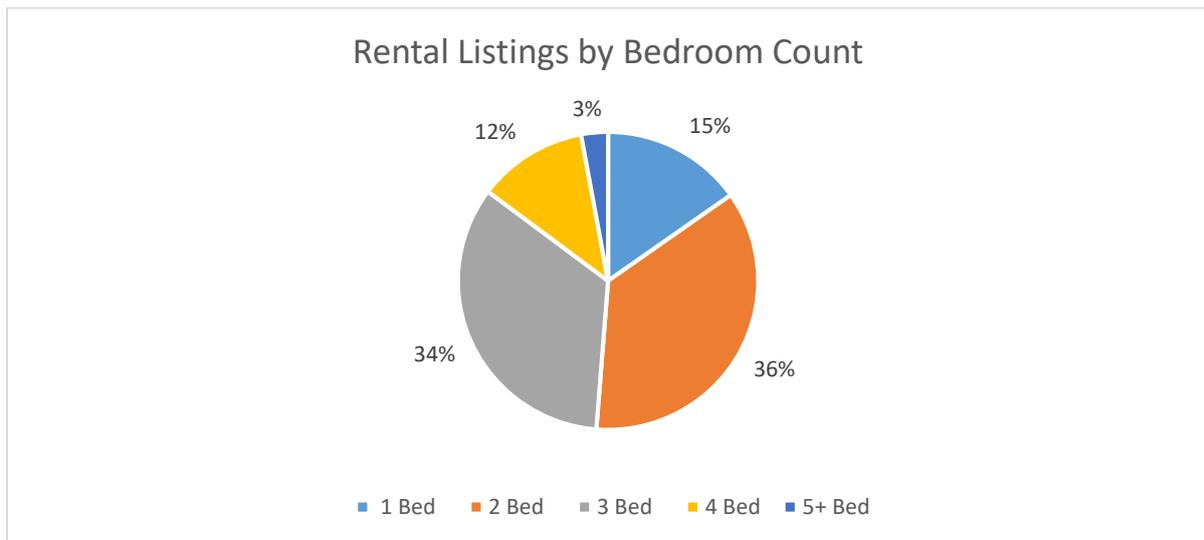
Figure 15 Property Mix by Bedroom Count



Source: Hometrack

Figure 15 below shows the mix of rental listings over the last 12 months by bedroom count. The largest share was two bedroom properties with 36%, followed by three bedroom properties with 34%. One, four and five bedroom properties made up 3%, 12% and 15% of the share respectively.

Figure 16 Rental Listings by Bedroom Count

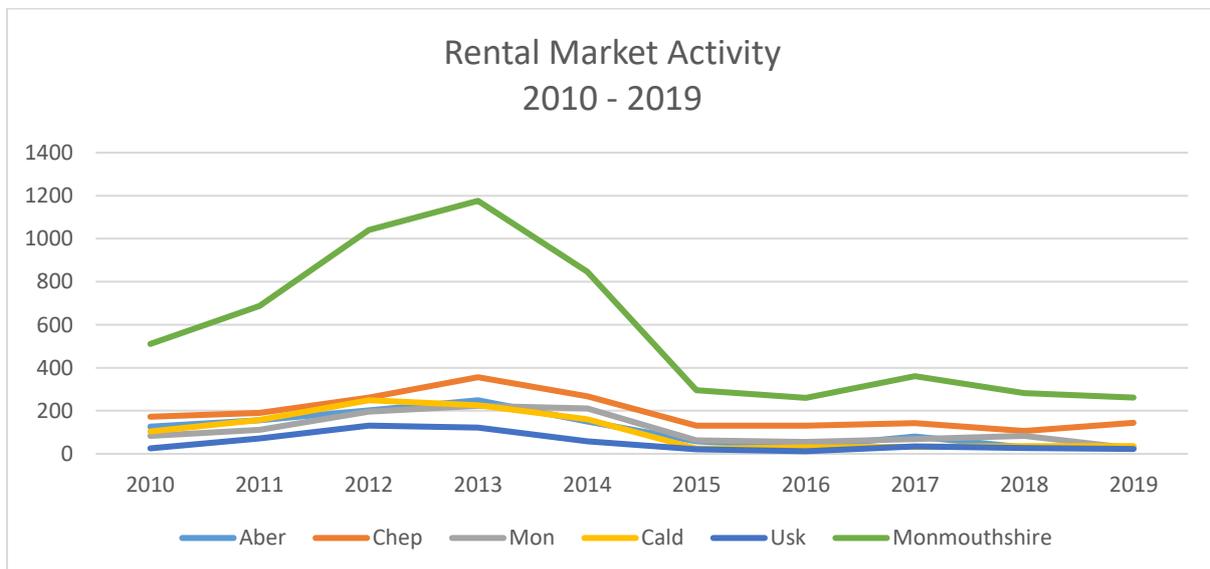


Source: Hometrack

### Market Activity

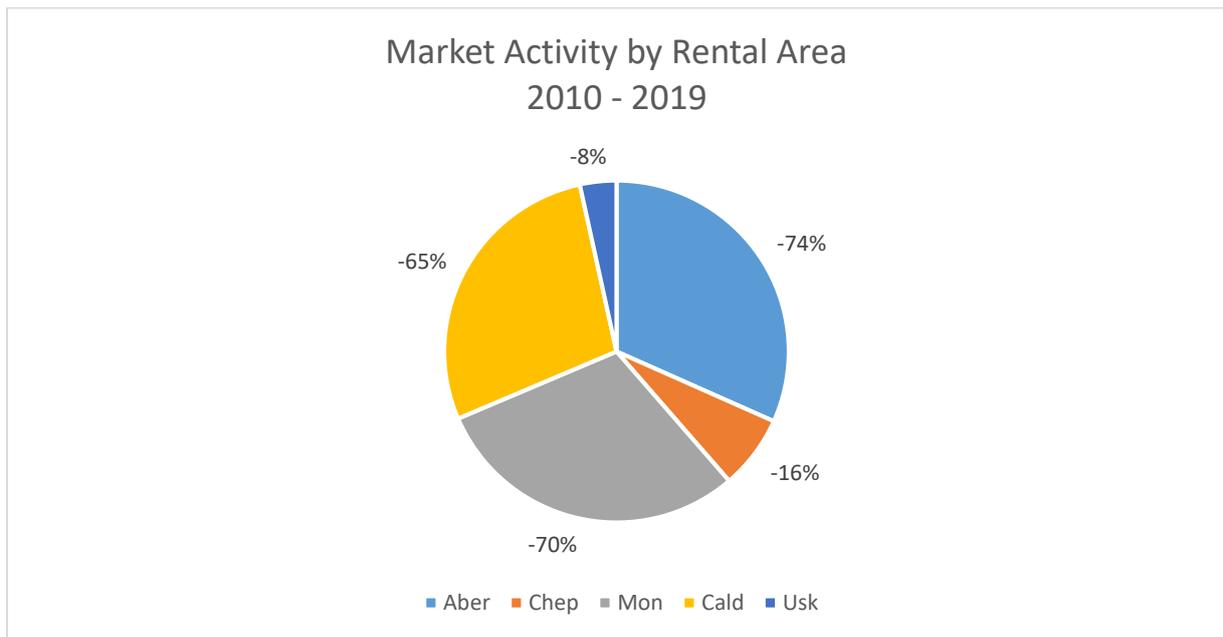
The data for this section includes only full years from 2010 – 2019.

Figure 17 Rental Market Activity



Source: Hometrack

Figure 18 Market Activity by Rental Area



Source: Hometrack

Figure 16 shows the market activity has contracted quite considerably in the five rental areas and Monmouthshire as a whole the rental market contracted by almost 50% between 2010-2019.

## Market Rental Value Growth

For this section, only data between one and four bedrooms was used due to the lack of available data five bedrooms.

Percentage Increase / Decrease of Monthly Rents 2010 - 2019		
Rental Area	Number of bedrooms	Average Rent Price Increase Since 2010
Abergavenny	1 Bed	22%
	2 Bed	16%
	3 Bed	22%
	4 Bed	11%
Usk	1 Bed	13%
	2 Bed	19%
	3 Bed	17%
	4 Bed	-1%
Chepstow	1 Bed	34%
	2 Bed	26%
	3 Bed	28%
	4 Bed	43%
Monmouth	1 Bed	30%
	2 Bed	25%
	3 Bed	19%
	4 Bed	13%
Caldicot	1 Bed	34%
	2 Bed	26%
	3 Bed	19%
	4 Bed	46%

Source: Hometrack

Other than the Usk rental area, the other rental areas have seen a significant rise in monthly rental values over the past ten years. For Monmouthshire as a whole the rental values have seen an average increase of almost 25% on 2010 values.

## Current Rental Values

Table 4 below illustrates the monthly rental values for the five rental areas as at Summer 2020. For example, the rental value for a one-bed property in Abergavenny ranges from £815 (highest value) to £295 (lowest value) with an average value of £513 and a median value of £475, based on a sample size of 192 properties.

Table 4 Monthly Rental Values

	Bedroom Category	Sample Number of Properties	Highest Current Monthly Rent	Lowest Current Monthly Rent	Average Current Monthly Rent	Median Current Monthly Rent
Abergavenny	1 Bed	192	£815	£295	£513	£475
	2 Bed	444	£925	£330	£634	£638
	3 Bed	347	£1,200	£405	£771	£755
	4 Bed	109	£2,195	£390	£1,070	£965
	5 + Bed	35	£3,535	£600	£1,649	£1,535
	<b>Total</b>	<b>1127</b>				
Usk	1 Bed	61	£710	£360	£535	£535
	2 Bed	178	£870	£398	£663	£660
	3 Bed	211	£1,190	£476	£805	£783
	4 Bed	65	£1,735	£424	£1,047	£960
	5 + Bed	16	£3,020	£1,100	£1,896	£1,818
	<b>Total</b>	<b>531</b>				
Chepstow	1 Bed	350	£770	£285	£559	£565
	2 Bed	650	£1,030	£485	£697	£695
	3 Bed	677	£2,055	£475	£845	£830
	4+ Bed	236	£2,380	£685	£1,295	£1,215
	5+ Bed	68	£3,165	£1,055	£1,663	£1,553
	<b>Total</b>	<b>1981</b>				
Monmouth	1 Bed	191	£710	£350	£529	£560
	2 Bed	450	£925	£410	£664	£665
	3 Bed	297	£1,545	£470	£836	£820
	4+Bed	151	£2,185	£700	£1,243	£1,170
	5+ Bed	40	£3,535	£1,065	£1,902	£1,813
	<b>Total</b>	<b>1129</b>				
Caldicot	1 Bed	96	£970	£250	£512	£520
	2 Bed	383	£885	£460	£655	£665
	3 Bed	454	£1,105	£535	£775	£770
	4+Bed	133	£1,515	£790	£1,051	£1,015
	5+ Bed	10	£2,010	£420	£1,450	£1,503
	<b>Total</b>	<b>1076</b>				

Source: Hometrack

### Local Housing Allowance Rates (LHA)

Monmouthshire has one single rate for each bedroom category (maximum bedroom rate of four bedrooms for the county). Table 5 illustrates the details for 2020/2021.

Table 5 Local Housing Allowance Rates - 2020/2021

Shared Allowance	£329
1 Bed	£414
2 Bed	£549
3 Bed	£648
4+Bed	£779

The following table illustrates the number of available properties that are affordable to those in receipt of the appropriate LHA rate for their bedroom category.

Table 6 Number of Properties at LHA Rate

Rental Area	Bedroom Count	Sample Number of Properties	Monthly LHA Rate	Number of properties at or below LHA rate	Percentage of properties at or below LHA
Abergavenny	1 Bed	192	£414.00	24	12.5%
	2 Bed	444	£549.00	81	18.2%
	3 Bed	347	£648.00	38	11.0%
	4 Bed	109	£779.00	5	4.6%
Usk	1 Bed	61	£414.00	0	0.0%
	2 Bed	178	£549.00	21	11.8%
	3 Bed	211	£648.00	15	7.1%
	4 Bed	65	£779.00	3	4.6%
Chepstow	1 Bed	350	£414.00	14	4.0%
	2 Bed	650	£549.00	9	1.4%
	3 Bed	677	£648.00	5	0.7%
	4+ Bed	236	£779.00	1	0.4%
Monmouth	1 Bed	191	£414.00	22	11.5%
	2 Bed	450	£549.00	41	9.1%
	3 Bed	297	£648.00	5	1.7%
	4+Bed	151	£779.00	4	2.6%
Caldicot	1 Bed	96	£414.00	8	8.3%
	2 Bed	383	£549.00	19	5.0%
	3 Bed	454	£648.00	11	2.4%
	4+Bed	133	£779.00	0	0.0%

<b>Total by Rental Properties</b>	<b>5675</b>	<b>Total Number of Properties at LHA Rate</b>	<b>326</b>	<b>Percentage</b>	<b>5.75%</b>
-----------------------------------	-------------	---	------------	-------------------	--------------

Source: Hometrack

Table 6 details the number of properties that came within the LHA rate applicable to their bedroom count is 326, which equates to 5.75% of the total number of available properties. This data shows that it is highly unlikely that recipients of local housing allowance could afford to rent a property at market rent.

### **Affordability**

To determine whether a household is able to afford to rent privately, a comparison was made between the median net annual household income and the median rental values for each property type by area.

It is assumed that a maximum of 35% of net income can be spent on renting and that net income is 74% of gross income (accounting for tax and NI contributions). The calculation method and assumptions are in line with guidance on calculating affordability issued by the Homes and Communities Agency.

Table 7 shows the net median family income required to meet the median rental values of each bedroom count. Note that the median wage has two values. This represents those residents that work “in county” and those that work “out of county”. This latter category represent 40% of the total work force.

Table 7 Affordability – Net Median Wage Based on Median Rents by Bedroom Category

Rental Area		Sample Number of Properties	Highest Current Monthly Rent	Lowest Current Monthly Rent	Median Current Monthly Rent	Rent as a percentage of Median Monthly Wage (In County)	Rent as a percentage of Median Monthly Wage (Out of County)	In County Median Net Wage.	Out of County Net Wage.
Abergavenny	1 Bed	192	£815.00	£295.00	£475.00	26.0%	30.6%	£1,828	£2,085
	2 Bed	444	£925.00	£330.00	£638.00	34.9%	30.6%		
	3 Bed	347	£1,200.00	£405.00	£755.00	41.3%	36.2%		
	4 Bed	109	£2,195.00	£390.00	£965.00	52.8%	46.3%		
	5 + Bed	35	£3,535.00	£600.00	£1,535.00	84.0%	73.6%		
	<b>Total</b>	<b>1127</b>							
Usk	1 Bed	61	£710.00	£360.00	£535.00	25.7%	25.7%		
	2 Bed	178	£870.00	£398.00	£660.00	36.1%	31.7%		
	3 Bed	211	£1,190.00	£476.00	£782.50	42.8%	37.5%		
	4 Bed	65	£1,735.00	£424.00	£960.00	52.5%	46.1%		
	5 + Bed	16	£3,020.00	£1,100.00	£1,817.50	99.4%	87.2%		
	<b>Total</b>	<b>531</b>							
Chepstow	1 Bed	350	£770.00	£285.00	£565.00	30.9%	27.1%		
	2 Bed	650	£1,030.00	£485.00	£695.00	38.0%	33.0%		
	3 Bed	677	£2,055.00	£475.00	£830.00	45.4%	40.0%		
	4+ Bed	236	£2,380.00	£685.00	£1,215.00	66.5%	58.0%		
	5+ Bed	68	£3,165.00	£1,055.00	£1,552.50	84.9%	74.0%		
	<b>Total</b>	<b>1981</b>							
Monmouth	1 Bed	191	£710.00	£350.00	£560.00	30.6%	26.9%		
	2 Bed	450	£925.00	£410.00	£665.00	36.4%	31.9%		
	3 Bed	297	£1,545.00	£470.00	£820.00	44.9%	39.3%		
	4+Bed	151	£2,185.00	£700.00	£1,170.00	64.0%	56.1%		
	5+ Bed	40	£3,535.00	£1,065.00	£1,812.50	99.2%	87.0%		
	<b>Total</b>	<b>1129</b>							
Caldicot	1 Bed	96	£970.00	£250.00	£520.00	28.5%	25.0%		
	2 Bed	383	£885.00	£460.00	£665.00	36.4%	31.9%		
	3 Bed	454	£1,105.00	£535.00	£770.00	42.1%	36.9%		
	4+Bed	133	£1,515.00	£790.00	£1,015.00	55.5%	48.7%		
	5+ Bed	10	£2,010.00	£420.00	£1,502.50	82.2%	72.18%		
	<b>Total</b>	<b>1076</b>							

Source: Hometrack

With the net monthly median earnings for people residing and working in Monmouthshire being £1,828 and for people residing in Monmouthshire but working outside the county being £2,085, accessing properties in the private rental sector in Monmouthshire remains a challenge for a large number of households (Source: Nomis Official Labour Market Statistics).

## **2.6 Affordability**

Although average wages have increased over the last two years for Monmouthshire residents, the high house prices in Monmouthshire still puts owning a home beyond the reach of many families who live and work in Monmouthshire.

Average earnings for those who work in Monmouthshire are £570 per week or £29,640 per annum. This is above the Wales average of £535 per week or £27,820 per annum. The average earnings of people who live in Monmouthshire and travel to work elsewhere are higher at £694.60 per week or £36,119.20 per annum. This is above the Wales average of £540.70 or £28,116.40.

Source: ONS - Annual survey of hours and earnings (2019 figures)

### **Higher Managerial Socio-economic Status**

Monmouthshire's economically active population can be broken down by occupation, 51.5% of residents are recorded as working in Higher Managerial or Professional positions and this compares to a Wales average of 42.6%. The house purchasing ability of this socio-economic group is far greater than local people on local incomes, and is one of the reasons why house prices, especially in rural areas are so unaffordable. With the removal of Severn Bridge tolls at the end of 2018, it is quite likely that there will be further counter-urbanisation from Bristol into Monmouthshire with both house prices and rental values in the private rented sector being pushed up even higher.

Source: ONS - Annual survey of hours and earnings (2019 figures)

## **2.7 Entry Level Property Price**

The entry level house price for Monmouthshire is £200,000.

There are cheaper properties available to buy in the county, but this figure reflects the market evidence of where the majority of first-time buyers access home ownership in Monmouthshire.

The £200,000 figure is the lower quartile price of a semi-detached house in Monmouthshire, based on sales and valuations. The reason it is based on sales and valuations is with far fewer sales taking place in 2020, combining it with valuation data gives a more up-to-date and robust figure.

Semi-detached properties account for just under 30% of all housing in Monmouthshire, so they are widely available in all areas of the county, as opposed to terraced properties which account for only 17% of the housing stock and detached properties which account for nearly 45% of the stock. Detached properties are significantly more expensive and therefore not considered entry level.

Although there are obvious differences between housing markets within Monmouthshire, the differences in semi-detached prices is not significant. The most recent market data shows the figure for Abergavenny to be the cheapest for semi-

detached at £175,000, with Caldicot being the most expensive area at £210,000. Although the figure for Abergavenny does appear low, using sales only data the lower quartile figure is then £210,000, but this is based on a property count of only seven properties.

To be able to access home ownership in Monmouthshire, with an entry level price of £200,000, after allowing for a 15% deposit of £30,000 a household's income would need to be over £48,500 based on a mortgage offer at 3.5 times the household income.

According to the latest Hometrack data, the current Monmouthshire average house price to average income ratio is 7.23:1. In other words, people living in Monmouthshire would need over seven times their income to be able to afford an averaged priced property. That ratio increases to 9:1 for someone on a lower quartile income.

Rural house prices in Monmouthshire usually attract a significant premium and with the majority of housing being detached a separate entry level price for the rural parts of the country was not considered to be necessary.

### 3. Monmouthshire Housing Market Areas

Monmouthshire's housing market has contracted slightly each year since the 2016 Brexit referendum, but when combined with the Covid-19 pandemic, the current local housing market is very unpredictable and with significantly fewer sales, it looks quite different to how it ever has before. There are so many inconsistencies in the market, for example, many expensive houses have been sold in rural areas, yet house prices have been contracting slightly in the towns of Chepstow and Abergavenny, so a county-wide average price does not provide a robust base to develop policy on.

Despite a lack of data, it is still possible to split the county into three distinct housing market areas. After a detailed examination of available data and the various geographical levels, which included electoral wards, postcode districts and super output areas, the data indicates that the county closely follows the three travel to work boundaries that fall in Monmouthshire's boundary that is:

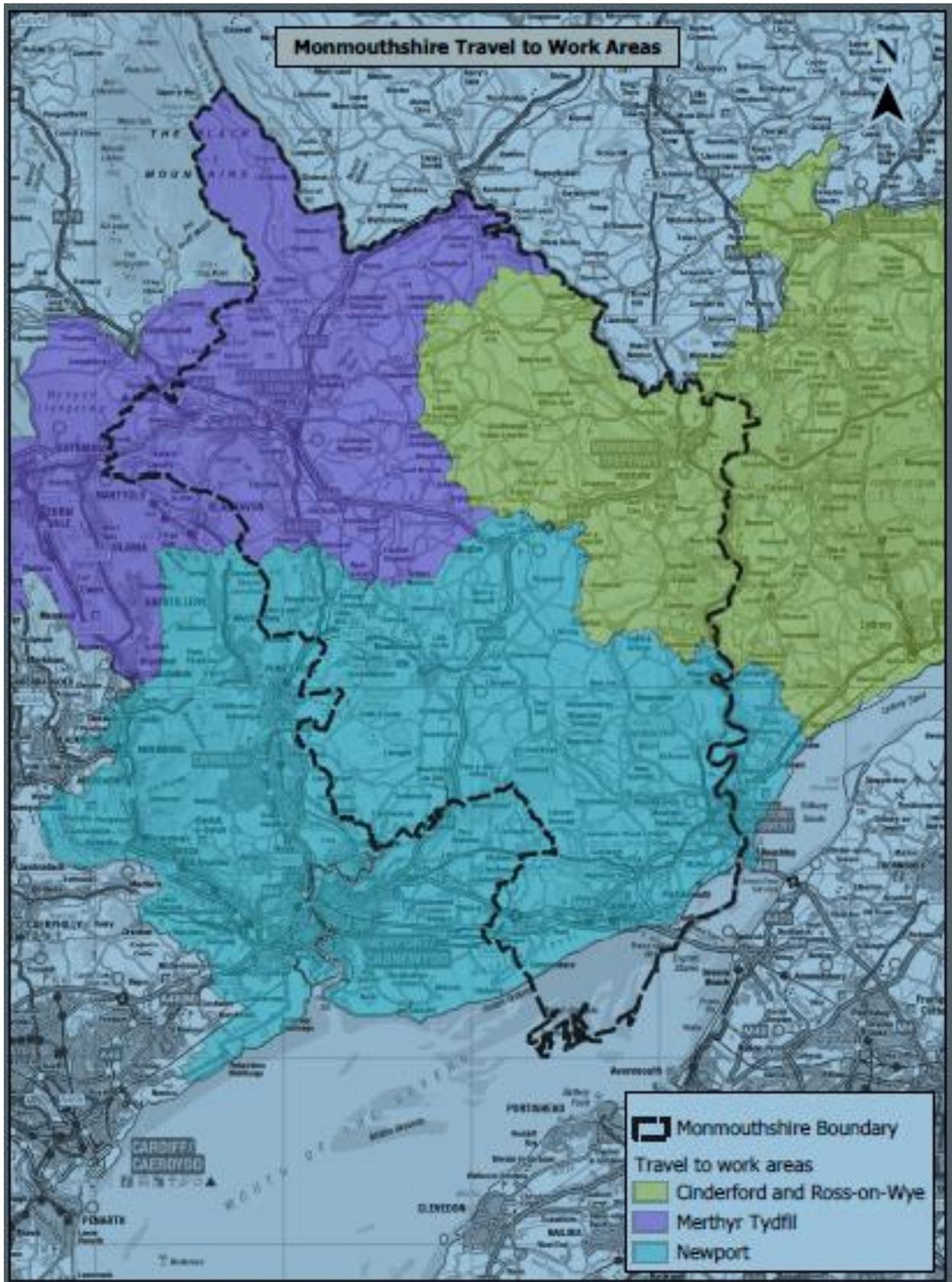
- Chepstow Housing Market Area (Newport Travel to Work Area)
- Monmouth Housing Market Area( Cinderford and Ross-on-Wye Travel to Work Area)
- Abergavenny Housing Market Area (Merthyr Tydfil Travel to Work Area)

The Travel to Work Areas which fall within Monmouthshire's boundaries are shown in Figure 18.

Travel to Work Areas are areas derived to approximate labour market areas. In other words, they are derived to reflect self-contained areas where most people both live and work. The current criteria for defining a Travel to Work Area is that at least 75% of the area's resident workforce in the area and at least 75% of the people who work in the area also live in the area.

Over time there has been a consistent reduction in the number of Travel to Work Areas in the UK as more people tend to commute longer distances to work. There were 228 Travel to Work Areas following the 2011 Census, but with the impact of the Covid-19 pandemic and the increasing number of people working from home, there is likely to be a further reduction following the 2021 Census.

Figure 19 Monmouthshire Travel to Work Areas



Geography & Technology, Welsh Government 57.20-21  
© Crown Copyright and database right 2020. Ordnance Survey 100021874.

As well as the commentary and figures provided for the three housing market areas in Monmouthshire, additional data is presented for the whole county to provide the wider context.

### **3.1 Abergavenny Housing Market Area**

This is the lowest priced of the three housing market areas in Monmouthshire with the current average house price of £292,567 (Figure 19) based on 559 sales and valuations for the twelve months up until August.

As with the two other housing market areas there has been a big downturn in the number of transactions for the twelve month period ending in August 2020 compared with the twelve month period ending in August 2019, when there were 741 sales and valuations.

The Abergavenny Housing Market Area has experienced a 5.6% growth in prices over the last year and 23.6% growth over the last four years. The Middle Super Output Area 002 which fits completely within a part of the town boundary has experienced negative growth over the last twelve months with the average price in August 2019 being £247,670 compared to £243,670 now. The disparity in prices between certain areas in Abergavenny is significant so the price difference is most likely due to the type of properties being sold and valued. For example if more properties on the west side of Abergavenny, adjacent to the Brecon Beacons National Park are included in these averages, the average price will be higher.

The most expensive part of this housing market area, is Lower Super Output Area 005B which includes Llanover and Llanfair Kilgeddin with the current average house price at £495,940.

The Abergavenny Housing Market Area has always attracted strong demand, as part of it lies within the Brecon Beacons National Park, it has very good road and rail infrastructure, it has a hospital and it has a very strong retail offering. With the hospital being downgraded this might impact on the nature of future housing demand, but its location and network infrastructure is the key to the housing market remaining strong.

### **3.2 Chepstow Housing Market Area**

The current average price for the Chepstow Housing Market Area is £321,888 (Figure 19) based on a sample size of 1197 sales and valuations for the twelve months up until August 2020.

As with many other areas, what is immediately noticeable is the downturn in transactions over the twelve months up to and including August 2020 when compared to the twelve months ending in August 2019. There were 1579 sales and valuations over the previous twelve month period.

This area of Monmouthshire has experienced the highest percentage of house price growth over the last four years including the last 12 months. What these headline figures do not show is that the majority of the growth has been concentrated in the

rural areas. An examination of house prices in Chepstow town alone shows that it has had zero price growth over the last twelve months, with average prices for the town dropping slightly from £225,088 in August 2019 to £224,924 in August 2020. The lack of growth may well be as a result of the significant price growth the town had over the previous three years with a percentage increase of 33.3%. Another reason could be the very low level of new home completions in Chepstow over the last decade.

The most expensive rural part of the Chepstow Housing Market Area, is Lower Super Output Area 007A which includes, St Arvans, Devauden, Llangwm and Llansoy with a current average house price of £521,368.

It is difficult to predict what will happen to the Chepstow Housing Market area with the ongoing Covid pandemic and the UK's exit from the EU, but if the last six months are an indicator then the rural parts of this area will continue to experience strong demand. The urban parts of this area provide less clarity, demand will very much depend on the health of the local economy and the retail experience provided in the towns, as well as the provision of new quality development. For example, the Waitrose store in Caldicot will close which will be a big loss to the southern part of the county. Normally, such a change could have a significant impact on the local housing market, however the vacated store has already been purchased by Aldi, and the town regeneration plans and new secondary school together with proposed public transport improvements will increase the town's appeal.

### **3.3 Monmouth Housing Market Area**

The current average house price for the Monmouth Housing Market Area is £363,359 (Figure 19) based on a sample size of 363 sales and valuations for the twelve months up until August 2020.

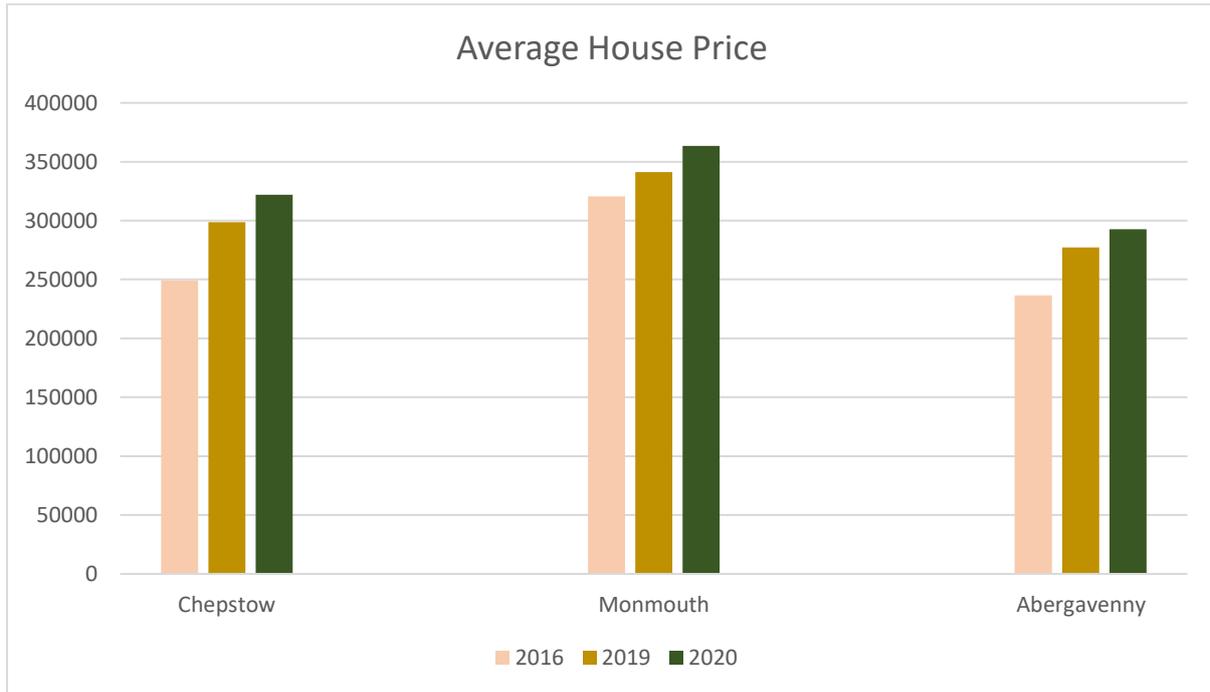
There is a significant downturn in the number of transactions for the twelve month period ending in August 2020 when compared to the twelve month period ending in August 2019. For the twelve months ending in August 2019, there were 524 sales and valuations.

This area of Monmouthshire has experienced the lowest percentage price increases over the last four years, but over the last twelve months house price growth has been very strong at 6.5%. Unlike Chepstow and Abergavenny, the other two major towns in Monmouthshire, the town of Monmouth, which includes Wyesham, has had annual growth of 5.9%, with the average house prices increasing from £280,886 in August 2019 to £297,366. One of the contributory factors to this growth may well be the availability of new build properties for sale, which usually attract a premium. Even though the average price in Monmouth is significantly higher than Chepstow, an examination of the average price per square metre shows that Monmouth provides better value per square metre. Over the six month ending in August 2020, the average price per square metre of properties in Chepstow was £2,399 per square metre compared to £2,143 in Monmouth.

The most expensive part of the Monmouth Housing Market area is Lower Super Output Area 005D, which includes Mitchel Troy, Dingestow and Tregare, with the current average house price being £615,949.

The neighbouring area of Forest of Dean has experienced very significant house price growth over the last twelve months of 21.8% and this is in the same travel to work area. It does appear with people either willing to travel further to work or have no need to travel, then housing markets which have previously provided very good value are now becoming sort after. Therefore if that trend continues, the Monmouth Housing Market Area will continue to see demand and house price growth for the foreseeable future.

Figure 20 Average House Prices in Monmouthshire’s Housing Market Areas



Source: Hometrack

## 4. Methodology and Data Sources for Assessing Housing Need

This Local Housing Market Assessment has utilised the Welsh Government's guidance documents:

***Local Housing Market Assessment Guide, March 2006***

and

***Getting Started with your Local Housing Market Assessment - A Step by Step Guide, November 2014.***

The guidance aims to enable local authorities to develop an understanding of the nature and level of housing demand and need in their local housing markets and outlines a quantitative approach to calculating housing need. The methodology for determining housing need follows a process:

Figure 21 Bathtub Analogy



The LHMA provides a snapshot of the housing market at a particular point in time, which is projected forward 5 years, however, the fluidity of the housing market requires regular updates to ensure a robust and valid evidence base. It is therefore the intention to review the data within this LHMA every two years.

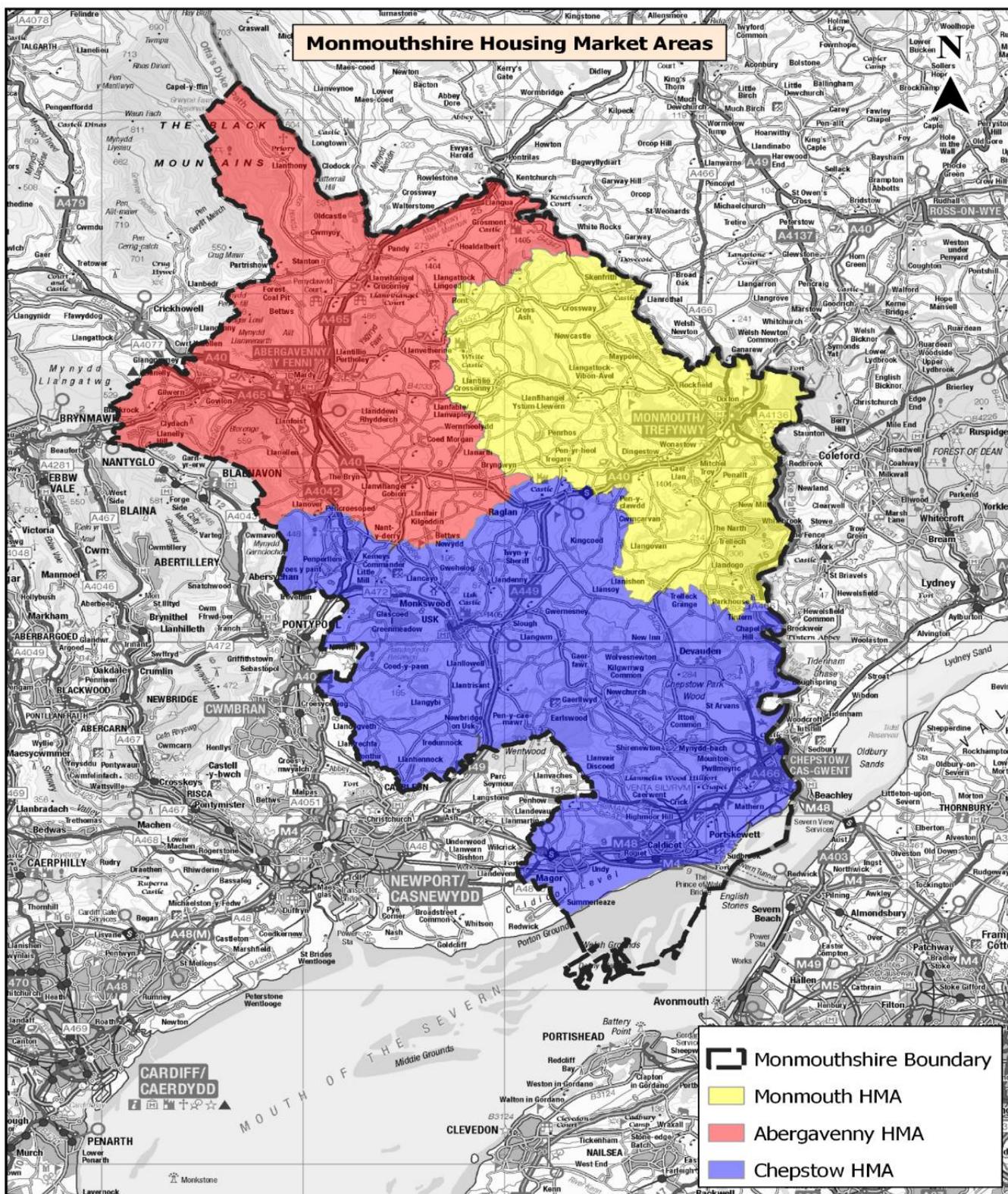
This assessment uses a range of datasets. The primary sources of data are:

- Hometrack

- Office of National Statistics
- CACI Paycheck
- Monmouthshire's Common Housing Register
- NOMIS – Official Labour Market Statistics
- Ministry of Justice

The Welsh Government guidance suggests that analysis should be undertaken at ward level as data is available at this level for all stages of the analysis. However, it is acknowledged that some authorities may consider alternative spatial scales to be more appropriate. The findings of this LHMA have been analysed across three housing market areas. This approach was adopted because housing markets are not representative of ward boundaries and with such a significant downturn in the number of sales and valuations, ward level data was found to be very inconsistent and could not be relied on. Therefore the use of Lower Super Output Areas and Middle Super Output Areas, which are statistical geographies designed to improve the reporting of small area statistics in England and Wales, have been used for the robustness of data. The three housing market areas in Monmouthshire are illustrated in Figure 21.

Figure 22 Map of Monmouthshire Housing Market Areas



Geography & Technology, Welsh Government 057.20-21  
 © Crown Copyright and database right 2020. Ordnance Survey 100021874.

## 4.1 Backlog of Housing Need

Backlog refers to the number of households who are currently unable to satisfy their housing need via the open market and have applied to the local authority for assistance. This was determined by collating data from Monmouthshire's common housing register and considered the Homeseach waiting list, which is the social rent list and the Low Cost Home Ownership waiting list.

The housing register includes a proportion of applicants who are not in housing need and the guidance recommends that a reduction is made to account for this. For the purposes of this assessment, those households with sufficient financial resources to satisfy their housing need on the open market, those households considered to be adequately housed and existing RSL tenants were excluded.

The number of applicants registered will continually fluctuate but at the time of writing there are over 3,500 households waiting for housing of which 2,435 households have a recognised housing need.

### Limitations

Monmouthshire operates a choice based lettings scheme for social housing, so whilst applicants are asked for their areas of preference, they still have the freedom to apply for housing in any part of the borough. It is therefore important to acknowledge that areas of preference can only ever be seen as an indication of where there is a housing need and not a definitive list of where more housing is required. In addition, whilst demand for property may be higher in some parts of Monmouthshire, land availability means that the ability to deliver properties in specific areas is inevitably limited and applicants may have to meet their housing need in alternative areas.

### Total Backlog

The following table shows the total annual backlog (over 5 years) by submarket area using data from the housing register.

Table 8 Gross Annual Affordable Housing Need

Submarket Area	1 Bed	2 Bed	3 Bed	4 Bed	5 Bed	Total
Abergavenny	108	48	15	3	1	175
Chepstow	139	65	22	7	1	234
Monmouth	58	25	9	2	1	95
<b>Total</b>	<b>305</b>	<b>138</b>	<b>46</b>	<b>12</b>	<b>3</b>	<b>504</b>

## 4.2 Newly Arising Need

Once the backlog for affordable housing has been determined, it is necessary to factor in newly arising need, by calculating how many new households will form in the next five years and estimating how many of them will require affordable housing.

Newly forming households are determined by using the WG population projections; 2018-based household projections for local authorities in Wales. Whilst these projections are based on a number of assumptions, including future births, deaths and migration, it remains the most reliable source of data available for estimating future population growth. Additional policy based assumptions have been added which reflect the issues that the Replacement Local Development Plan is looking to address.

To calculate the overall number of new households arising in the next five years, the total projected figures for 2020 were subtracted from the projected figures for 2025, leaving a total net growth figure of 1690 households. Using 2011 Census data, as a guide, these figures were disaggregated to calculate the proportion of new households residing in each ward and submarket area.

Table 9 Net Household Growth 2020 - 2025

Submarket Area	Total Growth (5 years)	Annual Growth
Abergavenny	527	105.4
Chepstow	894	178.8
Monmouth	269	53.8
<b>Total</b>	<b>1690</b>	<b>338</b>

### New Households priced out of the Market

Not all new households will require affordable housing, but it is important to calculate how many could be priced out of the housing market. We have no way of knowing how many of these households will require assistance from the Local Authority in the form of affordable housing. The data is unable to tell us someone's personal circumstances; they may have inheritance or financial support from family to enter the property market without assistance.

Help to Buy is available in Monmouthshire and the scheme may be extended beyond March 2021. Since its inception in 2014, 266 properties have been purchased in Monmouthshire and it remains an option to assist those struggling to purchase a property without any support (October 2020, Source: Stats Wales).

Using a 3.5:1 ratio, which is the standard earning to house price calculator for most mortgage lenders, and comparing income data (CACI Paycheck) to the Monmouthshire entry level property price of £200,000 (Hometrack), an estimate of households priced out of the market has been achieved.

Table 10 Households priced out of the Market

Submarket Area	Annual Growth	% priced out of market	Annual Requirement
Abergavenny	105	72.38%	76
Chepstow	179	63.68%	114
Monmouth	54	68.51%	37
<b>Total</b>	<b>338</b>	<b>68.19%</b>	<b>227</b>

The findings show that approximately **227** households will be priced out of the market each year, a total of **1,135** households over the next five years.

### 4.3 Existing Households Falling into Housing Need

The LHMA also needs to take account of existing households that may fall into need each year due to homelessness. WG guidance states that this should be estimated by looking at recent trends. Ministry of Justice data is available at Local Authority level and can be used to identify the number of mortgage and landlord possession claims leading to orders. Ministry of Justice data shows that there are approximately 208 landlord and mortgage repossessions within Monmouthshire for the period 2015 – 2020. Some of these households will already have been included in the homeless households counted below, but others will not, further increasing the overall demand for affordable housing.

During the same period there were 1,003 homelessness presentations which required temporary accommodation. Dividing the homelessness total by 5 gives an average of 200.6 existing households falling into housing need each year until 2025. To give an estimation of distribution at ward level the census ward level proportions were applied to the 200.6 figure and an indicative breakdown of bedroom size required was factored in by applying the proportionate demand identified from the Common Housing Register. The results are shown in table 11.

Table 11 Existing Households Falling into Need

Submarket Area	1 Bed	2 Bed	3 Bed	4 Bed	Total
Abergavenny	38.16	16.9	5.63	1.88	62.57
Chepstow	64.72	28.65	9.54	3.03	105.94
Monmouth	19.46	8.62	2.87	0.96	31.91
<b>Total</b>	<b>122.34</b>	<b>54.17</b>	<b>18.04</b>	<b>5.87</b>	<b>200.42</b>

Another area of need, which is not been specifically covered in the above data sets, relates to households who are leaving hospital or institutional care and are unable to return to their existing accommodation. Housing and Communities are working closely with Aneurin Bevan Health Board Health and Social Care colleagues to identify these households to adequately meet their housing needs, either through existing stock or through new build bespoke accommodation.

## **Further Consideration – Covid-19 Pandemic**

The data set above utilises statistics from the last 5 years (2014 - 2019). It does not consider the current socio and economic environment due to the impact of Covid-19 on existing households. Many self-employed and small business owner households living in Monmouthshire could be experiencing furlough, reduced wages or unemployment, and the effects of Government restrictions due to the pandemic.

The medium to long-term impact of this is unknown, however, it is reasonable to assume that some of these households may encounter financial difficulties, which could lead to mortgage or rent arrears. There is currently a moratorium in place until 31<sup>st</sup> March 2021, which requires landlords to serve a 6 month notice to terminate a tenancy (unless in exceptional circumstances) and mortgage lenders are offering payment holidays for homeowners struggling to make their mortgage repayments. These measures are temporary in nature and although they have been extended during the pandemic, they will cease at some point in the future.

Another matter for consideration is Welsh Government issued specific guidance requiring the Council to accommodate those who are rough sleeping or displaced for public health reasons. Welsh Government issued further guidance in Phase 2 Planning Guidance for Homelessness & Housing Related Support. This sets out Welsh Government's three-phase plan to reduce homelessness post Covid-19. This requires the Council to:

- Continue to support those placed in temporary accommodation and anyone still to be placed.
- Prepare a transition plan setting out the provision of more sustainable accommodation.
- Improve the quality and availability of temporary, permanent, semi-permanent and supported accommodation. There is an emphasis on the provision of self-contained accommodation and a range of different types.

It is expected that both of these issues will increase demand from existing households and see more people fall into housing need, over and above anything we have previously seen in Monmouthshire.

### **4.4 Affordable Housing Supply**

To predict accurately future housing demand, it is essential to take into consideration current supply, turnover and the number of new build properties that will need to be developed in the next five years.

### **Existing Affordable Housing Stock – General Needs**

Table 12 shows the breakdown of current affordable housing stock, which is managed by RSL's. Monmouthshire Housing Association, Melin Homes and Pobl own and manage the majority of this accommodation.

Table 12 Existing Housing Stock – General Needs

Submarket Area	1 bed	2 bed	3 bed	4 bed	5 bed	6 bed	8 bed	Total
Abergavenny	354	463	621	59	2	0	0	1,499
Chepstow	536	788	861	69	1	1	0	2,256
Monmouth	158	257	322	17	0	0	1	755
<b>Total</b>	<b>1,048</b>	<b>1,508</b>	<b>1,804</b>	<b>145</b>	<b>3</b>	<b>1</b>	<b>1</b>	<b>4,510</b>

### Existing Affordable Housing Stock – Older Person’s Housing

The information in Table 13 below shows the provision of older person’s accommodation in Monmouthshire.

Table 13 Existing Housing Stock – Older Persons Housing

Submarket Area	Bedsit	1 bed	2 bed	3 bed	4 bed	Total
Abergavenny	20	289	148	9	0	466
Chepstow	0	322	156	2	1	481
Monmouth	0	208	54	2	0	264
<b>Total</b>	<b>20</b>	<b>819</b>	<b>358</b>	<b>13</b>	<b>1</b>	<b>1,211</b>

### Social Rent Lettings

Past letting trends were analysed over the previous 3 years – 2017/18, 2018/19 and 2019/20 and an average was taken in order to predict the likely number of lets that will come forward each year of the LHMA period. Like the housing register data used in calculating the backlog of need, this lettings data did not contain existing RSL tenants who were rehoused.

Table 14 Lettings Data 2017 - 2020

Year	Number of Lets
2017/18	316
2018/19	337
2019/20	330
<b>Annual Average</b>	<b>327.66</b>

### 4.5 Committed Supply of New Affordable Homes

In addition to projected lets, the anticipated quantity of affordable housing ‘already planned to be built over the time period of the assessment’ should also be considered (WAG, 2006b, para. 6.81). Data sources used to determine this were:

- Social Housing Grant Programme
- Joint Housing Land Availability Study
- Local Development Plan

Planning applications granted permission subject to S106 agreements were also factored in and only schemes highly likely to be delivered over the next five years were considered. The relevant data was formatted by ward, property size and property type. Table 15 shows the committed supply of affordable housing over the next five years.

Over the next five years, the total number of properties planned is as follows:

- Neutral tenure affordable housing - 534.05

Table 15 Committed Supply of New Affordable Homes (5 years)

<b>Submarket Area</b>	<b>1 bed</b>	<b>2 bed</b>	<b>3 bed</b>	<b>4 bed</b>	<b>Total</b>
Abergavenny	89.25	72.9	24.35	4	190.5
Chepstow	100	74.7	35.3	8	218
Monmouth	42	50.1	29.45	4	125.55
<b>Total</b>	231.25	197.70	89.10	16	<b>534.05</b>

## 5. Key Findings

The net shortfall of affordable housing is calculated by taking the backlog of need (Housing Register data divided by five for each year of the LHMA period) and adding existing households falling into need and newly arising need. The committed supply of affordable housing is deducted from this figure leaving the estimated annual shortfall. It would, however, be inaccurate to assume that each home would only be occupied once over the next five years and not allowing for turnover could potentially inflate the requirement for new affordable housing. Current levels of turnover were calculated by dividing average lets over the last three years by existing social rented stock and the related ward level turnover for each property type was factored into the net shortfall for each ward to determine the annual affordable dwelling requirement.

### 5.1 Social Rent

The backlog of housing need from Monmouthshire's Common Housing Register is 2,435 (Para 4.1). Dividing this figure by 5 for each year of the LHMA gives an annual figure of 487. Existing households falling into need due to homelessness has been calculated as an additional 200.6 households per year (Para 4.3) and newly arising need as 77 households per year (Para 4.2). This gives a need figure of 764.6 per annum.

The combined annual average of lets and committed supply figure is 435.10 per annum (Para 4.5). Deducting this figure from the need figure gives a net need of 329.50, the turnover rate (the average turnover rate has been calculated at 3%) is applied to give the annual social rented need for Monmouthshire. There are **319.6** social rent properties required for each year of the LHMA.

### 5.2 Low Cost Home Ownership (LCHO)

The annual backlog for LCHO is 17 and the newly arising need is calculated as 117, this gives a gross need of 134. When the committed supply of 18.8 is deducted this gives a net annual need of **115.2** LCHO properties for each year of the LHMA.

### 5.3 Intermediate Rent

There isn't currently a backlog of recorded need for intermediate rental properties, this is due to how the housing register is currently set up and applicants being able to register for either social rent or LCHO or both. Past experience of allocating intermediate rents have shown there is demand and applicants have come from the LCHO waiting list and band 4 and 5 of the social rent waiting list. As there is no definitive waiting list for intermediate rent, we have assumed a backlog of zero. There is scope to provide Intermediate rent in Monmouthshire and the annual newly arising need is calculated at 33, which gives a need of **33** intermediate rents for each year of the LHMA.

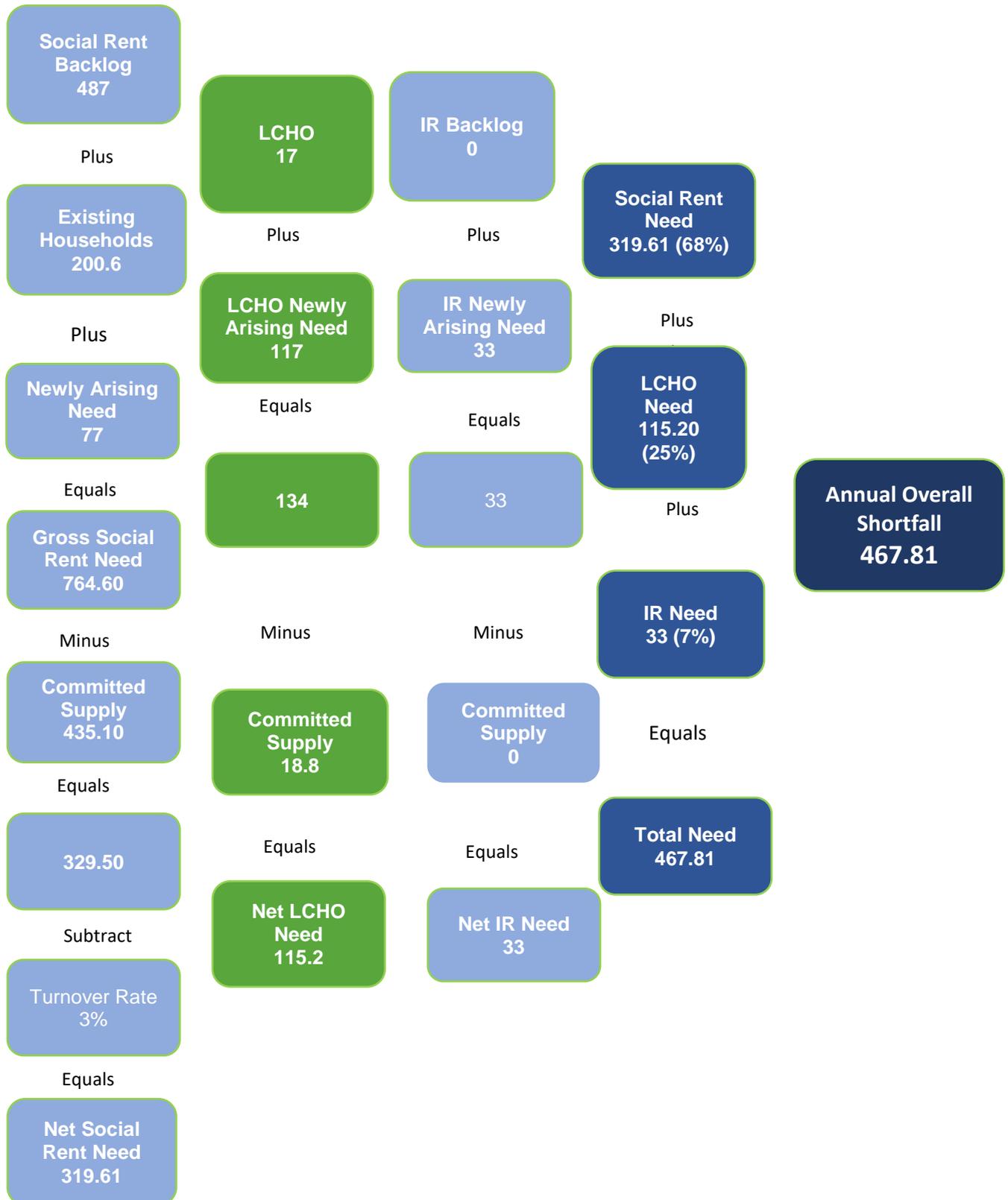
## **5.4 Gypsy and Travellers**

At the time of writing the LHMA, an updated Gypsy and Traveller Accommodation Assessment (GTAA) for the period 2020 to 2025 was out for consultation. The draft GTAA concluded that there is an unmet need of nine pitches under the assessment period 2020 to 2025 with a further unmet need of four pitches over the remaining length of the Replacement Local Development Plan (2026 – 2033).

## **5.5 Summary of Annual Affordable Housing Shortfall**

The illustration in Figure 22 shows the summary of the shortfall of affordable housing for each tenure type.

Figure 23 Annual Affordable Housing Shortfall



## 6. Conclusion

This LHMA has utilised the Welsh Government Guidance to consider the affordable housing requirements within Monmouthshire from 2020 to 2025.

A variety of secondary data has been utilised including figures from the common housing register, household projections, residential possession orders, homelessness data, up to date house prices, private rented sector statistics, income levels, existing RSL stock and committed affordable housing supply. An in-depth analysis of these sources has produced a robust update on previous findings. Much of the data was gathered at ward level before being amalgamated into the three distinct housing market areas.

The annual shortfall of affordable housing in Monmouthshire for 2020 to 2025 is 467.81 dwellings. This can be broken down to a shortfall of 319.61 social rented properties, 115.20 low cost home ownership properties and 33 intermediate rents per annum which gives a split of 68% social rents required and 32% intermediate (LCHO and intermediate rent) need.

The highest property type needed for all areas is one bedroom properties. The Council is seeing an increased number of single households registering on Homesearch and also growing numbers of single people requiring support from the Housing Options Team. Due to the scarcity of one bedroom properties, the demand is far outstripping supply and leading to long waiting times on the register. Though it may seem obvious to focus on the shortage of one bedroom properties, this must be balanced with creating sustainable and resilient communities and ensuring a mix of all house types and tenures.

The 467.81 figure should not be taken as an annual target for the delivery of affordable housing; it is an indication of current projected need and sets a benchmark the Council can work towards. New build homes are not the only solution to the supply of affordable accommodation and the Council is working with landlords in the private rented sector to increase the options available as well as engaging property owners who own empty properties.

There are many factors that impact on supply and demand for housing and these will be reviewed on a regular basis in order to update the LHMA. This will ensure that both the Local Authority and its partners have a clear understanding of housing need in Monmouthshire and that they are able to work together to ensure the best outcomes for residents of Monmouthshire.

## Equality and Future Generations Evaluation

<b>Name of the Officer</b> Louise Corbett  <b>Phone no:</b> 07970 957039 <b>E-mail:</b> lousiecorbett@monmouthshire.gov.uk	<b>Please give a brief description of the aims of the proposal</b>  Submit the completed Local Housing Market Assessment (LHMA) to the Welsh Government in accordance with statutory requirements.
<b>Name of Service area</b>  Housing & Communities	<b>Date</b> 16 <sup>th</sup> November 2020

Page 107  
 107. Are your proposals going to affect any people or groups of people with protected characteristics? Please explain the impact, the evidence you have used and any action you are taking below.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Age	The LHMA provides an assessment of housing need for households of all ages and supports the delivery of affordable housing.	None	N/A
Disability	The LHMA provides an assessment of housing need for households with disabilities and supports the delivery of adapted housing and supported housing.	None	N/A

**Appendix 2**

<b>Protected Characteristics</b>	<b>Describe any positive impacts your proposal has on the protected characteristic</b>	<b>Describe any negative impacts your proposal has on the protected characteristic</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
Gender reassignment	None	None	N/A
Marriage or civil partnership	None	None	N/A
Pregnancy or maternity	None	None	N/A
Race	None	None	N/A
Religion or Belief	None	None	N/A
Sex	None	None	N/A
Sexual Orientation	None	None	N/A
Welsh Language	None	None	N/A

## Appendix 2

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Poverty	The LHMA provides an assessment of need for affordable housing and supports delivery of appropriate housing for households that do not earn enough to satisfy their housing need on the open market.	None	N/A

2. **Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<b>A prosperous Wales</b> Efficient use of resources, skilled, educated people, generates wealth, provides jobs	<p><b>Positive:</b> The LHMA provides an indication of affordable housing need and is part of the evidence base, which informs future plans. Affordable housing helps the overall prosperity of neighbourhoods and residents (e.g. a stable home to access employment) and contributes towards balanced and resilient communities that are sustainable. The building of new affordable housing also contributes to the economy with regard to the supply chain, employment and apprenticeship opportunities.</p> <p><b>Negative:</b> None</p>	N/A

## Appendix 2

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<b>A resilient Wales</b> Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)	N/A	N/A
<b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood	<b>Positive:</b> The LHMA provides an assessment of affordable housing need and ensures that affordable housing is suitable for the identified need. Needs considered include those who have physical health issues, mental health issues or other welfare needs. The provision of suitable housing can assist in promoting good health, independence and well-being.  <b>Negative:</b> None	N/A
<b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected	<b>Positive:</b> Affordable housing makes an important contribution to the sustainability and cohesiveness of our towns and villages by providing homes that local people can afford to live in and helps to mitigate against the need to move away.  <b>Negative:</b> None.	N/A
<b>A globally responsible Wales</b> Taking account of impact on global well-being when considering local social, economic and environmental wellbeing	N/A	N/A
<b>A Wales of vibrant culture and thriving Welsh language</b>	N/A	N/A

## Appendix 2

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation		
<b>A more equal Wales</b> People can fulfil their potential no matter what their background or circumstances	The LHMA provides an assessment of housing need and supports delivery of affordable housing. Landlords of affordable homes offer a range of support such as financial inclusion or education and employment opportunities - all of which contributes to empowering people and helps them fulfil their potential.	N/A

### 3. How has your proposal embedded and prioritised the sustainable governance principles in its development?

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Balancing short term need with long term and planning for the future</p> <p><b>Long Term</b></p>	The LHMA provides an assessment of the current housing market in addition to assessing the need for all types of affordable housing. The report also assesses housing need against the committed supply of affordable housing over the next 5 years. Information contained in the LHMA will contribute towards the evidence base for a range of housing and planning related plans and policies.	The LHMA will be updated in 2022

## Appendix 2

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p><b>Collaboration</b></p> <p>Working together with other partners to deliver objectives</p>	<p>The findings of the LHMA will contribute to negotiations with RSL's and private developers to ensure the right type of affordable housing is delivered in the right location.</p>	<p>The LHMA will be updated in 2022</p>
 <p><b>Involvement</b></p> <p>Involving those with an interest and seeking their views</p>	<p>N/A</p>	<p>N/A</p>
 <p><b>Prevention</b></p> <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The LHMA helps to identify emerging trends in house prices together with the current and future housing needs of Monmouthshire households and will be used as part of the evidence base for a range of housing and planning related plans and strategies.</p>	<p>N/A</p>

## Appendix 2

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Considering impact on all wellbeing goals together and on other bodies</p>	<p>Affordable housing makes an important contribution to the sustainability of our towns and villages by providing homes that local people on low incomes can afford to live in. The allocation of affordable housing seeks to support those in housing need and vulnerable households, the housing application assessment considers a range of needs including medical and welfare needs and banding is awarded in line with someone's circumstances. An allocation of affordable housing is often a betterment to an individual's circumstances. RSL partners offer a range support to their tenants such as financial inclusion, advice in relation to fuel poverty/energy efficiency or advice around education and employment all of which help the individual as well as the economy and environment</p>	<p>N/A</p>

**4. Council has agreed the need to consider the impact its decisions has on the following important responsibilities: Social Justice, Corporate Parenting and Safeguarding. Are your proposals going to affect any of these responsibilities?**

	Describe any positive impacts your proposal has	Describe any negative impacts your proposal has	What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?
Social Justice	The LHMA supports the delivery of affordable housing and provides data on housing need down to ward level.	N/A	N/A

## Appendix 2

Safeguarding	The LHMA provides data on the housing needs of homeless households, those that require specialist housing such as adapted or supported housing and also older persons' housing.	N/A	N/A
Corporate Parenting	N/A	N/A	N/A

### 5. What evidence and data has informed the development of your proposal?

A number of data sources were used in the preparation of the LHMA. These include:

- CACI Paycheck Data.
- Hometrack (Housing Intelligence) Data
- Monmouthshire's Common Housing Register
- Office of National Statistics

The legislation and good practice which have informed the LHMA are:

- Local Housing Market Assessment Report; Getting Started with your Local Housing Market Assessment, Welsh Government, 2014
- Local Market Housing Assessment guide, Welsh Government, March 2006
- Housing Act 1985
- Housing (Wales) Act 2014
- The Well-being of Future Generations (Wales) Act 2015

### 6. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?

## Appendix 2

The LHMA provides an assessment of the current housing market and helps to identify emerging trends in house prices and affordability. In addition to assessing the need for all types of affordable housing, the report also assesses housing need against the committed supply of affordable housing over the next 5 years. Information contained in the LHMA will contribute towards the evidence base for a range of housing and planning related plans and policies.

### 7. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.

What are you going to do	When are you going to do it?	Who is responsible

Page 115

**VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.**

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
1	DMT		Positive impacts of LHMA and AH delivery added to report.
2.	Members Workshop	01/12/2020	
3.	Adult and Economy & Development Select Committee	10/12/2020	
4.	Cabinet	16/12/2020	



**SUBJECT: MONMOUTHSHIRE REPLACEMENT LOCAL DEVELOPMENT PLAN GROWTH AND SPATIAL OPTIONS**  
**MEETING: JOINT ADULTS AND ECONOMY AND DEVELOPMENT SELECT COMMITTEE**  
**DATE: 10 DECEMBER 2020**  
**DIVISION/WARDS AFFECTED: ALL**

**1. PURPOSE:**

- 1.1 The purpose of this report is to inform the Joint Adults and Economy and Development Select Committee of the non-statutory consultation on the Replacement Local Development Plan (RLDP) Growth and Spatial Options Paper, and to seek Committee's feedback/comments on the Paper.

**2. RECOMMENDATIONS:**

- 2.1 To feedback/comment on the RLDP Growth and Spatial Options Paper as appropriate, prior to officers seeking Cabinet's endorsement to consult on 16<sup>th</sup> December 2020.

**3. KEY ISSUES:**

Background

- 3.1 The Council is preparing a Replacement Local Development Plan for the County (excluding the area within the Brecon Beacons National Park) to cover the period 2018-2033. The RLDP will set out land use development proposals for the County and will identify where and how much new development will take place over the Plan period. It will also identify areas to be protected from development and contain policies against which future planning applications will be assessed.
- 3.2 Cabinet Members will be aware that we reached the Preferred Strategy stage of the RLDP process in March 2020 when Council endorsed the Preferred Strategy for statutory consultation, engagement and stakeholder involvement (5<sup>th</sup> March 2020).
- 3.3 Progress on the RLDP was subsequently paused in March 2020 because the Covid-19 pandemic meant we could not continue with the Preferred Strategy public engagement events. Following advice from the Minister for Housing and Local Government<sup>1</sup>, the decision was subsequently made to cease the Preferred Strategy consultation and second call for candidate sites on 20<sup>th</sup> July 2020. This enabled the Council to undertake a review of the RLDP issues, vision, objectives and evidence base<sup>2</sup> in terms of sensitivity to the consequences the current pandemic before progressing with Plan preparation. This review was agreed by Council in October 2020.
- 3.4 Following this, in August 2020 the Welsh Government published a correction to the 2018-based population and household projections. These projections form the starting point for the Plan's evidence base on growth levels and comprise important

<sup>1</sup> Minister for Housing and Local Government Letter to Local Authority Leaders and Chief Executives National Park Authority Chief Executives – Planning System and Covid-19, 7th July 2020

<sup>2</sup> Monmouthshire RLDP Review of Issues, Vision and Objectives and Evidence Base in Light of Covid-19 (September 2020)

new evidence that requires consideration. In order to ensure that the evidence base for the RLDP is robust and based on the most up to date information, the decision was made to revisit both the Growth and Spatial Options and Preferred Strategy stages of the RLDP process.

- 3.5 These unavoidable delays have necessitated a further revision to the RLDP Delivery Agreement timetable and community involvement scheme. The Revised Delivery Agreement, together with the RLDP Review of Issues, Vision and Objectives and Evidence Base were reported to, and endorsed by, Council on 22<sup>nd</sup> October 2020. The Welsh Government approved the Delivery Agreement on 30<sup>th</sup> October 2020 meaning that work on the RLDP will progress in accordance with the revised timetable, the next key stage being the Growth and Spatial Options.

#### Purpose of the Growth and Spatial Options Paper

- 3.6 The Growth and Spatial Options Paper sets out a number of alternative growth and spatial strategy options for consideration having regard to the Plan's evidence base and policy aspirations. The options presented provide an indication of the scale of growth (housing and employment) that the RLDP will need to address, together with spatial strategy options for accommodating that growth. The consideration of realistic growth and spatial options is an important part of the preparation of the RLDP which are intended to facilitate discussion and inform the Preferred Strategy.
- 3.7 The Growth and Spatial Options Paper is attached at **Appendix 1**. It identifies our preferred growth and spatial options that are considered to best address the County's key issues/challenges and meet the RLDP objectives. The Paper should be read alongside the RLDP Issues, Vision and Objectives Paper (January 2019, as amended June 2019 and March 2020), RLDP Review of Issues, Vision and Objectives in Light of Covid-19 (September 2020) and the Reports prepared by Edge Analytics (November 2020)<sup>3</sup>.
- 3.8 The Paper is structured as follows:

**Section 1 Introduction** – outlines the purpose, background, evidence base and consultation arrangements of the Growth and Spatial Options Paper.

**Section 2 Growth Scenarios and Options** - presents a range of alternative demographic, housing and employment growth options for consideration to inform the RLDP (2018-2033). The population, household, dwelling and employment implications associated with each of the alternative growth options are presented, together with their wider implications for the County and the extent to which they align with the RLDP and Integrated Sustainability Appraisal (ISA) objectives.

**Section 3 Spatial Strategy Options** - presents a range of spatial strategy options for accommodating the required level of housing and employment growth in the County. The implications associated with each of the alternative spatial strategy options and the extent to which they align with the RLDP and ISA objectives are set out.

**Section 4 Next Steps** - sets out the next key stage in the RLDP process.

**Appendix 1** – Monmouthshire RLDP Demographic Evidence Edge Analytics (November 2020)

**Appendix 2** - Monmouthshire RLDP Affordable Housing Evidence Addendum Report Edge Analytics (November 2020)

---

<sup>3</sup> Monmouthshire RLDP Demographic Evidence, Edge Analytics (November 2020) and Monmouthshire RLDP Affordable Housing Evidence Addendum Report, Edge Analytics (November 2020)

**Appendix 3 – RLDP Objectives**

**Appendix 4 – ISA Objectives**

**Appendix 5 – Long List of Growth Scenarios**

**Appendix 6 – Long List of Spatial Options**

**Appendix 7 – Summary Matrix of Growth Options against the RLDP Objectives**

**Appendix 8 – Summary Matrix of Growth Options against the ISA Objectives**

**Appendix 9 – Summary Matrix of the Spatial Options against the RLDP Objectives**

**Appendix 10 – Summary Matrix of the Spatial Options against the ISA Objectives**

An Executive Summary and Easy Read version of the paper have been prepared and are attached at **Appendix 2** and **Appendix 3** respectively.

### Growth Options

- 3.9 Cabinet originally endorsed a range of growth and spatial options for non-statutory consultation on 3<sup>rd</sup> July 2019. Consultation and engagement took place in July/August 2019, the responses to which helped to inform the Preferred Strategy (March 2020). The growth options were based on the latest projections data available at the time, this being the Welsh Government 2014-based population and household projections. However, in August 2020 the Welsh Government published a correction to the 2018-based population and household projections which was the first update since the 2014 projections. In preparing Local Development Plans, national policy requires local authorities to take account of updates to nationally published data, such as household and population projections<sup>4</sup>. The latest Welsh Government (WG) population and household projections form the starting point for the Plan's evidence base on growth levels, onto which policy choices can be added to ensure that the issues are addressed, objectives met and vision achieved. As such, the updated projections comprise important new evidence that requires full consideration. In order to ensure that the evidence base for the RLDP is robust and based on the most up to date information, we need to revisit both the Growth and Spatial Options and Preferred Strategy stages of the RLDP process.
- 3.10 In view of this, Edge Analytics was commissioned to prepare a range of up-dated demographic, dwelling and employment growth scenarios using the 2018-based projections as the starting point, to inform the RLDP growth options. In accordance with the requirements of the Development Plans Manual (March 2020), the Paper<sup>5</sup> considers the 2018-based Welsh Government projections, as well as the latest available statistics and evidence, including the Monmouthshire Economies of the Future Report (2018) and the 2020 Monmouthshire Local Housing Market Assessment (LHMA), to provide a range of growth scenarios for the County. The paper sets out a demographic profile of the County, illustrating the geographical context, components of population change (i.e. births, deaths and migration), housing completions and the changing age profile of the population. It then considers how much housing and employment growth would be needed over the RLDP period for each of the scenarios set out.
- 3.11 A total of 14 scenarios have been generated, together with further sensitivity testing for all of the demographic and dwelling-led scenarios with regard to household formation

---

<sup>4</sup> Development Plans Manual, March 2020 (paragraph 2.33)

<sup>5</sup> Monmouthshire RLDP Demographic Evidence, Edge Analytics (November 2020)

and commuting ratios. This sensitivity testing seeks to address the County's unbalanced demographic, one of the key RLDP objectives, and one which has increased emphasis and importance in light of the Covid-19 pandemic.

3.12 The sensitivity adjustments are:

- To increase household formation rates – the 2018 population projections show a high level of households comprising 4+ adults, indicating young adults are living with their parents or in shared accommodation, unable to afford their own home. By increasing household formation rates, more homes will be built increasing opportunities for these young adults to access housing within the County rather than move elsewhere. This objective will be supported by affordable housing and private sector housing mix policies. This approach will help with the intention to increase the volume of homes for younger adults - in order to provide homes to retain younger adult age groups and rebalance Monmouthshire's ageing demographic (LDP Objectives 9, 10, 11, 12 and 13).
- Apply a reduction in the commuting ratio – the 2011 census indicated that 40% working age population commutes out of the County for work. This adjustment reflects the Council's economic ambition to attract new employment to the County, meaning fewer people will need to travel out for work. This objective will be supported by policies relating to broadband infrastructure connectivity for new homes and policy support for employment hubs, enabling home-working. This approach will support the Council's Climate Emergency declaration (LDP Objectives 1, 14, 15 and 17).
- Adjust migration rates to reflect local influences i.e. the removal of the Severn Bridge Tolls. This adjustment reflects known trends. Monmouthshire's population is ageing and declining so in-migration continues to be essential to rebalance Monmouthshire's ageing demographic and ensure communities are socially and economically sustainable. Affordable housing policies will prioritise people with a Monmouthshire connection (LDP Objectives 9, 12 and 13).
- A specific policy-led affordable housing element is added to all the selected growth options. These additional dwellings will be delivered on sites comprising at least 50% affordable housing and will meet 10% of the total affordable housing need within the County (identified by Monmouthshire's Local Housing Market Assessment 2020). This approach will help to explicitly address the Council's key/most prevalent issue of lack of affordable housing (LDP Objectives 9, 10, 11, 12 and 13). There will be a requirement that this element of the option will be delivered on sites which have at least 50% affordable housing.

3.13 The aim is to create a more balanced population structure to ensure that the County has a sufficient population base of working aged people to support the economy and to ensure our communities are sustainable and resilient, and to provide a level of growth that can provide opportunities for younger people to both stay and move to the area. The sensitivity testing achieves this by modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34), whilst at the same time reducing out-commuting by retaining more of the resident workforce.

3.14 From these 14 scenarios, six alternative growth options have been selected for non-statutory consultation to assist in determining the housing and employment requirements of the RLDP. The options selected are considered to represent a robust range of growth scenarios and include four demographic, one dwelling-led and one employment-led option as summarised in Table 1. Further details of the assumptions/sensitivity testing applied to the selected growth options are set out Table 4 of the Growth and Spatial Options Paper.

- 3.15 In addition to the initial modelling, all six selected options have been the subject of additional testing to establish the impact on demography, dwellings, household formation and employment of an affordable-housing policy-led strategy. This is set out in detail in the Edge Analytics Affordable Housing Evidence Addendum Report<sup>6</sup>.
- 3.16 The affordable housing policy-led element of the testing aims to address the key issues associated with housing affordability in the County. Firstly it aims to address the issue of affordability for those people who are either not able to form households or are forced to leave the County due to high average house purchase and private rent prices in the County, i.e. the intermediate affordable housing need. Secondly, it seeks to address the need for social rented homes in the County. The current pandemic has increased the need for such homes and revealed the extent of hidden homelessness in the County. The Minister for Housing and Local Government has announced that post-Covid-19, no-one should return to the streets. The affordable housing policy-led growth will assist in addressing these fundamental issues/challenges by providing opportunities to retain/house those in need of social and intermediate homes. It will also help to redress the County's demographic imbalance and improve the resilience and sustainability of our communities and the strength of our economic base.
- 3.17 The LHMA identifies the level of housing need in the County and is a core piece of baseline evidence to inform the RLDP. To establish the number of additional dwellings associated with the affordable housing policy-led growth for each selected option, and therefore the overall dwelling growth required over the Plan period, the population and household formation arising from the initial modelling has been entered into the LHMA model. This has established the level of affordable housing need which will arise over the Plan period from each of the six selected growth options.
- 3.18 As a starting point, it is proposed to meet 10% of the need identified in the LHMA on affordable housing-led sites where at least 50% of the homes are affordable. The 10% target may be refined in light of the evidence as we progress through the Plan process. The delivery of both market and affordable homes on these sites is in addition to homes delivered on sites allocated to meet the level of growth evidenced by the initial modelling.
- 3.19 The Growth and Spatial Options Paper sets out the population, household, dwelling and employment implications associated with each of the selected growth options, together with their wider implications for the County and the extent to which they will achieve the RLDP objectives. The options have also been assessed through the Integrated Sustainability Appraisal process. A summary of the implications associated with the selected growth options is set out in Table 1.
- 3.208 Based on the assessment of the growth options set out in the Paper, Growth Option 5 - Population-led projection (with added policy assumptions) - is our preferred option. It is considered that this option provides a level of growth that would best address the County's key issues/challenges and meet the RLDP objectives, including the provision of market and affordable homes, sustainable economic growth and enabling/supporting balanced and socially sustainable communities, particularly in terms of demography; the importance of which has been heightened by the current pandemic. Overall, this option is considered to be the most conducive to achieving the RLDP vision and the Council's core purpose of building sustainable and resilient communities across Monmouthshire.

**Table 1: Summary of the Implications of Selected Growth Options**

Growth Option	Type of Scenario	Population Change 2018-2033	Population Change %	Average Net Migration per annum	Household Change 2018-2033	Household Change %	Dwellings per annum	Dwellings 2018-2033	Jobs per annum	Jobs 2018-2033
1. <b>Balanced Migration (with added policy assumptions)</b> (Net Nil Migration (MR, CR_R), AH )	Demographic	-5110	-5.4%	108	-240	-0.6%	-17	-255	-120	-1,800
2. <b>WG 2018-based Principal Projection (AH)</b>	Demographic	6,047	6.4%	818	3,749	9.3%	262	3,930	208	3,120
3. <b>WG 2018-based Principal Projection (with added policy assumptions)</b> (WG 2018-based Principal (MR, CR_R), AH)	Demographic	6,147	6.5%	825	4,551	11.3%	318	4,770	265	3,975
4. <b>Dwelling-led Average (based on dwelling completion rates)</b> Dwelling-led 5 year average, AH	Dwelling	10,641	11.3%	1,110	5,628	14.0%	402	6,030	364	5,460
5. <b>Population-led projection(with added policy assumptions)</b> (PG Long Term (adjusted) (5yr) (MR, CR_R), AH)	Demographic	12,443	13.2%	1,223	7,255	18.1%	507	7,605	481	7,215
6. <b>Employment-led projection (with added policy assumptions)</b> (Radical Structural Change Higher (CR_R), AH)	Employment	17,403	18.5%	1,524	8,653	21.6%	604	9,060	642	9,630

## Spatial Strategy Options

- 3.21 In addition to setting out options for the level of growth needed over the Plan period, consideration must also be given to spatial strategy options for broadly where this development should take place within the County. The Paper presents a range of spatial strategy options for accommodating the required level of housing and employment growth in the County.
- 3.22 As we are revisiting the Growth and Spatial Options stage of the RLDP process, the RLDP spatial options previously considered have been reassessed to identify suitable options for consideration. Consequently, two of the options considered in the 2019 consultation Paper, which included a new settlement, have been discounted as Welsh Government officials advised these would be contrary to national policy set out in PPW10 which suggests that new settlements should only be proposed as part of a joint LDP, Strategic Development Plan or Future Wales: the National Plan 2040. An additional option, which focuses growth in the North of the County, has been included as an option as a result of consultation responses to the 2019 consultation. Accordingly, a total of 4 broad Spatial Distribution Options have been taken forward as realistic options. These are:
- **Option 1: Continuation of the Existing LDP Strategy**  
Distribute development around the County with a particular focus on Main Towns, some development in Severnside and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development to be accompanied by new employment opportunities, where possible.
  - **Option 2: Distribute Growth Proportionately across the County's most Sustainable Settlements** – Growth, including jobs and affordable housing, would be distributed across the County's most sustainable settlements, with the level of growth proportionate to that settlement's size and amenities, affordable housing need as identified in the LHMA, the capacity for growth and/or the need for development to sustain the community.
  - **Option 3: Focus Growth on the M4 Corridor** – Growth would be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections, including via the South Wales Main rail line at Severn Tunnel Junction. Affordable Housing would be directed to those sustainable areas in the south of the County identified in the LHMA as having the greatest housing.
  - **Option 4: Focus Growth in the North of the County** – Growth would be predominantly located in the most sustainable settlements within the North of the County to capitalise on its strategic links to the Heads of the Valleys and wider Cardiff Capital Region via the A465, and towards Herefordshire via the A449 and A40, along with rail links to Newport, Cardiff and the North via the Welsh Marches line. Affordable Housing would be directed to those sustainable areas in the north of the County identified in the LHMA as having the greatest housing need.
- 3.23 As with the growth options, the Paper considers the implications associated with each of the alternative spatial strategy options, and the extent to which they will achieve the RLDP objectives. The options have also been assessed through the Integrated Sustainability Appraisal process.

3.24 The Spatial Options presented provide alternative spatial strategy options for accommodating growth, having regard to the Plan's evidence base and policy aspirations. Based on the assessment set out in the Paper, Spatial Option 2 - to Distribute Growth Proportionately across the County's most Sustainable Settlements - is the preferred Spatial Option. It is considered that this option would best address the County's issues and challenges and meet the RLDP objectives, including the provision of market and affordable homes throughout the County's most sustainable settlements, sustainable economic growth and enabling/supporting balanced and socially sustainable communities; the importance of which has been heightened by the current pandemic. Overall, this spatial option is considered to be the most conducive to achieving the RLDP vision and the Council's core purpose of building sustainable and resilient communities across Monmouthshire.

### Consultation and Engagement

3.25 There is no statutory requirement to consult on the RLDP growth and spatial strategy options. However, as with the original growth and spatial options, it is considered appropriate to continue to engage with stakeholders/our communities at this key stage of the process to help build consensus on the growth levels and spatial strategy of the RLDP and to fully understand the implications of the options. Engagement/consultation at this stage of the process will also ensure that the Council accords with the two of the five ways of working as set out in the Well-being of Future Generations Act (i.e. involvement and collaboration).

3.26 It is proposed that a non-statutory consultation on the Growth and Spatial Options will take place for a 4-week period from 4<sup>th</sup> January to 1<sup>st</sup> February 2021, whereby comments will be invited on the consultation questions set out in the Paper. Engagement/consultation will also take place via:

- Planning Policy officer attendance at Area Committee meetings (if held) and at a joint Area Cluster meeting on 21<sup>st</sup> January 2021;
- A Members' Workshop on 8<sup>th</sup> December 2020 (hosted by the Economy & Development Select Committee);
- RLDP Growth and Spatial Options virtual event(s) during the consultation period which will be open for all to attend (details tbc);
- Scrutiny by Economy & Development and Adult Select Joint Committee on 10<sup>th</sup> December 2020;
- Internal discussions within the Council through DMT/SLT;
- Notify all parties on the LDP database of the non-statutory consultation.

### Next steps

3.27 Feedback from this consultation/engagement process will be considered and will help inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The Preferred Strategy will be the subject of further engagement/consultation and political reporting as the RLDP is progressed. It is anticipated that statutory consultation on the Preferred Strategy will take place in Spring/Summer 2021.

## **4. SUSTAINABLE DEVELOPMENT AND EQUALITY IMPLICATIONS:**

4.1 The Planning and Compulsory Purchase Act (2004) sets out the requirement for all LDPs to be subject to a Sustainability Appraisal (SA). All stages of the RLDP will be subject to an Integrated Sustainability Assessment (including Strategic Environmental Assessment (SEA), Well-being of Future Generations (WFG), Health Impact Assessment (HIA), Equality Impact Assessment (EqIA), and Welsh Language Impact

Assessment (WLIA)), whose findings will be used to inform the development of the Replacement LDP strategy, policies and site allocations in order to ensure that the Plan will be promoting sustainable development.

- 4.2 A Future Generations Evaluation (including equalities and sustainability impact assessment) is attached to this report at **Appendix 4**.

#### Safeguarding and Corporate Parenting

- 4.3 There are no safeguarding or corporate parenting implications arising directly from this report

## 5 OPTIONS APPRAISAL

Option	Benefit	Risk	Comment
1. Joint Adults and Economy and Development Select Committee consider and comment, as appropriate, on the RLDP Growth and Spatial Options Paper.	This report provides the Joint Adults and Economy and Development Select Committee with the opportunity to view the Growth and Spatial Options Paper and comment accordingly. Any feedback received will be carefully considered and will help inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy.		This is our preferred option.  The Paper sets out a number of alternative growth and spatial options for consideration informed by a robust evidence and policy aspirations. It identifies our preferred growth and spatial options to address the County's key issues/ challenges and to meet the RLDP and ISA objectives. The Paper will facilitate discussion and inform the next key stage of the process, the Preferred Strategy.
2. Joint Adults and Economy and Development Select Committee do not consider or comment on the RLDP Growth and Spatial Options Paper.		Joint Adults and Economy and Development Select Committee would miss an opportunity to comment on the growth and spatial options presented in the Paper which will help to shape the Preferred Strategy.	The option of not commenting on the Paper would result in the Joint Adults and Economy and Development Select Committee missing a key opportunity to help shape the Preferred Strategy and should, therefore, be discounted.

## 6. RESOURCE IMPLICATIONS

- 6.1 Officer and consultant time and costs associated with the preparation of the Growth and Spatial Options Paper and carrying out the required consultation exercises. Any

costs will be met from the Planning Policy budget or LDP reserve and carried out by existing staff.

## 7. **CONSULTEES**

- Enterprise DMT
- SLT
- Cabinet
- Member workshop 8<sup>th</sup> December 2020
- Joint Adults and Economy & Development Select Committee 10<sup>th</sup> December 2020

## 8. **BACKGROUND PAPERS**

- Monmouthshire RLDP Issues, Vision and Objectives Paper (January 2019, as amended June 2019)
- Monmouthshire RLDP Review of Issues, Vision and Objectives and Evidence Base in Light of Covid-19 (September 2020)
- Monmouthshire RLDP Demographic Evidence, Edge Analytics (November 2020)
- Monmouthshire RLDP Affordable Housing Evidence Addendum Report, Edge Analytics (November 2020)
- Monmouthshire RLDP Revised Delivery Agreement (October 2020)
- Monmouthshire RLDP Integrated Sustainability Appraisal (ISA) of Strategic Options Report, Aecom (December 2020)

## 9. **AUTHORS:**

Mark Hand  
Head of Placemaking, Housing, Highways and Flooding

Craig O'Connor  
Head of Planning

Rachel Lewis  
Planning Policy Manager

## 10. **CONTACT DETAILS:**

Tel: 07773 478579  
[markhand@monmouthshire.gov.uk](mailto:markhand@monmouthshire.gov.uk)

Tel: 07816 175737  
[craigoconnor@monmouthshire.gov.uk](mailto:craigoconnor@monmouthshire.gov.uk)

Tel: 01633 644827  
[rachellewis@monmouthshire.gov.uk](mailto:rachellewis@monmouthshire.gov.uk)

## **APPENDICES:**

- APPENDIX 1: Monmouthshire RLDP Growth and Spatial Options Paper, December 2020  
APPENDIX 2: Monmouthshire RLDP Growth and Spatial Options: Executive Summary, December 2020  
APPENDIX 3: Monmouthshire RLDP Growth and Spatial Options: Easy Read Version, December 2020  
APPENDIX 4: Future Generations Evaluation

# Monmouthshire Replacement Local Development Plan

## GROWTH AND SPATIAL OPTIONS PAPER

December 2020



monmouthshire  
sir fynydd



## CONTENTS

	<b>Page</b>
Executive Summary	i
<b>1.</b> Introduction	<b>1</b>
<b>2.</b> Replacement LDP Growth Scenarios and Options	<b>8</b>
<b>3.</b> Replacement LDP Spatial Options	<b>75</b>
<b>4.</b> Next Steps	<b>110</b>
Glossary	
Appendices:	
<b>1</b> – Monmouthshire RLDP Updating Demographic Evidence Report Edge Analytics (November 2020)	
<b>2</b> - Monmouthshire RLDP Affordable Housing Evidence Addendum Report Edge Analytics (November 2020)	
<b>3</b> – RLDP Objectives	
<b>4</b> – ISA Objectives	
<b>5</b> – Long List of Growth Scenarios	
<b>6</b> – Long List of Spatial Options	
<b>7</b> – Summary Matrix of Growth Options against the RLDP Objectives	
<b>8</b> – Summary Matrix of Growth Options against the ISA Objectives	
<b>9</b> – Summary Matrix of the Spatial Options against the RLDP Objectives	
<b>10</b> – Summary Matrix of the Spatial Options against the ISA Objectives	



## Executive Summary

- i. The Council is preparing a Replacement Local Development Plan (RLDP) for Monmouthshire (excluding the part of the County that is within the Brecon Beacons National Park). The RLDP will identify where and how much new development will take place during the 'Plan period' (2018-2033). It will allocate land for development, identify areas to be protected, and contain policies to guide decisions on applications for planning permission. We aim to adopt the RLDP in Autumn 2023.
- ii. The RLDP will be accompanied by an Integrated Sustainability Appraisal (ISA) which will consider the environmental, equalities, health and well-being impacts of the Plan. The Integrated Sustainability Appraisal is a working document, updated as the RLDP progresses. The RLDP will include an Infrastructure Plan, setting out what is needed to support the development of the allocated sites, and will sit alongside a Local Transport Plan and Economic Strategy. Together, these Plans will seek to deliver on the Council's economic ambition and its core purpose to build sustainable and resilient communities that support the well-being of current and future generations.
- iii. We originally consulted on a range of growth and spatial options in the summer of 2019, the decision has been made, however, to revisit this stage of the Plan process. The Welsh Government population and household projections form the starting point for the RLDP evidence on growth levels, onto which policy choices can be added as needed, for example to ensure that the County's identified issues are addressed, objectives met and vision achieved. The publication of corrected Welsh Government 2018-based population and household projections in August 2020 comprise important new evidence that requires consideration to ensure that the evidence base for the RLDP is robust and based on the most up to date information. Consequently we need to revisit both the Growth and Spatial Options and Preferred Strategy stages of the plan preparation process.
- iv. This Paper sets out alternative growth and spatial options for the RLDP, together with the implications of each option and the extent to which they will achieve the RLDP and Integrated Sustainability Appraisal (ISA) objectives. The options presented in this Paper provide an indication of the scale of growth (housing and employment) that the RLDP will potentially need to include and broad options of where that growth could be located (spatial option), having regard to the evidence base and policy aspirations.

### **Growth Options**

- v. Section 2 of the Paper presents a range of alternative demographic, dwelling and employment-led growth options for consideration to inform the RLDP (2018-2033).
- vi. In light of the publication of corrected Welsh Government 2018-based projections Monmouthshire has commissioned Edge Analytics to prepare a range of up-dated demographic, dwelling and employment growth scenarios to inform the RLDP growth options.
- vii. A total of fourteen different scenarios have been generated for Monmouthshire, together with further sensitivity testing for all of the demographic and dwelling-led scenarios with regard to household formation and commuting ratios. From these fourteen different scenarios, six growth options have been selected for consultation

(see Table below). These six options have been the subject of further testing to establish the impact on demography, household formation and employment of an affordable-housing policy-led strategy. It should be noted that the growth outcomes of each scenario generated includes that part of Monmouthshire that falls within the Brecon Beacons National Park.

- viii. This Paper considers the population, household, dwelling and employment implications associated with each of the alternative growth options set out below, together with their wider implications for the County and the extent to which they will achieve the RLDP's and ISA objectives. A summary of the implications associated with each option is provided in Table 6.
- ix. Based on the assessment of the growth options our preferred option to address the County's issues/challenges and meet the RLDP and ISA objectives is Growth Option 5, Population-led (with added policy assumptions).<sup>1</sup>
- x. To provide an indication of the baseline position, the 2019 Office for National Statistics Mid-Year Estimate gives Monmouthshire a population of 94,590; the 2011 Census recorded 38,233 households in Monmouthshire; and the 2011 Census recorded 40,044 dwellings in Monmouthshire. The preferred Growth Option (5) would result in a population increase 12,443 (13.2%) and an additional 7,605 homes over the Plan period (2,945 new homes once existing commitments and windfall allowances are taken into account).

---

<sup>1</sup> This is the PG Long Term (adjusted) (5yr) (MR, CR\_R), AH) scenario from the Edge Analytics Reports.

## Summary of Selected Growth Options

Options (type)		Assumptions	Additional homes by 2033	Additional jobs by 2033
Option 1 (Demographic)	<b>Balanced Migration (with added policy assumptions)</b> (Net Nil Migration (MR, CR_R), AH )	Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration. Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. An average of 53dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	-255 homes	-1800 jobs
Option 2 (Demographic)	<b>WG 2018-based Principal Projection (AH)</b>	Replicates the WG 2018-based population projection. Migration assumptions are based on the five-year period prior to 2018 (i.e. 2013/14–2017/18). An average of 71dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+3930 homes	+3,120 jobs
Option 3 (Demographic)	<b>WG 2018-based Principal Projection (with added policy assumptions)</b> (WG 2018-based Principal (MR, CR_R), AH)	Replicates the WG 2018-based population projection. Migration assumptions are based on the five-year period prior to 2018 (i.e. 2013/14–2017/18). Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. An average of 76dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+4770 homes	+3975 jobs
Option 4 (Dwelling)	<b>Dwelling-led Average (based on dwelling completion rates)</b> (Dwelling-	Annual dwelling growth is applied from 2020/21 onward, based on the last five years of completions (2015/16–2019/20). This gives an average annual dwelling growth of +310 pa in Monmouthshire. An average of 80dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the	+6030 homes	+5460 jobs

	led 5 year average, AH)	projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.		
Option 5 (Demographic)	<b>Population-led projection(with added policy assumptions)</b> (PG Long Term (adjusted) (5yr) (MR, CR_R), AH)	Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, to take account of the removal of the Severn Bridge tolls. All other migration flow assumptions are consistent with the PG Long Term scenario. Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. An average of 94dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+7605 homes	+7215 jobs
Option 6 (Employment)	<b>Employment-led projection (with added policy assumptions)</b> (Radical Structural Change Higher (CR_R), AH)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains at current value (2019) (2.9%). An average of 124dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+9060 homes	+9630 jobs
*Radical Structural Change' (RSC) scenarios consider the potential impact of substantial economic changes in Monmouthshire's economy, resulting in a significantly higher employment growth range than under the 'Baseline' and UK Growth equivalent. Under these scenarios, employment growth ranges from +3,866 to +8,273 jobs over the plan period, averaging +258 and +552 pa respectively.				

## Spatial Strategy Options

- xi. Section 3 of the Paper sets out four spatial strategy options for accommodating the proposed level of housing and employment growth:
- **Option 1: Continuation of the Existing LDP Strategy** – Growth would be distributed around the County with a particular focus on Main Towns<sup>2</sup>, with some development in Severnside<sup>3</sup> and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development to be accompanied by new employment opportunities, where possible.
  - **Option 2: Distribute Growth Proportionately across the County's most Sustainable Settlements<sup>4</sup>** – Growth, including jobs and affordable housing, would be distributed across the County's most sustainable settlements, with the level of growth proportionate to that settlement's size and amenities, affordable housing need as identified in the LHMA, the capacity for growth and/or the need for development to sustain the community.
  - **Option 3: Focus Growth on the M4 corridor** – Growth would be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections, including via the South Wales Main rail line at Severn Tunnel Junction. Affordable Housing would be directed to those sustainable areas in the South of the County identified in the LHMA as having the greatest housing need.
  - **Option 4: Focus Growth in the North of the County** – Growth would be predominantly located in the most sustainable settlements within the North of the County to capitalise on its strategic links to the Heads of the Valleys and wider Cardiff Capital Region via the A465, and towards Herefordshire via the A449 and A40, along with rail links to Newport, Cardiff and the North via the Welsh Marches line. Affordable Housing would be directed to those sustainable areas in the North of the County identified in the LHMA as having the greatest housing need.
- xii. The advantages and disadvantages of each spatial option and the extent to which they will achieve the RLDP and ISA objectives are set out in Section 3, together with an indicative map of each option. Based on the assessment of the spatial options our preferred option to address the County's issues/challenges and meet the RLDP and ISA

---

<sup>2</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014), now renamed to Primary Settlements and includes the addition of Llanfoist.

<sup>3</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014), with the addition of Crick.

<sup>4</sup> A Sustainable Settlement Appraisal will be published to inform the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.

objectives is Spatial Option 2 to Distribute Growth Proportionately across the County's most Sustainable Settlements<sup>5</sup>.

### **Engagement/Consultation**

- xiii. There is no statutory requirement for consultation on the Growth and Spatial Options. However, in accordance with the RLDP Revised Delivery Agreement (October 2020) and as with the original growth and spatial options, it is considered appropriate to continue to engage with stakeholders/our communities at this key stage of the process to help build consensus on the growth levels and spatial strategy of the RLDP and to fully understand the implications of the options.
- xiv. Non-statutory engagement and consultation on the Growth and Spatial Options Paper will take place for a four-week period from 4<sup>th</sup> January 2021 to 1<sup>st</sup> February 2021, whereby comments will be invited on the consultation questions set out in Sections 2 and 3. An Easy Read version of this document has also been prepared which is available to view via the Planning Policy pages of the Council's website.
- xv. Feedback from the consultation/engagement on the Growth and Spatial Options Paper will be considered and, where appropriate, will inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The RLDP Preferred Strategy will be the subject of engagement/consultation in May/June 2021.

---

<sup>5</sup> A Sustainable Settlement Appraisal will be published to inform the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.

# 1 Introduction

## Purpose of this paper

- 1.1 The Growth and Spatial Options Paper sets out a number of alternative growth and spatial strategy options for consideration as part of the Replacement Local Development Plan (RLDP) process, informed by a range of evidence. The consideration of realistic growth and spatial options is an important part of the preparation of the RLDP which is intended to facilitate discussion and inform the next key stage of the process, the Preferred Strategy. The Paper will therefore have a key role in informing the RLDP Preferred Strategy which will set out the Council's preferred levels of growth for housing and employment over the Plan period and identify broad locations for accommodating this growth in order to ensure the delivery of sustainable and resilient communities. The Preferred Strategy will be made available for consultation in May / June 2021.

## Background

- 1.2 Monmouthshire County Council (MCC) is in the process of preparing a RLDP for the County (excluding the area within the Brecon Beacons National Park). The RLDP will cover the period 2018-2033 and will be the statutory land use plan to support delivery of the Council's vision for the future of the County and its communities. The RLDP 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 and provide policies against which future planning applications will be assessed.
- 1.3 The RLDP is being prepared in accordance with the Revised Delivery Agreement (October 2020). One of the first key stages of the RLDP process involved the preparation of the Issues, Vision and Objectives. The Issues, Vision and Objectives Paper identifies the key issues, challenges and drivers facing the County and sets out the vision and objectives for the RLDP. This paper was subject to targeted engagement in January-February 2019<sup>6</sup>. The Issues, Vision and Objectives Paper was subsequently reviewed and amended to reflect relevant feedback from the targeted engagement process, the Council's declaration of a climate emergency in May 2019 and continued development of the RLDP evidence base.
- 1.4 Subsequent to the preparation of the Issues, Vision and Objectives Paper we progressed with the Growth and Spatial Options and Preferred Strategy stages of the RLDP process. A non-statutory consultation on the Growth and Spatial Options was undertaken for a four-week period between 8<sup>th</sup> July and 5<sup>th</sup> August 2019 and a statutory consultation on the RLDP Preferred Strategy commenced on the 9<sup>th</sup> of March 2020.

---

<sup>6</sup> The Issues, Vision and Objectives Paper (June 2019) is available to view on the Planning Policy pages of the Council's website

- 1.5 Progress on the RLDP was paused in March 2020 because the Covid-19 pandemic meant we could not continue with the public engagement events. Following advice issued in a letter from the Minister for Housing and Local Government (7<sup>th</sup> July 2020)<sup>7</sup>, the decision was made to cease the RLDP Preferred Strategy consultation and second call for candidate sites on 20<sup>th</sup> July 2020. The letter requires Local Planning Authorities to undertake an assessment of the RLDP evidence base, strategy and policies in terms of sensitivity to the consequences of the current pandemic before progressing with Plan preparation.
- 1.6 A review of the RLDP Issues, Vision and Objectives was undertaken in June 2020 and incorporated into the RLDP Review of Issues, Vision Objectives (IVO) and Evidence Base (September 2020)<sup>8</sup>. This review demonstrated that the Plan's Issues, Vision and Objectives remain relevant to Monmouthshire. The review concluded that in light of Covid-19 a number of issues and objectives are now considered to have increased emphasis and importance, consistent with the priorities identified in the Welsh Government *Building Better Places* document published in July 2020<sup>9</sup>. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography.
- 1.7 In February 2020 Welsh Government (WG) published its 2018-based population and household projections. Subsequently these projections were found to contain an error. The error was caused by incorrect processing of cross-border flows between Wales and England in the ONS national projection, resulting in the projected mid-2028 population for Wales being approximately 65,000 too low, and that for England being approximately 65,000 too high. The projections were therefore withdrawn.
- 1.8 In August 2020, the WG published corrected 2018-based population and household projections, these constitute a first update since the 2014-based population and household projections. There have been no changes to the assumptions and structure of the WG household projection model, but the population projections have been subject to a number of important modifications and enhancements, as follows:
- The revised projections are no longer constrained to the 2018-based national population projections, produced by the ONS. This is a change to the 2018-based projections published in February 2020 which were constrained to the national population projection.
  - Fertility, mortality and migration assumptions are drawn from the five-years to 2018.
  - Internal Migration assumptions are based on migration rates rather than fixed counts.

---

<sup>7</sup> [https://gov.wales/sites/default/files/publications/2020-07/planning-and-the-post-covid-19-recovery-letter-to-local-authorities\\_0.pdf](https://gov.wales/sites/default/files/publications/2020-07/planning-and-the-post-covid-19-recovery-letter-to-local-authorities_0.pdf)

<sup>8</sup> <https://www.monmouthshire.gov.uk/app/uploads/2020/11/Monmouthshire-RLDP-Review-of-Issues-Vision-Objectives-and-Evidence-Base-in-Light-of-Covid.pdf>

<sup>9</sup> <https://gov.wales/sites/default/files/publications/2020-07/building-better-places-the-planning-system-delivering-resilient-and-brighter-futures.pdf>

- 1.9 National policy requires that updates to nationally published data, such as household and population projections should be taken into account (Development Plans Manual, March 2020, Para. 3.83). The latest WG population and household projections form the starting point for the Plan’s evidence base on growth levels, onto which policy choices can be added to ensure that the issues are addressed, objectives met and vision achieved. At the time of the consultation on the Growth and Spatial Options in July/August 2019 the latest available projections were the WG 2014-based population and household projections. The updated projections comprise important new evidence that requires consideration.
- 1.10 Following a review of the corrected WG 2018-based projections for Monmouthshire, Edge Analytics were commissioned to update the scenarios configured in June 2019, incorporating the latest WG evidence. Edge Analytics have also modelled additional scenarios, using alternative assumptions on fertility, mortality, and migration to assess the impact on the projections of the methodological changes.
- 1.11 In accordance with Welsh Government guidance realistic options should be identified. The identified options should be: genuine, reasonable, reflect the evidence and the plan issues/objectives, meet the evidenced needs of the area, deliverable within the plan period, conform to national policy, complement regional or local initiatives and be flexible and sustainable (Development Plans Manual, March 2020, Para. 3.87).
- 1.12 A total of 14 scenarios have been generated, these have been assessed and 6 scenarios selected for consultation. This paper sets out these 6 alternative growth options together with 4 possible spatial options for the RLDP, based on this updated evidence. It also sets out the implications of each option and the extent to which they will achieve both the RLDP and Integrated Sustainability Appraisal (ISA) objectives.
- 1.13 The ISA, which accompanies the RLDP, will consider the environmental, equalities, health and well-being impacts of the Plan. The ISA is a working document, updated as the RLDP progresses. To help inform this stage of the process the anticipated impacts of each selected growth and spatial options have been assessed against the ISA Objectives and are included in this Paper. The RLDP will also be accompanied by an Infrastructure Plan, setting out what is needed to support the development of the allocated sites, as well as a Local Transport Plan and Economic Strategy. Together, these plans will seek to deliver on the Council’s economic ambition and its core purpose to build sustainable and resilient communities that support the well-being of current and future generations.
- 1.14 The options presented in this Paper provide an indication of the scale of growth (dwelling and employment) that the RLDP will potentially need to address and possible spatial strategy options for accommodating that growth, having regard to the evidence base and policy aspirations. Having assessed both the growth and spatial options in light of both the RLDP and ISA objectives and the issues/challenges that Monmouthshire is facing, Growth Option 5 – Population-led (with added policy assumptions) and Spatial Option 2 – Distribute Growth Proportionately across the

County's most Sustainable Settlements, are the Council's preferred options. The purpose of this non-statutory consultation is to establish whether, based on the options assessment and evidence provided, there is consensus on the preferred options or whether alternative options are preferred. Support for preferred alternative options should be accompanied by details of how they will address both the RLDP and ISA objectives and the issues/challenges Monmouthshire is facing.

- 1.15 The unavoidable delays detailed above with regard to the Covid-19 pandemic, the review of the IVO and the publication of updated key evidence has necessitated a further revision to the RLDP Delivery Agreement timetable and community involvement scheme. The Revised Delivery Agreement<sup>10</sup>, together with the RLDP Review of Issues, Vision and Objectives and Evidence Base, were reported to the Council on 22<sup>nd</sup> October 2020. The Revised Delivery Agreement was approved by the Welsh Government<sup>11</sup> on 30<sup>th</sup> October 2020, meaning that work on the RLDP will progress in accordance with the revised timetable.

### Evidence Base

- 1.16 This Paper has been informed by a range of background evidence which includes the following:

- RLDP Revised Delivery Agreement (October 2020).
- Annual Monitoring Reports (AMRs) that monitor the progress of the Adopted LDP; 2014-2015, 2015-2016, 2016-2017, 2017-2018, 2018-2019 and 2019-20.
- The Adopted LDP Review Report (March 2018) evaluates the extent to which the adopted LDP is functioning effectively.
- The Monmouthshire Public Service Board Well-being Plan (February 2018) identifies important issues for the County as a whole that must be considered.
- Monmouthshire Corporate Business Plan 2017-2022 (Incorporating Well-being Objectives) (February 2018) sets out the Council's four Well-being objectives.
- The Issues, Vision and Objectives Paper (January 2019, as amended June 2019) which sets out the key issues, challenges and drivers facing the County along with the RLDP vision and objectives to address the issues, challenges and drivers identified.
- The RLDP Review of the Issues, Vision and Objectives and Evidence Base in light of Covid-19 (June 2020).
- The updated Monmouthshire RLDP Demographic Evidence produced by Edge Analytics (November 2020) which considers the impact of demographic, housing and employment change and provides growth scenarios for the Local Authority area.
- Edge Analytics Affordable Housing Evidence Report (November 2020)

---

<sup>10</sup> <https://www.monmouthshire.gov.uk/app/uploads/2020/11/Revised-DA-October-2020-Final.pdf>

<sup>11</sup> <https://www.monmouthshire.gov.uk/app/uploads/2020/11/Monmouthshire-LDP-1st-Plan-Revision-2nd-Revision-DA-Agreement-Letter-FINAL.pdf>

- Candidate Site Register (February 2019) which provides a log of the Candidate Sites submitted during the first call, to be considered for inclusion for development, redevelopment and/or protection in the RLDP.
  - MCC Economies of the Future Reports (2018) and associated economic ambition.
  - Wider contextual issues, including the CCR City Deal and the recent removal of the Severn Bridge Tolls.
- 1.17 In particular, this Paper should be read alongside the RLDP Issues, Vision and Objectives Paper (January 2019, as amended June 2019), the RLDP Review of the Issues, Vision and Objectives and Evidence Base in Light of Covid-19 (June 2020), the Monmouthshire RLDP Updated Demographic Evidence Report (November 2020) and Monmouthshire Affordable Housing Report produced by Edge Analytics (November 2020).
- 1.18 Further data will be collated as part of the RLDP evidence base and findings will be published at the appropriate times during the preparation of the RLDP. A number of background papers will also be produced as part of the RLDP preparation.

### Structure

- 1.19 This Paper is structured as follows:

**Section 1 Introduction** – outlines the purpose, background, evidence base and consultation arrangements of the Growth and Spatial Options Paper.

**Section 2 Growth Scenarios and Options** - sets out a range of alternative demographic, housing and economic growth options for consideration to inform the Replacement LDP (2018-2033). The population, household, dwelling and employment implications associated with each of the alternative growth options are presented, together with their wider implications for the County and the extent to which they align with the RLDP and ISA objectives.

**Section 3 Spatial Strategy Options** - presents a range of spatial strategy options for accommodating the required level of housing and employment growth in the County. The implications associated with each of the alternative spatial strategy options and the extent to which they align with the RLDP and ISA objectives are set out.

**Section 4 Next Steps** - sets out the next key stages in the RLDP process.

**Appendix 1** – Monmouthshire RLDP Demographic Evidence Edge Analytics (November 2020)

**Appendix 2** – Monmouthshire RLDP Affordable Housing Evidence Addendum Report Edge Analytics (November 2020)

**Appendix 3** – RLDP Objectives

**Appendix 4** – ISA Objectives

**Appendix 5** – Long List of Growth Scenarios

**Appendix 6** – Long List of Spatial Options

**Appendix 7** – Summary Matrix of Growth Options against the RLDP Objectives

**Appendix 8** – Summary Matrix of Growth Options against the ISA Objectives

**Appendix 9** – Summary Matrix of the Spatial Options against the RLDP Objectives

**Appendix 10** – Summary Matrix of the Spatial Options against the ISA Objectives

### Consultation on the RLDP Growth and Spatial Options

- 1.20 There is no statutory requirement for consultation on the Growth and Spatial Options. However, in accordance with the RLDP Revised Delivery Agreement (October 2020) and as with the original growth and spatial options, it is considered appropriate to continue to engage with stakeholders/our communities at this key stage of the process to help build consensus on the growth levels and spatial strategy of the RLDP and to fully understand the implications of the options. Engagement/consultation at this stage of the process will also ensure that the Council accords with two of the five ways of working as set out in the Well-being of Future Generations Act (i.e. involvement and collaboration).
- 1.21 Non-statutory engagement and consultation on the Growth and Spatial Options will take place for a four week period from 4<sup>th</sup> January 2021 to 1<sup>st</sup> February 2021, whereby comments will be invited on the consultation questions set out in the Paper. Our consultation and engagement arrangements have been revised in light of the Covid-19 pandemic and reflect the Coronavirus Regulations (2020) and recent Ministerial advice<sup>12</sup>. We have reviewed the use of digital involvement options to provide communities with information and the ability to engage with the RLDP in a virtual manner. Further details are provided in the Revised Delivery Agreement (October 2020)<sup>13</sup>. Engagement/consultation will also take place via:
- Planning Policy officer virtual attendance at Area Committee and Area Cluster meeting during January 2021;
  - A Members' Workshop on 8<sup>th</sup> December 2020 (hosted by the Economy & Development Select Committee);
  - Scrutiny by Economy & Development Select Committee on 10<sup>th</sup> December 2020;
  - Internal discussions within the Council through DMT/SLT;
  - Notifying all parties on the RLDP database of the consultation.
- 1.22 Feedback from the consultation/engagement on the Growth and Spatial Options Paper will be considered and, where appropriate, will inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The RLDP

---

<sup>12</sup> Minister for Housing and Local Government Letter to Local Authority Leaders and Chief Executives National Park Authority Chief Executives – Planning System and Covid19, 7th July 2020

<sup>13</sup> <https://www.monmouthshire.gov.uk/app/uploads/2020/11/Revised-DA-October-2020-Final.pdf>

Preferred Strategy will be the subject of engagement/consultation and political reporting in May-June 2021.

- 1.23 This Paper is available to view on the Council's website and will be available to view at the Council's Community HUBs, please see the Planning Policy Current Consultations page on the Council's website for further details. An Easy Read version of this document has been prepared which can also be viewed on the website. Copies of the Easy Read will also be available at the Council's Community HUBs. For details of how to respond to this consultation please see the Planning Policy Current Consultations page on the Council's website.

## 2 RLDP Growth Scenarios and Options

### Purpose

- 2.1 This section of the report presents a range of alternative demographic, dwelling and employment-led growth options for consideration to inform the RLDP (2018-2033). In order to inform the level of housing and employment provision within the RLDP, a range of scenarios/trend-based assumptions need to be considered.
- 2.2 The 2018-based Welsh Government (WG) population and household projection variants form the starting point of the scenario analysis. However, it is important to consider alternative scenarios to test the impacts of different assumptions over the Plan period. This approach reflects current national planning policy guidance as set out in PPW10 (December 2018, paragraphs 4.2.6-4.2.7), which requires LPAs to consider and provide for a level of housing that is based on various sources of evidence rather than just the WG projections. This includes having regard to what the Plan is seeking to achieve, links between homes and jobs, affordable housing need as evidenced by the Local Housing Market Assessment (LHMA), as well as deliverability of the Plan, in order to identify an appropriate strategy for housing delivery in the area.
- 2.3 The Council commissioned Edge Analytics to prepare a range of updated demographic, dwelling and employment-led growth scenarios, using the 2018-based WG projections as the starting point, to inform the growth options/opportunities for the RLDP (the Edge Report is attached at Appendix 1). In accordance with the requirements of the WG Development Plans Manual (March 2020), the report considers the latest WG projections, as well as the latest available statistics and evidence, including the Monmouthshire Economies of the Future report (2018) and the Monmouthshire LHMA (2020), to provide a range of growth scenarios for the County. The Edge Report sets out a demographic profile of the County, illustrating the geographical context, components of population change (i.e. births, deaths and migration), housing completions and the changing age profile of the population. It then considers how much housing and employment growth would be needed over the RLDP period for each of the scenarios set out.

### Growth Scenarios

- 2.4 A total of fourteen different scenarios have been generated by Edge Analytics – the WG 2018-based Principal projection and two 2018-based variant projections, four alternative trend-based demographic scenarios, three dwelling-led scenarios and four employment-led scenarios. It should be noted that the growth outcomes of each scenario generated includes that part of Monmouthshire that falls within the Brecon Beacons National Park<sup>14</sup>. This has been done to ensure consistency between the demographic and dwelling-led scenarios and the employment-led scenarios. The

---

<sup>14</sup> The growth outcomes under each of the 6 scenarios selected for consultation excluding that part of the County which falls within the Brecon Beacons National Park are presented in Appendix C of the Edge Report.

employment-led scenarios are based on data which looks at trends for the whole County, not just that part which falls outside of the Brecon Beacons National Park.

2.5 In addition to these fourteen Scenarios, additional sensitivity testing has been undertaken for the demographic and dwelling-led scenarios. This sensitivity testing seeks to:

- address the County’s unbalanced demographic, one of the key RLDP objectives, and one which has increased emphasis and importance in light of the Covid-19 pandemic. The WG 2018-based household projections showed increasing growth in households of 4 or more adults, indicating a trend for young adults to either live with their parents or in shared accommodation, unable to afford their own home. The sensitivity testing addresses this by modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34). This approach will help retain younger adult age groups and rebalance Monmouthshire’s ageing demographic (RLDP Objectives 9, 10, 11, 12 and 13).
- address out-commuting, another key objective for the Plan. The 2011 census indicated that 54% of the working age population commutes out of the County for work. The reduction in out-commuting in the sensitivity testing reflects the Council’s economic ambition to attract new employment to the County and encourage people to reduce travel by working from home in accordance with WG ambition of 30% of people working from or near home. This approach will support the Council’s Climate Emergency declaration (RLDP Objectives 1, 14, 15 and 17).

2.6 The sensitivity testing thus aims to create a more balanced population structure to ensure that the County has a sufficient population base of working aged people to support the economy and to ensure our communities are sustainable and resilient, and to provide a level of growth that can provide opportunities for younger people to both stay in and move into the area, whilst at the same time reducing out-commuting by retaining more of the resident workforce.

### Demographic and Dwelling-led Scenarios

2.7 The following demographic and dwelling-led scenarios have been generated by Edge Analytics. Each scenario has also been subject to the sensitivity testing detailed in paragraph 2.5.

**Table 1: Demographic and Dwelling-led Scenarios**

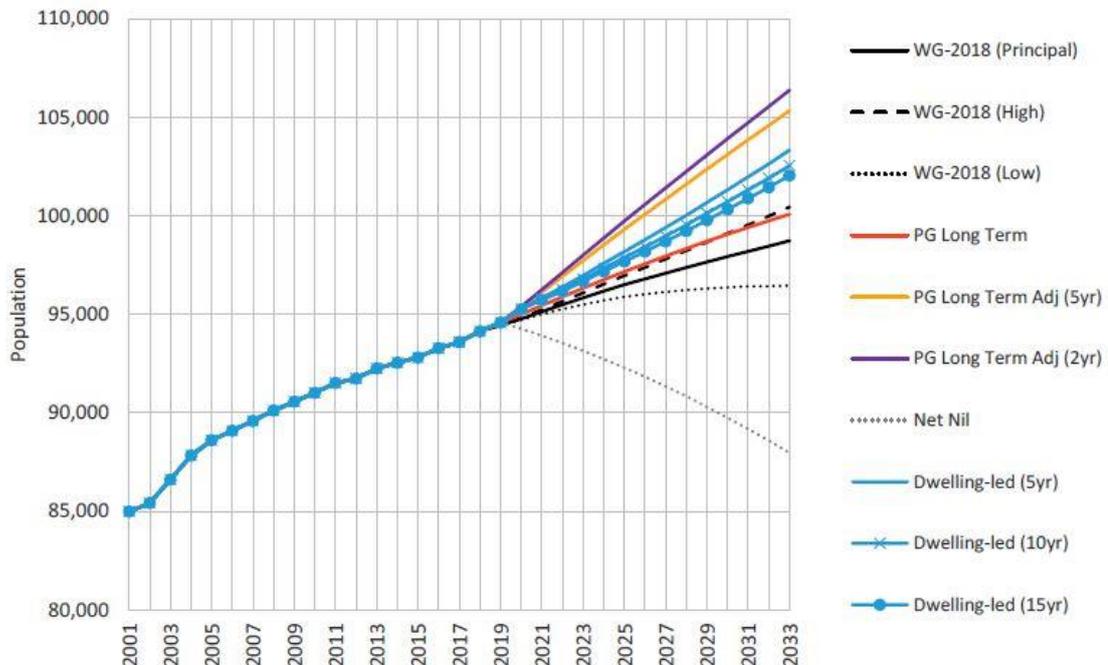
Welsh Government 2018-based	Assumptions
WG-2018 (Principal)	Replicates the WG 2018-based <i>Principal</i> population projection, using historical population evidence for 2001-2018.
WG-2018 (High)	Replicates the WG 2018-based <i>High</i> population projection, using historical population evidence for 2001-2018.
WG-2018 (Low)	

		Replicates the WG 2018-based <i>Low</i> population projection, using historical population evidence for 2001-2018.
<b>Trend-based Demographic</b>		<b>Assumptions</b>
POPGRPOUP Long Term		Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Migration assumptions are derived from an 18-year historical period (2001/02–2018/19).
POPGROUP Long Term Adjusted (5yr)		Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge toll. All other migration flows are consistent with the <b>PG Long Term scenario</b> .
POPGROUP Long Term Adjusted (2yr)		Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 2-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge toll. All other migration flows are consistent with the <b>PG Long Term scenario</b> .
Net Nil Migration		Uses an ONS 2019 MYE, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration.
<b>Dwelling-led</b>		<b>Assumptions</b>
Dwelling-led year average	5	Models the population impact of an average dwelling growth of +310 dpa, based on a 5-year history of housing completions. The dwelling growth is applied from 2020/21 onwards, fixed throughout the Plan period.
Dwelling-led year average	10	Models the population impact of an average dwelling growth of +285 dpa, based on a 10-year history of housing completions. The dwelling growth is applied from 2020/21 onwards, fixed throughout the Plan period.
Dwelling-led year average	15	Models the population impact of an average dwelling growth of +269 dpa, based on a 15-year history of housing completions. The dwelling growth is applied from 2020/21 onwards, fixed throughout the Plan period.

2.8 The population growth trajectories for these scenarios for the RLDP period 2018-2033 are shown in Chart 1 below. Population growth ranges from -6.6% under the Net Nil scenario to +13.0% under the PG Long Term Adjusted (2yr) scenario. The 2019 Office for National Statistics mid-year estimate gives Monmouthshire a population of 94,590.

2.9 The household and dwelling implications of the demographic projections are evaluated through the application of membership rates, average household size, communal population statistics and a dwelling vacancy rate<sup>15</sup> of 4.5% based on the 2011 Census. In the dwelling-led scenarios these assumptions are used to determine the level of population growth required by the defined dwelling growth trajectory.

**Chart 1: Monmouthshire Population Growth Trajectory 2001–2033**



### Linking Population, Household and Employment Growth

- 2.10 It is recognised that there is not always a direct relationship between homes and jobs, however, it is important to consider both in tandem in order to assist in determining a sustainable level of growth to underpin the RLDP. Planning Policy Wales (PPW) advocates a holistic approach to planning, “Placemaking”, which draws upon an area’s potential to create high quality development that promotes people’s prosperity, health and well-being. Analysis has been undertaken to determine the likely demographic impact of various growth scenarios on homes and jobs with a view to achieving a sustainable balance between the two.
- 2.11 Using key assumptions on economic activity, unemployment and the commuting ratio (as defined in Table 2), the estimated employment growth that could be supported by the WG, dwelling and demographic trend scenarios has been calculated for each scenario as set out in the Edge Report. These assumptions have also been used in the employment-led scenarios.

<sup>15</sup> As defined in the Edge Analytics Demographic Report

**Table 2: Key Assumptions used in the Employment Growth Scenario Analysis**

<b>Economic Activity Rate</b>	Economic activity rates are the proportion of the population that are actively involved in the labour force, either employed or unemployed and looking for work. Economic activity rates for Monmouthshire have been derived from the Census and adjusted in line with the Office for Budget Responsibility's (OBR) (July 2018) forecast of long-term changes to age-specific labour force participation. This forecast estimates that the aggregate economic activity rate (16-89) is estimated to reduce by approx. 2% points from 61% to 59% over the Plan period 2018-2033. More specifically, economic activity rates in the older age groups (55+) are expected to increase over the Plan period, especially in the female groups. A small decline in economic activity rates is expected amongst the 35-54 age groups, although an increase is expected in the female equivalent.
<b>Unemployment Rate</b>	Historical unemployment rates are sourced from ONS model-based estimates. For Monmouthshire the 2019 rate of 2.9% has been applied in the trend, Dwelling-led and core Employment-led scenarios, fixed throughout the forecast period.
<b>Commuting Ratio<sup>16</sup></b>	The 2011 Census recorded 43,210 workers living in Monmouthshire and 38,458 people working in Monmouthshire, which gives a net out-commuting ratio of 1.12 (i.e. there are more workers living in the County than available employment). A reduced commuting ratio of 1.10 has been applied to the employment-led scenarios and through the sensitivity testing to the demographic and dwelling-led scenarios to model the impact of this key objective.

2.12 By applying the assumptions listed in table 2 to the individual scenarios it gives an estimation of the number of jobs that are likely to be needed for the arising resident population. Whilst this takes account of known trends with regard to economic activity rates, unemployment and the commuting ratio, it cannot take account of individual choice with regard to employment location. In light of the current Covid-19 pandemic working patterns have changed in the short term with a large increase in the number of people working from home. It is likely that the increased propensity for home and remote working will be a longer term trend over the Plan period. Welsh Government announced in September 2020 that they have a long-term ambition for around 30% of the Welsh workforce to work remotely either from home or near to home using community-based remote working hubs<sup>17</sup>. When considering the number of jobs arising from each scenario this trend for an increased propensity to work remotely will need to be taken into account.

### Employment-led Scenarios

2.13 A range of employment-led scenarios have also been generated based on the evidence contained in the Economies of the Future Report which sets out average annual

<sup>16</sup> The Commuting ratio is the balance between local employment and the size of the resident workforce. A commuting ratio greater than 1.00 indicates a net out-commute (i.e. number of resident workers in an area is greater than the level of employment). A commuting ratio less than 1.00 indicates a net in-commute (i.e. employment total is greater than number of resident workers).

<sup>17</sup> <https://gov.wales/aim-30-welsh-workforce-work-remotely>

employment growth under Oxford Economics Baseline, UK Growth Rate and Radical Structural Change forecasts. Using an employment-led configuration of the POPGROUP model, the population and housing growth implications of the Baseline, UK Growth Rate, Radical Structure Change Lower and Radical Structural Change Higher economic forecasts have been estimated. All employment forecasts have been run using the economic assumptions outlined in Table 2 above, which are consistent with those applied to the demographic and dwelling-led scenarios. The impact of a reducing commuting ratio assumption has been considered for all of the scenarios. The employment-led scenarios generated are set out in Table 3.

**Table 3: Employment-led Scenarios**

Employment-led Scenarios	Assumptions
Baseline (CR reducing)	Annual employment growth is consistent with the Employment-led Baseline scenario. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period.
UK Growth Rate (CR reducing)	Annual employment growth is consistent with the Employment-led UK Growth Rate scenario. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period.
Radical Structural Change Lower (CR reducing)	Annual employment growth is consistent with the Employment-led Radical Structural Change (Lower) scenario. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period.
Radical Structure Change Higher (CR reducing)	Annual employment growth is consistent with the Employment-led Radical Structural Change (Higher) scenario. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period.

### Selected Alternative Growth Options

- 2.14 The fourteen growth outcomes associated with the WG, demographic, dwelling-led and employment-led scenarios listed above together with the sensitivity testing are set out in detail in the Edge Analytics Demographic Report (attached at Appendix 1). Given the quantum of scenarios generated, it is considered pertinent to condense these into a lower number of options to assist in determining the housing and employment requirements of the RLDP. The options selected are considered to represent a realistic range of growth scenarios.
- 2.15 The following options have therefore been selected for consideration as alternative growth options for consultation purposes. These include four demographic, one dwelling-led and one employment-led option as summarised in Table 4. The justification for selecting the alternative options is set out in Appendix 5.
- 2.16 Of the six options selected, three have been the subject of the sensitivity testing detailed at paragraph 2.5. These three options reflect the Council's key aims of addressing the unbalanced demographic in the County by retaining the younger age

groups and reducing out-commuting. The outputs from this initial modelling for all 6 options form the baseline for the demographic, dwelling and employment outputs.

- 2.17 In addition to the initial modelling, all six selected options have been the subject of additional testing to establish the impact on demography, dwellings, household formation and employment of an affordable-housing policy-led strategy. This is set out in detail in the Edge Analytics Affordable Housing Evidence Addendum Report (attached at Appendix 2).
- 2.18 The affordable housing policy-led element of the testing aims to increase the extent to which the RLDP addresses the issues associated with housing affordability in the County. There are two issues that this element of testing seeks to address. Firstly it aims to address the issue of affordability for those people who are either not able to form households or are forced to leave the County due to high average house purchase and private rent prices in the County, i.e. the intermediate affordable housing need. Secondly, the current pandemic has revealed the extent of hidden homelessness in the County and increased the need for social rent properties. The Minister for Housing and Local Government has announced that post-Covid-19, no-one should return to the streets. By addressing these fundamental issues/challenges it will provide opportunities to retain/house these people and therefore further redress the demographic imbalance and improve the resilience and sustainability of our communities and the strength of our economic base.
- 2.19 The Local Housing Market Assessment (LHMA) is a core piece of baseline evidence for the Plan as it identifies the level of housing need in the County. The Development Plans Manual (paragraph 5.32) states that the scale of affordable housing need will be a key consideration when determining the overall level and location of housing in the Plan, as well as the allocation of affordable housing-led sites where at least 50% of the homes are affordable.
- 2.20 To establish the number of additional dwellings associated with the Affordable Housing policy-led element of each chosen option and therefore the overall dwelling growth required over the Plan period, the population and household formation arising from the initial modelling has been entered into the LHMA model. This has established the level of affordable housing need which will arise over the Plan period from each of the six individual options.
- 2.21 As a starting point, it is proposed to meet 10% of the need identified in the LHMA on affordable housing-led sites where at least 50% of the homes are affordable. The 10% target may be refined in light of the evidence as we progress through the Plan process. The delivery of both market and affordable homes on these sites is in addition to that delivered on sites allocated to meet the level of growth evidenced by the initial modelling. The RLDP will thus be meeting in excess of 10% of the identified affordable housing need when both sources of dwelling supply are taken into account.

**Table 4: Summary of Selected Growth Options**

Options (type)		Assumptions
Option 1 (Demographic)	<b>Balanced Migration (with added policy assumptions)</b> (Net Nil Migration (MR, CR_R), AH)*	Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration. Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period. An average of 53dpa is added to the projected dwelling growth under this scenario between 2018-2033. This reflects a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.
Option 2 (Demographic)	<b>WG 2018-based Principal (AH)</b>	Replicates the WG 2018-based population projection. Migration assumptions are based on the five-year period prior to 2018 (i.e. 2013/14–2017/18). An average of 71dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.
Option 3 (Demographic)	<b>WG 2018-based Principal Projection (with added policy assumptions)</b> (WG 2018-based Principal (MR, CR_R), AH)*	Replicates the WG 2018-based population projection. Migration assumptions are based on the five-year period prior to 2018 (i.e. 2013/14–2017/18). Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period. An average of 76dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.
Option 4 (Dwelling)	<b>Dwelling-led Average (based on dwelling completion rates)</b> Dwelling-led 5 year average, AH*	Annual dwelling growth is applied from 2020/21 onward, based on the last five years of completions (2015/16–2019/20). This gives an average annual dwelling growth of +310 pa in Monmouthshire. An average of 80dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of

Options (type)		Assumptions
		achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.
Option 5 (Demographic)	<b>Population-led projection (with added policy assumptions)</b> (PG Long Term (adjusted) (5yr) (MR, CR_R), AH)*	Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge tolls. All other migration flow assumptions are consistent with the PG Long Term scenario. Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period. An average of 94dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.
Option 6 (Employment)	<b>Employment-led projection (with added policy assumptions)</b> (Radical Structural Change** Higher (CR_R), AH)*	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the Plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains at current value (2019) (2.9%). An average of 124dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.

\* These are the option titles referred to in the Edge Analytics Reports.

\*\*'Radical Structural Change' (RSC) scenarios consider the potential impact of substantial economic changes in Monmouthshire's economy, resulting in a significantly higher employment growth range than under the 'Baseline' and UK Growth equivalent.

2.22 The following section considers the population, household, dwelling and employment implications associated with each of the alternative growth options set out in Table 4, together with their wider implications for the County and the extent to which they will achieve the RLDP objectives. The performance of the options in relation to the objectives is assessed according to the ratings set out in Table 5. A summary of the implications of the growth options is set out in Table 6. A summary of the performance of the growth options against the RLDP Objectives is included at Appendix 7. The options have also been assessed through the Integrated Sustainability Appraisal process. A summary of the growth options performance against the ISA Themes is included at Appendix 8.

**Table 5: Key to Assessment of Options against RLDP Objectives**

Rating	Predicted effect
Green	Helps to achieve the objective.
Amber	Neutral impact on objective.
Red	Unlikely to achieve objective.

- 2.23 A Review of the RLDP Issues, Vision and Objectives (IVO) in light of Covid-19 was undertaken in June 2020 and incorporated into the RLDP Review of IVO and Evidence Base Paper (September 2020). This concluded the Plan’s Issues, Vision and Objectives remain relevant in light of Covid-19 and that it is appropriate to continue with the preparation of the RLDP on the basis of these values. However, some objectives were concluded to have increased emphasis and importance in light of Covid-19, consistent with the priorities identified in the Welsh Government *Building Better Places* document published in July 2020. These objectives are denoted with an \* in the tables for clarity.

## Selected Growth Options

**Table 6: Summary of the Implications of Selected Growth Options**

Growth Option	Type of Scenario	Population Change 2018-2033	Population Change %	Average Net Migration per annum	Household Change 2018-2033	Household Change %	Dwellings per annum	Dwellings 2018-2033	Jobs per annum	Jobs 2018-2033
1. <b>Balanced Migration (with added policy assumptions)</b> (Net Nil Migration (MR, CR_R), AH)*	Demographic	-5110	-5.4%	108	-240	-0.6%	-17	-255	-120	-1,800
2. <b>WG 2018-based Principal Projection</b> (AH)	Demographic	6,047	6.4%	818	3,749	9.3%	262	3,930	208	3,120
3. <b>WG 2018-based Principal Projection (with added policy assumptions)</b> (WG 2018-based Principal (MR, CR_R), AH)*	Demographic	6,147	6.5%	825	4,551	11.3%	318	4,770	265	3,975
4. <b>Dwelling-led Average (based on dwelling completion rates)</b> Dwelling-led 5 year average, AH*	Dwelling	10,641	11.3%	1,110	5,628	14.0%	402	6,030	364	5,460
5. <b>Population-led projection (with added policy assumptions)</b> (PG	Demographic	12,443	13.2%	1,223	7,255	18.1%	507	7,605	481	7,215

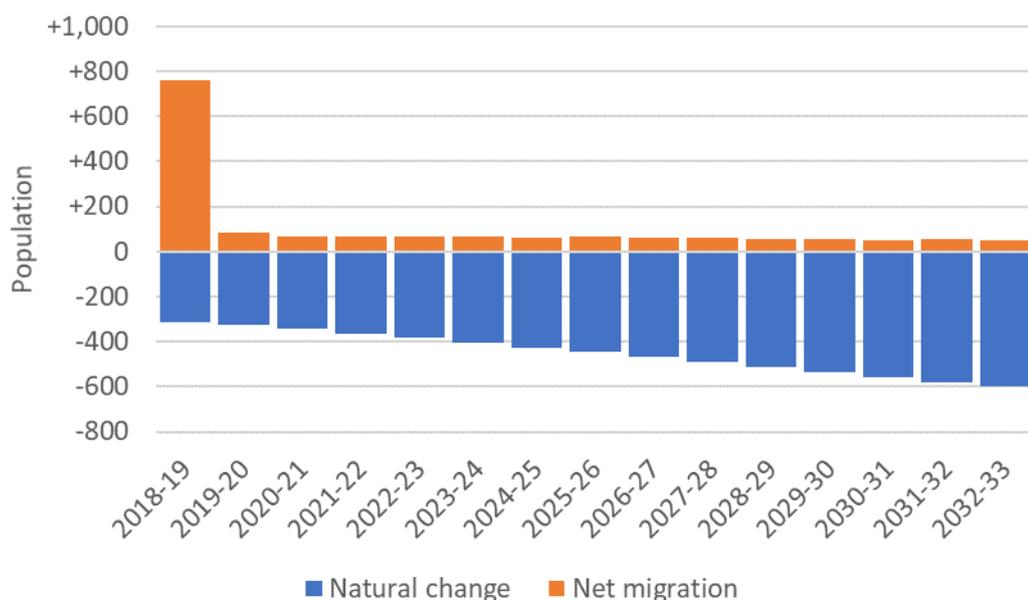
Growth Option	Type of Scenario	Population Change 2018-2033	Population Change %	Average Net Migration per annum	Household Change 2018-2033	Household Change %	Dwellings per annum	Dwellings 2018-2033	Jobs per annum	Jobs 2018-2033
Long Term (adjusted) (5yr) (MR, CR_R), AH)*										
6. <b>Employment-led projection (with added policy assumptions)</b> (Radical Structural Change Higher (CR_R), AH)*	Employment	17,403	18.5%	1,524	8,653	21.6%	604	9,060	642	9,630

\*These are the option titles referred to in the Edge Analytics Reports.

**Option 1: Balanced Migration (with added policy assumptions) (Net Nil Option (MR CR\_R), AH)**

- 2.24 The purpose of this option is to test the impact of a very low level of net migration. Internal and international migration in-flows and out-flows are balanced to depict how natural change (i.e. births and deaths) could affect future population and household growth. The sensitivity testing has then been applied to the output to establish the impact on the projection of modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34), whilst at the same time reducing out-commuting by retaining more of the resident workforce.
- 2.25 Additional testing has been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing. The only net migration arising from this option comes from this element of the testing.
- 2.26 This option projects a population decline of 5,110 (5.4%) and a decline of 240 (0.6%) in the number of households in the County over the Plan period. This level of decline translates into a negative dwelling requirement of 17 dpa (dwellings per annum) between 2018 and 2033.
- 2.27 Chart 2 below illustrates that under this option, with the only inward migration coming from the affordable policy-led element from 2019-20 onwards, there would be an increasing negative level of natural change over the Plan period with fewer births than deaths as the population ages. 2018-19 in-migration reflects the current trend. Monmouthshire’s communities would decline.

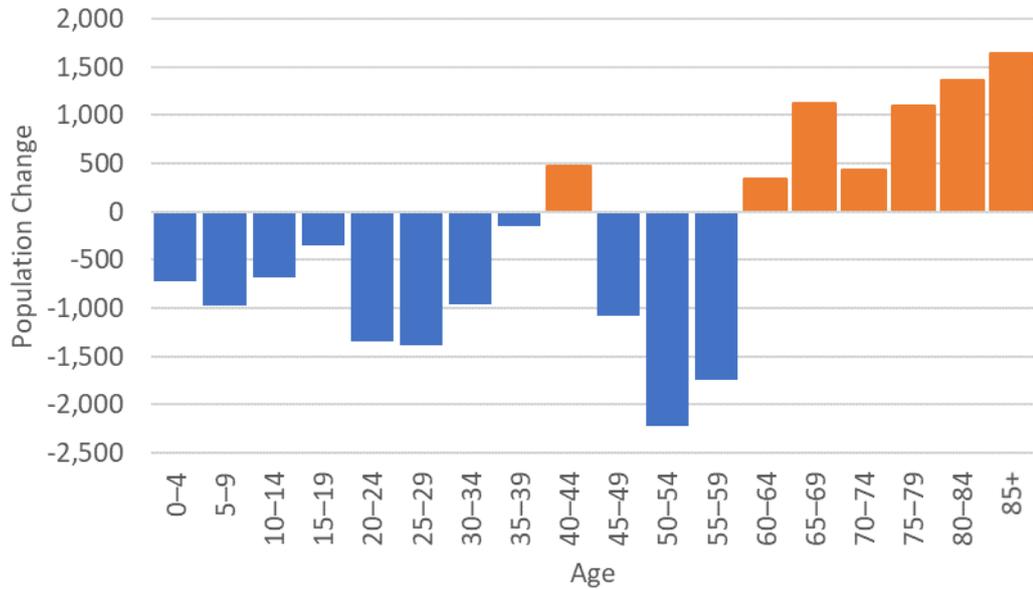
**Chart 2: Components of Population Change**



- 2.28 This option impacts significantly on the age profile of the County leading to a notably unbalanced demographic, with only the over 60 age group showing any substantial

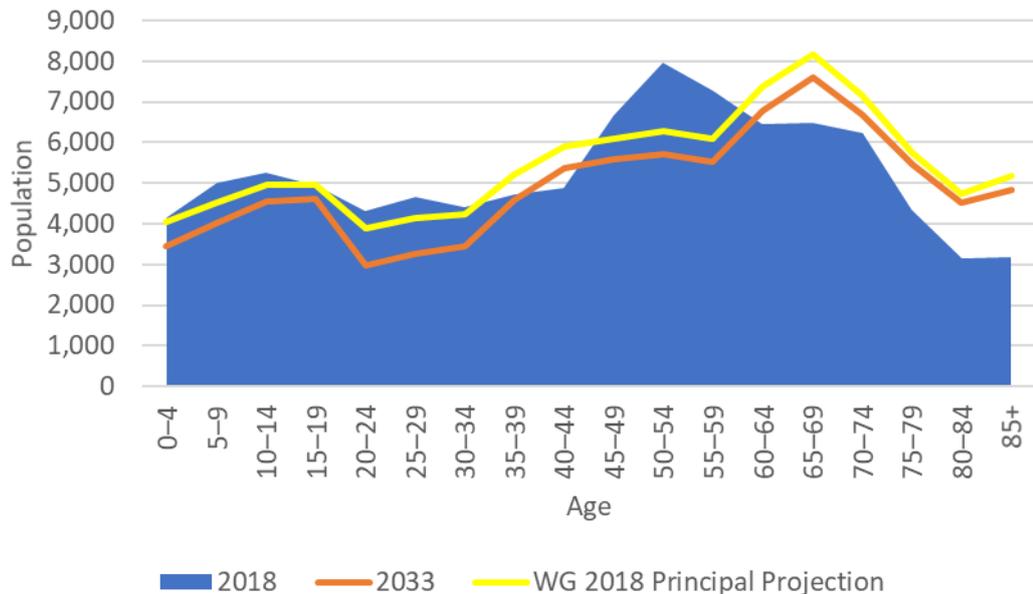
growth over the Plan period. The 40-44 age group shows minimal growth, while all other age groups show a decline (Charts 3 and 4). This leads to an increased ageing demographic in the County over the Plan period.

**Chart 3: Population Growth/Decline by Age Group 2018-2033**



Orange = HIGHER in 2033      Blue = LOWER in 2033

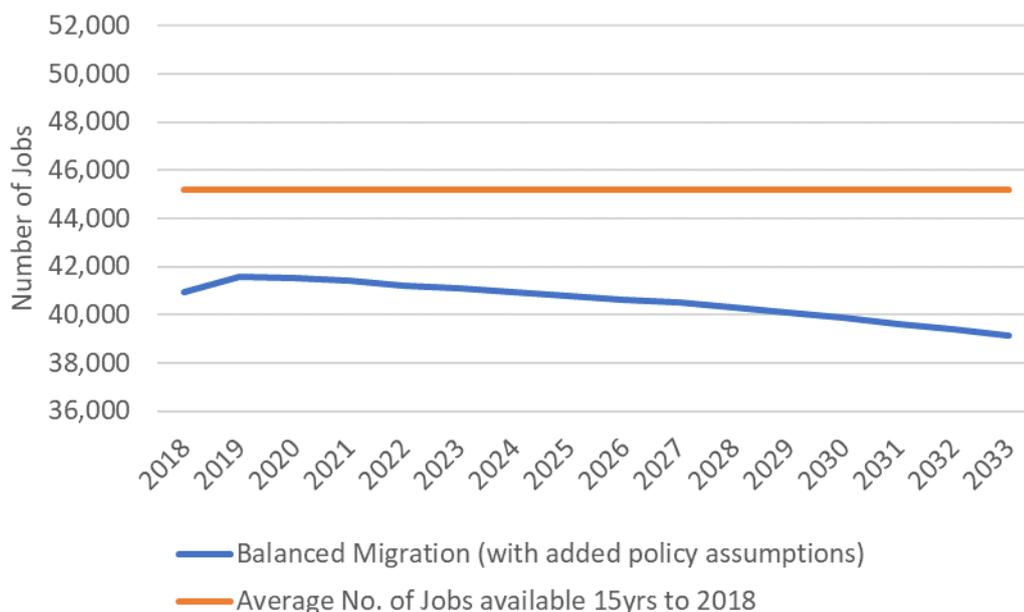
**Chart 4: Implications for the Age Profile of Monmouthshire**



2.29 This option also projects a significant decline in employment over the Plan period, 4.4% from 40,951 jobs in 2018 to 39,149 in 2033. The number of job losses per annum is also projected to increase over the Plan period, from 39 jobs lost in 2020 to nearly 250 jobs lost in 2033. This is due to the lack of any net migration flows coupled with a

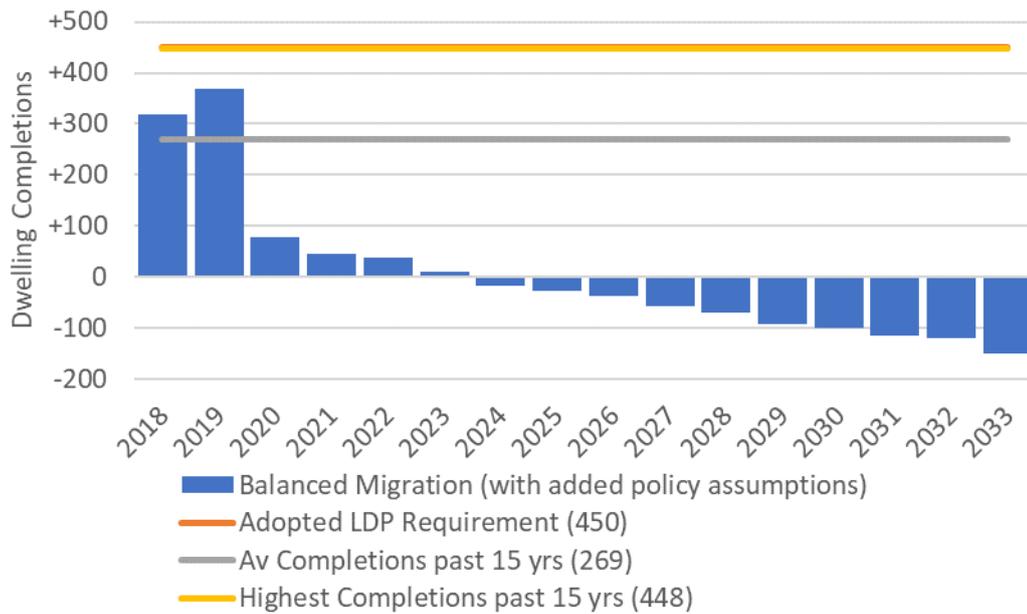
significantly ageing, economically inactive population profile (Chart 5). With a shrinking workforce, Monmouthshire will become increasingly unattractive for businesses to set up, remain or grow here, and with a shrinking population and ageing demographic, some businesses will be affected by a reduced customer base and so close or relocate.

**Chart 5: Implications for Employment Growth**



2.30 All of these factors impact on the dwelling requirement over the Plan period. There is a low level of need during the first five years of the Plan period up to 2022, after which there is a negative need, resulting in an average requirement of -17dpa over the whole Plan period (Chart 6). There are currently 4,660 new homes within existing commitments and windfall allowances. This option would result in too many homes in the County for a declining population.

**Chart 6: Dwelling Requirement**



2.31 This clearly illustrates the fact that all of the population change and employment growth in Monmouthshire is driven by in-migration and thus this option would not provide a robust basis to inform the RLDP’s housing and employment requirement figure.

2.32 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not address the demographic imbalance in the County.
- A decline in school aged children, placing less pressure on the capacity of existing schools. However, it would provide no scope to secure any improvements through planning gain and could lead to potential school closures.
- A decline in the working age population in the County with a declining work force unable to support local employment provision leading to job losses and a negative impact on the local economy. Provides no opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
- With a net loss of dwellings, a reduction in the level of affordable housing secured through the planning system, even with the addition of the affordable housing policy-led element. A restricted supply of homes could lead to higher house prices, thus making the County even less affordable to the younger working age population and perpetuating the demographic imbalance.

- The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire. However, this growth option would lead to a net loss of dwellings and would not deliver the Council's core purpose of building sustainable and resilient communities.
- Any deficiencies in access to good quality open space would be exacerbated due to the lack of any growth to support additional provision and/or upgrades to existing provision. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
- Difficulties in sustaining services/facilities across the County with resulting negative impacts e.g. rural isolation etc. The Covid-19 pandemic has highlighted the importance of local services and facilities to support our communities.
- Inability to secure infrastructure provision/upgrades through planning gain from development. The current pandemic has highlighted the importance of key infrastructure, including digital infrastructure and active travel options to support/enable increased home / remote working and support local communities.

**Table 7: Assessment of Option 1: Balanced Migration (with added policy assumptions) (Net Nil Option (MR CR\_R), AH)\*\* against the RLDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 2.22		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	A declining working age population in the County unable to support local employment provision would lead to job losses and a negative impact on the local economy, a loss of 120 jobs pa. This would not meet the Council's ambitions for sustainable economic growth and would not enable the creation of sustainable and resilient communities. In this respect, the growth level provides no opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
<b>Objective 2</b>	Retail centres*	Declining customer base would impact negatively on the viability, vitality and attractiveness of the retail centres in the County's towns. The role and function of the high street in the local community has been highlighted of particular importance in the current

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
		pandemic, this option would not provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	There would be no negative impact on the natural environment, although at the same time it would provide no opportunities to improve Green Infrastructure and ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	There would be no negative impact on areas of flood risk, as there would be no need for additional housing or employment development.
<b>Objective 5</b>	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
<b>Objective 6</b>	Land	There is no need for additional housing or employment development required therefore no further greenfield land or best and most versatile agricultural land required.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources, although at the same time provides no opportunities for improvements.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	Would have a negative impact on health and well-being with an ageing and declining population and no growth to support additional provision and/or upgrades to existing provision or to sustain existing provision. Any deficiencies in provision of good quality open space would be exacerbated. The value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Would result in an increase in the proportion of the older and elderly people living in the County leading to a more unbalanced demographic as well a decline in the overall population. Difficulties in sustaining services/facilities across the County will exacerbate

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
		rural isolation. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not support/enable social sustainability and balanced communities across the County.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	No requirement for additional housing although an ageing demographic would require a different type of housing to that currently available. With a net loss of dwellings there would be a reduction in the availability of affordable and market housing. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments, including affordable housing. This option would not address the County's affordability issues or build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	No requirement for new housing so provides no opportunity to enhance the character and identity of Monmouthshire's settlements. The value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	Would impact negatively on communities with an unbalanced demographic, providing no opportunity for housing provision, job creation or improvements to existing services and facilities. The resultant demographic change over the Plan period provides no opportunities to support social sustainability and balanced communities. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable. This growth option would fail to address this key issue and would be detrimental to our core purpose of creating sustainable and resilient communities.
<b>Objective 13</b>	Rural Communities	Would impact negatively on rural communities by providing no opportunity to strengthen the rural economy or opportunities for people to stay in their local communities. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
		Difficulties in sustaining services/facilities across the County would increase rural isolation.
<b>Objective 14</b>	Infrastructure*	Would have a negative impact as a declining and unbalanced demographic would result in falling school numbers and could result in school closures, as well as increased pressure on health and social care. Difficulties in sustaining services/facilities across the County as well as limited opportunities to improve a range of infrastructure, including active travel and digital infrastructure would increase issues associated with rural isolation.
<b>Objective 15</b>	Accessibility	Would have a negative impact as loss of employment would limit job opportunities in the County and a net loss of dwellings leading to a continuation of out-commuting levels in the short term, reducing as the population ages. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term. The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to communities. Lack of employment opportunities within settlements would not encourage active travel and the use of sustainable transport options.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	There would be no negative impact on culture and heritage, but at the same time offers no benefits for the economy, tourism and social well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change*	There would be no negative impact on climate change, with a reduction in commuting in the long term as the population ages being a positive. At the same time there would be limited opportunities to contribute to minimising carbon by providing opportunities for renewable energy generation, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

\*\* Option title as referred to in the Edge Analytics Reports.

## **Integrated Sustainability Appraisal (ISA) Analysis**

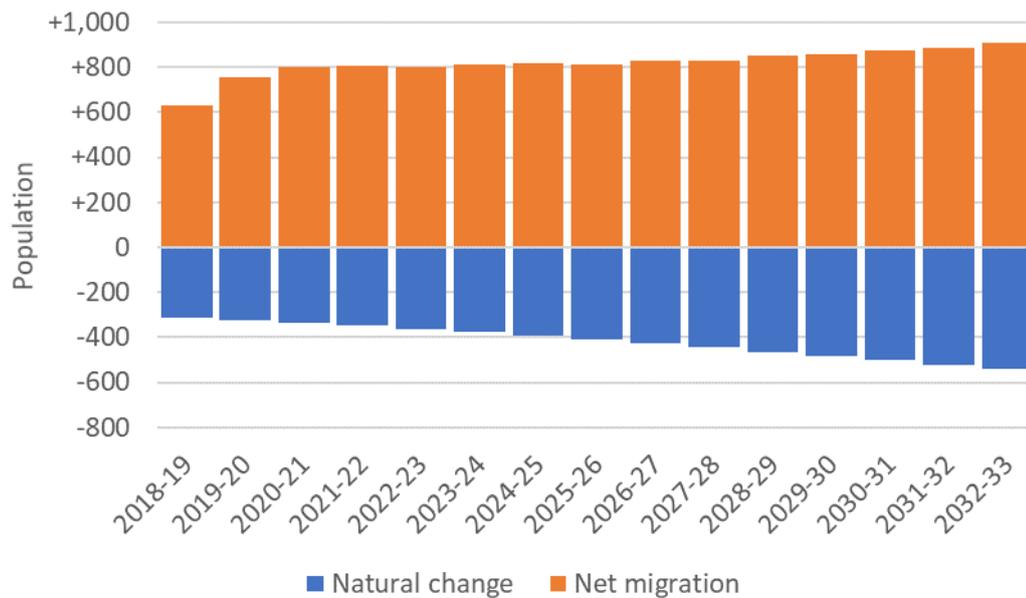
- 2.33 Growth Option 1 performs least well of the options against the ISA themes relating to the economy and employment, population and communities, health and wellbeing and equalities. Options 1 to 4 represent job growth at a lower rate than past delivery rates, and the demographic projections indicate a declining workforce, as well as a declining customer base. This option performs notably worse when compared to the other options and through negative growth is considered likely to lead to negative effects of significance.
- 2.34 This option would also not contribute towards meeting and sustaining sufficient land supply for the forthcoming Plan period, which could significantly impact upon the future vitality of communities. Not only will this option severely limit opportunities to address changing housing needs in terms of types and tenures, but the lack of growth is also likely to drive up house prices and exacerbate affordability issues. This option may also result in very limited opportunities for the younger population to live and work in the County and difficulties in sustaining services/ facilities across the County, exacerbating rural isolation. Negative effects against these ISA themes are considered likely to be of significance under this option.
- 2.35 There are considered to be no significant effects with regard to this option against the remaining ISA themes. With no growth proposed under this option it is considered likely that there will be marginal effects in terms of congestion on the existing highway network, although it is recognised that with no growth under this option it will not provide the critical mass to enable infrastructure improvements. This is particularly important given the wider ambitions to transition to a lower-emission infrastructure network, where development will be a key delivery vehicle for the technological and infrastructure advances which underpin the transition.
- 2.36 As this option does not propose any further growth it is also likely to avoid significant effects in relation to the natural resources, biodiversity and landscape ISA themes. At this stage it is concluded that it is not possible to identify any significant differences between the Options or conclude that they are likely to have significant effects on the historic environment. None of the Options is likely to have a significant effect on the Welsh language.

### **Option 2: Welsh Government (WG) 2018-Based Principal Projection (AH)**

- 2.37 This option replicates the WG 2018-Based Principal Projection, using historical population evidence for 2001-2018. Additional testing has been undertaken to establish the impact on demography, dwellings, household type and employment of the addition of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing.

2.38 This option projects a population increase of 6,047 (6.4%) with a corresponding increase of 3,749 households (9.3%) in the County over the Plan period. This level of household growth results in an estimated average annual dwelling growth of 262 dpa over the 2018– 2033 Plan period (total 3,930 dwellings). The figure of 262 dpa is lower than the current LDP dwelling requirement of 450 dpa and also below average completions over the past 5 (310 dpa) and 10 years (285 dpa).

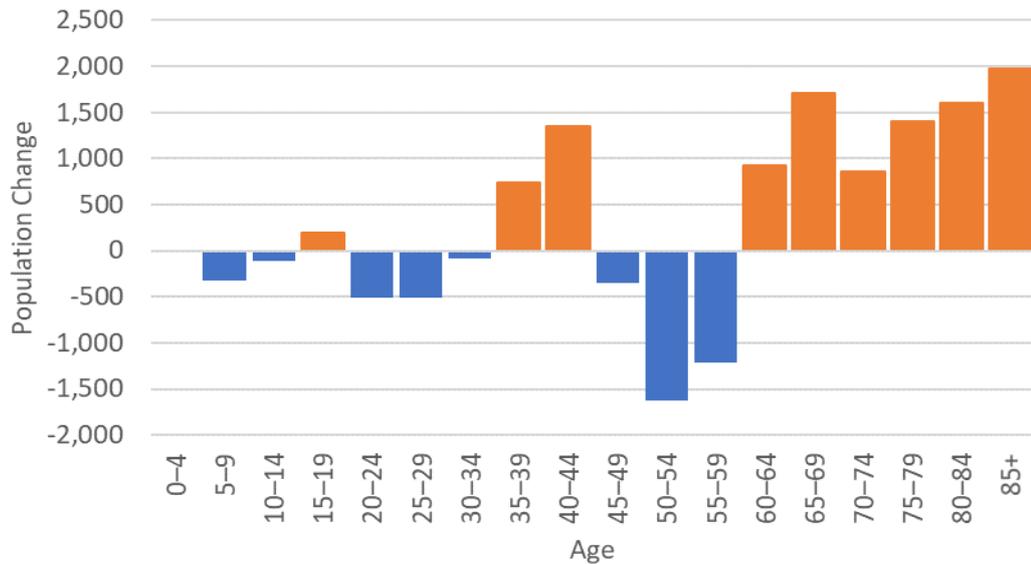
**Chart 7: Components of Change**



2.39 This option projects net in-migration of an average of 818 persons per annum throughout the Plan period. However, this is counter balanced by an increasing level of negative natural change as the population ages (Chart 7).

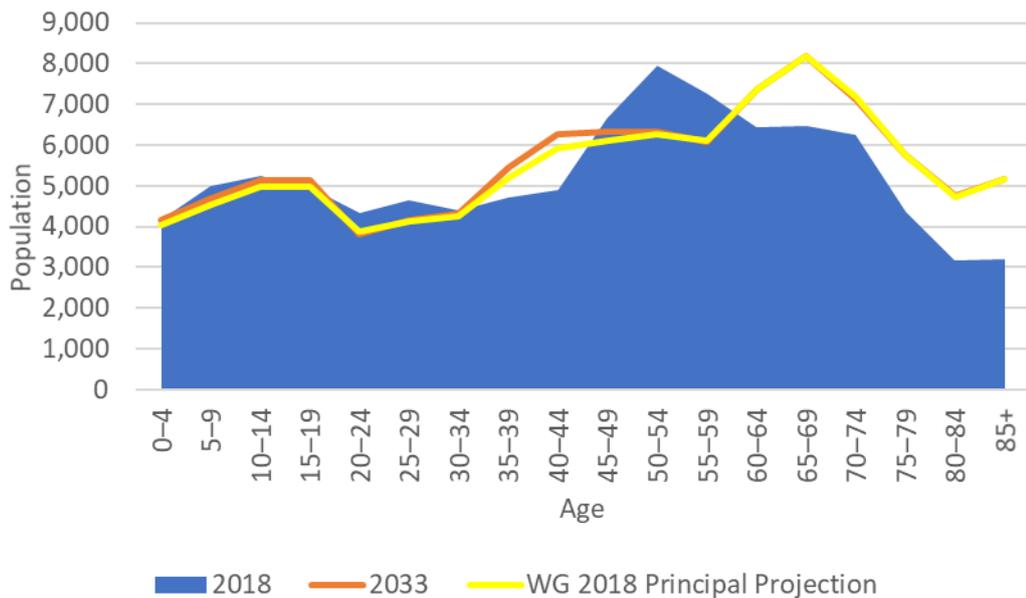
2.40 As with the balanced migration option, this option has significant implications on the age profile of the County. Whilst there is growth in the 35-44 age groups the majority of population growth is coming from the over 60 age groups with all other age groups, with the exception of the 15-19 age group, experiencing negative growth, again resulting in an unbalanced demographic (Charts 8 and 9).

**Chart 8: Population Growth/Decline by Age Group 2018-2033**



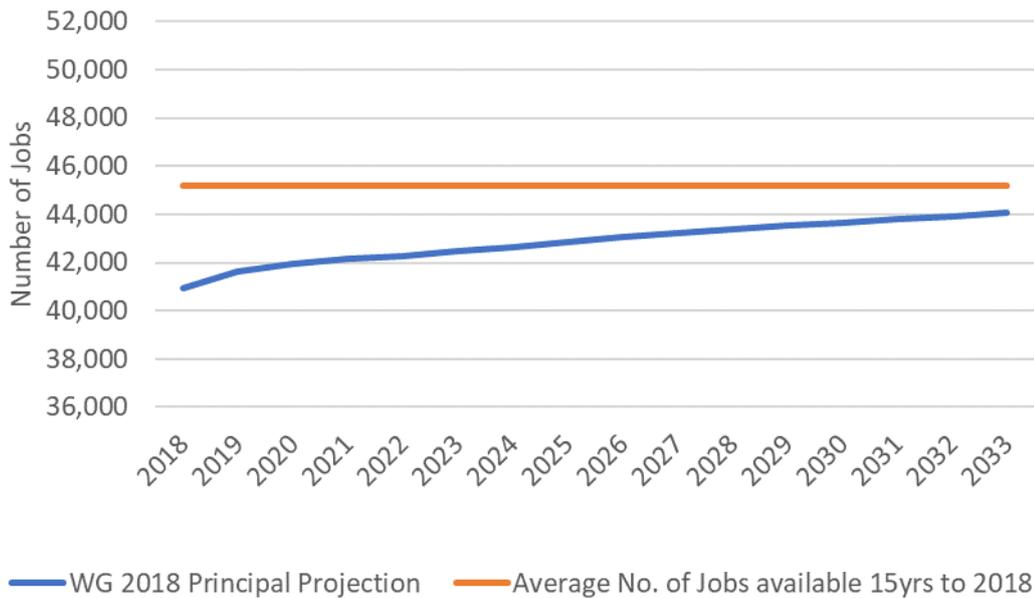
Orange = HIGHER in 2033      Blue = LOWER in 2033

**Chart 9: Implications for the Age Profile of Monmouthshire**



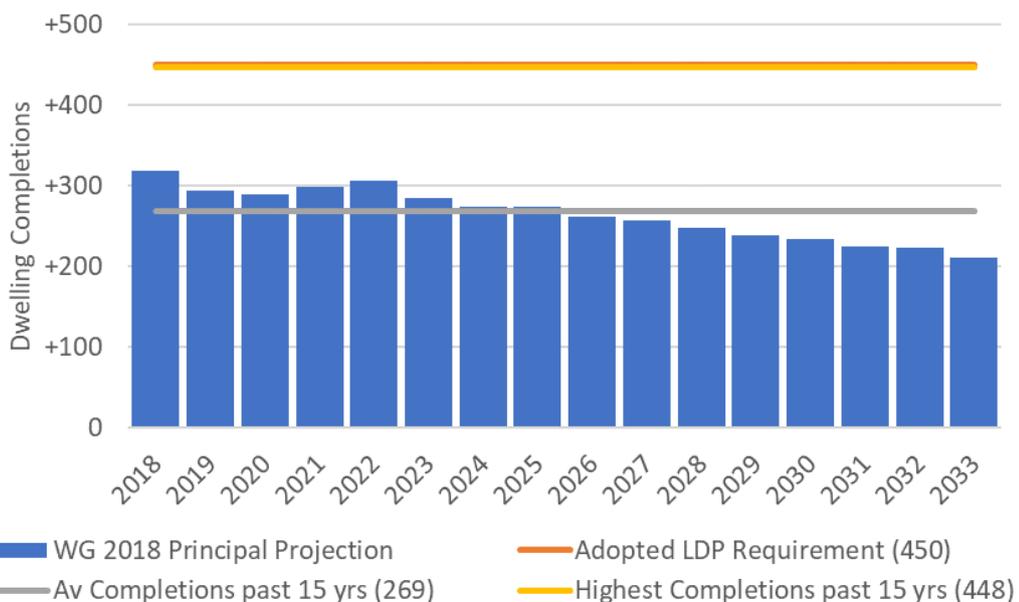
2.41 Whilst this option projects an increase of some 3,120 jobs over the total Plan period, the level of job growth slows in the later part of the Plan period. The number of jobs also remains below the average seen in the past 15 years (Chart 10). As this option would not drive job creation in the long term, it would result in an outflow of workers from the County thus negatively impacting on the local economy and increasing out-commuting. It would also mean that there would again be implications in terms of retaining younger people within the County to both live and work and would therefore be in direct conflict with key objectives of the RLDP.

**Chart 10: Implications for Employment Growth**



2.42 All of these factors impact on the dwelling requirement over the Plan period. The dwelling requirement within this option equates to an average of 262 per year, marginally lower than the average build rate over the past 15 years and significantly lower than the adopted LDP requirement (Chart 11). There are currently 4,660 new homes within existing commitments and windfall allowances. This option would require no new allocations under the RLDP, with again an excess of new homes when these existing commitments and allowances are taken into account.

**Chart 11: Dwelling Requirement**



2.43 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public

and private sectors. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not address the demographic imbalance in the County.

- An overall decline in school aged children, placing less pressure on the capacity of existing schools. However, it would provide no scope to secure any improvements through planning gain and could lead to potential school closures.
- An overall decline in the working age population in the County, although there is some growth in the 35-44 age groups, which could fuel some employment growth. The overall number of jobs is projected to be at a lower level than in the previous 15 years, however, indicating that people will still need to leave the County to access employment. This would not reduce levels of out-commuting or promote sustainable travel to work patterns. Provides limited opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
- Opportunities to secure some affordable housing but at this lower level would not address this key issue. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County’s affordability issues and to build sustainable and resilient communities throughout Monmouthshire.
- Limited opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
- Limited opportunities to secure infrastructure provision/upgrades through planning gain from development. The current pandemic has highlighted the importance of key infrastructure, including digital infrastructure and active travel options to support/enable increased home working and support local communities.

**Table 8: Assessment of Option 2: Welsh Government (WG) 2018-Based Principal Projection (AH) against RLDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 2.22		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	An overall decline in the working age population in the County, although there is some growth in the 35-44 age groups, which could fuel some employment growth. The overall number of jobs is projected to be at a lower level than in the previous 15 years indicating that people will

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
		still need to leave the County to access employment. This would not meet the Council's ambitions for sustainable economic growth and would not enable the creation of sustainable and resilient communities. In this respect, the level of growth provides limited opportunities to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
<b>Objective 2</b>	Retail centres*	Would provide opportunity to add to the customer base in existing centres but would be unlikely to address the pressures the retail centres in the County's towns are currently facing which would impact negatively on the vitality, viability and attractiveness of the retail centres in the County's towns. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic. This option would not provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	There would be no significant impacts on the natural environment, although at the same time it would provide few opportunities to create new linkages through improvements to Green Infrastructure and ecological connectivity. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	There would be no negative impact as the low level of growth can be located away from areas of flood risk and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
<b>Objective 6</b>	Land	Provision of housing alongside employment could promote efficient use of land and use of brownfield sites. However, it is recognised that there are limited opportunities for development on brownfield land and lower grade agricultural land.
<b>Objective 7</b>	Natural resources	There would be no negative impact on the ability to promote the efficient use of natural resources. Any

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
		developments will be encouraged to be water and energy efficient.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	Would have a negative impact on health and well-being with an ageing population and a low level of growth to support additional provision and/or upgrades to existing provision. Any deficiencies in provision of good quality open space would be exacerbated. The value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Would result in an increase in the proportion of the older and elderly people living in the County leading to a more unbalanced demographic. Very limited opportunities for the younger population to live and work in the County. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not address the demographic imbalance in the County.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	With a build rate lower than that achieved over the past 15 years, this option would not be able to offer the range or number of homes to address the demographic imbalance or the range of homes needed to attract the economically active age group and the type of homes the ageing demographic would require. Limited opportunity to secure additional market and affordable housing. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments, including affordable housing. This option would not address the County's affordability issues or build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Low requirement for new housing so provides very limited opportunity to enhance the character and identity of Monmouthshire's settlements. The value and importance of place-making has been emphasised in light of Covid-19.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
<b>Objective 12</b>	Communities	Would impact on communities, by providing limited opportunities for job creation or improvements to existing services and facilities. The unbalanced demographic and low level of dwelling and job creation provides little opportunity to support social sustainability and balanced communities. This growth option would fail to address this key issue and would be detrimental to our core purpose of creating sustainable and resilient communities.
<b>Objective 13</b>	Rural Communities	Would impact negatively on rural communities by providing few opportunities to strengthen the rural economy or opportunities for people to stay in their local communities. Difficulties in sustaining services/facilities across the County will result in rural isolation.
<b>Objective 14</b>	Infrastructure*	Would have a negative impact as a declining and unbalanced demographic would result in falling school numbers and could result in school closures, as well as increased pressure on health and social care. Difficulties in sustaining services/facilities across the County as well as limited opportunities to improve a range of infrastructure, including active travel and digital infrastructure would increase issues associated with rural isolation.
<b>Objective 15</b>	Accessibility	Would have a negative impact as limited employment growth would limit job opportunities in the County leading to a continuation of out-commuting levels. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term. The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to communities. Lack of employment opportunities and low housing growth level would result in limited opportunities to enhance accessibility, active travel and the use of sustainable transport options.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	There would be no negative impact on culture and heritage, but at the same time offers few benefits for the economy, tourism and social well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
Objective 17	Climate Change*	There would be no negative impact on climate change, with a reduction in commuting in the long term as the population ages being a positive. At the same time there would be limited opportunities to contribute to minimising carbon by providing opportunities for renewable energy generation, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

### Integrated Sustainability Appraisal (ISA) Analysis

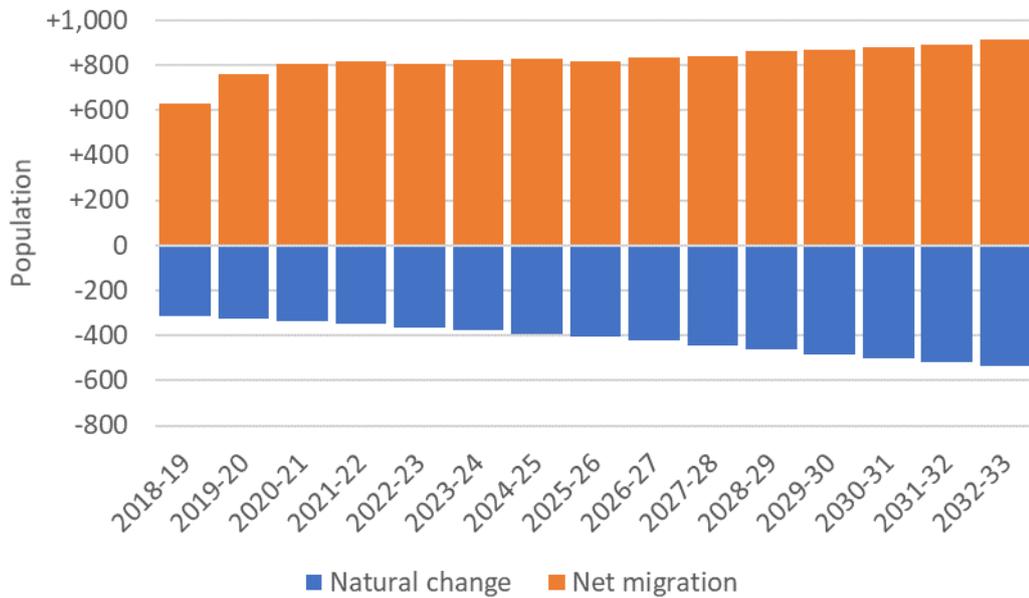
- 2.44 Growth Option 2 performs marginally better than option 1 against the ISA themes relating to the economy and employment, population and communities, health and wellbeing and equalities. Options 1 to 4 all represent job growth, albeit at a lower rate than past delivery rates, and the demographic projections indicate a declining workforce, as well as a declining customer base. Uncertain effects are considered likely against the economy ISA theme for this option, although these effects increase in significance as the rate of growth decreases. Options 2 to 6 deliver gradually increasing levels of growth, it is assumed that as the level of growth increases, so does the ability to deliver a greater range/ mix of new homes to help meet the needs of all residents in the County, including affordable housing. Higher levels of growth also increase the potential for accessibility improvements and other community benefits associated with development, including new and improved service and facility provision, extended green infrastructure, transport and infrastructure upgrades, new open spaces and an improved public realm. On the whole impacts against these ISA themes are considered to be uncertain under this option.
- 2.45 There are considered to be no or uncertain effects with regard to this option against the remaining ISA themes. With limited growth under options 2 and 3 it is considered likely to lead to marginal effects in terms of congestion on the existing highway network, although it is recognised that the level of growth under this option is not likely to provide the critical mass to enable infrastructure improvements. This is particularly important given the wider ambitions to transition to a lower-emission infrastructure network, where development will be a key delivery vehicle for the technological and infrastructure advances which underpin the transition.
- 2.46 In terms of biodiversity and landscape the increasing level of growth under options 2 to 6 is likely to require increasingly more land take. This is considered likely to result in wider habitat loss and fragmentation as well as increased pressure; notably disturbance (through recreation, noise and light), atmospheric pollution, and through

impacts on water quality and resources. The increasing level of growth under options 2 to 6 is likely to place higher pressure on greenfield land resources and result in wider impacts on the landscape across the County. Given the limited brownfield land available in the County, it is considered that most additional growth will be delivered on greenfield land on the edge of existing settlements, placing increased pressure on the County's landscape interests and rural character with the potential for long term negative effects. Whilst it is likely that mitigation is available to reduce the significance of any effects, the residual effects remain uncertain at this stage until development locations are more clearly defined. Overall no or limited growth under options 1, 2 and 3 is not considered likely to lead to effects of significance. At this stage it is concluded that it is not possible to identify any significant differences between the Options or conclude that they are likely to have significant effects on the historic environment. None of the Options is likely to have a significant effect on the Welsh language.

**Option 3: Welsh Government (WG) 2018-Based Principal Projection (with added Policy assumptions) (WG 2018 Principal Projection (MR CR\_R), AH)**

- 2.47 This option replicates the WG 2018-Based Principal Projection, using historical population evidence for 2001-2018. The sensitivity testing has then been applied to the output to establish the impact on the projection of modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34), whilst at the same time reducing out-commuting by retaining more of the resident workforce.
- 2.48 Additional testing has been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing.
- 2.49 This option projects a population increase of 6,147 (6.5%) with a corresponding increase of 4,551 households (11.3%) in the County over the Plan period. This level of household growth results in an estimated average annual dwelling growth of 318 dpa over the 2018– 2033 Plan period (total 4,770 dwellings). The figure of 318 dpa is lower than the current LDP dwelling requirement of 450 dpa and broadly in line with average completions over the past 5 years (310 dpa).

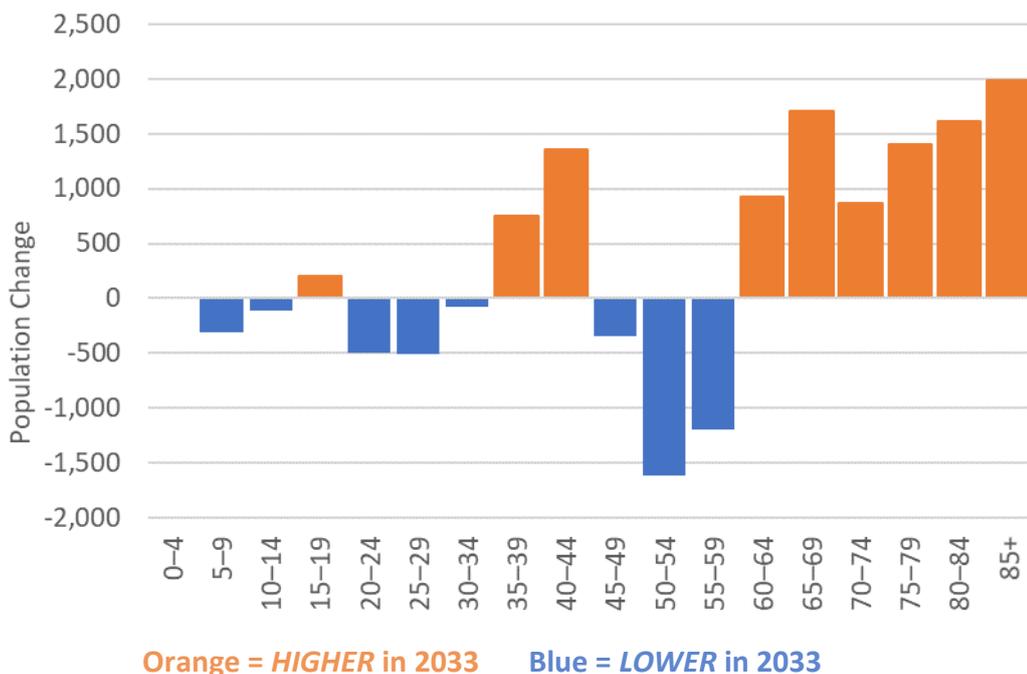
**Chart 12: Components of Change**



2.50 This option projects net in-migration of an average of 825 persons pa throughout the Plan period. However, this is counter balanced by an increasing level of negative natural change as the population ages (Chart 12).

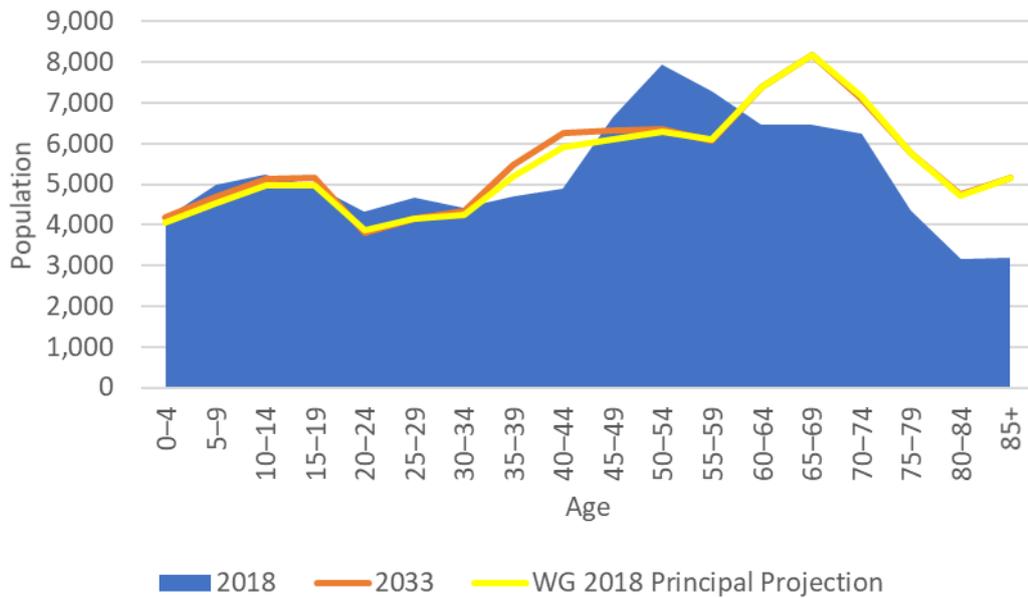
2.51 As with the previous options this option has significant implications for the age profile of the County. Whilst there is growth in the 35-44 age groups the majority of population growth is coming from the over 60 age groups with all other age groups, with the exception of the 15-19 age group, experiencing negative growth, again resulting in an unbalanced demographic (Charts 13 and 14).

**Chart 13: Population Growth/Decline by Age Group 2018-2033**



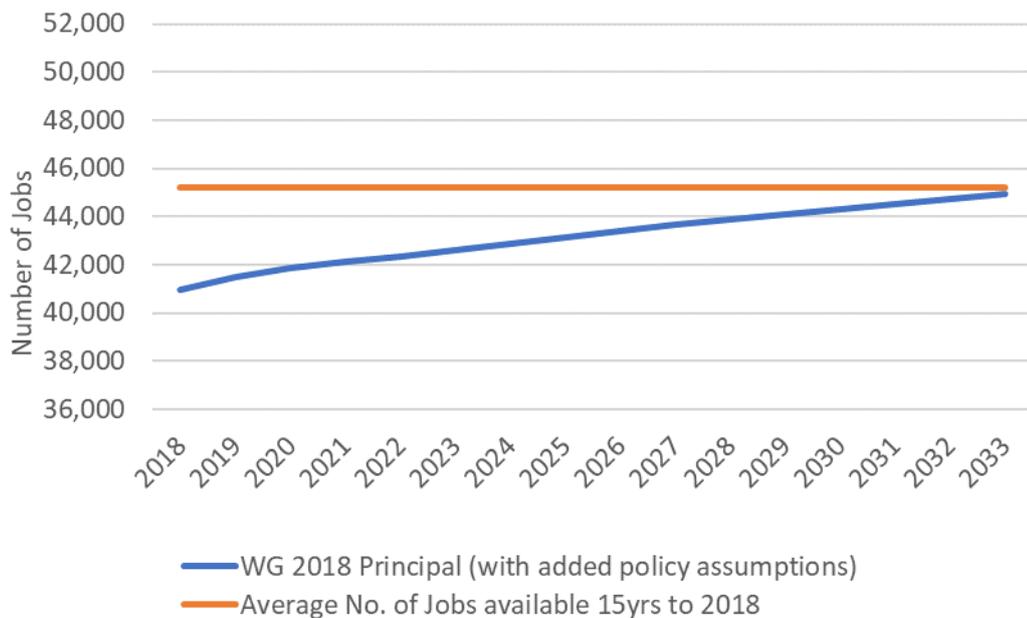
Orange = HIGHER in 2033      Blue = LOWER in 2033

**Chart 14: Implications for the Age Profile of Monmouthshire**



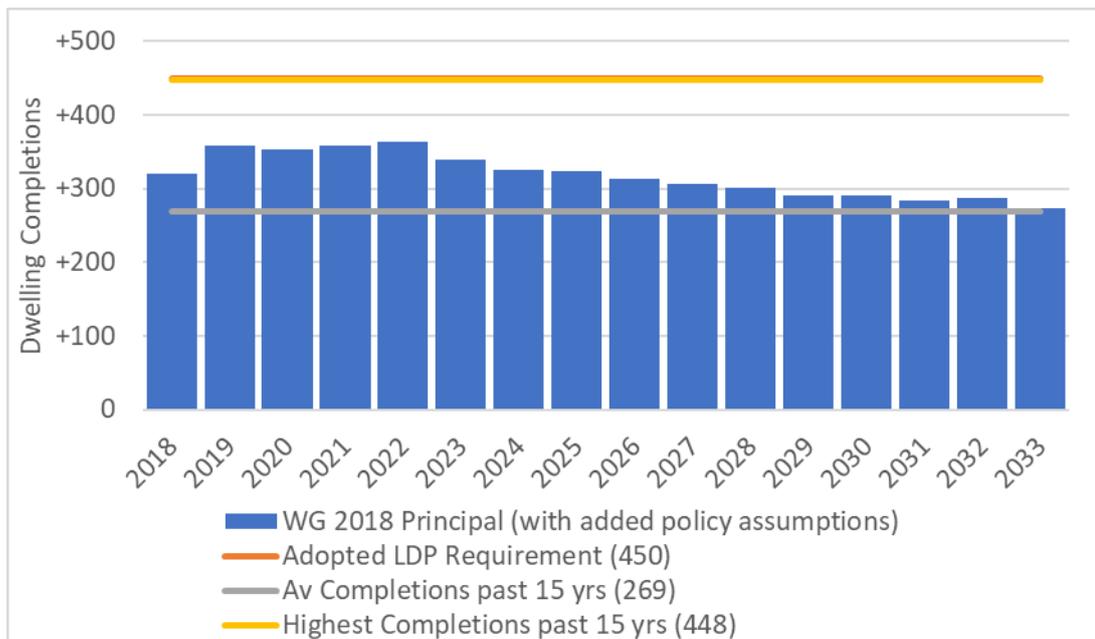
2.52 This option projects an increase of 3,975 jobs over the total Plan period. Whilst the number of jobs remains below the average seen in the past 15 years (Chart 15) the gap between the two lessens as the Plan progresses. In the 15 years to 2018 there was an average of 45,200 jobs available within the County, under this option there is projected to be an average of just below 43,200 jobs available. As this option models a commuting ratio that reduces from the 2011 Census value (1.12) to 1.10 over the Plan period, the population and dwelling growth associated with this level of job growth is not as high as might be expected as Monmouthshire would be retaining more of its own population to maintain the job growth.

**Chart 15: Implications for Employment Growth**



2.53 All of these factors impact on the dwelling requirement over the Plan period. The dwelling requirement within this option equates to an average of 318 per year, higher than the average build rate over the past 15 years but significantly lower than the adopted LDP requirement (Chart 16). There are currently 4,660 new homes within existing commitments and windfall allowances. This option would only require an additional 110 new dwellings over the Plan period.

**Chart 16: Dwelling Requirement**



2.54 The implications associated with this growth option include:

- An increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not address the demographic imbalance in the County.
- An overall decline in school aged children, placing less pressure on the capacity of existing schools. However, it would provide no scope to secure any improvements through planning gain and could lead to potential school closures.
- An overall decline in the working age population in the County, although there is some growth in the 35-44 age groups, which could fuel some employment growth. The overall number of jobs is projected to be at a lower level than in the previous 15 years, indicating that whilst the commuting levels will reduce people will still need to leave the County to access employment, this will not promote sustainable travel to work patterns. Provides limited opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.

- Opportunities to secure affordable housing but at this lower level would not address this key issue. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County’s affordability issues and to build sustainable and resilient communities throughout Monmouthshire.
- Opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
- Opportunities to secure infrastructure provision/upgrades through planning gain from development. The current pandemic has highlighted the importance of key infrastructure, including digital infrastructure and active travel options to support/enable increased home working and support local communities.

**Table 9: Assessment of Option 3: Welsh Government (WG) 2018-Based Principal Projection (with added Policy assumptions) (WG 2018 Principal Projection (MR CR\_R), AH)\*\* against RLDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 2.22		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	An overall decline in the working age population in the County, although there is some growth in the 15 -19 and 35-44 age groups, which could fuel some employment growth. Employment growth brings job levels in the County broadly in line with the average job level seen over the last 15 years, but not until towards the end of the Plan period. This indicates that whilst the commuting levels will reduce people will still need to leave the County to access employment. Provides limited opportunities to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
<b>Objective 2</b>	Retail centres*	Would provide opportunity to add to the customer base in existing centres but would be unlikely to address the pressures the retail centres in the County’s towns are currently facing which would impact negatively on the vitality, viability and attractiveness of the retail centres in the County’s towns. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic, this

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
		option would not provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	There would be no negative impact on the natural environment, although at the same time it would provide few opportunities to create new linkages through improvements to Green Infrastructure and ecological connectivity. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	There would be no negative impact as growth can be located away from areas of flood risk and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
<b>Objective 6</b>	Land	Provision of housing alongside employment could promote efficient use of land and use of brownfield sites. However, it is recognised that there are limited opportunities for development on brownfield land and lower grade agricultural land.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	The continuation of an ageing population and proposed level of growth would have a negative impact on health and well-being with limited scope to support additional provision and/or upgrades to existing provision. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space. The value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Would result in an increase in the proportion of the older and elderly people living in the County leading to a more unbalanced demographic. Very limited opportunities for the younger population to live and work in the County.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
		The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not address the demographic imbalance in the County.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	This build rate would not be able to offer the range or number of homes to address the demographic imbalance or the range of homes needed to attract the economically active age group and the type of homes the ageing demographic would require. Opportunities to secure some affordable housing but at this lower level would not address this key issue. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Low requirement for new housing so provides very limited opportunity to enhance the character and identity of Monmouthshire's settlements. The value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	This option allows for some economic growth and opportunities to secure some affordable housing through a higher level of dwelling growth. However, at this level there is little impact on the unbalanced demographic, it provides little opportunity to support social sustainability and balanced communities. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable. This growth option would fail to address this key issue and would be detrimental to our core purpose of creating sustainable and resilient communities.
<b>Objective 13</b>	Rural Communities	Would impact negatively on rural communities by providing limited opportunities to strengthen the rural economy or opportunities for people to stay in their local communities. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable. Difficulties in sustaining

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
		services/facilities across the County will result in rural isolation.
<b>Objective 14</b>	Infrastructure*	Would have a negative impact as a declining and unbalanced demographic would result in falling school numbers and could result in school closures, as well as increased pressure on health and social care. Difficulties in sustaining services/facilities across the County as well as limited opportunities to improve a range of infrastructure, including active travel and digital infrastructure would increase issues associated with rural isolation.
<b>Objective 15</b>	Accessibility	The overall number of jobs is projected to be at a lower level than in the previous 15 years, indicating that whilst the commuting levels will reduce people will still need to leave the County to access employment, this will not promote sustainable travel to work patterns. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term. The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to communities. The proposed growth level would result in limited opportunities to enhance accessibility, active travel enhancements and the use of sustainable transport options.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	There would be no negative impact on culture and heritage, but at the same time offers few benefits for the economy, tourism and social well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change*	There would be no negative impact on climate change, with a reduction in commuting in the long term as the population ages being a positive. At the same time there would be limited opportunities to contribute to minimising carbon by providing opportunities for renewable energy generation, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

\*\* Option title as referred to in the Edge Analytics Reports.

## **Integrated Sustainability Appraisal (ISA) Analysis**

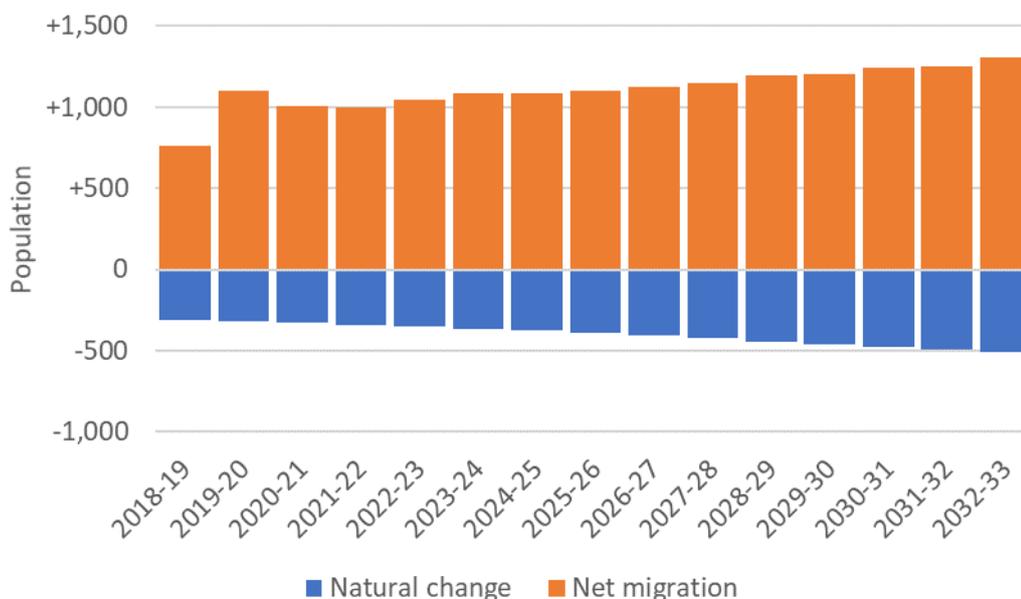
- 2.55 Growth Option 3 performs marginally better than options 1 and 2 against the ISA themes relating to the economy and employment, population and communities, health and wellbeing and equalities. Options 1 to 4 represent job growth, albeit at a lower rate than past delivery rates, and the demographic projections indicate a declining workforce, as well as a declining customer base. Uncertain effects are considered likely against the economy ISA theme for this option, these effects increase in significance as the rate of growth decreases. Options 2 to 6 deliver gradually increasing levels of growth, it is assumed that as the level of growth increases, so does the ability to deliver a greater range/ mix of new homes to help meet the needs of all residents in the County, including affordable housing. Higher levels of growth also increase the potential for accessibility improvements and other community benefits associated with development, including new and improved service and facility provision, extended green infrastructure, transport and infrastructure upgrades, new open spaces and an improved public realm. On the whole impacts against these ISA themes are considered to be uncertain under this option.
- 2.56 There are considered to be no or uncertain effects with regard to this option against the remaining ISA themes. With limited growth under options 2 and 3 it is considered likely to lead to marginal effects in terms of congestion on the existing highway network, although it is recognised that the level of growth under this option is not likely to provide the critical mass to enable infrastructure improvements. This is particularly important given the wider ambitions to transition to a lower-emission infrastructure network, where development will be a key delivery vehicle for the technological and infrastructure advances which underpin the transition. In terms of biodiversity and landscape the increasing level of growth under options 2 to 6 is likely to require increasingly more land take. This is considered likely to result in wider habitat loss and fragmentation as well as increased pressure; notably disturbance (through recreation, noise and light), atmospheric pollution, and through impacts on water quality and resources. However, residual effects remain uncertain at this stage reflecting the ability to mitigate effects at the site/ project level. Overall no or limited growth under options 1, 2 and 3 is not considered likely to lead to effects of significance.
- 2.57 The increasing level of growth under options 2 to 6 is likely to place higher pressure on greenfield land resources and result in wider impacts on the landscape across the County. Given the limited brownfield land available in the County, it is considered that most additional growth will be delivered on greenfield land on the edge of existing settlements, placing increased pressure on the County's landscape interests and rural character with the potential for long term negative effects. Whilst it is likely that mitigation is available to reduce the significance of any effects, the residual effects remain uncertain at this stage until development locations are more clearly defined. At this stage it is concluded that it is not possible to identify any significant differences between the Options or conclude that they are likely to have significant effects on the

historic environment. None of the Options is likely to have a significant effect on the Welsh language.

**Option 4: Dwelling-led Average (based on housing completion rates) (5yr Average Completions) (Dwelling-led 5 year average, AH)**

- 2.58 The 5 Year dwelling-led option is based on residential completions in the Monmouthshire County Council planning area from 2015/16 to 2019/20 and assumes for the initial modelling an average annual dwelling growth rate of 310 per annum during this period. Additional testing has been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing.
- 2.59 By applying the additional testing this produces a dwelling growth of 6,030, an average of 402 dpa over the Plan period. This level of dwelling growth would result in a population increase of 10,641 persons (11.3%) with a corresponding increase of 5,628 (14%) households in the County over the Plan period. A key benefit of considering this level of growth is that it is based on actual past delivery rates and takes account of local socio-economic conditions. However, it needs to be borne in mind that this would represent a continuation of past dwelling completion rates and as this simply replicates what has happened previously it is questioned whether this would address the demographic and economic challenges that we are seeking to address.

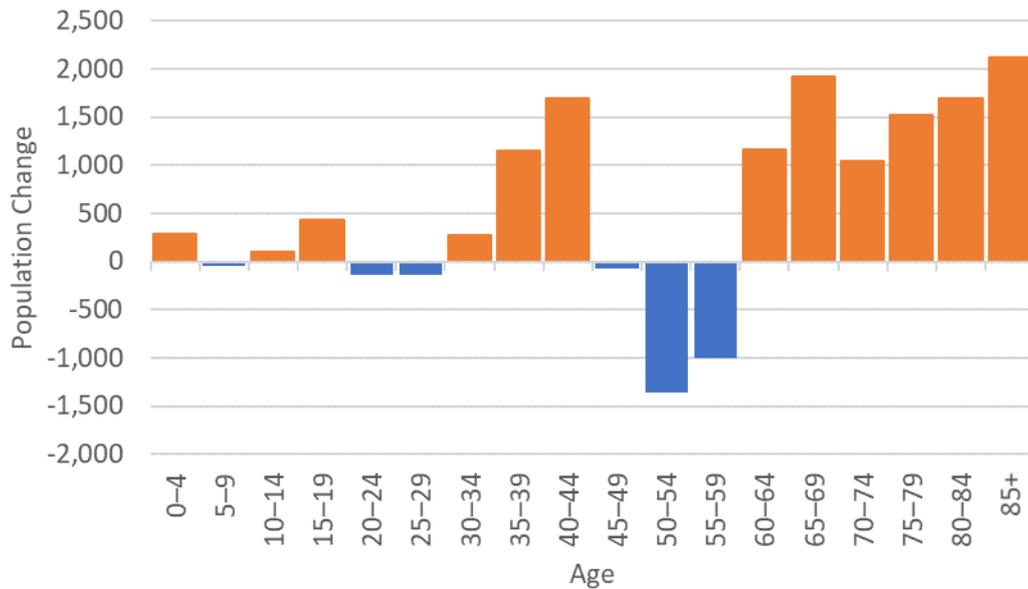
**Chart 17: Components of Population Change**



- 2.60 This option projects net average in-migration of around 1,110 persons pa throughout the Plan period, out-weighing the negative impact of natural change, leading to a net growth in the population (Chart 17).

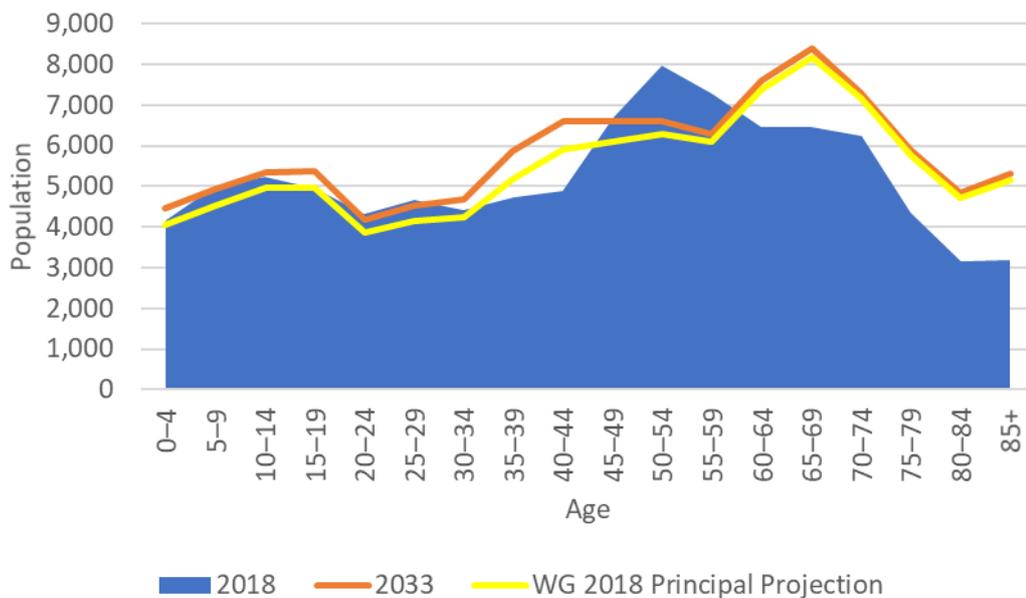
2.61 As with the previous options, this option also impacts on the age profile of the County. There is growth from a larger number of age groups, although the level of growth coming from the younger age groups is at a low level. The majority of population growth is therefore still coming from the over 60 age groups, with the 45-59 age groups declining, again resulting in an unbalanced demographic (Charts 18 and 19).

**Chart 18: Population Growth/Decline by Age Group 2018-2033**



Orange = HIGHER in 2033      Blue = LOWER in 2033

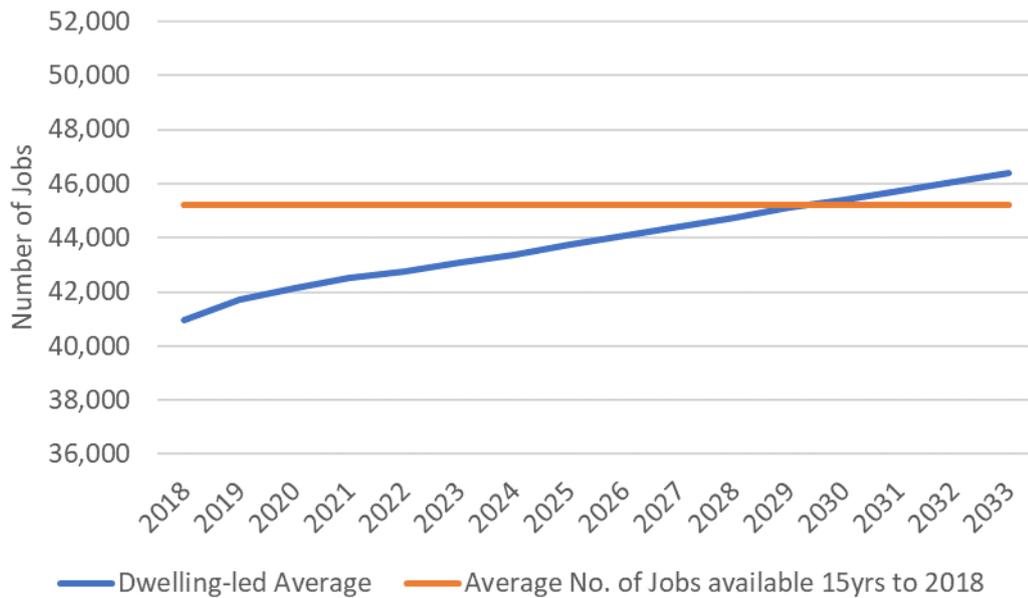
**Chart 19: Implications for the Age Profile of Monmouthshire**



2.62 As with option 3, this option also projects a growth in jobs with an increase of 5,460 jobs, an average of 364 jobs pa over the Plan period. However, in terms of the average number of jobs in the County, this option again projects a lower level than over the

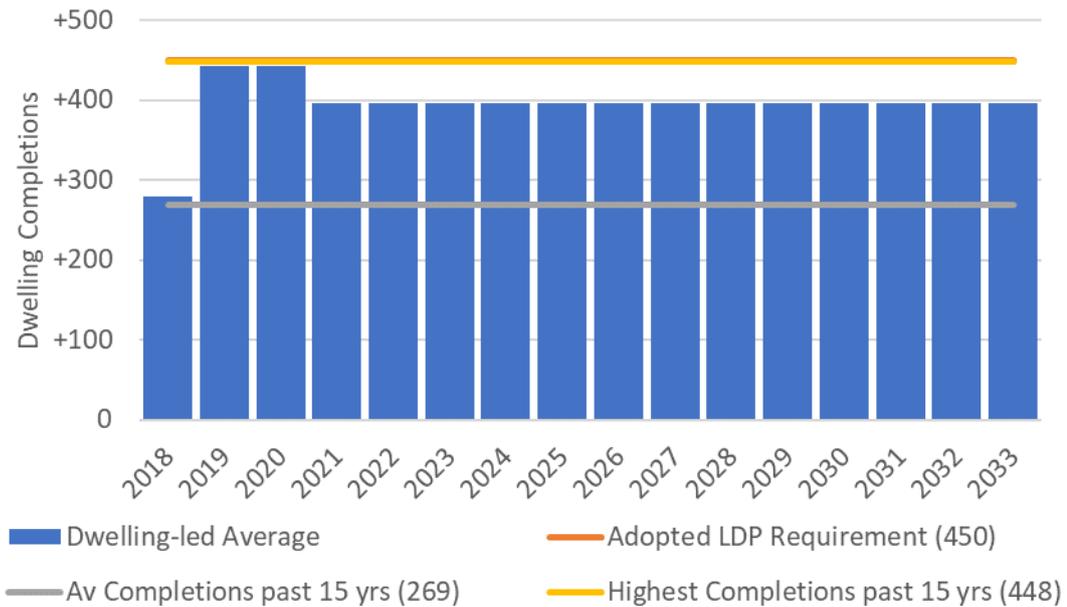
previous 15 years. In the 15 years to 2018, there was an average of 45,200 jobs available within the County, under this option there is projected to be an average of 43,890 jobs available. Despite the lower average number of jobs available there is projected to be a steady increase over the Plan period with the number of jobs available exceeding the 15 year average by 2030. (Chart 20).

**Chart 20: Implications for Employment Growth**



2.63 This option represents a continuation of the dwelling growth rates from the past 5 years, i.e. ‘business as usual’. With the addition of the affordable housing policy-led element, this would result in average dwelling completions of 402 dpa over the Plan period which is below the adopted LDP dwelling requirement of 450 dpa (Chart 21). There are currently 4,660 new homes within existing commitments and windfall allowances. This option would require an additional 1,370 new dwellings over and above these existing commitments and allowances over the Plan period.

**Chart 21: Dwelling Requirement**



2.64 The implications associated with this growth option include:

- Despite a small uplift in the younger age groups, results in an increase in the proportion of the older and elderly people living in the County, impacting upon the type of housing required and service providers across public and private sectors. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not address the demographic imbalance in the County.
- A relatively stable number of school aged children, placing no pressure on the capacity of existing schools, but with limited opportunities to secure improvements to existing schools through planning gain.
- Growth in established households around the 35-44 age group, which could fuel some employment growth. However, the overall number of jobs is projected to be at a lower level than in the previous 15 years, indicating that people will still need to leave the County to access employment. This would not significantly reduce levels of out-commuting or promote sustainable travel to work patterns.
- Whilst this option projects growth in jobs over the Plan period, it is unlikely that this level of job growth located within the County will be needed given the increased propensity to work from home / remotely. It is expected that the trend for increased home and remote working will continue over the longer term which will act to reduce this job growth figure over the Plan period.
- Opportunities to secure affordable housing through the planning system. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the

County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.

- Opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
- Opportunities to secure infrastructure provision/upgrades through planning gain from development. The current pandemic has highlighted the importance of key infrastructure, including digital infrastructure and active travel options to support/enable increased home working and support local communities

**Table 10: Assessment of Option 4: Dwelling-led Average (based on housing completion rates) (5yr Average Completions) (Dwelling-led 5 year average, AH)\*\* against RLDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 2.22		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	Despite the lower average number of jobs available there is projected to be a steady increase over the Plan period with the number of jobs available exceeding the 15 year average by 2030. This level of growth would encourage greater indigenous business growth and encourage inward investment. Provides opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
<b>Objective 2</b>	Retail centres*	Would provide opportunity to add to the customer base in existing centres The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic, this option would be likely to provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	Likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
<b>Objective 4</b>	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
<b>Objective 6</b>	Land	Provision of housing alongside employment could promote efficient use of land and use of brownfield sites. However, it is recognised that there are limited opportunities for development on brownfield land and lower grade agricultural land.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	Any developments will be encouraged to support healthier lifestyles and provide sufficient open space. The value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Begins to address the unbalanced demographic through growth from a larger number of age groups, although the level of growth from the younger age groups is at a low level. The majority of population growth is coming from the over 60 age groups, with 45-59 declining, again resulting in an unbalanced demographic. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	Would provide a level of housing that is sufficient to provide a wide ranging choice of homes for both existing and future residents. Level of development would provide opportunity to secure affordable and market homes. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles. The value

RLDP Objective Number	RLDP Objective Headline	Performance of Option 4 against the RLDP Objectives
		and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	Could impact negatively on communities as despite a small uplift in the younger age groups, an increase in the proportion of the older population living within the County would result in an unbalanced demographic, impacting on the services required throughout the County. New development however will provide opportunities for job creation and some improvements to existing services and facilities. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography.
<b>Objective 13</b>	Rural Communities	Could impact negatively on communities as despite a small uplift in the younger age groups, an increase in the proportion of the older population living within the County would result in an unbalanced demographic, impacting on the services required throughout the County. New development however could help strengthen the rural economy and address rural isolation, assisting in building sustainable rural communities.
<b>Objective 14</b>	Infrastructure*	Development will generate opportunities to both provide new infrastructure and enhance the existing. Appropriate infrastructure could be provided to accommodate any new development.
<b>Objective 15</b>	Accessibility	Despite the lower average number of jobs available there is projected to be a steady increase over the Plan period with the number of jobs available exceeding the 15 year average by 2030. However, this does indicate that people will still need to leave the County to access employment for the majority of the Plan period. This would not reduce levels of out-commuting or promote sustainable travel to work patterns. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term. The proposed growth level would result in some opportunities to enhance accessibility, active travel and the use of sustainable transport options.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
		economy, tourism and well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change	There would be no negative impact on climate change as the resilience of new development to aspects of climate change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

\*\* Option title as referred to in the Edge Analytics Reports.

### **Integrated Sustainability Appraisal (ISA) Analysis**

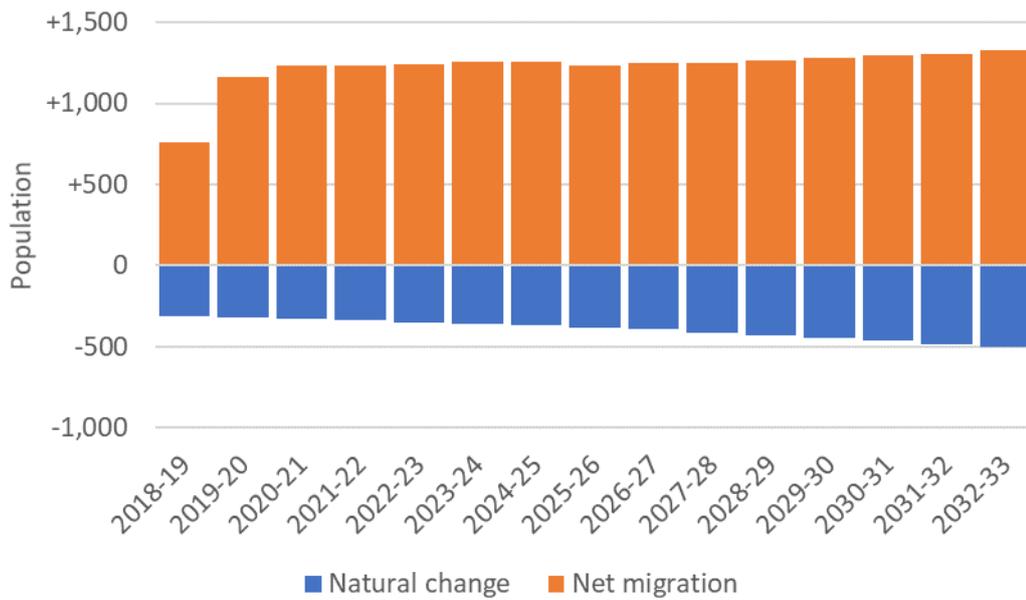
- 2.65 Growth Option 4 performs better than the lower growth options against the ISA themes relating to the economy and employment, population and communities, health and wellbeing and equalities. . Options 1 to 4 represent job growth, albeit at a lower rate than past delivery rates, and the demographic projections indicate a declining workforce, as well as a declining customer base. Uncertain effects are considered likely against the economy ISA theme for this option, these effects increase in significance as the rate of growth decreases. Options 2 to 6 deliver gradually increasing levels of growth, it is assumed that as the level of growth increases, so does the ability to deliver a greater range/ mix of new homes to help meet the needs of all residents in the County, including affordable housing. Higher levels of growth also increase the potential for accessibility improvements and other community benefits associated with development, including new and improved service and facility provision, extended green infrastructure, transport and infrastructure upgrades, new open spaces and an improved public realm. On the whole impacts against these ISA themes are considered to be uncertain under this option.
- 2.66 There are considered to be no or uncertain effects with regard to this option against the remaining ISA themes. Whilst Options 4, 5 and 6 propose higher levels of growth that has greater potential for negative effects in terms of congestion, negative effects are not considered likely to be significant against the transport ISA theme. In terms of biodiversity as the level of growth increases through Options 4 to 6 so too does the potential significance of negative effects. However, the residual effects remain uncertain at this stage reflecting the ability to mitigate effects at the site/ project level.
- 2.67 As the additional growth under Options 2 to 6 increases it is likely to require increasingly more land take, placing greater pressure on greenfield land resources and

resulting in wider impacts on the landscape across the County: this has the potential for long term negative effects. Alongside the potential for negative effects, it is recognised however that there is also the opportunity for growth to deliver landscape enhancements; maximising opportunities to secure and/or improve green infrastructure, public open space and recreation provision through planning gain. The nature and significance of effects will therefore ultimately be dependent on the exact location, design/ layout of development, and the implementation of mitigation measures. At this stage it is concluded that it is not possible to identify any significant differences between the Options or conclude that they are likely to have significant effects on the historic environment. None of the Options is likely to have a significant effect on the Welsh language.

**Option 5: Population-led projection (with added policy assumptions) (PG Long Term Adjusted 5yr) (MR CR\_R) AH**

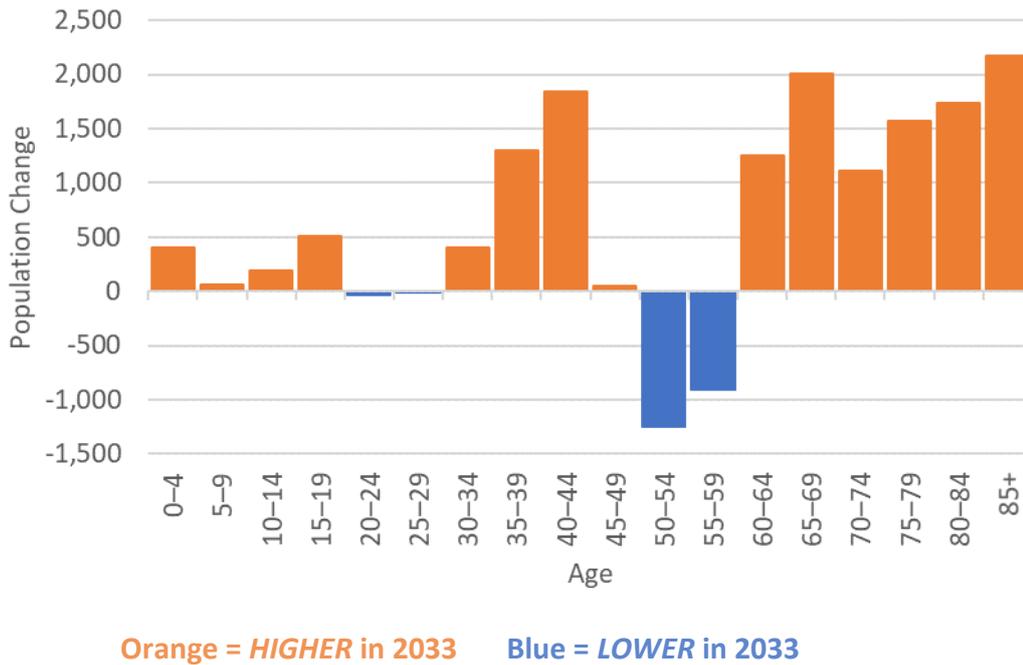
- 2.68 This option uses the POPGROUP forecasting model to develop a trend-based demographic option. It uses an ONS 2019 Mid Year Estimate as the base year and then uses migration flow assumptions based on an eighteen-year historical period but with internal in-migration rates adjusted to reflect the higher in-migration (based on the last 5 years) from Bristol and South Gloucestershire. This option has been modelled to reflect the impact of the removal of the Severn Bridge Tolls.
- 2.69 The sensitivity testing has then been applied to the output to establish the impact on the projection of modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34), whilst at the same time reducing out-commuting by retaining more of the resident workforce.
- 2.70 Additional testing has been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing.
- 2.71 This option results in the highest net migration rates of any of the demographic or dwelling-led scenarios, with only the radical structural change employment-led scenario resulting in a higher level. By applying the adjustment to the internal in-migration rates, this scenario projects an increase of 12,443 (13.2%) in the population with a corresponding increase of 7,255 (18.1%) in the number of households in the County over the Plan period. This represents a projected dwelling growth of 7,605 over the Plan period, 507 dpa.

**Chart 22: Components of Population Change**

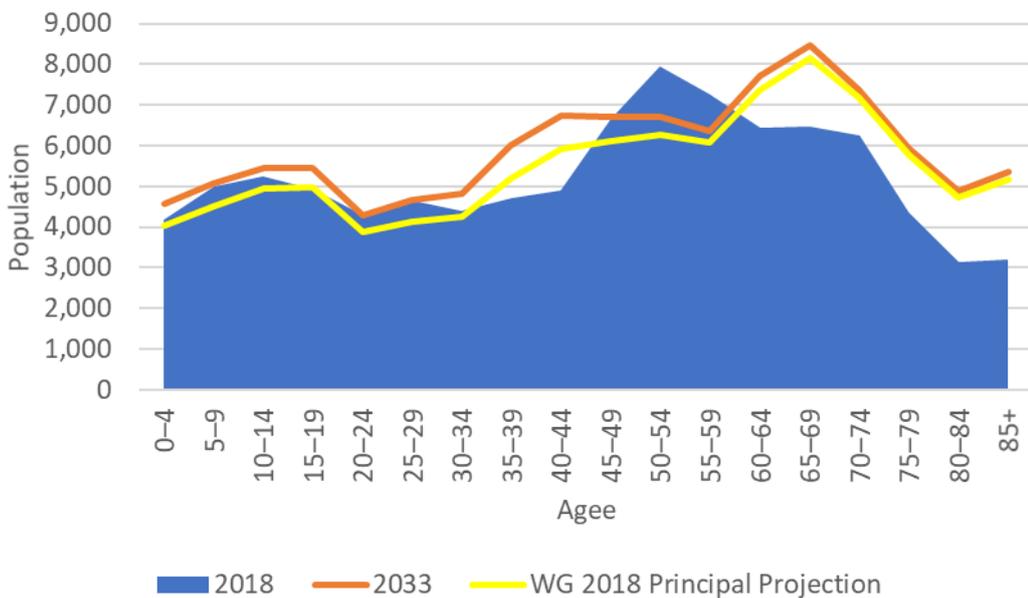


- 2.72 This option projects net average in-migration of 1,220 persons pa throughout the Plan period, significantly out-weighting the negative impact of natural change, leading to a net growth in the population. This option shows the highest migration levels of any of the demographic or dwelling-led options as it takes account of the increased level of in-migration from neighbouring areas since the removal of the Severn Bridge Toll (Chart 22).
- 2.73 This level of migration results in a significant impact on the age profile of the County, and whilst there continues to be growth in the over 60 age groups there is a corresponding growth in the key 30-49 age groups, with growth mirrored in the 0-19 age groups. This option captures increased in-migration in the key labour force age groups (Charts 23 and 24).

**Chart 23: Population Growth/Decline by Age Group 2018-2033**



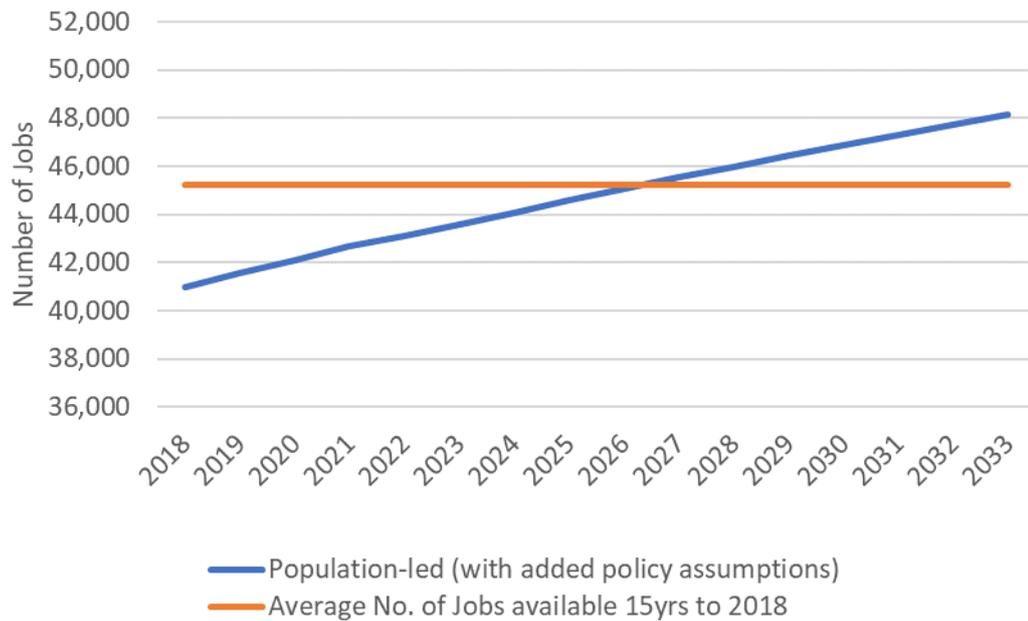
**Chart 24: Implications for the Age Profile of Monmouthshire**



2.74 The growth in jobs under this scenario is significantly higher than in the previous options with an increase of 7,215 jobs, 481 jobs pa over the Plan period (Chart 25). The number of jobs available rises significantly towards the end of the Plan period, with 48,160 jobs available in the County by 2033. This option models a commuting ratio that reduces from the 2011 Census value (1.12) to 1.10 over the Plan period, the population and dwelling growth associated with this level of job growth is not as high

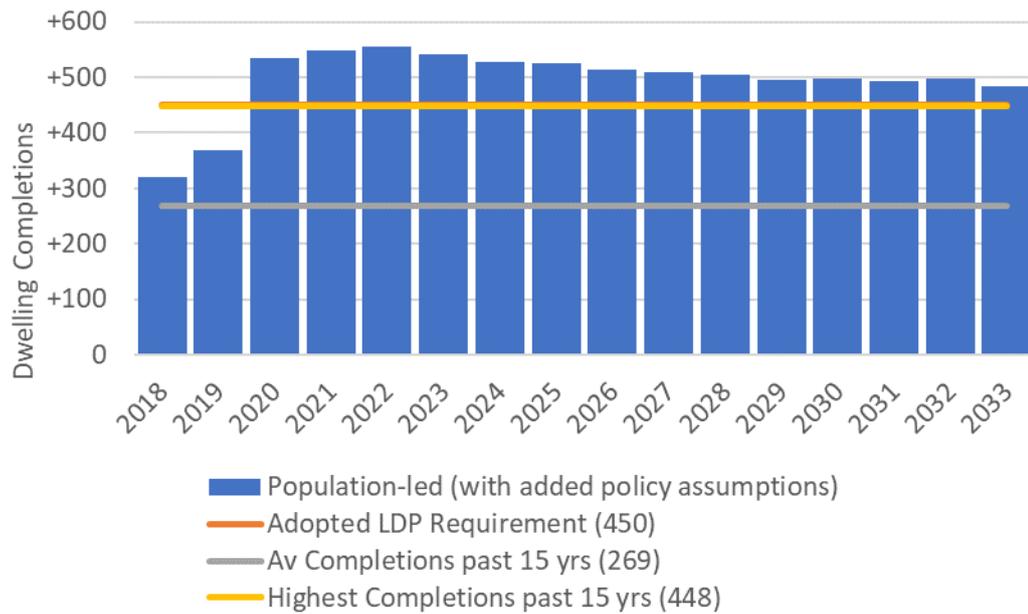
as might be expected as Monmouthshire would be retaining more of its own population to maintain the job growth.

**Chart 25: Implications for Employment Growth**



2.75 This option represents a dwelling growth rate of some 507 dpa over the Plan period. This is a higher level than experienced over the past 15 years and is higher than the current LDP requirement (Chart 26). There are currently 4,660 new homes within existing commitments and windfall allowances. This option would require an additional 2,945 new dwellings over and above these existing commitments and allowances over the Plan period.

**Chart 26: Dwelling Requirement**



2.76 The implications associated with this growth option include:

- This option shows significant progress in achieving a more balanced demographic, although the increase in the number of older and elderly people living in the County would still impact upon the type of housing required and service providers across public and private sectors. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography.
- Growth in the number of school aged children, placing more pressure on the capacity of existing schools. However, the level of housing delivery would provide a substantial opportunity to secure additional provision through planning gain to fund extensions and/or new schools.
- Growth in the number of working aged people living in Monmouthshire, with a notable increase in established households around the 30-44 age group, fuelling growth in employment provision. A reduction in out-commuting likely to lead to more sustainable travel patterns. Provides the opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
- Whilst this option projects a significant growth in jobs over the Plan period, it is unlikely that this level of job growth located within the County will be needed given the increased propensity to work from home / remotely. It is expected that the trend for increased home and remote working will continue over the longer term which will act to reduce this job growth figure over the Plan period.
- Opportunities to secure more significant affordable housing through the planning system. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to

address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.

- Opportunities to sustain services /facilities in urban and rural areas with associated benefits including addressing rural isolation. The Covid-19 pandemic has highlighted the importance of local services and facilities to support our communities.
- Opportunities to secure meaningful infrastructure provision/upgrades through planning gain from development, including digital infrastructure and active travel options to support/enable increased home/remote working and support local communities, all of which have increased importance in light of the Covid-19 pandemic.
- Increased opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.

**Table 11: Assessment of Option 5: (Population-led projection (with added policy assumptions) (PG Long Term (Adjusted 5yr) (MR CR\_R) AH)\*\* against RLDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 5 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 2.22		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	Would result in a growth in jobs of 481 pa. This level of growth would encourage greater indigenous business growth and encourage inward investment. Provides the opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic and would assist in building sustainable and resilient communities.
<b>Objective 2</b>	Retail centres*	Would provide increased opportunities to add to the customer base in retail centres in the County's towns, with a 13.2% increase in the population. There would be benefits arising from indigenous employment growth in the County, fostering the vitality, viability and attractiveness of the centres. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic. This option would provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		

<b>RLDP Objective Number</b>	<b>RLDP Objective - Headline</b>	<b>Performance of Option 5 against the RLDP Objectives</b>
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	Likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	Levels of housing and employment development could impact on the safeguarding of the County's mineral resource. Developments can nevertheless be located away from safeguarded areas.
<b>Objective 6</b>	Land	Provision of housing alongside employment could promote efficient use of land and use of brownfield sites. However, it is recognised that there are limited opportunities for development on brownfield land and lower grade agricultural land.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient and incorporate appropriate renewable energy technologies.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	Any developments will be encouraged to support healthier lifestyles and provide sufficient open space. The value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Results in an evening out of the age profile with growth coming from a broader cross section of the demographic. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option shows significant progress in achieving a more balanced demographic.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	Would provide a level of housing that is sufficient to provide a wide ranging choice of homes for both existing and future residents. The level of growth would provide

RLDP Objective Number	RLDP Objective Headline	Performance of Option 5 against the RLDP Objectives
		opportunities to secure more significant affordable housing through the planning system. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles. Growth in employment alongside housing will create more sustainable places. The value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	A more balanced demographic with new development providing for a wide ranging choice of homes and jobs for both existing and future residents together with improvements to existing services and facilities. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography.
<b>Objective 13</b>	Rural Communities	A more balanced demographic with new development providing opportunities which could help support the rural economy and address rural isolation.
<b>Objective 14</b>	Infrastructure*	Appropriate infrastructure could be provided to accommodate any new development. The current pandemic has highlighted the importance of the provision of digital infrastructure and active travel options to support/enable increased home working and support local communities.
<b>Objective 15</b>	Accessibility	The level of employment growth alongside the housing development would be likely to reduce the need to travel. This would also be enhanced by the recent increase in agile working and home and remote working as a result of Covid-19, which is likely to continue over the longer term. Any new developments will need to consider active travel and integrated sustainable transport.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 5 against the RLDP Objectives
Objective 17	Climate Change*	The resilience of new development to aspects of climate change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

\*\* Option title as referred to in the Edge Analytics Reports.

### **Integrated Sustainability Appraisal (ISA) Analysis**

- 2.77 Growth Option 5 performs positively against the ISA themes relating to the economy and employment and population and communities. Both Options 5 and 6 seek higher economic growth levels than Options 1 to 4 and as a result, are expected to perform better in relation to the employment ISA theme. The housing growth proposed alongside economic development also seeks to address potential demographic imbalances with growth in key working age groups. Both Options are considered likely to support the retention of younger age groups and reduce out-commuting through growth with high levels of sustainable local access. Both Options provide opportunities to encourage a more diverse and vibrant economy, significant long-term positive effects are anticipated under both Options 5 and 6. However it is considered that Option 5, by more closely aligning with past delivery rates in the earlier years of the Plan period, presents a more realistic option. As a result, significant positive effects are considered likely under Option 5 against these ISA themes.
- 2.78 Options 5 and 6 also perform highly against the ISA themes relating to health and wellbeing, equalities and transport. Whilst Options 5 and 6 propose a higher level of growth that has greater potential for negative effects in terms of congestion, negative effects are not considered likely to be significant and it is recognised that Options 5 and 6 provide greater critical mass to enable more significant infrastructure improvements. This is particularly important given the wider ambitions to transition to a lower-emission infrastructure network, where development will be a key delivery vehicle for the technological and infrastructure advances which underpin the transition.
- 2.79 There are considered to be no or uncertain effects with regard to this option against the remaining ISA themes. In terms of biodiversity the increasing level of growth under options 2 to 6 is likely to require increasingly more land take. This is considered likely to result in wider habitat loss and fragmentation as well as increased pressure; notably disturbance (through recreation, noise and light), atmospheric pollution, and through impacts on water quality and resources. Despite this, it is recognised that a higher

level of growth could also offer greater opportunities for delivering biodiversity net gain, securing and/ or enhancing green infrastructure, public open space and recreation provision through planning gain. The nature and significance of residual effects will therefore ultimately be dependent on the exact location, design/ layout of development, the implementation of mitigation measures, and the sensitivity of receptors. Residual effects therefore remain uncertain at this stage reflecting the ability to mitigate effects at the site/ project level.

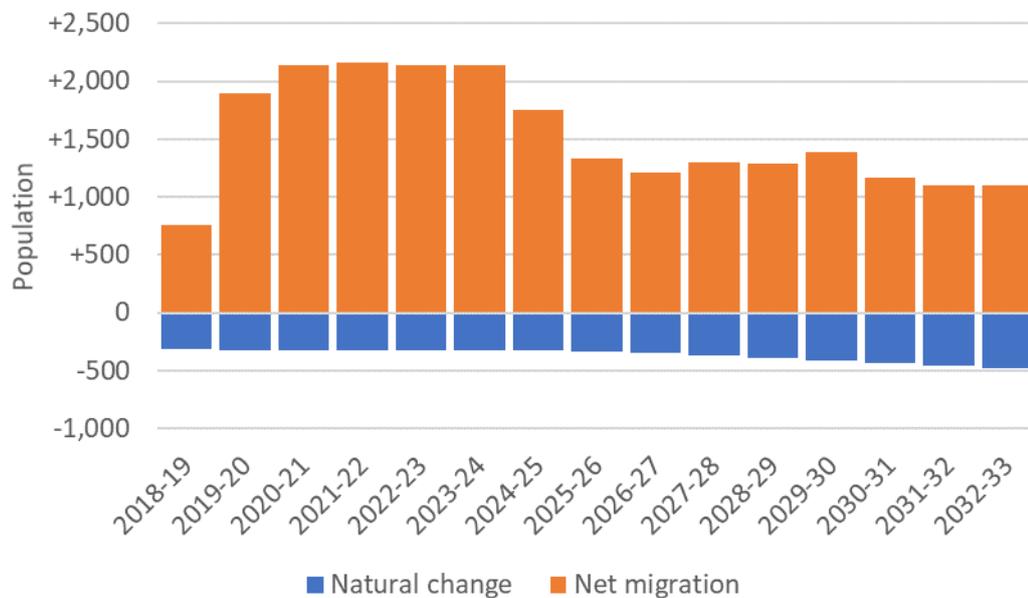
- 2.80 All of the options, with the exclusion of Option 1, are likely to require increasingly more land, placing higher pressure on greenfield land resources and resulting in wider impacts on the landscape across the County. Given the limited brownfield land available in the County, it is considered that most additional growth will be delivered on greenfield land on the edge of existing settlements, placing increased pressure on the County's landscape interests and rural character with the potential for long term negative effects. Whilst it is likely that mitigation is available to reduce the significance of any effects, the residual effects remain uncertain at this stage until development locations are more clearly defined. At this stage it is concluded that it is not possible to identify any significant differences between the Options or conclude that they are likely to have significant effects on the historic environment. None of the Options is likely to have a significant effect on the Welsh language.

**Option 6: Employment-led Projection (with added policy assumptions) (Radical Structural Change Higher (Commuting Ratio Reducing),AH)**

- 2.81 This is an employment-led option. As a starting point it takes the higher level of job creation under the radical structural change option of the Economies of the Future Report. This estimates an additional 10,000 jobs above the 2017 level by 2037. When the additional underlying assumptions are applied to this option this equates to an annual growth of 642 jobs or a total of 9,630 jobs over the Plan period.
- 2.82 This option uses economic assumptions that are consistent with those applied to Monmouthshire's demographic and dwelling-led scenarios. That is an unemployment rate which remains at the current value (2019) (2.9%) and consistent employment growth and economic activity rate assumptions over the Plan period. This option was not subject to the sensitivity testing applied to the demographic and dwelling-led options, however, it assumes that the commuting ratio will reduce to the same degree as for the sensitivity testing. With the provision of more jobs in the County it is realistic to assume that the commuting ratio would reduce, i.e. Monmouthshire would retain more of its own workers rather than them commuting elsewhere to work. This option takes this into account and assumes a smaller net out-commute by the end of the Plan period. Whilst not impacting on the overall growth of employment, this reduces population growth and thus the dwelling requirement as fewer people are estimated to commute out of the County, thus reducing the need for in-migration to support the employment and dwelling growth.

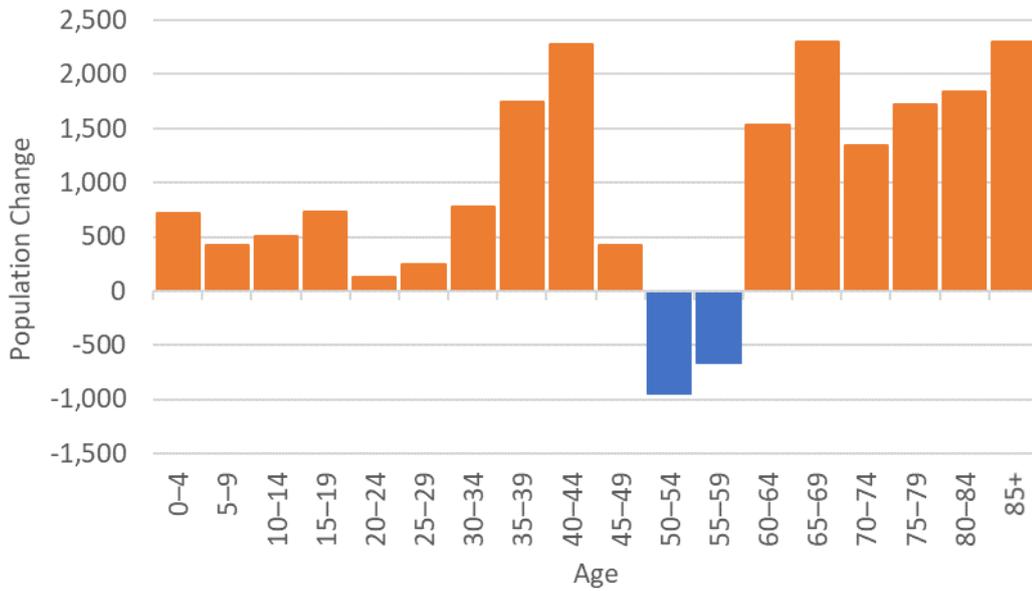
- 2.83 Whilst not all of the sensitivity testing assumptions have been applied to this option additional testing has been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing.
- 2.84 By applying these principles this employment-led option projects an increase of 17,403 (18.5%) in the population with a corresponding increase of 8,653 (21.6%) households in the County over the Plan period. This represents a projected dwelling growth rate of 9,060 (604 dpa) to support this level of employment growth.

**Chart 27: Components of Population Change**



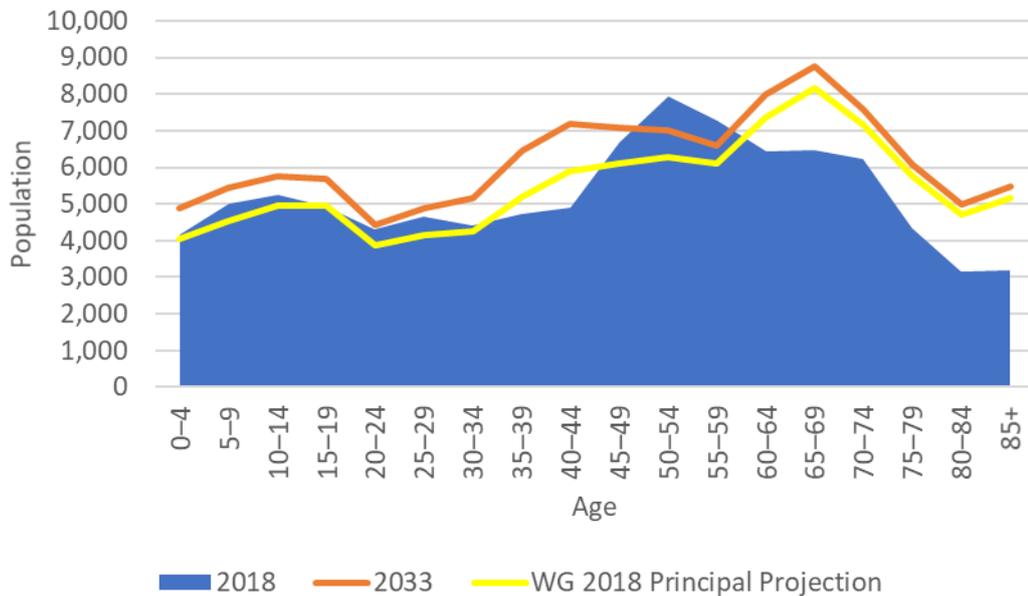
- 2.85 This option projects net average in-migration of 1,520 persons pa throughout the Plan period, significantly out-weighting the negative impact of natural change, leading to a net growth in the population (Chart 27).
- 2.86 This results in a significant impact on the age profile of the County, and whilst there continues to be growth in the over 60 age groups there is a corresponding growth in the key labour force age groups with this growth mirrored in the 0-19 age groups. This scenario captures increased in-migration in all of these groups with the exception of 50-59 year olds (Charts 28 and 29).

**Chart 28: Population Growth/Decline by Age Group 2018-2033**



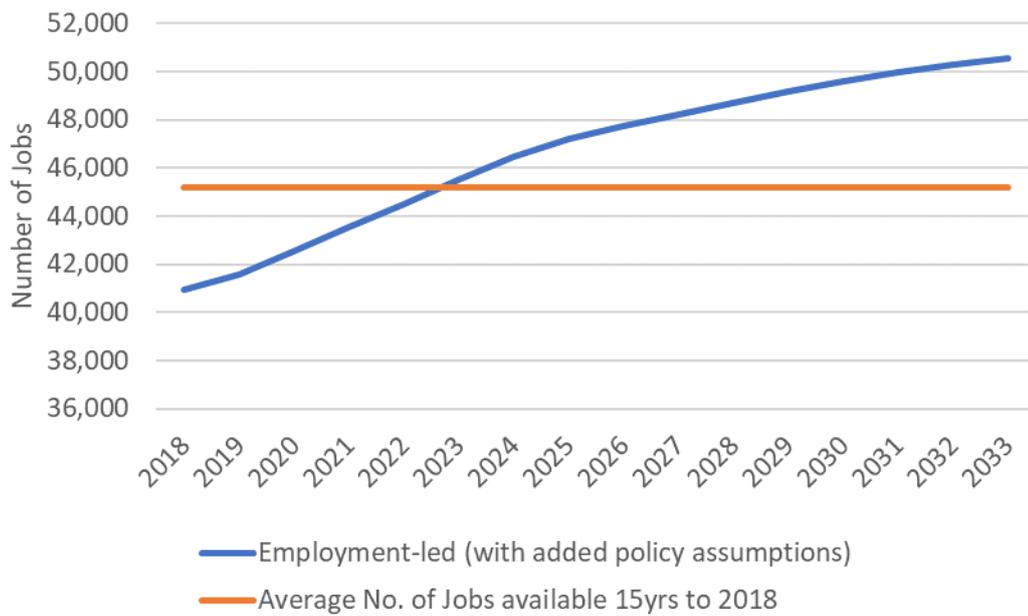
Orange = HIGHER in 2033      Blue = LOWER in 2033

**Chart 29: Implications for the Age Profile of Monmouthshire**



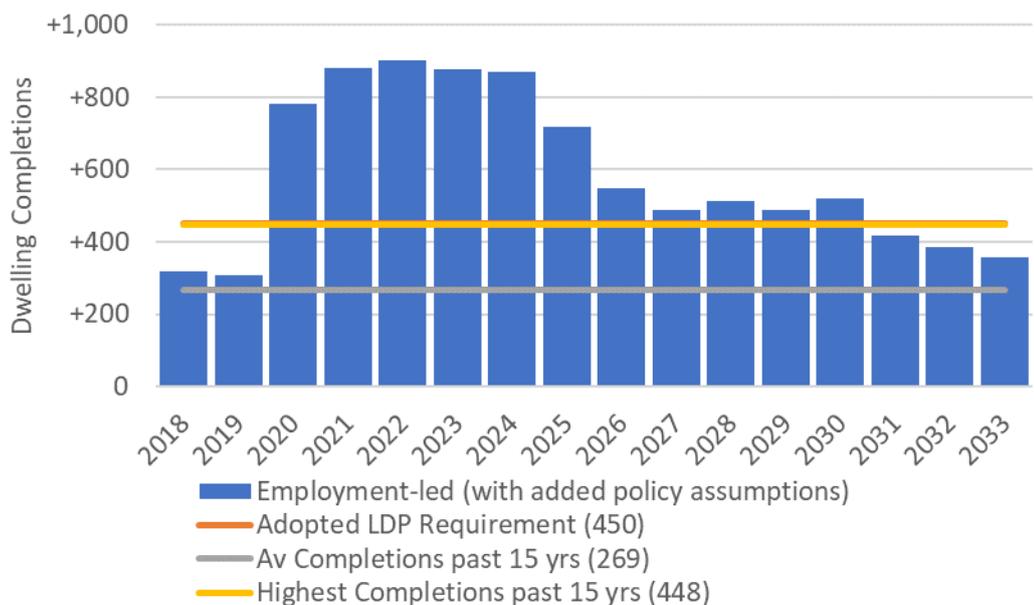
2.87 The growth in jobs under this option is significantly higher than that achieved under the other options. It also leads to a higher average number of jobs within the County than the 45,200 available pa over the 15 years to 2018 at some 46,660. As this option models a commuting ratio that reduces from the 2011 Census value (1.12) to 1.10 over the Plan period, population and dwelling growth is not as high as might be expected under this scenario as Monmouthshire would be retaining more of its own population to maintain the job growth (Chart 30).

**Chart 30: Implications for Employment Growth**



2.88 This option represents a dwelling growth rate of 604 dpa over the plan period. This is higher than the level of dwelling growth experienced over the past 15 years and is significantly higher than the adopted LDP requirement. (Chart 31). There are currently 4,660 new homes within existing commitments and windfall allowances. This option would require an additional 4,400 new dwellings over and above these existing commitments and allowances over the Plan period.

**Chart 31: Dwelling Requirement**



2.89 The implications associated with this growth option include:

- A significantly more balanced demography with an increase in the number of older and elderly people living in the County balanced against an increase in the younger age groups, impacting upon the type of housing required and service providers across public and private sectors. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would address the demographic imbalance in the County.
- Significant growth in the number of school aged children, placing more pressure on the capacity of existing schools. However, the level of housing delivery would provide a substantial opportunity to secure additional provision through planning gain to fund extensions and/or new schools.
- Growth in the number of working aged people living in Monmouthshire, with a notable increase in established households around the 35-44 age group, fuelling growth in employment provision. A reduction in out-commuting likely to lead to more sustainable travel patterns. Provides the opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
- Whilst this option projects a significant growth in jobs over the Plan period, it is unlikely that this level of job growth located within the County will be needed given the increased propensity to work from home / remotely. It is expected that the trend for increased home and remote working will continue over the longer term which will act to reduce this job growth figure over the Plan period.
- High level of projected dwelling growth may be challenging given past completion rates so benefits from this option may not come to fruition.
- Opportunities to secure more significant affordable housing through the planning system. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.
- Opportunities to sustain/enhance services and facilities in urban and rural areas with associated benefits including addressing rural isolation. The Covid-19 pandemic has highlighted the importance of local services and facilities to support our communities.
- Increased pressure on the County's landscape and biodiversity interests but potential to maximise opportunities to secure and/or enhance green infrastructure, public open space and recreation provision through planning gain. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
- Increased demands on infrastructure, but potential to deliver infrastructure improvements through increased planning gain from development including digital infrastructure and active travel options to support/enable increased

home/remote working and support local communities, all of which have increased importance in light of the Covid-19 pandemic.

**Table 12: Assessment of Option 6: Employment-led Projection (with added policy assumptions) (Radical Structural Change Higher (Commuting Ratio Reducing), AH)\*\* against RLDP Objectives**

LDP Objective Number	LDP Objective - Headline	Performance of Option 6 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 2.22		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	Would result in a growth in jobs of 648 pa. This level of growth would encourage greater indigenous business growth and encourage inward investment. Provides the opportunity to create a thriving, well-connected, diverse economy, which has been highlighted as being of particular importance in light of the current pandemic.
<b>Objective 2</b>	Retail centres*	Would provide increased opportunities to add to the customer base in retail centres in the County's towns, with an 18.5% increase in the population. There would be benefits arising from indigenous employment growth in the County, fostering the vitality, viability and attractiveness of the centres. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic. This option would provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	Levels of housing and employment development likely to result in further pressure on the natural environment. New developments could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	Level of development likely to result in development in areas which have floodplains. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	Higher levels of housing and employment development may impact on the safeguarding of the County's mineral

LDP Objective Number	LDP Objective Headline	Performance of Option 6 against the RLDP Objectives
		resource. Additional waste infrastructure may be required for this level of growth.
<b>Objective 6</b>	Land	Provision of housing alongside employment could promote efficient use of land and use of brownfield sites. However, it is recognised that there are limited opportunities for development on brownfield land and lower grade agricultural land.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	Any developments will be encouraged to support healthier lifestyles and provide sufficient open space. The value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	There would be a positive impact with a more balanced demography with an increase in the number of older and elderly people living in the County balanced against an increase in the younger age groups and greater provision of dwellings and jobs increasing the opportunities for the younger population to both live and work in Monmouthshire. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would address the demographic imbalance in the County.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	Would provide a level of housing that is sufficient to provide a wide ranging choice of homes for both existing and future residents. The level of growth would provide opportunities to secure more significant affordable housing through the planning system. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Any developments will need to enhance the character and identity of the settlements and be in accordance with national sustainable place-making principles. Growth in employment alongside housing will create more

		sustainable places. The value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	A more balanced demographic with new development providing for a wide ranging choice of homes and jobs for both existing and future residents together with improvements to existing services and facilities. The current pandemic has demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography.
<b>Objective 13</b>	Rural Communities	A more balanced demographic with new development providing opportunities which could help support the rural economy and address rural isolation.
<b>Objective 14</b>	Infrastructure*	Appropriate infrastructure could be provided to accommodate any new development. The current pandemic has highlighted the importance of the provision of digital infrastructure and active travel options to support/enable increased home working and support local communities.
<b>Objective 15</b>	Accessibility	The level of employment growth alongside the housing development would be likely to reduce the need to travel. This would also be enhanced by the recent increase in agile working and home working as a result of Covid-19, which is likely to continue over the longer term. Any new developments will need to consider active travel and integrated sustainable transport.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	Has the potential to impact on the heritage of a number of settlements in Monmouthshire. On the other hand through design developments can protect and enhance the built environment as well as provide benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change*	There would be no negative impact on climate change as the resilience of new development to aspects of climate change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

\*\* Option title as referred to in the Edge Analytics Reports.

## **Integrated Sustainability Appraisal (ISA) Analysis**

- 2.90 Growth Option 6 performs positively against the ISA theme relating to the economy and employment and population and communities, there are no or uncertain effects against the remaining ISA themes. Both Options 5 and 6 seek higher economic growth levels than Options 1 to 4 and as a result, are expected to perform significantly better in relation to the employment ISA theme. The housing growth proposed alongside economic development also seeks to address potential demographic imbalances with growth in key working age groups. Both Options are considered likely to support the retention of younger age groups and reduce out-commuting through growth with high levels of sustainable local access. Both Options provide opportunities to encourage a more diverse and vibrant economy, significant long-term positive effects are anticipated under both Options 5 and 6. However, the assumption in relation to higher levels of growth should also consider limits to growth and reflect the need to balance growth aspirations with realistic achievability. Considering this, it is not considered appropriate to rank Option 6 higher than Option 5, reflecting a marginally higher uncertainty in relation to achievability.
- 2.91 Options 2 to 6 deliver the highest level of growth of all of the options, and it is assumed that as the level of growth increases, so does the ability to deliver a greater range/ mix of new homes to help meet the needs of all residents in the County, including affordable housing. Higher levels of growth also increase the potential for accessibility improvements and other community benefits associated with development. However, it is noted with both options 5 and 6 that there is a need to manage the impacts of growth on local infrastructure capacity so that it does not place unnecessary burdens on existing infrastructure..
- 2.92 The option also performs highly against the ISA theme relating to transport. Whilst Options 5 and 6 propose a higher level of growth that has greater potential for negative effects in terms of congestion, negative effects are not considered likely to be significant and it is recognised that Options 5 and 6 provide greater critical mass to enable more significant infrastructure improvements. This is particularly important given the wider ambitions to transition to a lower-emission infrastructure network, where development will be a key delivery vehicle for the technological and infrastructure advances which underpin the transition.
- 2.93 There are considered to be no or uncertain effects with regard to this option against the remaining ISA themes. In terms of biodiversity the increasing level of growth under options 2 to 6 is likely to require increasingly more land take. This is considered likely to result in wider habitat loss and fragmentation as well as increased pressure; notably disturbance (through recreation, noise and light), atmospheric pollution, and through impacts on water quality and resources. Despite this, it is recognised that a higher level of growth could also offer greater opportunities for delivering biodiversity net gain, securing and/ or enhancing green infrastructure, public open space and recreation provision through planning gain. The nature and significance of residual effects will therefore ultimately be dependent on the exact location, design/ layout of

development, the implementation of mitigation measures, and the sensitivity of receptors. Residual effects therefore remain uncertain at this stage reflecting the ability to mitigate effects at the site/ project level.

- 2.94 All of the options, with the exclusion of Option 1, are likely to require increasingly more land take, placing pressure on greenfield land resources and resulting in wider impacts on the landscape across the County. Given the limited brownfield land available in the County, it is considered that most additional growth will be delivered on greenfield land on the edge of existing settlements, placing increased pressure on the County's landscape interests and rural character with the potential for long term negative effects. Whilst it is likely that mitigation is available to reduce the significance of any effects, the residual effects remain uncertain at this stage until development locations are more clearly defined. Given the higher levels of growth under Options 5 and 6, there is greater potential negative effects of significance overall against the Landscape ISA theme. At this stage it is concluded that it is not possible to identify any significant differences between the Options or conclude that they are likely to have significant effects on the historic environment. None of the Options is likely to have a significant effect on the Welsh language.

#### **RLDP Preferred Growth Option**

- 2.95 The Growth Options presented provide alternative growth strategy options to inform the level of dwelling and employment provision within the RLDP, having regard to national policy, the evidence base and policy aspirations. Based on the assessment set out above, Growth Option 5 Population-led projection (with added policy assumptions) is the Council's preferred Growth Option.
- 2.96 Growth Option 5 would provide the level of growth that will help to deliver the Council's core purpose of building sustainable and resilient communities for current and future generations. Fundamentally, this option will enable the provision of a sufficient range and choice of homes, both market and affordable, the need for which has been heightened by the current pandemic. This option will also assist in ensuring our communities are balanced and socially sustainable, particularly in terms of demography, which is a key RLDP objective and the importance of which has been clearly demonstrated during the current pandemic.
- 2.97 Likewise, the level of employment growth will assist in reducing the need to travel / levels of out-commuting, and promoting self-contained communities. Whilst this option projects a significant growth in jobs, with an increase of 7,215 jobs over the Plan period, it is unlikely that this level of job growth located within the County will be needed given the increased propensity to work from home / remotely. It is expected that the trend for increased home and remote working will continue over the longer term which will act to reduce this job growth figure over the Plan period. While it will not be possible for all employment sectors to work from home /work remotely, policy support requiring broadband connectivity and supporting the provision of local employment hubs will enable those who can and choose to do so. The Covid-19

pandemic has affected home-buying trends with an emphasis on quality of life, house size and access to outdoor green space rather than a focus on commuting times. Monmouthshire is a very attractive proposition and stands to gain from an increased economically active population without the associated problems of increased commuting, and local businesses and services would benefit from increased custom and footfall with workers spending their wages in local businesses rather than in the town/city in which they previously worked.

- 2.98 Appropriately located growth will increase the customer base and workforce, supporting local facilities, businesses and services. The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to our communities. This option would best meet the needs of and support the communities of Monmouthshire by providing a level of growth which will provide opportunities to secure affordable housing, improvements to infrastructure and potential to maximise opportunities to secure and/or enhance green infrastructure, public open space and recreation provision.
- 2.99 With regard to the ISA analysis, Growth Option 5 performs better overall against the ISA themes than any of the other five options. In particular Growth Option 5 along with Growth Option 6 are predicted to perform well against ISA themes relating to population/ communities and economy/ employment. Both Options are considered likely to support the retention of younger age groups and reduce out-commuting through growth with high levels of sustainable local access. Both Options provide opportunities to encourage a more diverse and vibrant economy. Through the delivery of new homes, jobs and community infrastructure that strategically improve accessibility and connectivity within the County Options 5 and 6 are considered to have the greatest potential to support diverse and inclusive communities. However the ISA considers that Option 5, by more closely aligning with past delivery rates in the earlier years of the Plan period, presents a more realistic option. As a result, significant positive effects are considered likely under Option 5 against these ISA themes.
- 2.100 Overall, Growth Option 5, Population-led projection (with added policy assumptions) best meets the RLDP objectives without adverse impacts on the climate emergency objective and is considered to be the most conducive to achieving the RLDP vision and the Council's core purpose of building sustainable and resilient communities across Monmouthshire.

#### Consultation Questions

- **Growth Option 5 (Population-led projection (with added policy assumptions)) is our preferred option. On the basis of the evidence above, do you agree with our preferred growth option? Please explain why and provide your reasons.**

- **If you have a preference for a different option, please state which option and provide details of how your preferred option will address the issues/challenges Monmouthshire is facing and the RLDP and ISA objectives?**

### 3 Spatial Strategy Options

- 3.1 In addition to setting out options for the level of growth needed over the plan period (set out in Section 2), the RLDP must set out a clear spatial strategy for where this development should take place within the County. This section of the report presents a range of spatial strategy options for accommodating housing and employment growth. As noted in paragraphs 1.4 to 1.8, the Council is revisiting the Growth and Spatial Options stage of the RLDP process following the publication of the corrected Welsh Government (WG) 2018-based population and household projections in August 2020. The RLDP spatial options previously considered have been reassessed to identify suitable options for consideration as part of this process. Two of the options considered in the 2019 consultation included a new settlement. These have since been discounted as the Welsh Government deemed them contrary to national policy set out in PPW (Edition 10) which states new settlements should only be proposed as part of a joint LDP, SDP or the NDF. An additional option, which focuses growth in the North of the County, has been included as a result of consultation responses on the 2019 Growth and Spatial Options. Accordingly, a total of four broad Spatial Distribution Options remain relevant and have been taken forward as realistic options at this time.
- 3.2 It is important to note that the selected spatial distribution options for growth are not intended to define precise boundaries, sites or land use allocations at this stage. Further detail will be provided as part of the Preferred Strategy and Deposit RLDP.
- 3.3 The consideration of realistic<sup>18</sup> growth and spatial options is an important part in the preparation of the RLDP, the purpose of which is to facilitate discussion and inform the Preferred Strategy consultation. Each spatial option will need to have regard to legislation, national planning policy, local and regional strategies, as well as, wider contextual issues such as the Cardiff Capital Region City Deal and the removal of the Severn Bridge Tolls. Furthermore, the options must take account of the specific characteristics, assets and issues prevalent in Monmouthshire to guide development in order to promote and deliver sustainable and resilient communities. A number of spatial options have been identified. However, it is considered pertinent to condense these into a number of realistic options for consultation purposes and having regard to the aforementioned issues. An initial assessment of all options has been undertaken as set out in Appendix 3, which includes an assessment of the appropriateness of options previously considered in the Adopted LDP (Para 5.10 LDP Manual Edition 3, 2020). This excludes the two new settlement options previously included in the 2019 consultation, as they are deemed to be contrary to National Policy, as noted in paragraph 3.1 above. A total of four spatial options, as set out below, have been selected for consideration as spatial options for further assessment and consultation purposes.
- 3.4 Any new growth areas must be served or be capable of being served, by appropriate infrastructure. This includes physical, digital and social infrastructure including;

---

<sup>18</sup> Paragraph 5.10 Development Plans Manual - Edition 3 (Welsh Government, March 2020)

community and recreational facilities, sewerage, water, transport, schools, health care and broadband. The delivery of new infrastructure in association with development will depend on a number of factors. While consideration of funding opportunities for new infrastructure to support sites is key to the deliverability of sites, not all of the evidence is available at present. This will nevertheless be updated throughout the process as this evidence is prepared. An infrastructure plan will be prepared alongside the Deposit RLDP.

### Settlement Hierarchy

- 3.5 A Sustainable Settlements Appraisal is being prepared as part of the evidence base to support the RLDP. Its purpose is to identify those settlements that are potentially suitable to accommodate future growth in terms of their location, role and function. This paper will provide valuable information to establish a settlement hierarchy to indicate a settlement’s potential for accommodating development, and, the hierarchy in relation to other settlements in Monmouthshire. A final decision on how much development a settlement can accommodate will nevertheless depend on a wide range of other factors, such as impact on the character of the settlement along with consideration of its environmental, physical and policy constraints and its location in relation to other settlements.
- 3.6 Utilising the approach based on the initial findings of the Sustainable Settlements Appraisal as a starting point, it is considered that the Primary, Secondary and Severnside Settlements in the County can be identified as below. This settlement hierarchy is nevertheless subject to change following completion of the Sustainable Settlements Appraisal and additional evidence as the Plan is progressed.

#### Draft Sustainable Settlement Hierarchy

<b>Primary Settlements:</b>	<b>Secondary Settlements:</b>	<b>Severnside:</b>	<b>Main Rural Settlements:</b>	
Abergavenny (including Llanfoist)	Penperlleni	Caerwent	Devauden	Penallt
Chepstow	Raglan	Caldicot	Dingestow	Pwllmeyric
Monmouth (including Wyesham)	Usk	Crick	Grosmont	Shirenewton
		Magor/Undy	Little Mill	Mynydd bach
		Portskewett	Llandogo	St Arvans
		Rogiet	Llanellen	Trellech
		Sudbrook	Llangybi	Werngifford
			Llanishen	Pandy
			Mathern	

- 3.7 Each spatial option is accompanied by a table setting out how that option performs against the RLDP objectives using the ratings set out in Table 13. A summary of the advantages and disadvantages for each option is provided along with a map to portray a spatial illustration. As noted in paragraph 3.2, the individual maps do not identify precise boundaries, sites or land use allocations at this stage. The options have also

been assessed through the Integrated Sustainability Appraisal (ISA) process, a summary of the findings and conclusions is presented against each option. A table providing a comparison of the ISA assessment for all four Spatial Options can be found in Appendix 10.

**Table 13 – Key to Assessment of Options against RLDP Objectives**

Rating	Predicted effect
Green	Helps to achieve the objective.
Amber	Neutral impact on objective.
Red	Unlikely to achieve objective.

- 3.8 A Review of the RLDP Issues, Vision and Objectives (IVO) was undertaken in June 2020 and incorporated into the RLDP Review of IVO and Evidence Base (September 2020)<sup>19</sup> which concluded the Plan’s Issues, Vision and Objectives remain relevant in light of Covid-19 and that it is appropriate to continue with the preparation of the RLDP on the basis of these values. However, some objectives identified as having increased importance in light of Covid-19, consistent with the priorities identified in the Welsh Government *Building Better Places* document published in July 2020. These objectives are denoted with an \* in the tables for clarity.

---

<sup>19</sup> <https://www.monmouthshire.gov.uk/app/uploads/2020/11/Monmouthshire-RLDP-Review-of-Issues-Vision-Objectives-and-Evidence-Base-in-Light-of-Covid.pdf>

## Spatial Strategy Options for the Distribution of Growth

3.9 A total of four broad Spatial Distribution Options have been identified as below:

- **Option 1: Continuation of the Existing LDP Strategy** – Growth would be distributed around the County with a particular focus on Main Towns<sup>21</sup>, with some development in Severnside<sup>22</sup> and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development would be accompanied by new employment opportunities, where possible.
- **Option 2: Distribute Growth Proportionately across the County's most Sustainable Settlements<sup>23</sup>** – Growth, including jobs and affordable housing, would be distributed across the County's most sustainable settlements, with the level of growth proportionate to that settlement's size and amenities, affordable housing need as identified in the LHMA, the capacity for growth and/or the need for development to sustain the community.
- **Option 3: Focus Growth on the M4 corridor** – Growth would be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections, including via the South Wales Main rail line at Severn Tunnel Junction. Affordable Housing would be directed to those sustainable areas in the South of the County identified in the LHMA as having the greatest housing need.
- **Option 4: Focus Growth in the North of the County** – Growth would be predominantly located in the most sustainable settlements within the North of the County to capitalise on its strategic links to the Heads of the Valleys and wider Cardiff Capital Region via the A465, and towards Herefordshire via the A449 and A40, along with rail links to Newport, Cardiff and the North via the Welsh Marches line. Affordable Housing would be directed to those sustainable areas in the North of the County identified in the LHMA as having the greatest housing need.

---

<sup>21</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014), now renamed to Primary Settlements and includes the addition of Llanfoist.

<sup>22</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014), with the addition of Crick.

<sup>23</sup> A Sustainable Settlement Appraisal will be published to inform the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.

## Option 1 Continuation of the Existing LDP Strategy

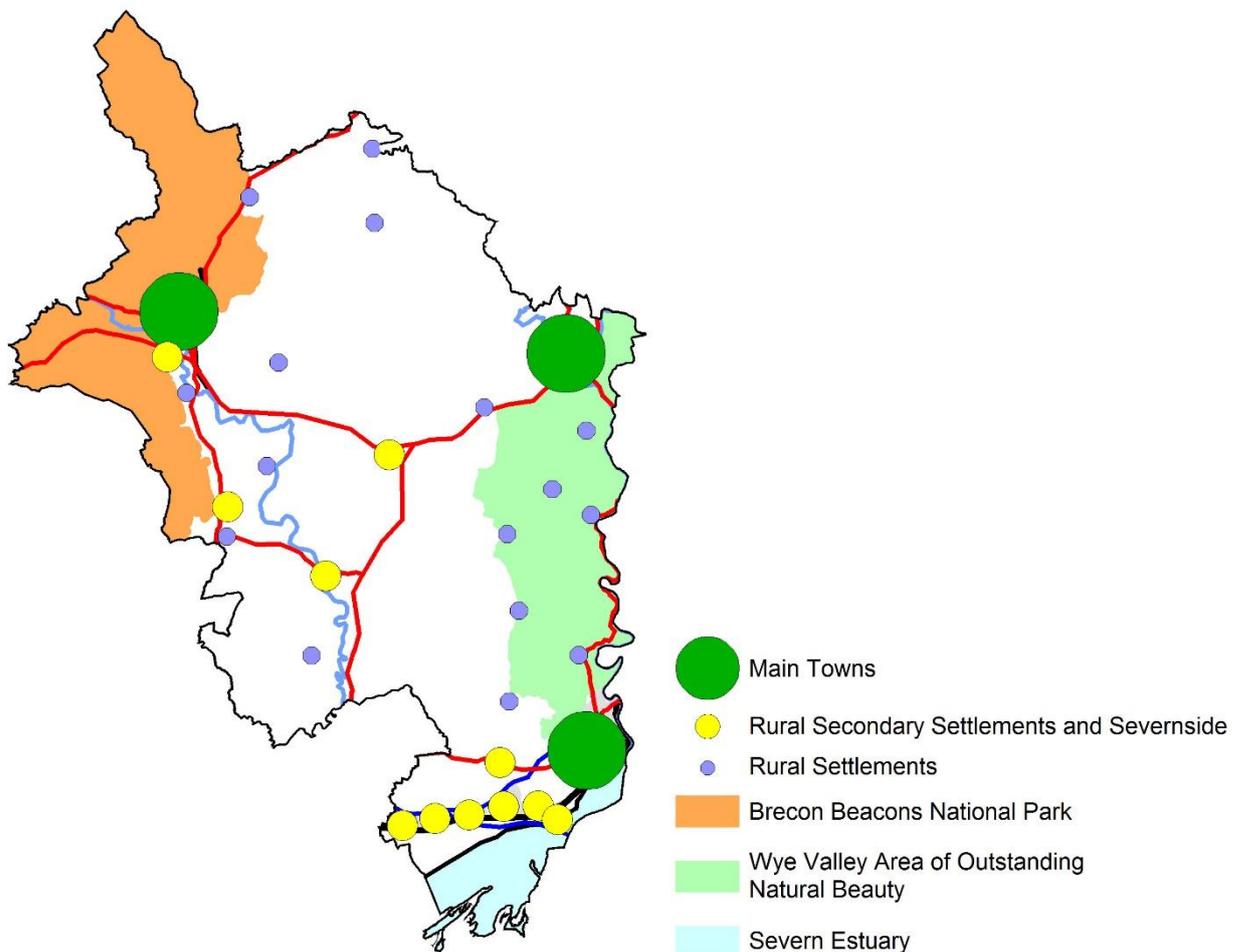
Table 14 – Option 1

### Option 1: Continuation of the Existing LDP Strategy

#### Description of Option:

This option replicates the existing Adopted LDP Strategy, which distributes growth around the County with a particular focus on Main Towns<sup>24</sup>, with some development in Severnside<sup>25</sup> and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development would be accompanied by new employment opportunities, where possible.

#### Map of Option 1



#### Advantages:

- Would provide growth in sustainable areas that have existing access to facilities/services, active travel links and employment opportunities. These settlements have the amenities to reduce the need to travel and in many cases to support 20 minute neighbourhoods.

<sup>24</sup> See paragraph 3.6 for definition of Primary Settlements, Main Towns are now incorporated into Primary Settlements, with the addition of Llanfoist.

<sup>25</sup> See paragraph 3.6 for definition of Primary Settlements, Secondary Settlements and Severnside, with some areas to be identified at a later stage as Rural Settlements.

### Option 1: Continuation of the Existing LDP Strategy

- Would provide affordable housing across the Primary Settlements<sup>26</sup>, Secondary Settlements<sup>27</sup> and Severnside<sup>28</sup> identified in paragraph 3.6 and some rural settlements.
- Could attract additional facilities in Primary Settlements, Secondary Settlements and Severnside.
- Development across the Primary Settlements<sup>29</sup>, Secondary Settlements<sup>30</sup> and Severnside<sup>31</sup> area would assist in ensuring a more balanced demography in these parts of the County.
- Would help support facilities in existing settlements, particularly in those rural areas where facilities are struggling/declining. Growth may also attract additional facilities where they do not currently exist.
- This option would facilitate growth consistent with emerging National Planning Policy, Future Wales: the National Plan 2040, which seeks the designation of a Green Belt “around Newport and Eastern parts of the Region”.

#### Disadvantages:

- Many of the Primary Settlements currently have physical infrastructure capacity issues which would need to be addressed to enable significant growth.
- Would result in additional pressure on social infrastructure within Primary Settlements and the Severnside area, such as health care facilities. Additional support for facilities in the Secondary Settlements and Rural Settlements not likely to be achieved due to limited growth in these areas.
- The focus of development in the Primary Settlements will result in further pressure on the environment.
- The provision of employment opportunities together with residential developments has not been fulfilled in all of the Strategic Mixed Use Sites allocated in the adopted LDP. Future employment allocations should be aligned with the findings of the Employment Land Review and other Council aspirations.
- Some rural areas could be disadvantaged as they would not all benefit from additional housing to help support and attract additional facilities.
- Preference for brownfield development over greenfield development. Growth would be predominately located on greenfield sites, however it is recognised that there are limited opportunities for brownfield development within the County.

<sup>26</sup> Main Towns of Abergavenny, Chepstow and Monmouth as identified in Policy S1 of the Adopted LDP

<sup>27</sup> Secondary Settlements of Llanfoist, Penperlleni, Raglan and Usk as identified in Policy S1 of the Adopted LDP

<sup>28</sup> Severnside sub-region consisting of Caerwent, Caldicot, Magor, Portskewett, Rogiet, Sudbrook and Undy

<sup>29</sup> Main Towns of Abergavenny, Chepstow and Monmouth as identified in Policy S1 of the Adopted LDP

<sup>30</sup> Secondary Settlements of Llanfoist, Penperlleni, Raglan and Usk as identified in Policy S1 of the Adopted LDP

<sup>31</sup> Severnside sub-region consisting of Caerwent, Caldicot, Magor, Portskewett, Rogiet, Sudbrook and Undy

**Table 15 – Assessment of Option 1 against RLDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
<p><b>*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 3.8</b></p>		
<p><b>A Prosperous Wales (Well-being Goal 1)</b></p>		
<p><b>Objective 1</b></p>	<p>Economic Growth/ Employment*</p>	<p>While new residential development will be accompanied by employment opportunities, where possible, development needs to be in the right locations to attract inward investment. There is a focus on Abergavenny, Chepstow and Monmouth, however some growth in the Secondary Settlements, Severnside area and most sustainable rural areas would encourage greater indigenous business growth across the County as a whole while at the same time encouraging inward investment. Provides opportunity to create a thriving, well-connected, diverse economy which is of particular importance in light of the current pandemic.</p>
<p><b>Objective 2</b></p>	<p>Retail centres*</p>	<p>Would provide the opportunity to add to the customer base/footfall of the main County towns of Abergavenny, Chepstow and Monmouth and support existing/attract additional facilities in these areas. However, limited development in Caldicot, Usk and other rural areas could result in further loss of retail in other areas. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic.</p>
<p><b>A Resilient Wales (Well-being Goal 2)</b></p>		
<p><b>Objective 3</b></p>	<p>Green Infrastructure, Biodiversity and Landscape*</p>	<p>Likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.</p>
<p><b>Objective 4</b></p>	<p>Flood risk</p>	<p>While Abergavenny, Chepstow and Monmouth have areas of floodplain, developments can be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.</p>
<p><b>Objective 5</b></p>	<p>Minerals and Waste</p>	<p>There would be no negative impact on minerals and waste, mineral landbank obligations can be met.</p>

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
<b>Objective 6</b>	Land	Limited opportunities for brownfield development or development on lower grade agricultural land, however, some opportunities exist within the Primary Settlements. Likely to be predominately greenfield development.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	There would be no negative impact on health and well-being. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space. The value and importance of having access to locally accessible open/green spaces has been heightened during the current pandemic.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	While the majority of market and affordable housing provision will be in the Primary Settlements of Abergavenny, Chepstow and Monmouth, housing will also be provided in Secondary Settlements, the Severnside area and some of the Rural Settlements which will assist in ensuring a balanced demography across the County. Would provide increased opportunities through employment and housing provision for the younger population to live and work in Monmouthshire. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would assist in supporting/enabling social sustainability and balanced communities.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	Would provide opportunity for sufficient homes, although recognise this is dependent on the level of growth. Affordable housing will be provided in Primary Settlements, Secondary Settlements, Severnside and some of the Rural Settlements. This will enable the provision of market and affordable homes across all housing market areas. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues and to build sustainable and resilient communities throughout Monmouthshire.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
<b>Objective 11</b>	Place-making	Any developments will need to enhance the character and identity of the Primary and Secondary Settlements, Severnside and Rural Settlements in accordance with national sustainable place-making principles. The value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	Developments will be located in those settlements within Monmouthshire with good access to employment, retail, community facilities and social infrastructure. Will also provide opportunities to support/enhance existing community facilities. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable. This option would assist in supporting/enabling social sustainability and balanced communities.
<b>Objective 13</b>	Rural Communities	Housing will be distributed in both urban and rural areas, with a focus in rural areas on the most sustainable Rural Settlements. Will help to support those rural areas where facilities are struggling/declining.
<b>Objective 14</b>	Infrastructure*	The focus of development in Abergavenny, Chepstow and Monmouth may result in further pressure on social and physical infrastructure in these areas. However, appropriate infrastructure should be in place/can be provided to accommodate any new development in those areas as well as in the Secondary Settlements, Severnside and Rural Settlements. The current pandemic has highlighted the importance of the provision of digital infrastructure and active travel options to support/enable increased home/remote working and support local communities.
<b>Objective 15</b>	Accessibility	While new residential development will be accompanied by employment opportunities, where possible, there is no guarantee that residents will live and work in the same area. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term <sup>32</sup> . The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to communities. While many of the settlements already have sustainable travel links in place

<sup>32</sup> Welsh Government announced in September 2020 that they have a long-term ambition for around 30% of the Welsh workforce to work remotely either from home or near to home using community-based remote working hubs <https://gov.wales/aim-30-welsh-workforce-work-remotely>

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 1 against the RLDP Objectives
		through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	Consideration will need to be given to ensure there is no adverse impact on the heritage of Abergavenny, Chepstow and Monmouth due to the focus of development in these areas. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change*	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

### **Integrated Sustainability Appraisal (ISA) Analysis**

- 3.10 The findings of the ISA note that this option, performs positively, and is found to have the potential for significant long term positive effects against the ISA themes relating to economy/employment, population/communities, health/wellbeing and equalities compared to the other options. This option focuses growth in the Main Towns, with some development in Severnside where there is greater need and better access to public transport, existing employment and facilities/services. Option 1 also scores positively in regard to equalities as it seeks to support and sustain a hierarchy of vibrant centres across the County, directing the majority of growth to the most sustainable settlements while also still delivering some growth in the secondary settlements and rural areas. The ISA appraisal notes Option 1 would perform positively in terms of providing housing to meet the identified needs of the County and would provide affordable housing throughout the settlement hierarchy, ensuring a range and choice of homes are delivered, particularly where there is a need for affordable housing, to assist in regaining a balanced population. Additionally, opportunities to maximise levels of self-containment of existing settlements are more likely to be taken through Option 1, addressing localised economic issues and supporting a well-connected diverse economy. Furthermore, Options 1 is anticipated to lead to long

term positive effects through reducing inequalities between rural and urban areas, along with supporting and sustaining a hierarchy of vibrant town and village centres across the County as a whole, which have been highlighted of particular importance during the current pandemic. The ISA notes that this option will likely positively address existing demographic issues, encouraging younger people to reside and work in the County.

- 3.11 The appraisal found that there is little to differentiate between the options at this stage with regard to the historic environment and biodiversity themes, noting that all options have the potential to result in negative effects. However, it is recognised the mitigation could be provided and development has the potential to deliver positive effects secured at the project scale. Given the precise location of growth is unknown at this stage, all options were found to have an uncertain effect on landscape and climate change themes. All options have the potential to result in negative effects for natural resources, albeit it is recognised that mitigation could be provided and the nature and significance of effects will be dependent on the scale and location of development.
- 3.12 The findings in the ISA note that while there are some small differences between Options 1 and 2 in terms of how growth is distributed during the Plan period, these differences are not significant enough to warrant one option being ranked higher or lower than the other against the ISA themes. As a consequence and as a comparison of all four options, Spatial Options 1 and 2 perform the best overall.

## Option 2 Distribute Growth Proportionately across the County's most Sustainable Settlements

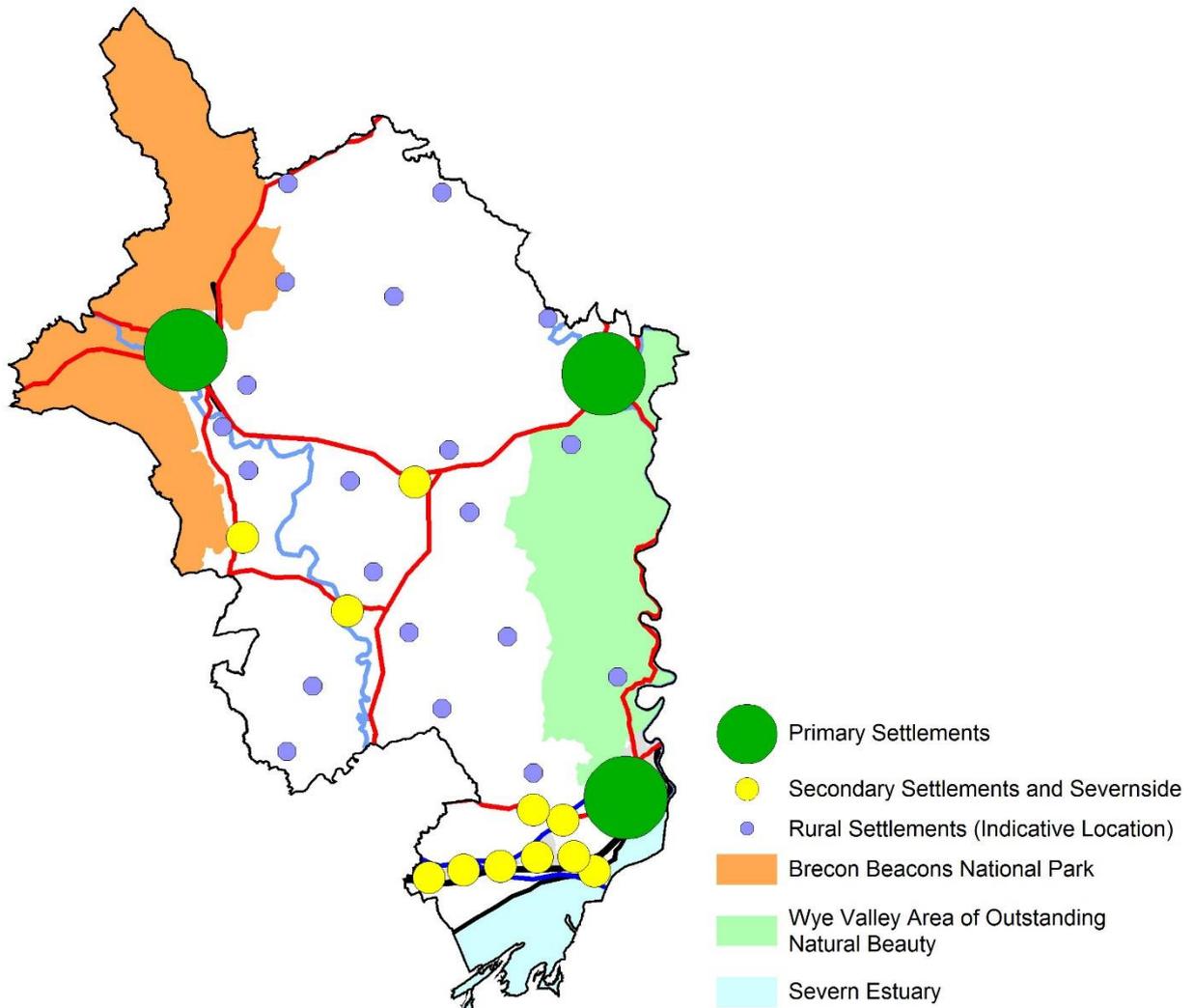
Table 16 – Option 2

### Option 2: Distribute Growth Proportionately across the County's most Sustainable Settlements.

#### Description of Option:

Growth, including jobs and affordable housing, would be distributed across the County's most sustainable settlements<sup>33</sup>, with the level of growth proportionate to that settlement's size and amenities, affordable housing need as identified in the LHMA, the capacity for growth and/or the need for development to sustain the community.

#### Map of option:



#### Advantages:

- Would meet housing needs, both market and affordable housing, throughout the County, including in rural areas where growth has been limited previously.

<sup>33</sup> A Sustainable Settlement Appraisal will be published to inform the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.

## **Option 2: Distribute Growth Proportionately across the County's most Sustainable Settlements.**

- Affordable housing would be provided in all housing market areas, with development focused in the most sustainable settlements identified in the LHMA as having the greatest need.
- Would provide growth in sustainable areas that have existing access to facilities/services, active travel links and employment opportunities. These settlements have the amenities to reduce the need to travel and in many cases to support 20 minute neighbourhoods.
- Would utilise existing infrastructure, particularly in the Primary and Severnside Settlements, by distributing development across the most sustainable settlements. Development will generate opportunities to both provide new infrastructure and enhance the existing.
- Would help to support facilities in existing settlements and address the day-to-day needs of residents including in those rural areas where facilities are struggling/declining. Proportionate distribution of growth across the County's most sustainable settlements may also attract additional facilities in these settlements.
- Proportionate development across the most Sustainable Settlements would assist in ensuring a more balanced demography throughout the County. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography.
- Allocation of employment land in line with the findings of the Employment Land Review and other Council aspirations will ensure employment land is located in the right areas to attract specific sectors/employers.
- This option would facilitate growth consistent with emerging National Planning Policy, Future Wales: the National Plan 2040, which seeks the designation of a Green Belt "around Newport and Eastern parts of the Region".

### **Disadvantages:**

- Some rural areas could be disadvantaged as they would not all benefit from additional housing to help support existing facilities or attract additional facilities.
- Preference for brownfield development over greenfield development. Growth would be predominately located on greenfield sites, however, it is recognised that there are limited opportunities for brownfield development within the County. Similarly, there are limited opportunities for development on lower grade agricultural land, much of which is floodplain.
- Some of the most Sustainable Settlements currently have infrastructure capacity issues which would need to be addressed to enable growth in these areas, for example Monmouth in relation to the provision of mains drainage and Chepstow in relation to capacity of road networks.

Table 17 – Assessment of Option 2 against RLDP Objectives

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 3.8		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	Distributing growth proportionately across the County’s most sustainable settlements would encourage greater indigenous business growth across the County as a whole while at the same time encouraging inward investment. Provides opportunity to create a thriving, well-connected, diverse economy, which is of particular importance in light of the current pandemic.
<b>Objective 2</b>	Retail centres*	Would provide the opportunity to add to the customer base in existing retail centres through growth in the most sustainable settlements. May also attract additional facilities in sustainable settlements. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	Likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and Ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	Distributing growth proportionately to the most sustainable settlements could result in development in areas such as Abergavenny, Chepstow, Monmouth, Raglan and Usk, which all have areas of floodplain. Developments can nevertheless be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
<b>Objective 6</b>	Land	Limited opportunities for brownfield development or development on lower grade agricultural land, however,

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
		some opportunities exist within the Primary Settlements. Likely to be predominately greenfield development.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	There would be no negative impact on health and well-being. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space, the value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Housing would be distributed proportionately across all housing market areas to meet housing needs in the most sustainable settlements identified as having capacity for growth/or in need of development to sustain them. Affordable housing will be directed to those sustainable areas identified in the LHMA as having the greatest housing need, which would assist in ensuring a more balanced demography. Would provide increased opportunities through employment and housing provision for the younger population to live and work in Monmouthshire. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would support/enable social sustainability and balanced communities across the County.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	Would provide opportunity for sufficient homes, although recognise this is dependent on the level of growth. Housing would be distributed proportionately across the County's most sustainable settlements to meet housing needs, including the provision of affordable housing in those sustainable areas identified in the LHMA as having the greatest housing need. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments to address the County's affordability issues

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
		and to build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Any developments will need to enhance the character and identity of the Primary, Secondary, Severnside and Rural Settlements in accordance with national sustainable place-making principles, the value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	Developments would be located in the most sustainable settlements in Monmouthshire in both urban and rural areas that have the best access to employment, retail, community facilities and social infrastructure (Primary Settlements, Secondary Settlements, Severnside and Rural Settlements). The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would support/enable social sustainability and balanced communities across the County.
<b>Objective 13</b>	Rural Communities	Housing would be distributed in both urban and rural areas, with a focus on the most sustainable settlements. Would help to support sustainable rural areas where facilities are struggling/declining by providing development to help sustain them.
<b>Objective 14</b>	Infrastructure*	Would utilise existing infrastructure, particularly in the Primary and Severnside Settlements, by distributing development across the most sustainable settlements. Development will generate opportunities to both provide new infrastructure and enhance the existing. Would also provide additional support for facilities in sustainable areas where growth has previously been limited. The current pandemic has highlighted the importance of the provision of digital infrastructure and active travel options to support/enable increased home/remote working and support local communities.
<b>Objective 15</b>	Accessibility	New residential development would be distributed proportionately across the County's most sustainable settlements, providing more choice of areas for people to live and work. However, there is no guarantee that residents would live and work in the same area. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 2 against the RLDP Objectives
		likely to continue over the longer term <sup>34</sup> . The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to communities. While many of the settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	Dependent on location of sites, has the potential to impact on the heritage of a number of settlements in Monmouthshire. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change*	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

### Integrated Sustainability Appraisal (ISA) Analysis

- 3.13 The ISA appraisal considers that Option 2 would perform positively and has the potential for significant long-term positive effects against the ISA themes relating to economy/employment, population/communities, health/wellbeing and equalities compared to the other options. This option focuses growth in the Primary Settlements, with some development in Severnside where there is greater need and better access to public transport, existing employment and facilities/services. Option 2 also scores positively in regard to equalities as it seeks to support and sustain a hierarchy of vibrant centres across the County, directing the majority of growth to the most sustainable settlements while also still delivering growth in the Secondary

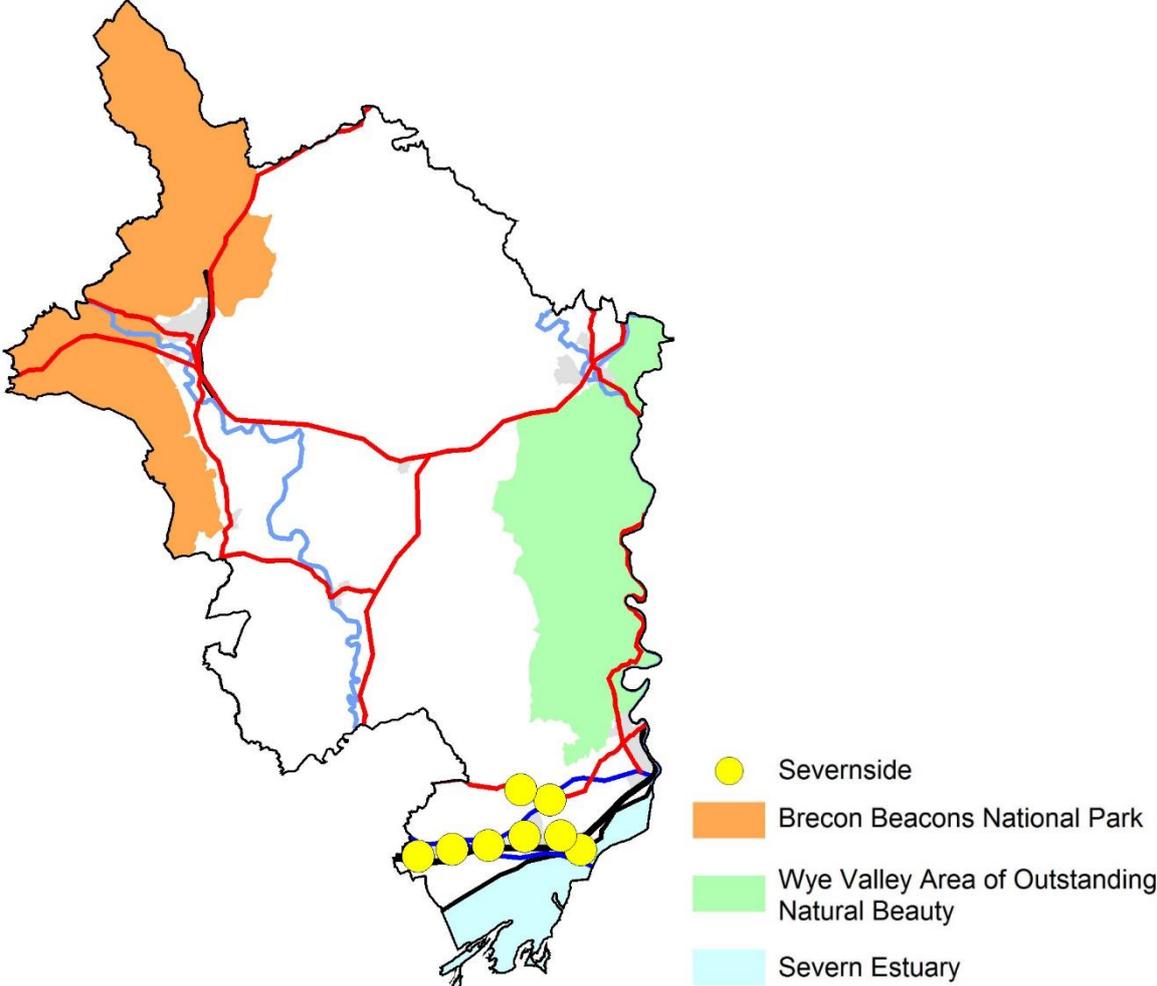
<sup>34</sup> Welsh Government announced in September 2020 that they have a long-term ambition for around 30% of the Welsh workforce to work remotely either from home or near to home using community-based remote working hubs <https://gov.wales/aim-30-welsh-workforce-work-remotely>

Settlements and Rural Settlements. The ISA appraisal notes Option 2 would perform positively in terms of providing housing to meet the identified needs of the County and would provide affordable housing throughout the settlement hierarchy, ensuring a range and choice of homes are delivered, particularly where there is a need for affordable housing, to assist in regaining a balanced population. Additionally, opportunities to maximise levels of self-containment of existing settlements are more likely to be taken through Option 2, addressing localised economic issues and supporting a well-connected diverse economy. Furthermore, Options 2 is anticipated to lead to long term positive effects through reducing inequalities between rural and urban areas, along with supporting and sustaining a hierarchy of vibrant town and village centres across the County as a whole, which have been highlighted of particular importance during the current pandemic. The ISA notes that this option will likely positively address existing demographic issues, encouraging younger people to reside and work in the County.

- 3.14 The appraisal found that there is little to differentiate between the options at this stage with regard to the historic environment and biodiversity themes, noting that all options have the potential to result in negative effects. However, it is recognised the mitigation could be provided and development has the potential to deliver positive effects secured at the project scale. Given the precise location of growth is unknown at this stage, all options were found to have an uncertain effect on landscape and climate change themes. All options have the potential to result in negative effects for natural resources, albeit it is recognised that mitigation could be provided and the nature and significance of effects will be dependent on the scale and location of development.
- 3.15 The findings in the ISA note that while there are some small differences between Options 1 and 2 in terms of how growth is distributed during the plan period, these differences are not significant enough to warrant one option being ranked higher or lower than the other against the ISA themes. As a consequence, and as a comparison of all four options, Spatial Options 1 and 2 perform the best overall.

### Option 3 Focus Growth on the M4 corridor

Table 18 – Option 3

<b>Option 3: Focus Growth on the M4 corridor</b>
<p><b>Description of Option:</b></p> <p>Growth would be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections, including via the South Wales Main rail line at Severn Tunnel Junction. Affordable Housing would be directed to those sustainable areas in the South of the County identified in the LHMA as having the greatest housing need.</p>
<p><b>Map of option:</b></p>  <p>Legend:</p> <ul style="list-style-type: none"><li>● Severnside</li><li>■ Brecon Beacons National Park</li><li>■ Wye Valley Area of Outstanding Natural Beauty</li><li>■ Severn Estuary</li></ul>
<p><b>Advantages:</b></p> <ul style="list-style-type: none"><li>• Would provide opportunities for building more sustainable communities and achieving infrastructure improvements/provision in the South of the County.</li><li>• Would provide growth in sustainable settlements in the South of the County that have existing access to facilities/services, active travel links and employment opportunities. These settlements have the amenities to reduce the need to travel and in many cases to support 20 minute neighbourhoods.</li></ul>

### Option 3: Focus Growth on the M4 corridor

- Opportunity to enable investment in public transport and possibly promote a modal shift from the car to more sustainable means of travel in the South of the County.
- Less pressure on greenfield edge of settlement sites and higher grade agricultural land outside the Severnside area.
- Would provide the potential to link housing and employment growth due to opportunities for a choice and range of employment land with good links to the M4 corridor and rail links via Severn Tunnel Junction and Caldicot.
- This option would facilitate growth consistent with emerging National Planning Policy, Future Wales: the National Plan 2040, which seeks the designation of a Green Belt “around Newport and Eastern parts of the Region”.

#### Disadvantages:

- Does not enable opportunities for sustainable development in all of the Primary and Secondary Settlements and runs the risk of perpetuating existing problems of lack of social and community facilities and high levels of out-commuting in Severnside if opportunities to link housing and employment growth are not harnessed effectively. However, with increased sustainable remote and home working likely over the Plan period there will be a reduction in commuting levels.
- Lack of employment opportunities outside the Severnside area would exacerbate out-commuting in other areas and would not assist in improving self-containment of the Primary and Secondary Settlements outside this area (i.e. Abergavenny/Llanfoist, Chepstow, Monmouth, Usk and Raglan). However, with increased sustainable remote and home working likely over the Plan period there will be a reduction in commuting levels.
- Would not support existing facilities or enable provision of additional facilities and infrastructure in areas outside of Severnside. Rural areas outside Severnside in particular will be disadvantaged as they would not benefit from additional housing to help support existing facilities or attract additional facilities.
- Does not directly assist in sustaining rural communities.
- Affordable housing provision would not be met across all housing market areas, both urban and rural, that are currently identified in the LHMA as in need as provision would be limited to the South of the County only.
- Preference for brownfield development over greenfield development. Growth would be predominately located on greenfield sites in the Severnside area, however, it is recognised that there are limited opportunities for brownfield development within the County. Similarly, there would be limited opportunities for development on lower grade agricultural land.

**Table 19 – Assessment of Option 3 against Draft LDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 3.8		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	While this option would provide the opportunity to link housing and employment growth, particularly due to proximity of the M4 corridor and railway links at Caldicot/Severn Tunnel Junction, it would be unlikely to have a significant impact on employment growth across the County as a whole as development would be limited to the South of the County in the Severnside area. The opportunity to create a thriving, well-connected, diverse economy, across the whole of the County is of particular importance in light of the current pandemic.
<b>Objective 2</b>	Retail centres*	Would provide the opportunity to add to the customer base/footfall in the Severnside area but there would be less of a focus on the main County Towns of Abergavenny, Chepstow and Monmouth, which would have a detrimental impact on the retail centres in these areas. Growth in this area may nevertheless attract additional facilities where they do not currently exist and support regeneration aspirations of Caldicot Town Centre, but would not offer the same to the town of Usk. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic, this option would not provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	Likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and Ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	Development across the Severnside area could result in development in the Gwent Levels, which is designated as floodplain. Developments can nevertheless be located away from areas at risk of flooding and will incorporate

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
		SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	There could be potential impact on minerals and waste, however, mineral landbank obligations can be met. Due to the focus of development in the South of the County, there could be some impact on the Limestone Mineral Safeguarding Area.
<b>Objective 6</b>	Land	Limited opportunities for brownfield development or development on lower grade agricultural land in the Severnside area, likely to be predominately greenfield development.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments would be encouraged to be water and energy efficient.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	There would be no negative impact on health and well-being. Any developments will be encouraged to support healthier lifestyles and provide sufficient open space, the value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Market and affordable housing provision would be focussed in the South of the County in the Severnside area. No growth is proposed in other Primary and Secondary Settlements outside of this area or the Rural Settlements, impacting on both market and affordable housing provision, which would in turn impact on demography as the younger population would be priced out in these areas. This option could also lead to rural isolation. Would provide some opportunities through employment and housing provision for the younger population to live and work in Monmouthshire in the Severnside area only and would not increase opportunities across the County as a whole. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not support/enable social sustainability and balanced communities across the County.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	Housing would be provided in the South of the County in the Severnside area and would not meet housing needs across all housing market areas, negatively impacting on the provision of affordable housing including in areas identified in the LHMA as having the greatest need. This would in turn impact on demography as the younger population will be priced out in these areas. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments, this option would not address the County's affordability issues or build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Any developments would need to enhance the character and identity of the Settlements in the South of the County in accordance with national sustainable place-making principles, the value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	Developments would only be located in the South of the County in the Severnside area with best access to employment, retail, community facilities and social infrastructure. Likely to result in a detrimental impact on rural areas, particularly in relation to rural isolation, and also the Primary and Secondary Settlements as no development would be directed to these locations. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable. This option would not support/enable social sustainability and balanced communities across the County.
<b>Objective 13</b>	Rural Communities	Housing would only be directed to the South of the County in the Severnside area and would not address rural need in other rural areas across the County. This would in turn impact on demography as the younger population would be priced out of these other rural areas. This would also impact on the sustainability of existing rural areas as there would be no additional support to help maintain rural facilities nor would there be any rural developments to attract additional rural employment opportunities. This option could also lead to rural isolation.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
<b>Objective 14</b>	Infrastructure*	Pressure on infrastructure would be limited to the South of the County in Severnside, in an area with good links to the M4 and other sustainable travel links including rail at Caldicot and Severn Tunnel Junction Train Stations. However, appropriate infrastructure should be in place/can be provided to accommodate for any new development in this area. Lack of development outside this area would not generate sufficient infrastructure improvements and gains in other areas across the County. Would provide additional support for facilities in the Severnside area only, additional support for facilities in other areas unlikely to be achieved. The current pandemic has highlighted the importance of the provision of digital infrastructure and active travel options to support/enable increased home/remote working and support local communities.
<b>Objective 15</b>	Accessibility	Development would be focused in the South of the County in the Severnside area where there are existing employment opportunities, however, there is no guarantee that residents will live and work in the same area. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term <sup>35</sup> . The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to communities. While many of the Severnside settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities. Development in this area benefits from good links to Cardiff Capital Region and the South West via the M4. However, the focus on the South of the County will result in limited opportunities to enhance accessibility in the rest of the County.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</b>	Culture, Heritage and Welsh Language	Dependent on location of sites, has the potential to impact on the heritage of a number of settlements in the

<sup>35</sup> Welsh Government announced in September 2020 that they have a long-term ambition for around 30% of the Welsh workforce to work remotely either from home or near to home using community-based remote working hubs <https://gov.wales/aim-30-welsh-workforce-work-remotely>

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 3 against the RLDP Objectives
		South of Monmouthshire, however, would be minimal development in the historic towns of Abergavenny, Chepstow and Monmouth. However, through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change*	Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.

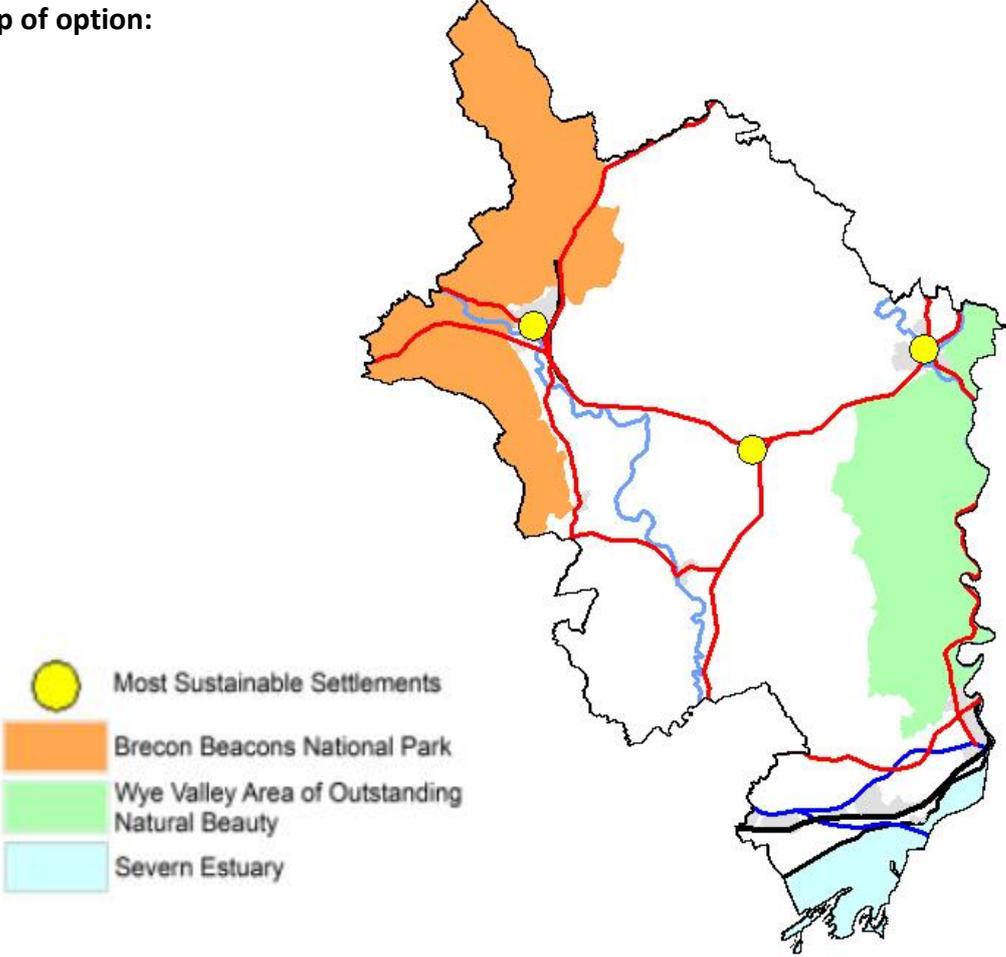
### Integrated Sustainability Appraisal (ISA) Analysis

- 3.16 The findings in the ISA note that Option 3 capitalises upon opportunities associated with the Cardiff Capital City Region Deal, the South East Wales Metro, and the continuing economic growth of the Bristol/ South West region. However, limited growth to the rest of the County would restrict economic growth in the wider County, and would not assist in sustaining Monmouthshire’s existing communities, exacerbating existing demographic issues and levels of out- commuting. Rural areas in particular will be disadvantaged as they would not benefit from additional housing to help support existing facilities or attract additional facilities. Housing will be delivered to the South of the County only, resulting in needs not being met across all market areas which could in turn have potential impact on house prices arising in this context, given the delivery of affordable homes will only be focussed in the South, and not meet needs more widely. This option, along with Option 4, performs least well in terms of equalities, diversity and social inclusion due to the likely isolation of communities and continuation of imbalanced demographic profile across Monmouthshire as a whole.
- 3.17 The appraisal found that there is little to differentiate between the options at this stage with regard to the historic environment and biodiversity themes, noting that all options have the potential to result in negative effects. However, it is recognised the mitigation could be provided and development has the potential to deliver positive

effects secured at the project scale. Given the precise location of growth is unknown at this stage all options were found to have an uncertain effect on landscape and climate change themes. This option was, however, ranked the highest for both themes given that it concentrates growth along the M4 corridor in a predominately urban area, located away from nationally designated landscapes to the east and north west of the County, and, is in an area that is not identified in the Flood Risk Management Plan as being significantly constrained in terms of fluvial flood risk. All options have the potential to result in negative effects for natural resources albeit it is recognised that mitigation could be provided and the nature and significance of effects will be dependent on the scale and location of development.

## Option 4 Focus Growth in the North of the County

Table 20 – Option 4

Option 4: Focus Growth in the North of the County
<p><b>Description of Option:</b></p> <p>Growth would be predominantly located in the most sustainable settlements within the North of the County to capitalise on its strategic links to the Heads of the Valleys and wider Cardiff Capital Region via the A465, and towards Herefordshire via the A449 and A40, along with rail links to Newport, Cardiff and the North via the Welsh Marches line. Affordable Housing would be directed to those sustainable areas in the North of the County identified in the LHMA as having the greatest housing need.</p>
<p><b>Map of option:</b></p>  <p>Legend:</p> <ul style="list-style-type: none"><li>Most Sustainable Settlements</li><li>Brecon Beacons National Park</li><li>Wye Valley Area of Outstanding Natural Beauty</li><li>Severn Estuary</li></ul>
<p><b>Advantages:</b></p> <ul style="list-style-type: none"><li>• Would provide opportunity for building sustainable communities through the provision of homes and jobs and improve levels of self-containment, and achieving infrastructure improvements/provision in the North of the County.</li><li>• Opportunity to enable investment in public transport and possibly promote a modal shift from car to more sustainable means of train and bus travel in Abergavenny.</li><li>• Would provide growth in sustainable areas in the North of the County that have existing access to facilities/services, active travel links and employment opportunities.</li></ul>

#### Option 4: Focus Growth in the North of the County

- This option would facilitate growth consistent with emerging National Planning Policy, Future Wales: the National Plan 2040, which seeks the designation of a Green Belt “around Newport and Eastern parts of the Region”.
- Potential to develop links from Abergavenny to the wider Cardiff Capital Region.

#### Disadvantages:

- Does not enable opportunities for sustainable development in all of the Primary, Secondary and Rural Settlements or the Severnside area.
- Lack of employment opportunities outside North Monmouthshire would exacerbate out-commuting in areas in the South of the County and would not assist in improving self-containment in these areas (i.e. Chepstow and Severnside).
- Would not support existing facilities or enable provision of additional facilities and infrastructure in areas outside North Monmouthshire. Settlements outside the North of the County, both urban and rural, would be disadvantaged as they would not benefit from additional growth to help support and sustain existing facilities or attract additional facilities.
- Does not assist in sustaining rural communities outside of the North of the County.
- Affordable housing provision would not be met across all housing market areas, both urban and rural, that are currently identified in the LHMA as in need as it would be limited to the North of the County only.
- Growth would be predominately located on greenfield sites, however, it is recognised that there are limited opportunities for brownfield development within the County. Similarly, there would be limited opportunities for development on lower grade agricultural land.

**Table 21 – Assessment of Option 4 against RLDP Objectives**

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19 as referred to in paragraph 3.8		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 1</b>	Economic Growth/ Employment*	While this option would provide the opportunity to link housing and employment growth in the North of the County, it would be unlikely to have a significant impact on employment growth across the County as a whole as development would be focused in the most sustainable settlements in the North of the County. The opportunity to create a thriving, well-connected, diverse economy, across the whole of the County is of particular importance in light of the current pandemic.

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
<b>Objective 2</b>	Retail centres*	Would provide opportunity to add to the customer base/footfall main towns of Abergavenny, Monmouth and Raglan but would disadvantage the footfall and customer base of Chepstow, Caldicot, Usk and Magor. Growth in the North of the County unlikely to support regeneration aspirations of Caldicot and Usk town centres. The role and function of the high street in the local community has been highlighted of particular importance in the current pandemic, this option would not provide sufficient support to existing retail facilities across the County.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</b>	Green Infrastructure, Biodiversity and Landscape*	Likely to result in further pressure on the natural environment. New developments in these locations could nevertheless improve Green Infrastructure and Ecological connectivity through opportunities to create new linkages. The value and importance of having access to locally accessible open/green spaces to assist in recreation and health and well-being has been heightened during the current pandemic.
<b>Objective 4</b>	Flood risk	While there are areas of Flood plain within the North of the County, developments can be located away from areas at risk of flooding and will incorporate SUDs in accordance with National Planning Policy and SUDs legislation.
<b>Objective 5</b>	Minerals and Waste	There would be no negative impact on minerals and waste, mineral landbank obligations can be met.
<b>Objective 6</b>	Land	Limited opportunities for development on brownfield land or lower grade agricultural land, however, some opportunities exist within the most Sustainable Settlements. Likely to be predominately greenfield development.
<b>Objective 7</b>	Natural resources	There would be no negative impact on ability to promote the efficient use of natural resources. Any developments will be encouraged to be water and energy efficient and incorporate appropriate renewable energy technologies.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</b>	Health and Well-being*	There would be no negative impact on health and well-being. Any developments will be encouraged to support

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
		healthier lifestyles and provide sufficient open space, the value and importance of having access to locally accessible open/green spaces has been emphasised in light of Covid-19.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	Market and affordable housing provision would be focussed in the North of the County, in the most sustainable Settlements. No growth is proposed in the South of the County impacting on both market and affordable housing provision, which would in turn impact on demography as the younger population would be priced out in these areas. This option could also lead to rural isolation within rural settlements, outside of North Monmouthshire. Would provide some opportunities through employment and housing provision for the younger population to live and work in Monmouthshire in the North of the County only, and would not increase opportunities across the County as a whole. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable, particularly in terms of demography. This option would not support/enable social sustainability and balanced communities across the County.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</b>	Housing*	Housing would be focused in the North of the County in the most sustainable Settlements and would not meet housing needs across all housing market areas, negatively impacting on the provision of affordable housing, particularly in areas identified in the LHMA as having the greatest need. This would in turn impact on demography as the younger population will be priced out in these areas. The current pandemic has emphasised the need to ensure the provision of a range and choice of homes (housing mix) in future housing developments, this option would not address the County's affordability issues or build sustainable and resilient communities throughout Monmouthshire.
<b>Objective 11</b>	Place-making	Any developments would need to enhance the character and identity of the Settlements in the North of the County in accordance with national sustainable place-making

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
		principles. The value and importance of place-making has been emphasised in light of Covid-19.
<b>Objective 12</b>	Communities	Developments would only be located in the North of the County with best access to employment, retail, community facilities and social infrastructure. Likely to result in a detrimental impact on settlements outside of North Monmouthshire, no development would be directed to these locations. The current pandemic has clearly demonstrated the importance of ensuring our communities are balanced and socially sustainable. This option would not support/enable social sustainability and balanced communities across the County.
<b>Objective 13</b>	Rural Communities	Housing would only be directed to the North of the County and would not address rural need in other rural areas across the County. This would in turn impact on demography as the younger population would be priced out in these other rural areas. This would also impact on the sustainability of existing rural areas as there would be no additional support to help maintain rural facilities nor would there be any rural developments to attract additional rural employment opportunities. This option could also lead to rural isolation.
<b>Objective 14</b>	Infrastructure*	Pressure on infrastructure would be limited to the North of the County in an area with good road links to the Heads of the Valleys and wider Cardiff Capital Region and rail links via the Welsh Marches line. However, appropriate infrastructure should be in place/ provided to accommodate for any new development in this area. Lack of development outside this area would not generate sufficient infrastructure improvements and gains in other areas across the County i.e. Chepstow and Severnside. Would provide additional support for facilities in the North of the County only, additional support for facilities in other areas unlikely to be achieved. The current pandemic has highlighted the importance of the provision of digital infrastructure and active travel options to support/enable increased home working and support local communities.
<b>Objective 15</b>	Accessibility	Development would be focused in the North of the County where there are existing employment opportunities, however, there is no guarantee that

RLDP Objective Number	RLDP Objective - Headline	Performance of Option 4 against the RLDP Objectives
		<p>residents will live and work in the same area. Although it should be recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term<sup>36</sup>. The increased reliance on access to local facilities and services during the current pandemic, has highlighted their importance to communities. While many of the North County settlements already have sustainable travel links in place through existing rail and bus links, any new developments will need to fully consider active travel and integrated sustainable transport opportunities. Development in Abergavenny would benefit from good links to Cardiff Capital Region via the A465. However, the focus on the North of the County will result in limited opportunities to enhance accessibility in the rest of the County.</p>
<p><b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b></p>		
<p><b>Objective 16</b></p>	<p>Culture, Heritage and Welsh Language</p>	<p>Dependent on location of sites, has the potential to impact on the heritage of a number of settlements in North Monmouthshire, however would be minimal development in the historic towns elsewhere in the County. Nevertheless through design developments can protect and enhance the built environment as well as providing benefits for the economy, tourism and well-being of communities. No impact on Welsh Language.</p>
<p><b>A Globally Responsible Wales (Well-being Goal 7)</b></p>		
<p><b>Objective 17</b></p>	<p>Climate Change*</p>	<p>Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities.</p>

**Integrated Sustainability Appraisal (ISA) Analysis**

<sup>36</sup> Welsh Government announced in September 2020 that they have a long-term ambition for around 30% of the Welsh workforce to work remotely either from home or near to home using community-based remote working hubs <https://gov.wales/aim-30-welsh-workforce-work-remotely>

- 3.18 The findings in the ISA note that Option 4 through its focus of growth in the most sustainable Settlements in the North of the County capitalises upon opportunities associated with the Cardiff Capital City Region Deal, notably the wider region via the A465, and towards Herefordshire via the A449 and A40 along with rail links to Newport, Cardiff and the North via the Welsh Marches line. However, limited growth to the rest of the County would restrict economic growth in the wider County, and would not assist in sustaining Monmouthshire's existing communities, exacerbating existing demographic issues and levels of out-commuting. Rural areas in particular will be disadvantaged as they would not benefit from additional housing to help support existing facilities or attract additional facilities. Housing will be delivered to the North of the County only, resulting in needs not being met across all market areas which could in turn have potential impact on house prices arising in this context, given the delivery of affordable homes will only be focussed in the North, and not meet needs more widely. This option along with Option 3 performs least well in terms of equalities, diversity and social inclusion due to the likely isolation of communities and continuation of imbalanced demographic profile across Monmouthshire as a whole.
- 3.19 The appraisal found that there is little to differentiate between the options at this stage with regard to the historic environment and biodiversity themes, noting that all options have the potential to result in negative effects, however it is recognised the mitigation could be provided and development has the potential to deliver positive effects secured at the project scale. Given the precise location of growth is unknown at this stage all options were found to have an uncertain effect on landscape and climate change themes. All options have the potential to result in negative effects for natural resources albeit it is recognised that mitigation could be provided and the nature and significance of effects will be dependent on the scale and location of development.

### RLDP Preferred Spatial Option

- 3.20 The Spatial Options presented provide alternative spatial strategy options for accommodating growth, having regard to the evidence base and policy aspirations. Based on the assessment set out above, Spatial Option 2 to Distribute Growth Proportionately across the County's most Sustainable Settlements<sup>37</sup> is the Council's preferred Spatial Option.
- 3.21 This option would provide proportionate growth in the most sustainable urban and rural areas, in accordance with the Sustainable Settlement Appraisal. It is considered that this spatial option provides a land use framework that will help to deliver the Council's core purpose of helping to build sustainable and resilient communities for current and future generations. Fundamentally, this option will enable the provision of a sufficient range and choice of homes, both market and affordable to be provided throughout the County's most sustainable settlements, the need for which has been heightened by the current pandemic. This option will also assist in ensuring our communities are balanced and socially sustainable, particularly in terms of demography, which is a key RLDP objective and the importance of which has been clearly demonstrated during the current pandemic. Likewise, employment growth will be directed to sustainable locations across the County, which will assist in reducing the need to travel /levels of out-commuting, and promoting self-contained communities. It is, however, recognised that in light of Covid-19 there has been an increase in agile and home working, which is likely to continue over the longer term<sup>38</sup> and further reduce commuting levels over the Plan period. Appropriately located growth will increase the customer base and workforce, supporting local facilities, businesses and services. The increased reliance on access to local facilities and services during the current pandemic has highlighted their importance to our communities. This option would best meet the needs of and support both the urban and rural communities of Monmouthshire.
- 3.22 In addition to this, the ISA analysis ranks Spatial Option 2, along with Spatial Option 1, as performing the best overall. The findings in the ISA note that while there are some small differences between Options 1 and 2 in terms of how growth is distributed during the Plan period, these differences are not significant enough to warrant one option being ranked higher or lower than the other against the ISA themes. Accordingly, Spatial Option 2 performs positively overall, and is found to have the potential for significant long term positive effects against the ISA themes relating to economy/employment, population/communities, health/wellbeing, and equalities compared to the other options. The ISA notes that this option will likely positively address existing demographic issues, encouraging younger people to reside and work

---

<sup>37</sup> A Sustainable Settlement Appraisal will be published to inform the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.

<sup>38</sup> Welsh Government announced in September 2020 that they have a long-term ambition for around 30% of the Welsh workforce to work remotely either from home or near to home using community-based remote working hubs <https://gov.wales/aim-30-welsh-workforce-work-remotely>

in the County. This option would perform positively in terms of providing housing to meet the identified needs of the County and would provide affordable housing throughout the settlement hierarchy, ensuring a range and choice of homes are delivered, particularly where there is a need for affordable housing, to assist in regaining a balanced population.

- 3.23 Overall, this option is considered to be the most conducive to achieving the RLDP vision and the Council's core purpose of building sustainable and resilient communities across Monmouthshire.

#### **Consultation Questions**

- **Spatial Option 2 (Distribute Growth Proportionately across the County's most Sustainable Settlements) is our preferred option. On the basis on the evidence above, do you agree with our preferred spatial option? Please explain why and provide your reasons.**
- **If you have a preference for a different option, please state your preferred option and provide details of how this option addresses the issues/challenges facing Monmouthshire and meets the RLDP objectives?**

## 4 Next Steps

- 4.1 Feedback from the non-statutory consultation on the Growth and Spatial Options Paper will be considered and, where appropriate, will inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The RLDP Preferred Strategy will be the subject of engagement/consultation in May-June 2021.

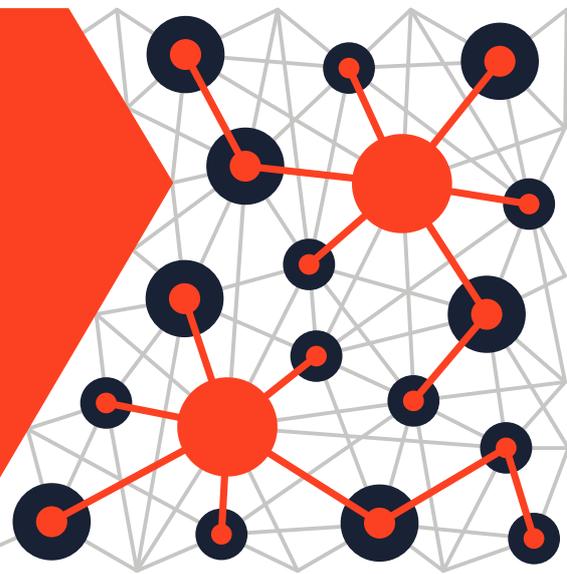
## **GLOSSARY**

- MR** Household membership rates are used to calculate the proportion of the household population in each household category by age group and sex i.e. 1 person households, 2 person households, etc. The household population is converted into households using average household size assumptions taken from the Welsh Government Household model. MR indicates that an assumption has been applied to the scenario which returns the household membership rates for young adult age groups (19-24, 25-29, 30-34) to their 2001 rates.
- CR\_R** Commuting ratio is reducing – the commuting ratio is the balance between the level of employment and the number of resident workers. A commuting ratio greater than 1.00 indicates that the size of the resident workforce exceeds the level of employment available in an area. The commuting ratio for Monmouthshire at the time of the 2011 Census was 1.12. CR\_R indicates that an assumption has been applied to the scenario which reduces the commuting ratio from its 2011 Census value to 1.10 by the end of the Plan period.
- AH** Affordable Housing - in addition to the initial modelling selected options have been the subject of additional testing to establish the impact on demography, dwellings, household formation and employment of an affordable-housing policy-led strategy. As a starting point, the additional testing models the impact of meeting 10% of the need identified in the Local Housing Market Assessment on affordable housing-led sites where at least 50% of the homes are affordable.
- PG** POPGROUP – forecasts have been developed using the POPGROUP suite of products. These enable forecasts to be derived for population, households and the labour force.

# Monmouthshire

Updating the RLDP Demographic Evidence

November 2020



---

## Acknowledgements

Demographic statistics used in this report have been derived from data from the Office for National Statistics licensed under the Open Government Licence v.3.0.

*The authors of this report do not accept liability for any costs or consequential loss involved following the use of the data and analysis referred to here; this is entirely the responsibility of the users of the information presented in this report.*

# Contents

Acknowledgements.....	i
Contents.....	ii
1 Introduction.....	1
2 Area Profile .....	2
3 Demographic Scenarios .....	10
4 Employment-led Scenarios .....	18
5 Summary.....	21
Appendix A Scenario Summary .....	23
Appendix B Age Profiles .....	24
Appendix C Outside Brecon Beacon NP .....	25
Appendix D POPGROUP Methodology .....	26
Appendix E Data Inputs & Assumptions.....	28

# 1 Introduction

## Context

- 1.1 Monmouthshire County Council has commenced preparation of its Replacement Local Development Plan (RLDP), covering the plan period 2018–2033. The RLDP is to be informed by the latest demographic statistics and forecasts, updating the previous evidence provided to the Council in 2019.
- 1.2 In August 2020, the Welsh Government (WG) published its 2018-based population and household projections, a first update since the 2014-based equivalents.
- 1.3 These new WG projections provide the *baseline* for the RLDP demographic evidence, to be considered alongside a range of growth scenarios. The Council is seeking to update the suite of trend, dwelling-led and employment-led scenarios configured in June 2019, incorporating the latest WG evidence. The Council has also outlined the requirement for additional scenarios, using alternative assumptions on fertility, mortality and migration. These additional scenarios incorporate a 2019 mid-year estimate, published by ONS in June 2020.
- 1.4 The Council is seeking to draw conclusions from the updated growth options, taking the evidence forward in a process of consultation for the RLDP.

## Approach

- 1.5 Edge Analytics is a specialist in Data Science, with a particular expertise in demographic modelling and forecasting and has worked with the majority of local planning authorities across Wales in the development and presentation of evidence to support LDP formulation.
- 1.6 Edge Analytics has used POPGROUP technology to configure an updated range of growth scenarios for Monmouthshire, incorporating demographic statistics from both ONS and WG, to produce forecasts for a 2018–2033 plan period.
- 1.7 Section 2 updates the Monmouthshire Area Profile with the latest demographic statistics. Section 3 presents the demographic growth scenarios, with the employment-led options detailed in Section 4. A summary of the evidence is provided in Section 5. The Appendices provide supplementary detail on the scenario outputs, alongside the methodology, data and assumptions used in the formulation of the analysis.

# 2 Area Profile

## Geography

2.1 Located in the South East Wales region, Monmouthshire borders Powys to the North, and Newport, Torfaen, and Blaenau Gwent to the West (Figure 1). Monmouthshire also borders England, with Herefordshire and Gloucestershire to the East, and Bristol and the surrounding authorities available via the Severn crossings. The Brecon Beacons National Park intersects the North West of the Unitary Authority (UA).

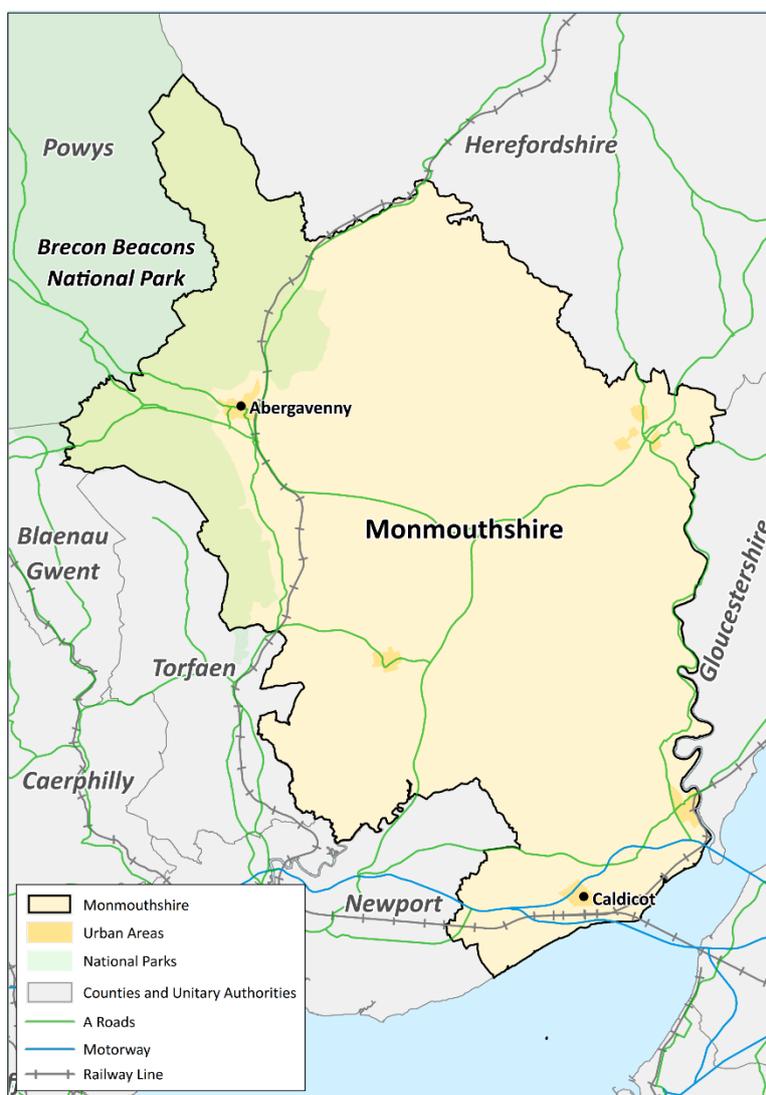


Figure 1: Monmouthshire UA – Geographical Context

## Population Change

2.2 As of mid-year 2019, Monmouthshire’s population was estimated to be approximately 94,000; an increase of 9,606 (11.3%) since 2001 (Figure 2).

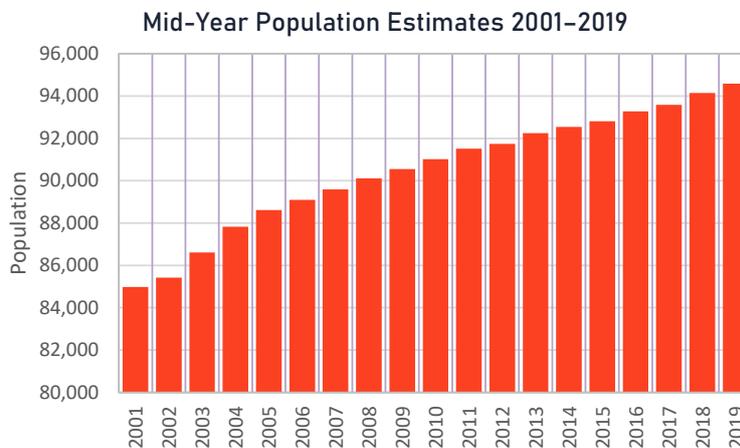


Figure 2: Mid-Year Population Estimates, 2001-2019 (Source: ONS)

2.3 Across Wales, population growth since 2001 has ranged from -3.6%–18.3%, with just two unitary authorities experiencing population decline (Figure 3). Monmouthshire’s growth rate has been exceeded only by Cardiff (18.3%), Bridgend (14.2%), Newport (12.4%) and The Vale of Glamorgan (12.0%). Ceredigion and Blaenau Gwent have experienced population decline since 2011, at -3.6% and -0.2%, respectively.

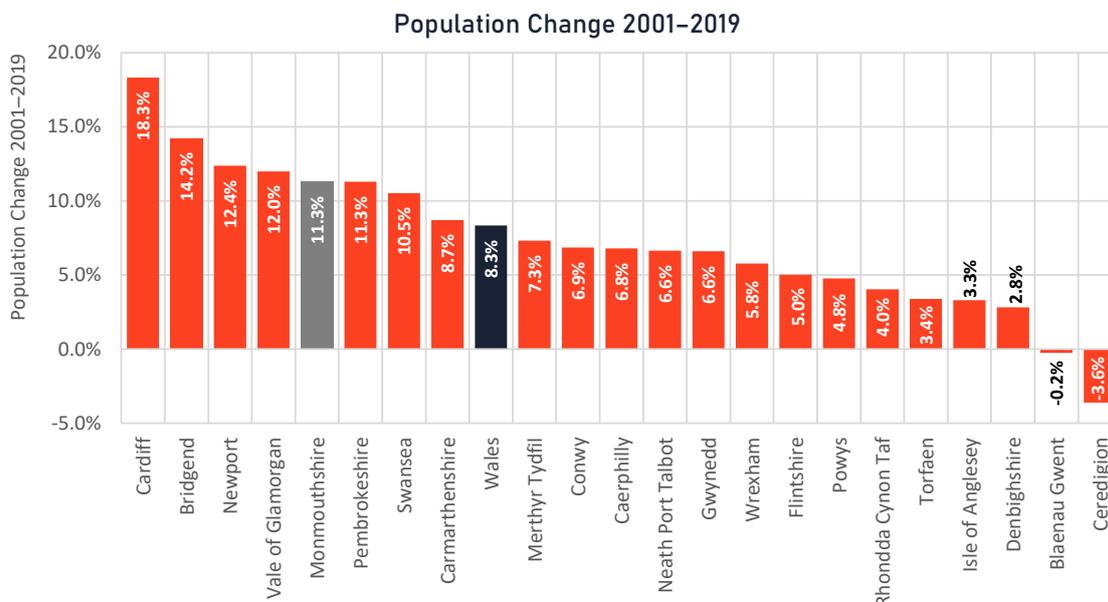


Figure 3: Population Growth Comparison – Wales, 2001-2019 (Source: ONS)

2.4 Monmouthshire’s population has increased year-on-year since 2001/02, with the highest annual population growth recorded in 2002–04 (Figure 4). Since 2005/06, annual population growth in Monmouthshire has fluctuated around +400 per year.

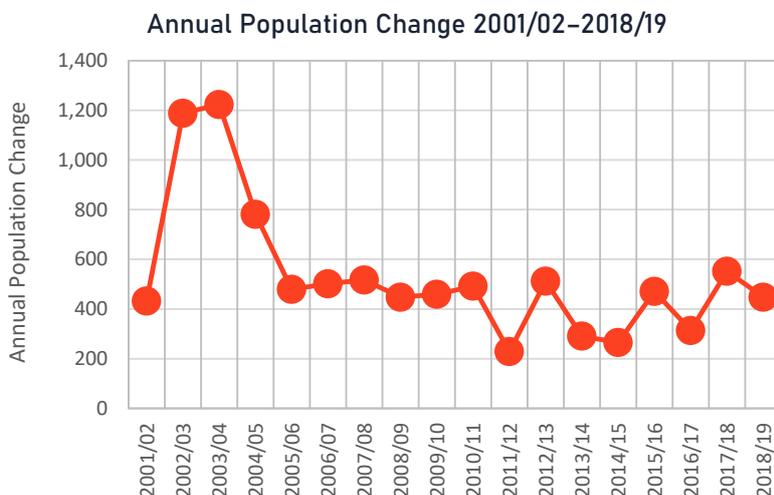
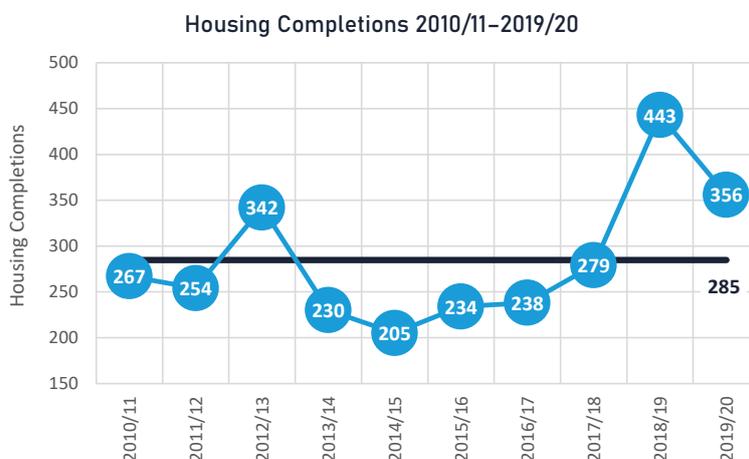


Figure 4: Population Change, 2001/02–2018/19 (Source: ONS)

2.5 Since 2010/11, Monmouthshire’s annual housing completions have averaged 285 dwellings per annum (dpa), with an uplift in the last two years (Figure 5).



(Source: Monmouthshire Joint Housing Land Availability Report, 2019 & Monmouthshire County Council)

Figure 5: Housing Completions, 2010/11–2019/20

2.6 An index of population growth for each of four broad age-groups (0–15, 16–64, 65+, 80+), reveals the important demographic changes that are taking place within Monmouthshire, ageing its population over time (Figure 6).

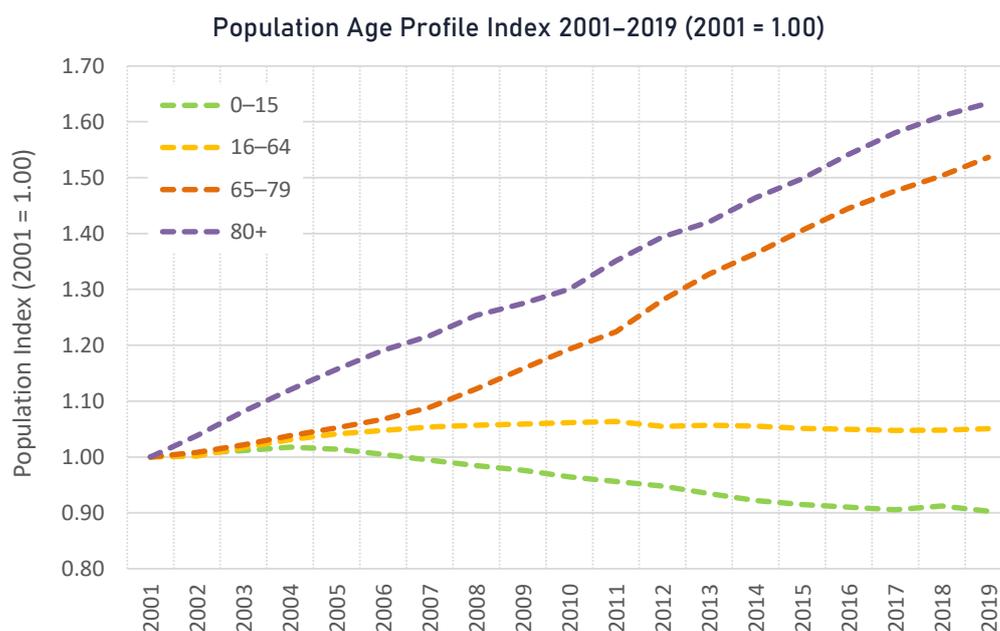


Figure 6: Population Age Profile Index, 2001-2019

2.7 Since 2001, the 65–79 and 80+ age-groups have increased in size by 54% and 63% respectively. In contrast, the 0–15 age-group is 10% smaller than its 2001 total. The size of the 16–64 age-group, the student and labour force age-group, has remained relatively stable since 2006, approximately 5–6% higher than in 2001.

## Births, Deaths & Migration

2.8 Examination of the ‘components’ of population change for Monmouthshire, reveals the factors that are estimated to have driven the change in population since 2001, including an upward adjustment (unattributable population change) to its population following the 2011 Census (Figure 7).

2.9 Natural change (the difference between births and deaths) has generally had a negative impact upon population change, with growth in the net loss since 2011. A net inflow from internal migration has been the main contributor to Monmouthshire’s population growth since 2001/02, falling to its lowest net inflow in 2008/09, increasing thereafter. Net international migration impacts have been smaller but with a net inflow estimated in all years since 2012.

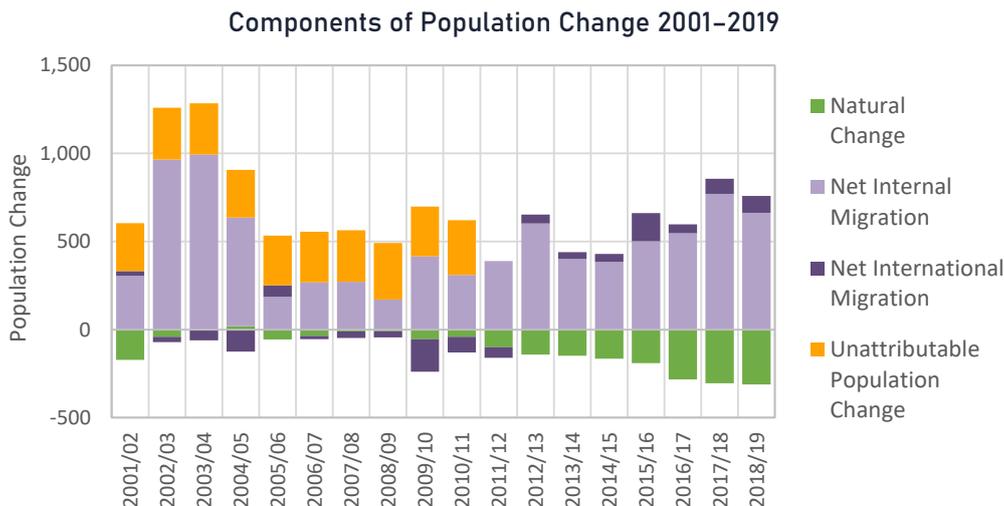


Figure 7: Components of Population Change, 2001/02-2017/18 (Source: ONS)

2.10 A closer examination of birth and death trends reveals that the number of deaths has exceeded births in all years except 2004/05 (Figure 8). A peak in birth numbers in 2003/04 to 2008/09 has been followed by a steady decline, with the 2018/19 birth total being the lowest recorded over the 2001–2019 period. With correspondingly higher death totals, the population decline resulting from natural change has increased since 2015/16.

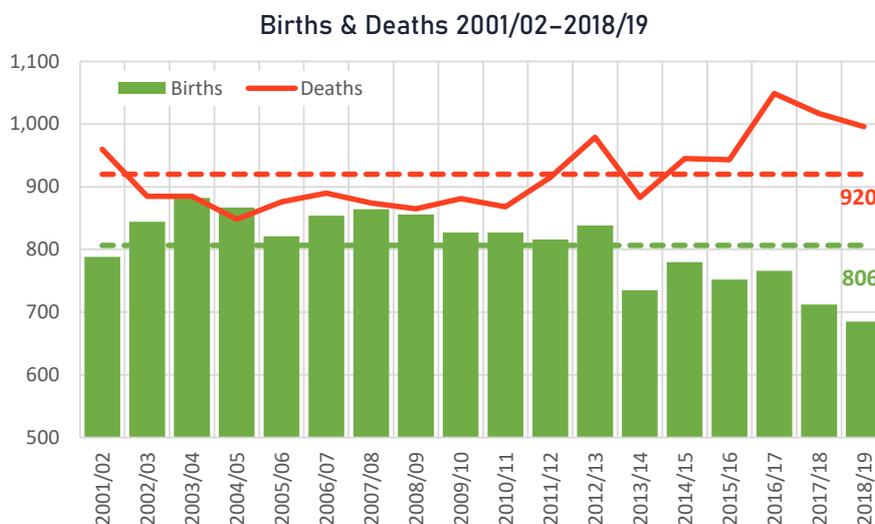


Figure 8: Births & Deaths, 2001/02-2017/18 (Source: ONS)

2.11 A more detailed scrutiny of Monmouthshire’s internal migration statistics reveals the annual fluctuations in both inflows and outflows. The inflow of internal migrants was at its lowest in 2008/09 at +3,796, rising steadily thereafter to its peak of +5,097 in 2018/19. The Higher Education Leavers Methodology (HELM)<sup>1</sup>, designed to better reflect the speed and pattern of movement of students

<sup>1</sup> Population estimates for the UK, mid-2019 methods guide, July 2020

following graduation, may have contributed to the relatively high net migration total experienced since 2016/17 (Figure 9).

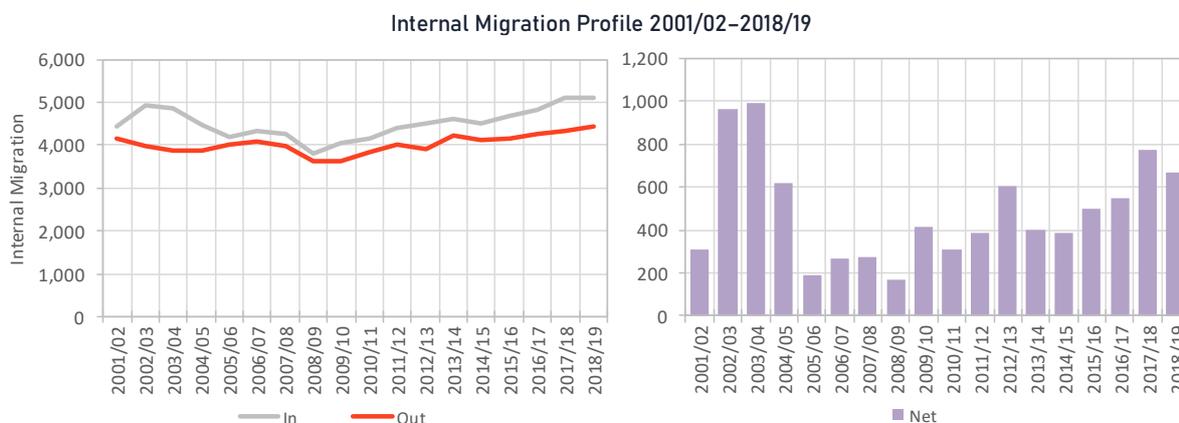


Figure 9: Internal Migration Profile, 2001/02 – 2018/19 (Source: ONS)

2.12 The importance of the student outflow to higher education is emphasised in Monmouthshire’s age-profile of internal migration. This indicates a large net outflow in the 15-19 student age-group. All other age-groups record a net inflow through internal migration, confirming Monmouthshire’s attractiveness as a destination for migrants across all family, labour-force and older ages (Figure 10).

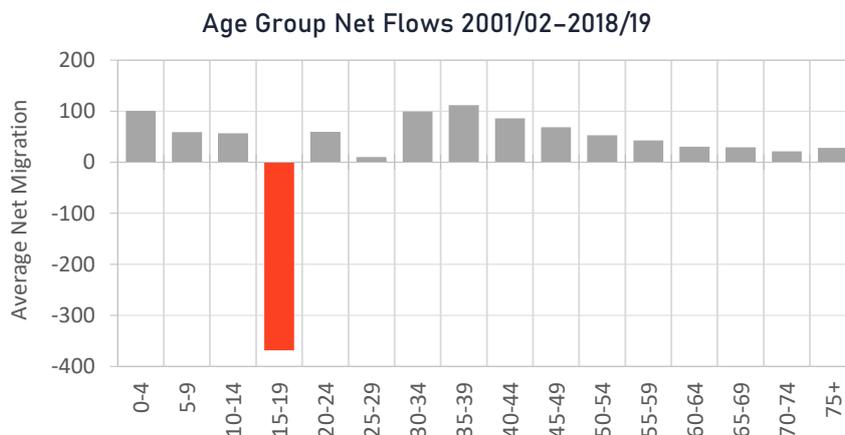


Figure 10: Internal Migration Age Profile, 2001/02–2018/19 (Source: ONS)

2.13 The recent rise in Monmouthshire’s net migration inflow may be influenced to some degree by the ‘return’ of students aged 20–24, but in the last two years the net inflow increase has been experienced across the majority of age-groups, with the exception of 15–19 year-olds (Figure 11). This suggests an in-migration of young people and families to Monmouthshire, in line with the increased level of housing provision.

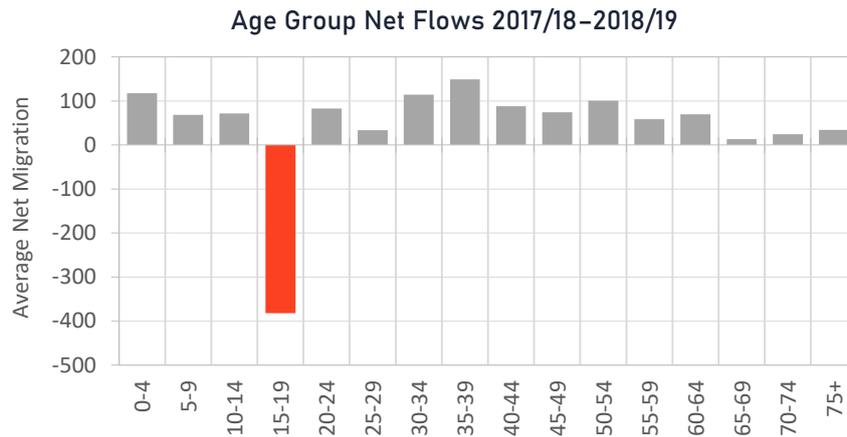


Figure 11: Internal Migration Age Profile, 2017/18–2018/19 (Source: ONS)

2.14 Geographically, Monmouthshire’s most significant net migration inflow exchange (2001–2019) has been from South Gloucestershire and Bristol with an average net inflow of +89 pa and +62 pa respectively. In contrast, its net migration outflow exchange has been greatest with Swansea and Carmarthenshire (Figure 12).

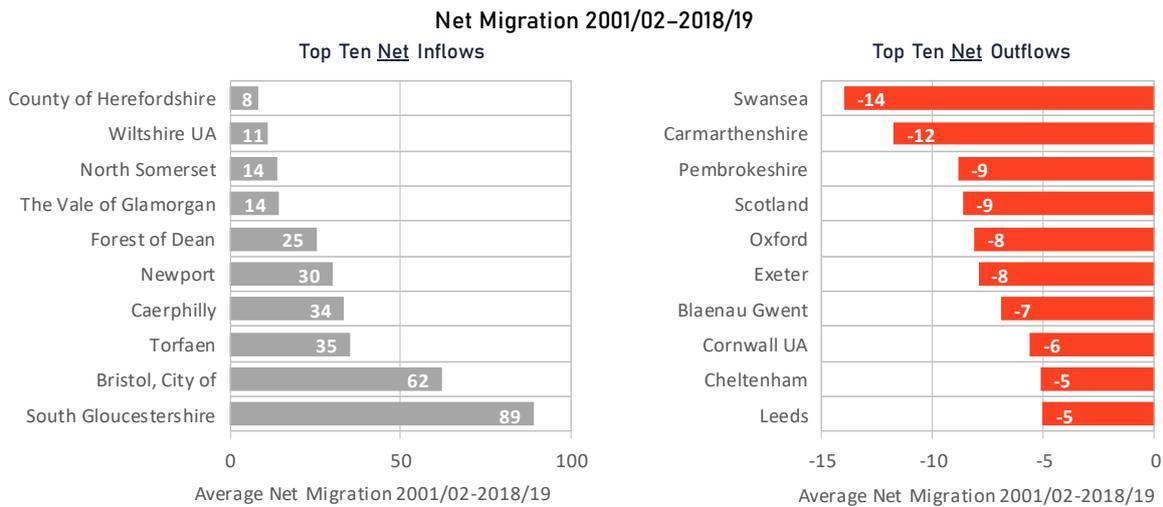


Figure 12: Top Ten Net Migration Inflows and Outflows, 2001/02–2018/19 (Source: ONS)

2.15 In the last two years of migration evidence, in-migration from South Gloucestershire and Bristol has risen substantially, with additional flows from the Forest of Dean and Caerphilly (Figure 13).

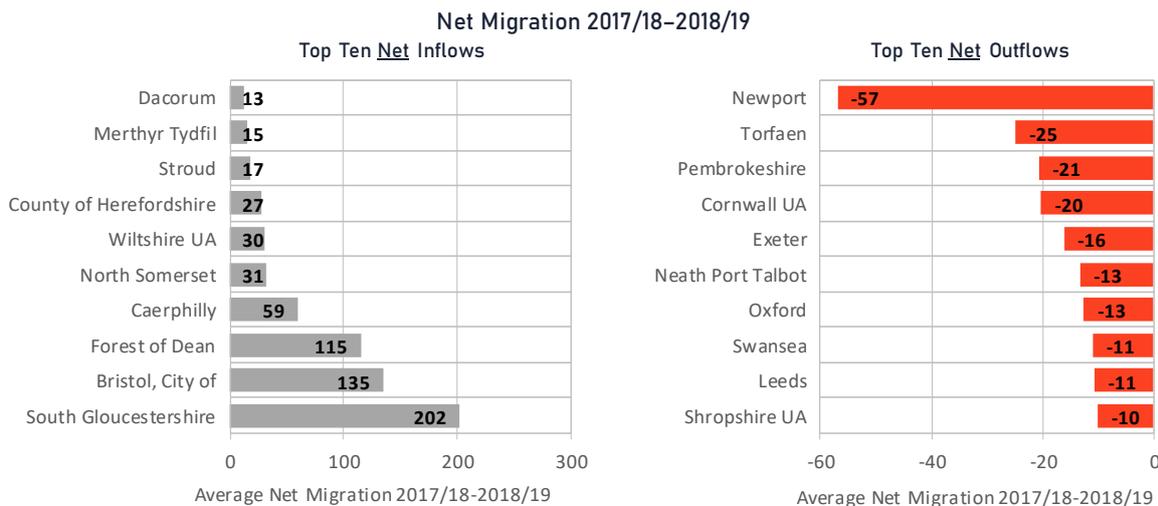


Figure 13: Top Ten Net Migration Inflows and Outflows, 2017/18-2018/19 (Source: ONS)

2.16 International migration continues to be the most difficult component to estimate robustly; so much so that ONS has downgraded its output to ‘experimental statistics’ status, whilst improvements continue<sup>2</sup>. The International Passenger Survey (IPS) is the mainstay of the UK’s immigration and emigration estimates but this is due to be dropped in autumn 2020, in favour of a mix of administrative datasets, including the patient register, higher education statistics and national insurance number (NINO) registrations.

2.17 International migration has had a more limited impact on Monmouthshire’s population change but its contribution has been positive in the majority of years since 2011, peaking at +160 in 2015/16 (Figure 7). NINO statistics provide a complementary illustration of international migration inflow to Monmouthshire; different to ONS mid-year population estimate statistics in that they refer only to work-based in-migration and include migrants whose stay may be shorter than 12 months (Figure 14).

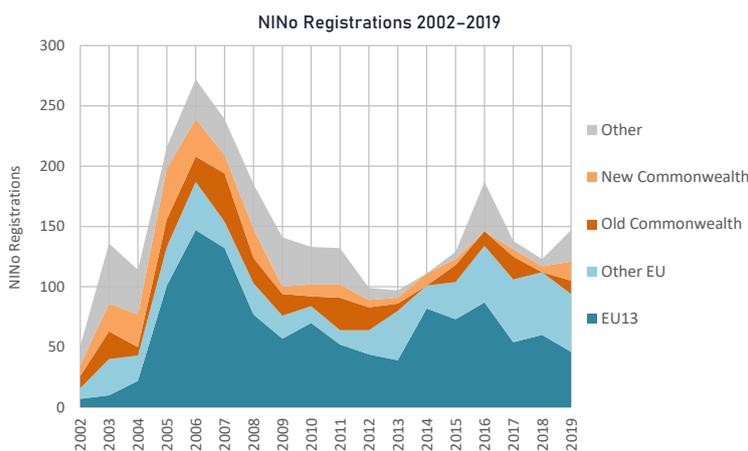


Figure 14: NINO registrations by country of origin, 2002-2019 (Source: DWP)

2.18 Total NINO registrations have fluctuated between 100-150 per year since the peak in 2007, with the large majority of migrants having a country of origin from within the European Union (EU).

<sup>2</sup> [Statement from the ONS on the reclassification of international migration statistics, August 2019](#)

# 3 Demographic Scenarios

## Scenario Definition

- 3.1 POPGROUP technology (see Appendix C) has been used to configure a suite of growth scenarios for Monmouthshire. Additional detail on all scenario data inputs and assumptions is provided in Appendix E of this document.
- 3.2 The **WG** scenarios include the full suite of variants that make up the 2018-based WG projections.
- 3.3 POPGROUP (**PG**) trend scenarios consider growth outcomes based on a continuation of long-term migration histories (**PG Long Term**), incorporating a **2019** base year. Alternative **PG Long Term** scenarios are presented, evaluating the potential effects of higher net in-migration associated with the relaxation of Severn Bridge tolls (**PG Long Term Adj**).
- 3.4 The **Dwelling-led** scenarios consider how a continuation of a 5-year, 10-year, and 15-year history of housing completion rates would impact upon future population growth, with a **2019** base year.
- 3.5 An extended range of **Employment-led** scenarios have also been configured for Monmouthshire. These scenarios are presented separately in Section 4.
- 3.6 Under each scenario, population, household, migration, dwelling and employment growth is presented over a 2018–2033 plan period, in line with Monmouthshire’s RLDP period.
- 3.7 For all scenarios, household and dwelling growth is estimated using assumptions from the WG 2018-based household projection model. An additional household membership rate return (**MR**) has been applied to all demographic scenarios, which considers the impact of higher household formation in the young adult age-groups. The household membership rates for the young adult age-groups (19–24, 25–29, 30–34) have been ‘returned’ to their respective 2001 level over the 2018–2033 plan period.
- 3.8 In modelling the relationship between households and dwellings, a Monmouthshire vacancy rate of 4.5% has been applied, derived from 2011 Census statistics.
- 3.9 All scenario outcomes are summarised in Appendix A. For population, household, net migration and dwelling growth outcomes for Monmouthshire *excluding* the Brecon Beacon National Park, please refer to Appendix C.

Table 1: Scenario Definition

1.	WG-2018 (Principal)	Replicates the WG 2018-based <i>Principal</i> population projection, using historical population evidence for 2001-2018.
2.	WG-2018 (High)	Replicates the WG 2018-based <i>High</i> population projection, using historical population evidence for 2001-2018.
3.	WG-2018 (Low)	Replicates the WG 2018-based <i>Low</i> population projection, using historical population evidence for 2001-2018.
4.	PG Long Term	Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Migration assumptions are derived from an 18-year historical period (2001/02–2018/19).
5.	PG Long Term Adj (5yr)	Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge toll. All other migration flows are consistent with the <b>PG Long Term</b> scenario.
6.	PG Long Term Adj (2yr)	Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 2-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge toll. All other migration flows are consistent with the <b>PG Long Term</b> scenario.
7.	Net Nil	Uses an ONS 2019 MYE, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration.
8.	Dwelling-led (5yr)	Models the population impact of an average dwelling growth of +310 dpa, based on a 5-year history of housing completions. The dwelling growth is applied from 2020/21 onwards, fixed throughout the plan period.
9.	Dwelling-led (10yr)	Models the population impact of an average dwelling growth of +285 dpa, based on a 10-year history of housing completions. The dwelling growth is applied from 2020/21 onwards, fixed throughout the plan period.
10.	Dwelling-led (15yr)	Models the population impact of an average dwelling growth of +269 dpa, based on a 15-year history of housing completions. The dwelling growth is applied from 2020/21 onwards, fixed throughout the plan period.

## Scenario Summary

- 3.10 The 2001–2033 population growth trajectories for all demographic scenarios are presented in Figure 16. In Table 2 each of the demographic scenarios is summarised in terms of population and household growth for the 2018–2033 RLDP period, alongside the average annual net migration and dwelling growth outcomes.
- 3.11 Population change for the 2018–2033 period ranges from -6.6% under the **Net Nil** scenario to 13.0% under the **PG Long Term Adj (2yr)** scenario. Over the plan period, this range of population growth equates to an estimated dwelling growth requirement of -109 to +388 dpa.
- 3.12 The **WG-2018 (Principal)** scenario results in a higher growth outcome (4.9%) compared to the previous WG 2014-based projection (0.8%), despite the introduction of dampened assumptions on fertility and mortality in the latest WG projections. Monmouthshire’s recent history of higher net in-migration to the UA is the key drive of the higher growth outcome (Figure 15).

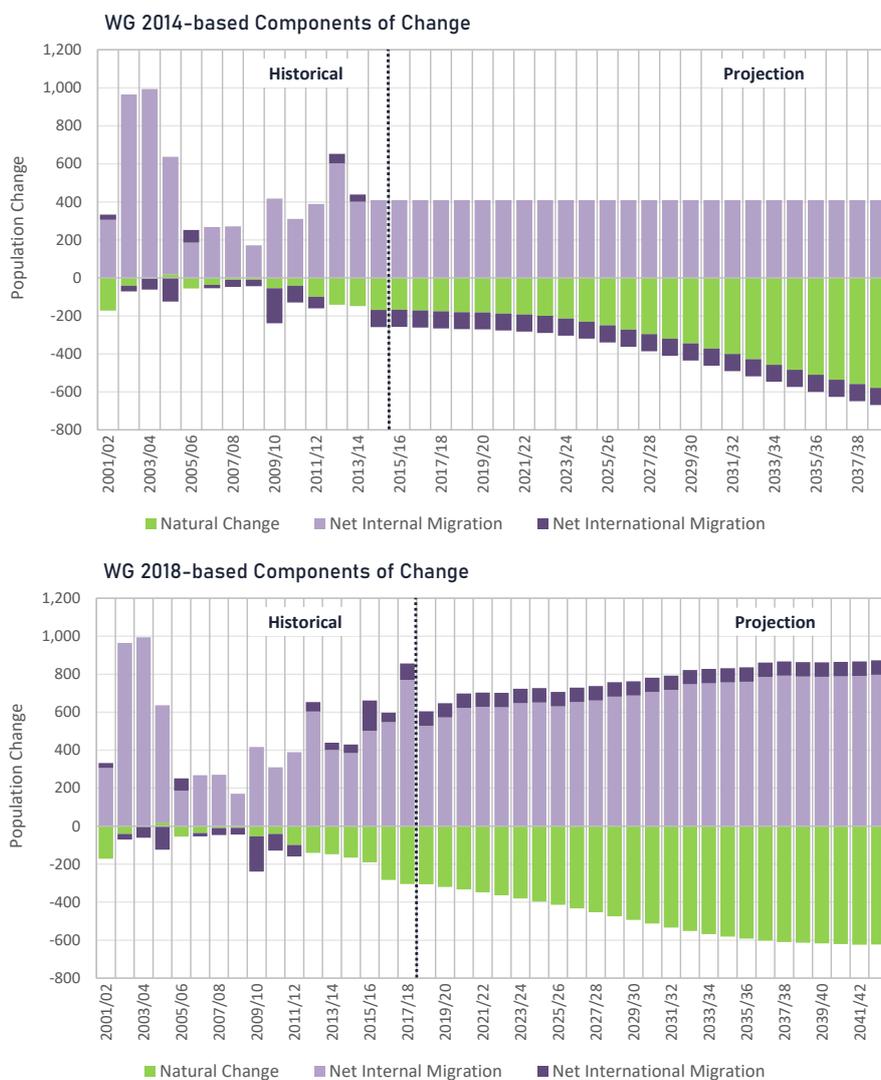


Figure 15: WG Principal Projections - Components of Population Change, 2001/02–2042/43 (Source: WG)

- 3.13 The **WG-2018 (High)** and **WG-2018 (Low)** scenarios provide alternative outcomes to the *Principal* projection, incorporating *High* and *Low* fertility, mortality and migration assumptions for Monmouthshire. The **WG-2018 (High)** and **WG-2018 (Low)** scenarios estimate population growth of 6.7% and 2.4% respectively, with an accompanying dwelling requirement of +236 and +136 dpa.
- 3.14 The **PG Long Term** scenario, drawing its migration assumptions from a 2001–2019 history, projects population growth of 6.3% and a dwelling requirement of +223 dpa. With the adjustment of internal in-migration rates to reflect higher in-migration from Bristol and South Gloucestershire (based on a 5-year or 2-year history), the **PG Long Term Adj (5yr)** and **PG Long Term Adj (2yr)** scenarios estimate higher population growth of 11.9% and 13.0% respectively and a dwelling requirement of +361 dpa and +388 dpa.
- 3.15 The **Net Nil** scenario, which assumes *balanced* net migration over the plan period, estimates population decline of -6.6% over the plan period. As a result, this scenario estimates a surplus in current dwelling stock.
- 3.16 The **Dwelling-led** scenarios (**Dwelling-led (5yr)**, **Dwelling-led (10yr)**, and **Dwelling-led (15yr)**), which continue the average rate of historical completions, estimate population growth of 9.8%, 8.9% and 8.4% respectively, with average net migration of +1,018, +969 and +937.

## Monmouthshire Growth Outcomes 2018–2033 Demographic Scenarios

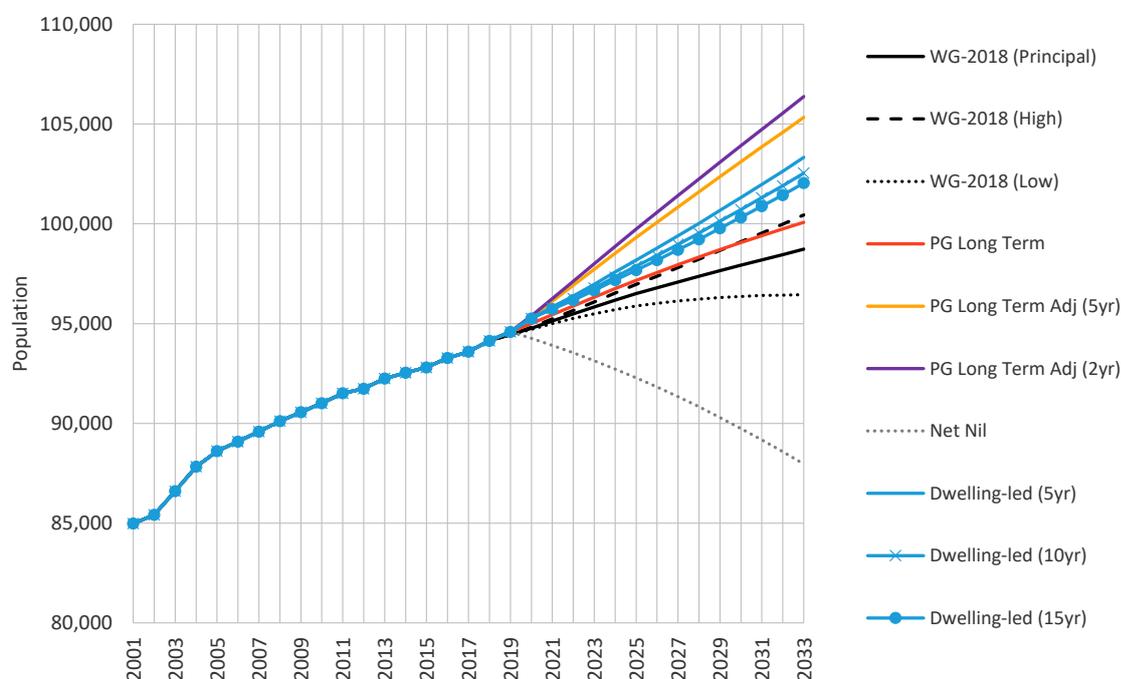


Figure 16: Monmouthshire Population Growth Scenarios, 2001-2033

Table 2: Population, Household, Migration, and Dwelling growth under each scenario, 2018–2033

Scenario	Change 2018–2033				Average per year	
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings
PG Long Term Adj (2yr)	12,236	13.0%	5,556	13.8%	1,188	388
PG Long Term Adj (5yr)	11,194	11.9%	5,164	12.9%	1,126	361
Dwelling-led (5yr)	9,190	9.8%	4,481	11.2%	1,018	322
Dwelling-led (10yr)	8,404	8.9%	4,170	10.4%	969	300
Dwelling-led (15yr)	7,901	8.4%	3,972	9.9%	937	286
WG-2018 (High)	6,309	6.7%	3,381	8.4%	774	236
PG Long Term	5,935	6.3%	3,199	8.0%	811	223
WG-2018 (Principal)	4,584	4.9%	2,732	6.8%	726	191
WG-2018 (Low)	2,306	2.4%	1,941	4.8%	677	136
Net Nil	-6,182	-6.6%	-1,555	-3.9%	51	-109

Note: Scenario outcomes include the 2018/19 mid-year population estimate. The **Net Nil** scenario applies ‘balanced’ migration assumptions from 2019/20 onward. The **Dwelling-led** scenarios include two years of dwelling completions data (2018/19, 2019/20).

## Membership Rate Sensitivity

- 3.17 Although the latest evidence continues to suggest that the level of household formation has fallen from historical levels, many LDPs are responding to national policy initiatives aimed at reversing this trend. It is likely that it is the younger age-groups that have seen the most significant change in household formation, due to a combination of housing undersupply and affordability issues, which in some areas may have led to ‘supressed’ rates of household formation.
- 3.18 An alternative set of household membership rates (**MR**) have been generated for Monmouthshire, in which the WG 2018-based rates for the young adult age-groups (19–24, 25–29, 30–34) have been adjusted to ‘return’ to their 2001 values between 2018–2033. This sensitivity analysis estimates how a return to higher household formation rates could manifest itself in higher dwelling growth outcomes for each scenario (Table 3).
- 3.19 For the **Dwelling-led** scenarios, the application of WG 2018-based ‘return’ household membership rates (**MR**) results in lower population growth outcomes over the plan period.

Table 3: Population & Dwelling Growth under alternative Household Membership Rates, 2018–2033

Scenario	Change 2018–2033		Average Annual Dwelling Growth	
	Population Change	Population Change %	2018-based	MR
Dwelling-led (5yr)	9,190	9.8%	322	
Dwelling-led (10yr)	8,404	8.9%	300	
Dwelling-led (15yr)	7,901	8.4%	286	
Dwelling-led (5yr) ( <b>MR</b> )	7,445	7.9%		322
Dwelling-led (10yr) ( <b>MR</b> )	6,688	7.1%		300
Dwelling-led (15yr) ( <b>MR</b> )	6,203	6.6%		286
PG Long Term Adj (2yr)	12,236	13.0%	388	441
PG Long Term Adj (5yr)	11,194	11.9%	361	413
WG-2018 (High)	6,309	6.7%	236	288
PG Long Term	5,935	6.3%	223	274
WG-2018 (Principal)	4,584	4.9%	191	242
WG-2018 (Low)	2,306	2.4%	136	186
Net Nil	-6,182	-6.6%	-109	-70

## Age Profiles

- 3.21 The changing age profile associated with Monmouthshire’s future population growth is an important consideration in planning for housing and in the development of the resident labour force. The updated suite of demographic projections has incorporated both revised fertility and mortality assumptions from the WG 2018-based projections and updated mid-year population estimates. These factors have had an effect upon the resulting age-structure associated with Monmouthshire’s projected population growth to 2033.
- 3.22 To illustrate, the lower growth **WG-2018 (Principal)** scenario is compared to the higher growth **PG Long Term Adj (2yr)** scenario (Figure 17). The changing age profile under each scenario is presented in Appendix B.

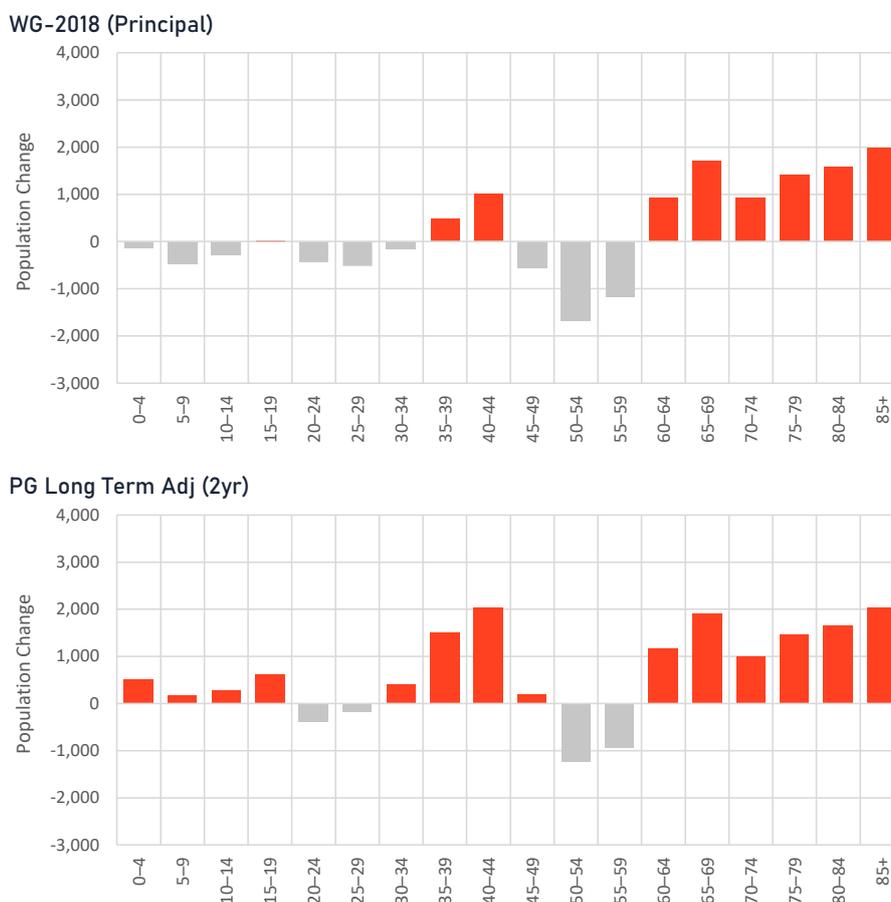


Figure 17: Population Change by Age-Group, 2018–2033

- 3.23 Under both scenarios, the 60+ age-groups reveal a similar growth profile, a reflection of the fact that this level of change is immutable, whichever scenario is being considered. The **PG Long Term Adj (2yr)** scenario estimates higher levels of growth (or smaller decline) in each of the school-age and younger adult age-groups, particularly 30–44 year-olds. The higher growth in these age-groups is particularly important when considering the link between Monmouthshire’s population change and the size and profile of the resident labour force.

## Linking Population and Employment

- 3.24 The estimated impact of each demographic scenario upon employment growth in Monmouthshire, is presented for the plan period 2018–2033. In each scenario, average annual employment growth has been estimated using 2011 Census economic activity rates adjusted in line with the latest Office for Budget Responsibility’s (OBR) analysis of labour market trends in its 2018 Fiscal Sustainability Report<sup>3</sup>. A fixed 2011 Census commuting ratio has been applied (**CR\_F**), plus a 2019 unemployment rate, also fixed throughout the plan period.
- 3.25 A commuting ratio sensitivity has also been applied to all scenarios (**CR\_R**), evaluating the employment growth impact of a reduction in the net-out commute. Under this sensitivity, the commuting ratio reduces from its 2011 Census value (1.12) to 1.10 by the end of the plan period.
- 3.26 Over the 2018–2033 plan period, application of a fixed commuting ratio (**CR\_F**) to each scenario results in a range of employment growth outcomes that varies from a decline of -203 per year under the **Net Nil** scenario to average annual employment growth of +417 per year under the **PG Long Term Adj (2yr)** scenario (Figure 18). A reduction in the net-out commute over the plan period (**CR\_R**), results in an uplift to the average annual employment change estimated under each scenario.

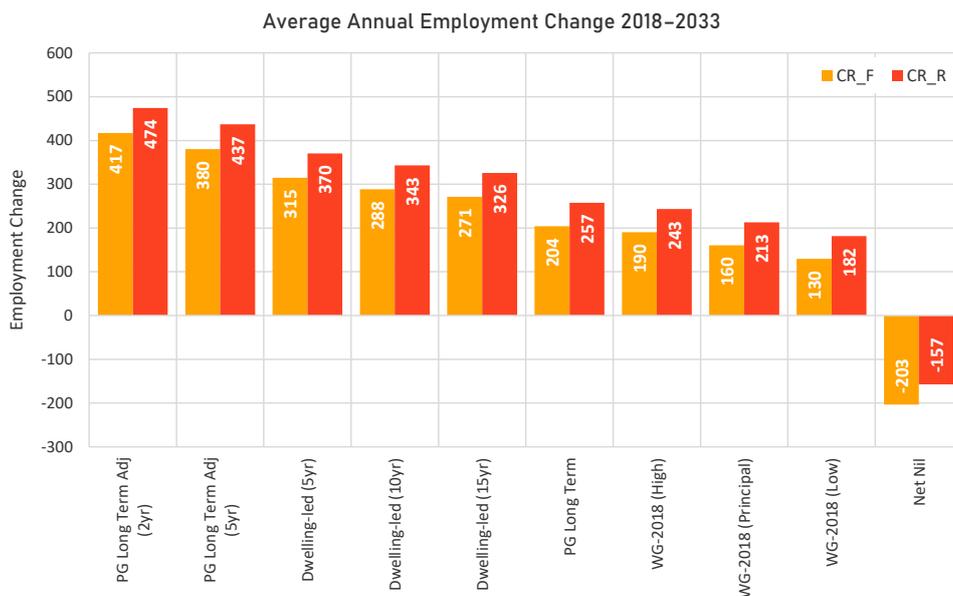


Figure 18: Average Annual Employment Change, 2018–2033

- 3.27 The age-structure differences between the lower and higher growth scenarios result in a more positive impact upon labour force projections, with higher growth evident in the younger adult age-groups over the RLDP plan period.
- 3.28 The following section presents a range of **Employment-led** scenarios, for comparison to the demographic scenarios and their population, dwelling and employment outcomes.

<sup>3</sup> [OBR, Fiscal sustainability report – July 2018](#)

# 4 Employment-led Scenarios

## Scenario Definition

- 4.1 The previous demographic analysis informing Monmouthshire’s RLDP formulation (June 2019) considered employment growth forecasts published by BE Group, Hatch and perConsulting as part of the ‘Economies of the Future’ report<sup>4</sup>.
- 4.2 The analysis considered the potential impact of alternative employment growth scenarios: a ‘Baseline’ scenario underpinned by an Oxford Economics 2018 forecast; plus, accelerated growth scenarios referred to as ‘UK Growth Rate’ and ‘Radical Structural Change’.
- 4.3 Whilst the employment growth forecasts have not been updated since the 2018 analysis, the ‘Baseline’, ‘UK Growth Rate’ and ‘Radical Structural Change’ employment growth forecasts have been used here to configure a range of updated **Employment-led** scenarios for Monmouthshire.
- 4.4 The updated **Employment-led** scenarios use a 2019 base year and incorporate the latest fertility and mortality assumptions from the WG 2018-based ‘Principal’ projection. The scenarios model the population, household and dwelling growth outcomes of the employment growth forecasts, and consider a reduced commuting ratio (Table 4).
- 4.5 Under each **Employment-led** scenario, population, household, migration, dwelling and employment growth is presented over a 2018–2033 plan period, in line with Monmouthshire’s RLDP period.
- 4.6 For all scenarios, household and dwelling growth is estimated using assumptions from the WG 2018-based household projection model. In modelling the relationship between households and dwellings, a Monmouthshire vacancy rate of 4.5% has been applied, derived from 2011 Census statistics.
- 4.7 All scenario outcomes are summarised in Appendix A. For population, household, net migration and dwelling growth outcomes for Monmouthshire *excluding* the Brecon Beacon National Park, please refer to Appendix C.

---

<sup>4</sup>[BE Group, Hatch and perConsulting, 2018. Future Monmouthshire: Economies of the Future Analysis](#)

Table 4: Employment-led Scenario Definition

11. <b>Employment-led Baseline (CR_R)</b>	Average annual employment growth of +73 is applied from 2019/20 onward, based on the 2018 Oxford Economics ‘Baseline’ forecast. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period.
12. <b>Employment-led UK Growth Rate (CR_R)</b>	Average annual employment growth of +154 is applied from 2019/20 onward, incorporating uplifts in identified underperforming sectors to match UK growth levels. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period.
13. <b>Employment-led Radical Structural Change (Lower) (CR_R)</b>	Average annual employment growth of +262 is applied from 2019/20, to consider the potential impact of substantial economic changes in Monmouthshire’s economy. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period.
14. <b>Employment-led Radical Structural Change (Higher) (CR_R)</b>	Average annual employment growth of +560 is applied from 2019/20, to consider the potential impact of substantial economic changes in Monmouthshire’s economy. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period.

## Scenario Summary

- 4.14 The 2001–2033 population growth trajectories for all scenarios are presented in Figure 19. In Table 5 each of the **Employment-led** scenarios is summarised in terms of population and household growth for the 2018–2033 RLDP period, alongside the average annual net migration and dwelling growth outcomes.
- 4.15 Assuming a reduction in the net-out commute (to 1.10) over the plan period, it is estimated that a population growth range of 1.8% to 16.1% would be required to support the employment growth range of +73 to +560 per year outlined in the **Employment-led Baseline (CR\_R)** and **Employment-led Radical Structural Change (Higher) (CR\_R)** scenarios. Over the plan period, this would result in an average dwelling growth requirement of +105 to +480 dpa.
- 4.16 The **Employment-led Radical Structural (Lower) (CR\_R)** scenario, assuming average annual employment growth of +262, projects population growth of 7.3% over the plan period. This level of population growth would result in an average dwelling growth requirement of +250 dpa.
- 4.17 The **Employment-led UK Growth Rate (CR\_R)** scenario, assuming average annual employment growth +154, estimates population growth of 4.1%, with average annual dwelling growth of +167 dpa.

## Monmouthshire Growth Outcomes 2018–2033

### Employment-led Scenarios

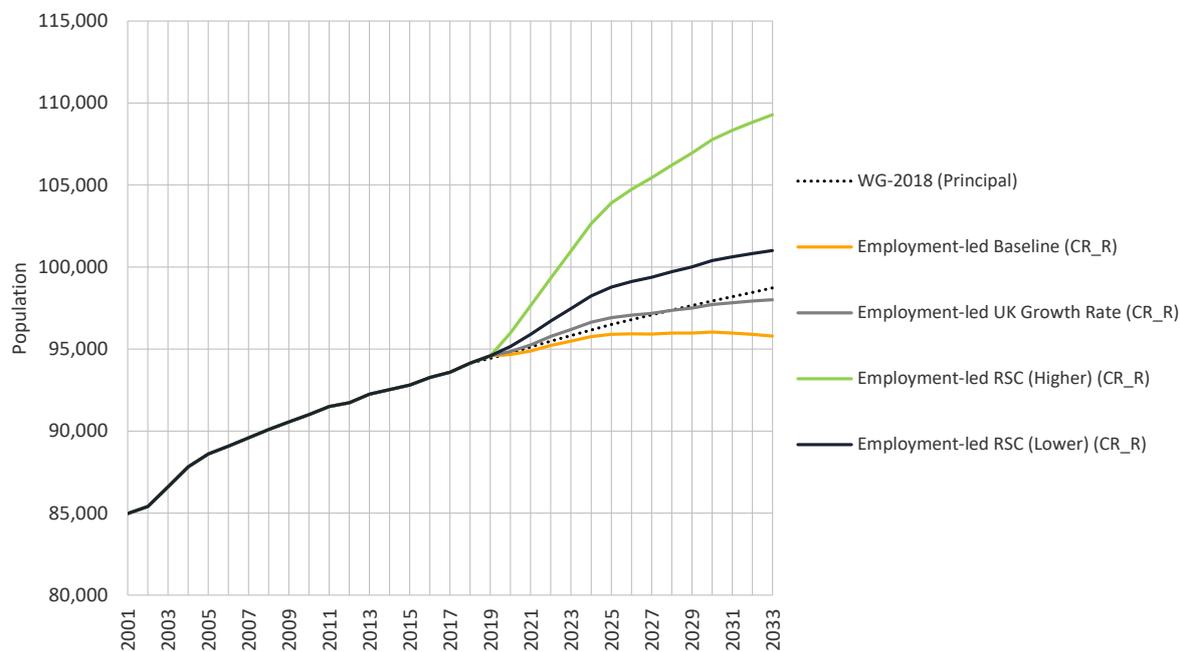


Figure 19: Monmouthshire Employment-led Population Growth Scenarios, 2001–2033

Table 5: Employment-led Scenario Growth Outcomes, 2018–2033

Scenario	Change 2018–2033				Average per year	
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings
<b>WG-2018 (Principal)</b>	<b>4,584</b>	<b>4.9%</b>	<b>2,732</b>	<b>6.8%</b>	<b>726</b>	<b>191</b>
Employment-led RSC (Higher) (CR_R)	15,142	16.1%	6,871	17.1%	1,382	480
Employment-led RSC (Lower) (CR_R)	6,872	7.3%	3,585	8.9%	866	250
Employment-led UK Growth Rate (CR_R)	3,871	4.1%	2,388	6.0%	678	167
Employment-led Baseline (CR_R)	1,653	1.8%	1,508	3.8%	538	105

# 5 Summary

## Growth Outcomes

- 5.1 Monmouthshire County Council is in the process of updating its RLDP. As part of this process, the Council has sought to collate the latest demographic evidence to inform its housing growth options. Monmouthshire's recent profile of population growth has been characterised by higher net immigration, particularly from Bristol and South Gloucestershire. Even with the introduction of dampened assumptions on fertility and mortality in the latest round of WG projections, its growth outlook is positive relative to the WG 2014-based evidence.
- 5.2 POPGROUP technology has been used to configure a suite of updated trend, **Dwelling-led** and **Employment-led** scenarios for Monmouthshire. Under each scenario, population, household, migration, dwelling and employment growth is presented over a 2018–2033 plan period.
- 5.3 Under the trend and **Dwelling-led** scenarios, household growth has been estimated using household membership rate assumptions from the WG's 2018-based household projection model, with the implications of a household membership rate sensitivity (**MR**) also evaluated. Under the **Employment-led** scenarios, household growth has been estimated using household membership rate assumptions from the WG's 2018-based household projection model. Associated dwelling growth has been estimated using a dwelling vacancy rate of 4.5% for Monmouthshire.
- 5.4 Estimates of the changing size of Monmouthshire's labour force and the employment growth that results from the variant population growth outcomes have been calculated using a combination of economic activity rates, an unemployment rate and a commuting ratio for the UA.
- 5.5 Over the 2018–2033 plan period, population change of 16.1% to -6.6% is estimated under the range of scenarios, with a corresponding household growth of 17.1% to -3.9%. The associated average annual dwelling growth ranges from +480 to -109 dpa (Figure 20).

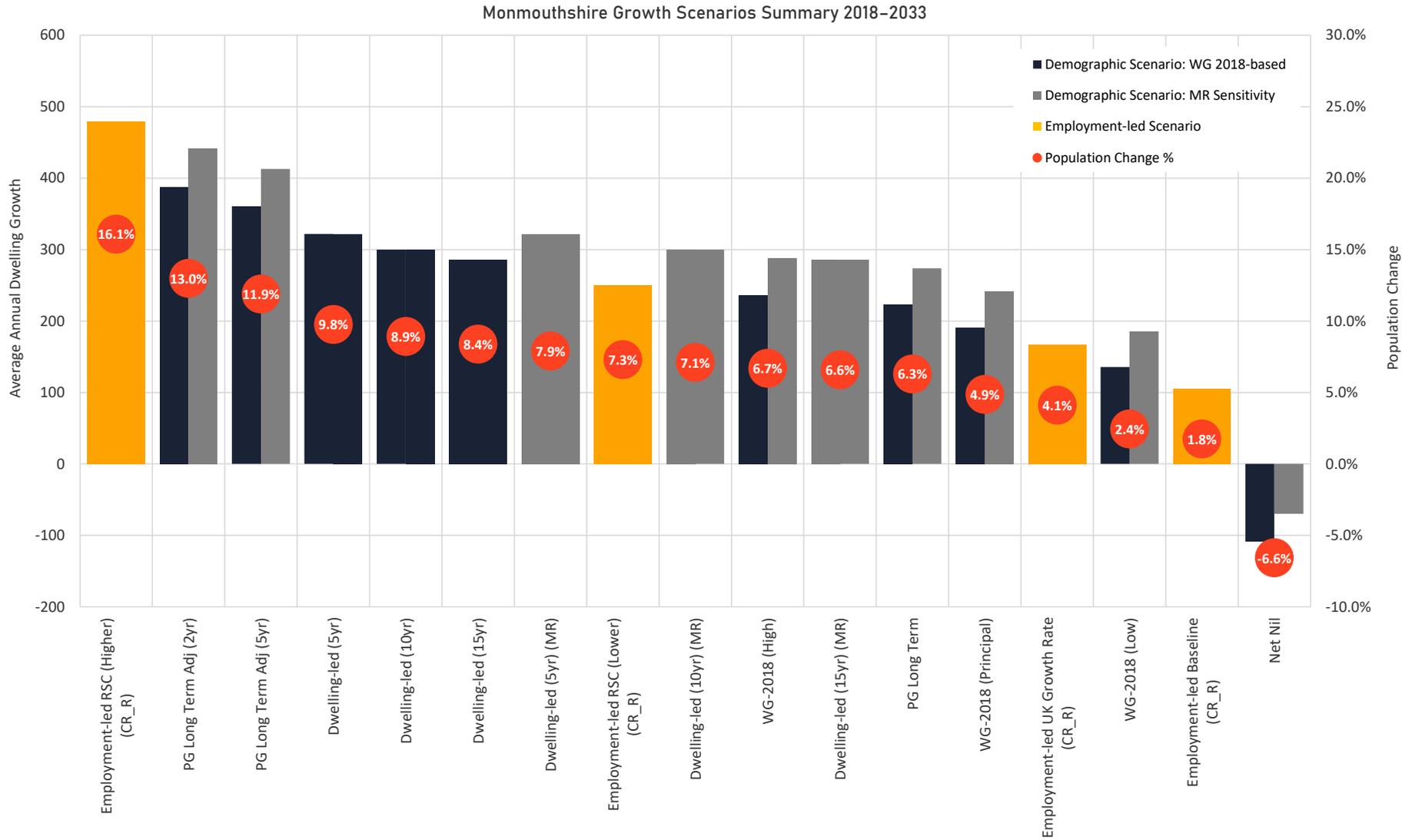


Figure 20: Monmouthshire Growth Scenarios Summary, 2018–2033

## LDP Development and COVID-19

- 5.6 The updated growth scenarios, presented as evidence to inform the RLDP for Monmouthshire, have been formulated at a time of extraordinary social and economic upheaval. Following the political turbulence of Brexit, the global COVID-19 pandemic has resulted in an unprecedented interruption to the daily lives of all UK citizens.
- 5.7 The latest round of WG population projections have introduced a dampened outlook for fertility and mortality, with the recovery from COVID-19 likely to confirm this, at least in the short-term. At the same time, the future impact of international migration is highly uncertain due both to the COVID-19 impact and with the impending introduction of the UK's new points-based system for immigration control.
- 5.8 The UK government has implemented unprecedented labour market interventions in an effort to mitigate the worst effects of the crisis, protecting incomes and providing a platform for economic recovery. But UK GDP is forecast to decline substantially during 2020, with the last two quarters of negative growth placing the country officially 'in recession'.
- 5.9 Whilst the latest news on vaccine development is very positive, the trajectory of social economic recovery will not be uniform across industry sectors and across geographical areas. Food service, retail, hotels, transport and the construction industry have been particularly badly affected. In line with previous economic recessions, it is likely that people on lower wages are going to be hardest hit by the economic impacts of a COVID-19-induced recession, with longer-lasting impacts upon economic inequalities and the geographical concentrations of income deprivation.
- 5.10 Planning for the future development of housing at such a moment, presents a real challenge. The gradual easing of the COVID-19 social restrictions will see businesses and communities adapting to different rules and guidelines for all aspects of daily life, including workplace activities, retailing, travel, education, healthcare, and leisure activities. The housing industry will be a critical component of the economic bounce-back and a key driver of the future growth and distribution of population.
- 5.11 The Minister for Housing and Local Government has emphasised that the planning system remains at the heart of shaping Wales' future, ensuring that the principles of sustainable development are not sacrificed in the pursuit of economic recovery at any cost<sup>5</sup>. The forthcoming completion of the postponed new Future Wales: the national plan 2040 (National Development Framework) remains critical to framing regional development in Wales, post-pandemic, and Planning Policy Wales (PPW 10) provides the guiding principles and policies to help drive recovery<sup>6</sup>.
- 5.12 Currently, there is insufficient evidence to inform an assessment of the COVID-19 impact upon long term demographic trends. The latest scenario evidence provides a timely and robust suite of outcomes from which Monmouthshire County Council can consider its RLDP options, reviewed and scrutinised in the light of social, economic and demographic changes that will result from the post-COVID-19 recovery.

---

<sup>5</sup> Letter from Julie James, Minister for Housing and Local Government to Local Authority Leaders and Chief Executives, July 7, 2020.

<sup>6</sup> [Building Better Places - Placemaking and the COVID-19 recovery, July 2020](#)

# Appendix A Scenario Summary

Table 6: All Scenario Outcomes, 2018–2033

Scenario	Change 2018–2033				Average per year	
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings
Employment-led RSC (Higher) (CR_R)	15,142	16.1%	6,871	17.1%	1,382	480
PG Long Term Adj (2yr) (MR, CR_R)	12,236	13.0%	6,317	15.7%	1,188	441
PG Long Term Adj (2yr)	12,236	13.0%	5,556	13.8%	1,188	388
PG Long Term Adj (5yr) (MR, CR_R)	11,194	11.9%	5,915	14.7%	1,126	413
PG Long Term Adj (5yr)	11,194	11.9%	5,164	12.9%	1,126	361
Dwelling-led (5yr)	9,190	9.8%	4,481	11.2%	1,018	322
Dwelling-led (5yr) (CR_R)	9,190	9.8%	4,481	11.2%	1,018	322
Dwelling-led (10yr)	8,404	8.9%	4,170	10.4%	969	300
Dwelling-led (10yr) (CR_R)	8,404	8.9%	4,170	10.4%	969	300
Dwelling-led (15yr)	7,901	8.4%	3,972	9.9%	937	286
Dwelling-led (15yr) (CR_R)	7,901	8.4%	3,972	9.9%	937	286
Dwelling-led (5yr) (MR)	7,445	7.9%	4,539	11.3%	908	322
Employment-led RSC (Lower) (CR_R)	6,872	7.3%	3,585	8.9%	866	250
Dwelling-led (10yr) (MR)	6,688	7.1%	4,229	10.5%	860	300
WG-2018 (High) (MR, CR_R)	6,309	6.7%	4,123	10.3%	774	288
WG-2018 (High)	6,309	6.7%	3,381	8.4%	774	236
Dwelling-led (15yr) (MR)	6,203	6.6%	4,030	10.0%	829	286
PG Long Term (MR, CR_R)	5,935	6.3%	3,921	9.8%	811	274
PG Long Term	5,935	6.3%	3,199	8.0%	811	223
WG-2018 (Principal) (MR, CR_R)	4,584	4.9%	3,462	8.6%	726	242
WG-2018 (Principal)	4,584	4.9%	2,732	6.8%	726	191
Employment-led UK Growth Rate (CR_R)	3,871	4.1%	2,388	6.0%	678	167
WG-2018 (Low) (MR, CR_R)	2,306	2.4%	2,660	6.6%	677	186
WG-2018 (Low)	2,306	2.4%	1,941	4.8%	677	136
Employment-led Baseline (CR_R)	1,653	1.8%	1,508	3.8%	538	105
Net Nil (MR, CR_R)	-6,182	-6.6%	-996	-2.5%	51	-70
Net Nil	-6,182	-6.6%	-1,555	-3.9%	51	-109

# Appendix B Age Profiles

B.1 The age profiles for all demographic scenarios are presented (Figure 21), indicating the estimated population change by age-group over the plan period 2018–2033.

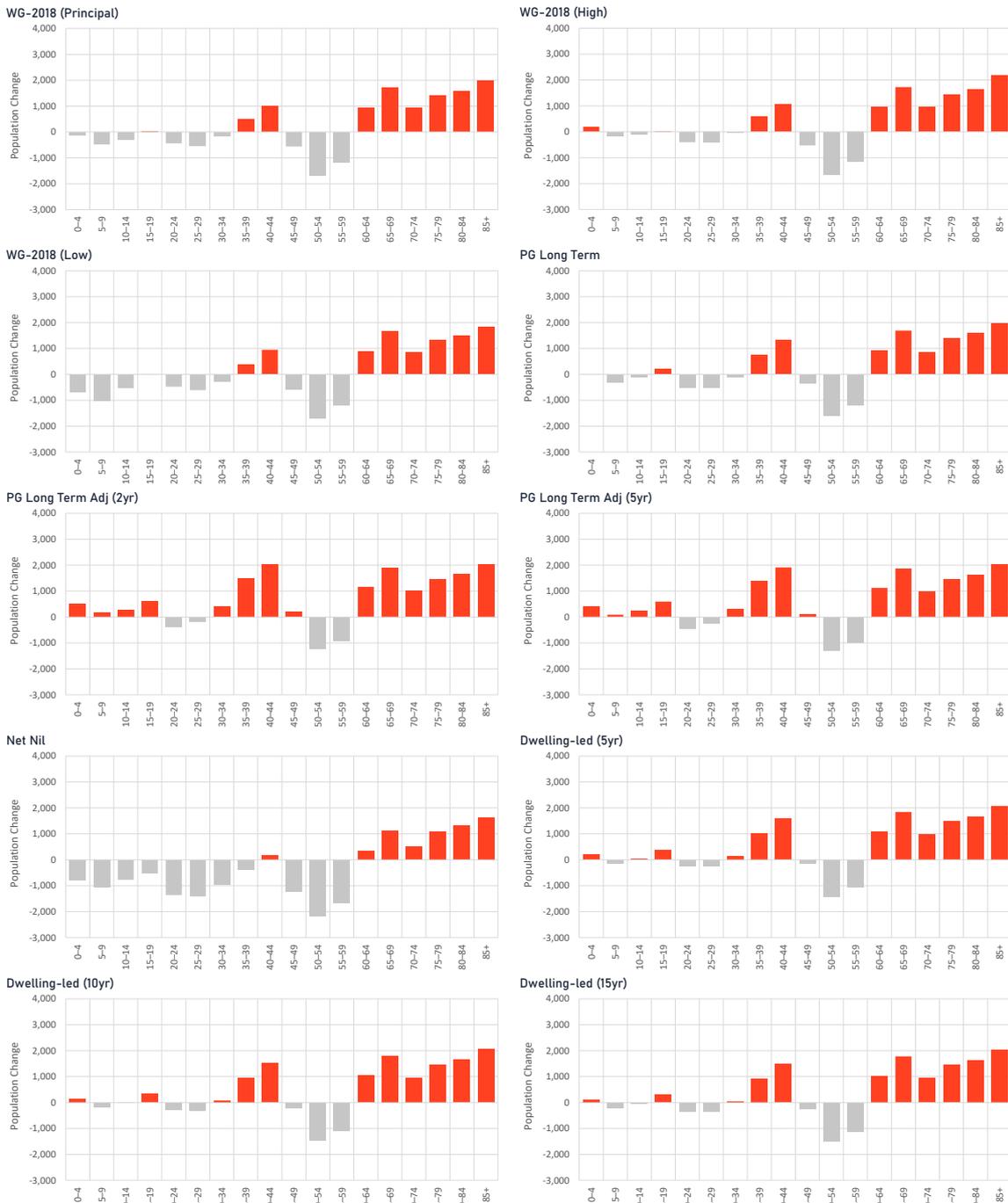


Figure 21: Age Profile for all Demographic Scenarios: Population Change, 2018–2033

# Appendix C Outside Brecon Beacon NP

## Scenario Outcomes

C.1 The population growth outcomes under each of the Council’s chosen scenarios, *excluding* the part that falls within Brecon Beacon National Park, are presented in Figure 22 and Table 7.

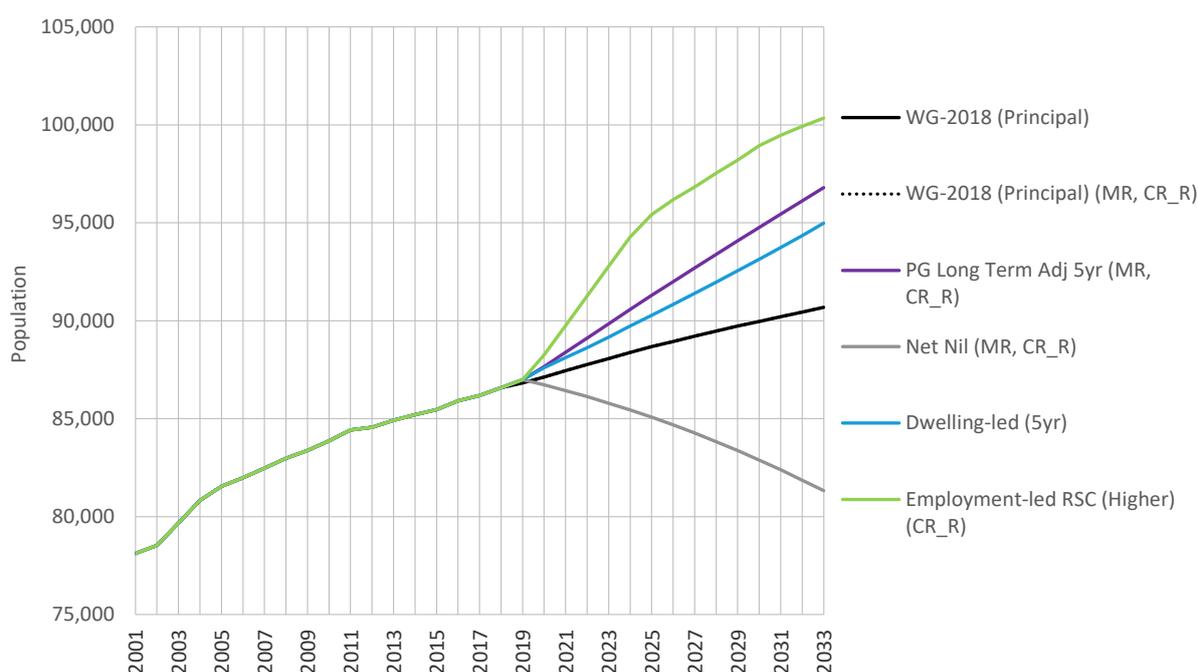


Figure 22: Monmouthshire (excluding the Brecon Beacon National Park) Scenario Outcomes, 2001–2033

Table 7: Monmouthshire (excluding Brecon Beacon NP) Scenario Outcomes, 2018–2033

Scenario	Change 2018–2033				Average per year	
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings
Employment-led RSC (Higher) (CR_R)	13,760	15.9%	6,274	17.1%	1,179	437
PG Long Term Adj 5yr (MR, CR_R)	10,213	11.8%	5,454	14.8%	961	380
Dwelling-led (5yr)	8,393	9.7%	4,131	11.2%	860	297
WG-2018 (Principal) (MR, CR_R)	4,106	4.7%	3,180	8.6%	589	222
<b>WG-2018 (Principal)</b>	<b>4,106</b>	<b>4.7%</b>	<b>2,503</b>	<b>6.8%</b>	<b>589</b>	<b>174</b>
Net Nil (MR, CR_R)	-5,255	-6.1%	-679	-1.8%	17	-47

## Appendix D POPGROUP Methodology

- D.1 Demographic forecasts have been developed using the POPGROUP suite of products. POPGROUP is a family of demographic models that enables forecasts to be derived for population, households and the labour force, for areas and social groups. The main POPGROUP model (Figure 23) is a cohort component model, which enables the development of population forecasts based on births, deaths and migration inputs and assumptions.
- D.2 The Derived Forecast (DF) model sits alongside the population model (Figure 24) providing an associated model for both household and labour-force projections and the basis for the dwelling-led and employment-led scenario options.
- D.3 For further information on POPGROUP, please refer to the Edge Analytics website: [www.edgeanalytics.co.uk](http://www.edgeanalytics.co.uk).

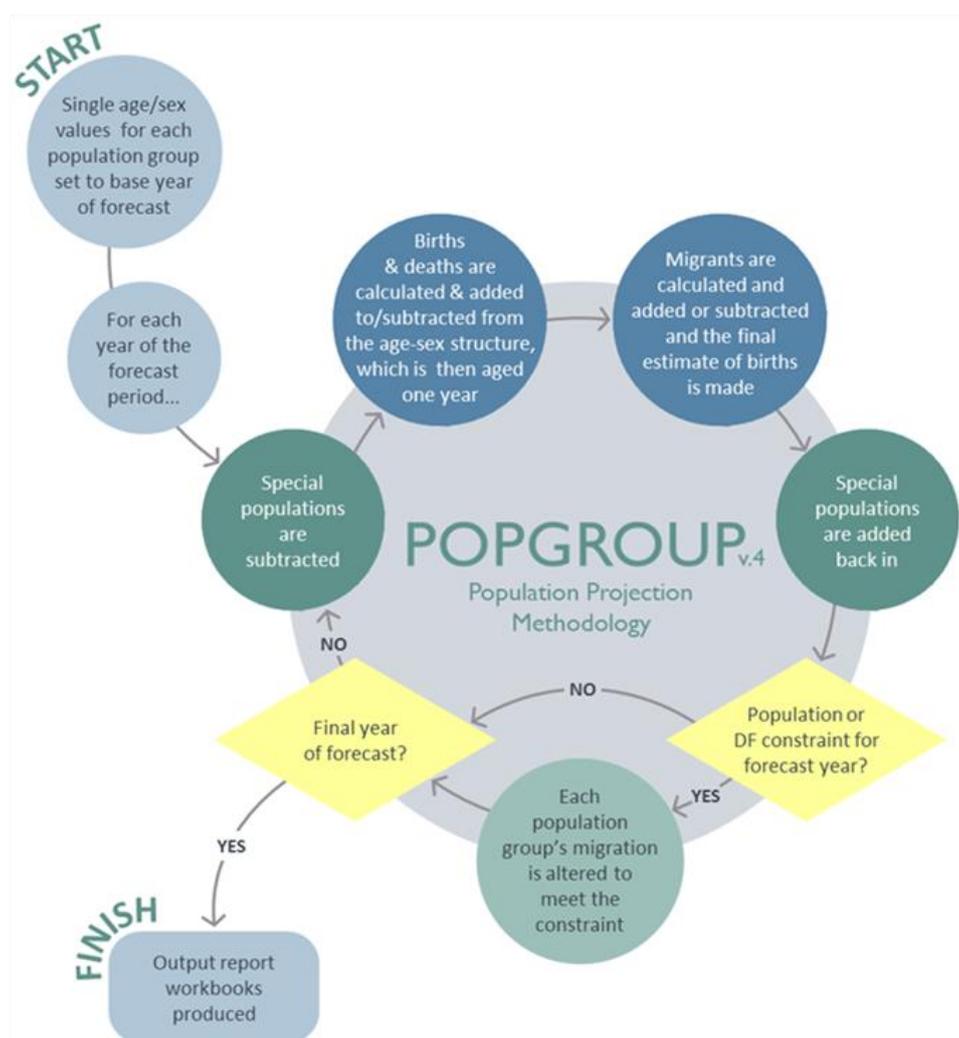
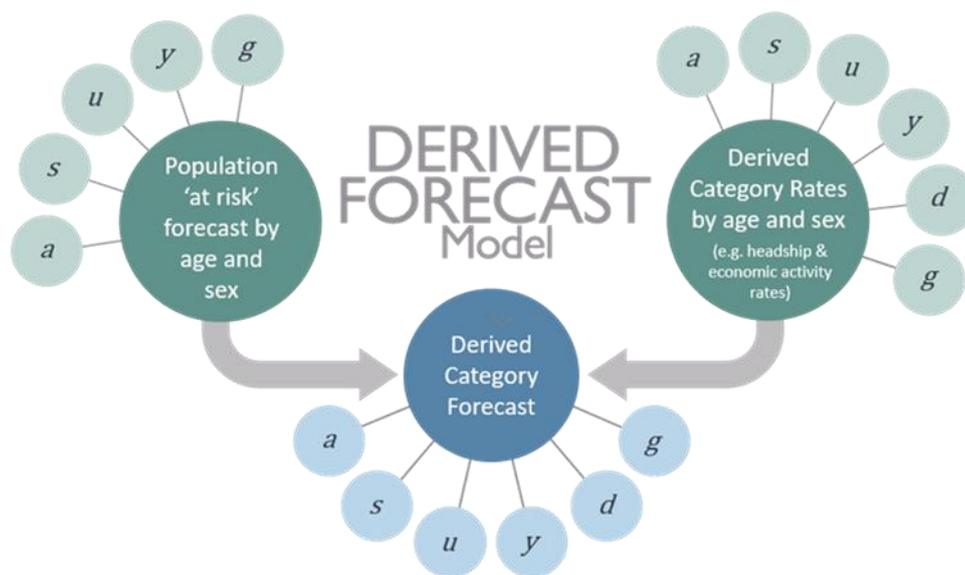


Figure 23: POPGROUP Population Projection Methodology



$$D_{a,s,u,y,d,g} = \frac{P_{a,s,u,y,g} R_{a,s,u,y,d,g}}{100}$$

<i>D</i>	Derived Category Forecast	<i>y</i>	Year
<i>P</i>	Population 'at risk' Forecast	<i>d</i>	Derived category
<i>R</i>	Derived Category Rates	<i>g</i>	Group (usually an area, but can be an ethnic group or social group)
<i>a</i>	Age-group		
<i>s</i>	Sex		
<i>u</i>	Sub-population		

Figure 24: Derived Forecast (DF) methodology

## Appendix E Data Inputs & Assumptions

### Population

- E.1 In each scenario, historical population statistics are provided by ONS mid-year population estimates (MYE), with all data disaggregated by single year of age and sex. The **WG** scenarios use MYE populations up to the 2018 base year. Each of the **PG**, **Dwelling-led** and **Employment-led** scenarios uses an ONS 2019 MYE as its base year.

### Births & Fertility

- E.2 In each scenario, historical mid-year to mid-year counts of births by sex have been sourced from the ONS MYEs. Under the **WG** scenarios, historical births counts have been used up to 2018.
- E.3 For the **PG**, **Dwelling-led** and **Employment-led** scenarios, birth counts are used from 2001/02 to 2018/19. From 2019/20, an area-specific and age-specific fertility rate (ASFR) schedule is derived from the WG 2018-based National Population Projections (NPP).
- E.4 In combination with the 'population-at-risk' (i.e. all women between the ages of 15-49), these ASFR assumptions provide the basis for the calculation of births in each year of the forecast period.
- E.5 In each of the **WG** scenarios, the future *counts* of births are specified from 2018 onwards to ensure consistency with the respective population growth outcomes.

### Deaths & Mortality

- E.6 In each scenario, historical mid-year to mid-year counts of deaths by sex and 5-year age group have been sourced from the ONS MYEs. Under the **WG** scenarios, historical deaths counts have been used up to 2018.
- E.7 For the **PG**, **Dwelling-led** and **Employment-led** scenarios, death totals are used from 2001/02 to 2018/19. From 2019/20, an area-specific and age-specific mortality rate (ASMR) schedule is derived from the latest WG 2018-based NPP.
- E.8 In each of the **WG** scenarios, the future counts of deaths are specified from 2018 onwards to ensure consistency with the respective population growth outcomes.

### Internal Migration

- E.9 In each scenario, historical mid-year to mid-year estimates of internal in- and out-migration by five-year age group and sex have been sourced from the 'components of change' data that underpin the ONS MYE statistics.
- E.10 In the **WG** scenarios, these historical estimates are used up to 2018, with future counts of migrants specified to remain consistent with the corresponding projection.

- E.11 Under the **PG Long Term** and **PG Long Term Adj** scenarios, an area and age-specific migration rate (ASMigR) schedule is derived from the full 18 year history of internal migration data (2001/02–2018/19), which then determines the future number of internal in- and out-migrants for the remainder of the plan period.
- E.12 Included in the **PG Long Term Adj** scenarios is an uplift to the internal *in-migration* schedule of rates, based on the last 2-years (**PG Long Term Adj (2yr)**) or the last 5-years (**PG Long Term Adj (5yr)**) of migration flows from Bristol and South Gloucestershire to Monmouthshire. The following steps summarise the method:
- **Step 1:** Calculate the historical 2-year (2017/18–2018/19) or historical 5-year (2014/15–2018/19) average migration flow from the combined Bristol & South Gloucestershire area to Monmouthshire.
  - **Step 2:** Calculate the schedule of migration rates by single-year of age and sex based on a long-term migration history (2001/02–2018/19) but including the ‘uplift’ estimated in Step 1. This results in a higher migration schedule for Monmouthshire.
  - **Step 3:** Apply the ‘adjusted’ schedule of migration rates to the respective **PG Long Term Adj** scenario to calculate future internal in-migration flows to Monmouthshire. Out-migration counts are consistent with the **PG Long Term** scenario.
- E.13 Under the **Dwelling-led** and **Employment-led** scenarios, future internal migration assumptions have been derived from the full eighteen-year historical period (**PG Long Term**), with migration altered to meet annual dwelling or employment growth requirements.

## International Migration

- E.14 Historical mid-year to mid-year counts of immigration and emigration by five-year age groups and sex have been sourced from the ‘components of population change’ data that underpin the ONS MYEs.
- E.15 In the **WG** scenarios, these counts are used up to 2018, with future counts of migrants specified directly from the projection statistics.
- E.16 In the **PG Long Term** and **PG Long Term Adj** scenarios, historical counts of immigration are used from 2001/02 to 2018/19. From 2019/20 onwards, an ASMigR schedule of rates is derived from an 18-year international migration history respectively, and used to distribute future counts by single year of age and sex.
- E.17 For the **Dwelling-led** and **Employment-led** scenarios, future international migration assumptions are derived from the full eighteen-year historical period (**PG Long Term**).

## Households & Dwellings

- E.18 A household is defined as, “one person living alone, or a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room or dining area”. A dwelling is defined as a unit of accommodation which can either be occupied by one household or vacant.

- E.19 Apart from the **Dwelling-led** scenarios, the household and dwelling implications of each population growth trajectory have been estimated through the application of household membership rates, communal population statistics and a dwelling vacancy rate. These assumptions have been sourced from the 2011 Census and the WG’s 2018-based household projection model.
- E.20 In the **Dwelling-led** scenarios, these assumptions are used to determine the level of population growth required by the defined dwelling growth trajectory.

## Membership Rates

- E.21 The membership rates are used to calculate the proportion of the household population in each household category by age group and sex (Table 8), taken from the WG household model. The household population is converted into households using average household size assumptions, taken from the household model.

Table 8: WG Household Categories (Source: WG)

Household Category
1 person
2 person (No children)
2 person (1 adult, 1 child)
3 person (No children)
3 person (2 adults, 1 child)
3 person (1 adult, 2 children)
4 person (No children)
4 person (2+ adults, 1+ children)
4 person (1 adult, 3 children)
5+ person (No children)
5+ person (2+ adults, 1+ children)
5+ person (1 adult, 4+ children)

- E.22 For each trend and **Dwelling-led** scenario, a membership rate sensitivity has been applied. Under the membership rate sensitivity (**MR**), an adjustment is applied to the household membership rates of the young adult age-groups (19–24, 25–29, 30–34). For these age-groups, the household membership rates ‘return’ to their 2001 values between 2018–2033.

## Communal Population Statistics

- E.23 Household projections in POPGROUP exclude the population ‘not-in-households’ (i.e. the communal/institutional population). These data are drawn from the WG household projection. Examples of communal establishments include prisons, residential care homes and student halls of residence.
- E.24 For ages 0-74, the number of people in each age group ‘not-in-households’ is fixed throughout the forecast period. For ages 75-85+, the population not-in-households varies across the forecast period depending on the size of the population.

## Vacancy Rate

E.25 The relationship between households and dwellings is modelled using a ‘vacancy rate’, derived from the 2011 Census using statistics on households (occupied household spaces) and dwellings (shared and unshared). A vacancy rate of 4.5% for Monmouthshire has been applied and fixed throughout the forecast period. Using the vacancy rate, the ‘dwelling requirement’ of each household growth trajectory has been evaluated.

## Labour Force & Jobs

E.26 The labour force and jobs implications of each population growth trajectory have been estimated through the application of three key economic assumptions: economic activity rates, commuting ratio and an unemployment rate.

## Economic Activity Rates

E.27 Economic activity rates are the proportion of the population that are actively involved in the labour force, either employed or unemployed and looking for work. Economic activity rates by five-year age group (ages 16-89) and sex for Monmouthshire have been derived from Census statistics, with adjustments made in line with the Office for Budget Responsibility’s (OBR) analysis of labour market trends in its 2018 Fiscal Sustainability Report<sup>7</sup> (Figure 25).

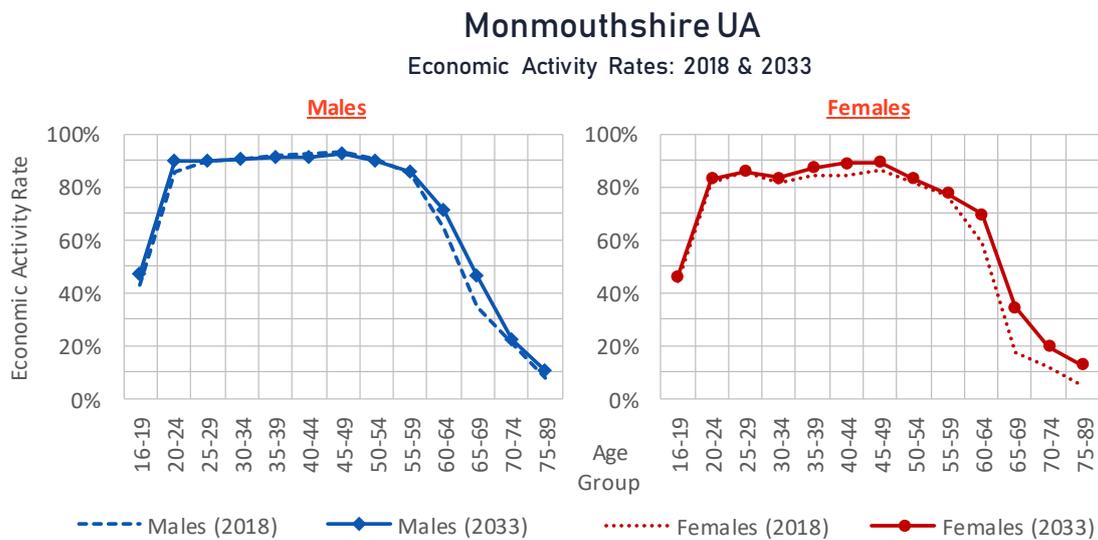


Figure 25: Economic Activity Rates for Monmouthshire, 2018-2033

## Commuting Ratio

E.28 The commuting ratio indicates the balance between the level of employment and the number of resident workers. A commuting ratio greater than 1.00 indicates that the size of the resident workforce exceeds the level of employment available in the area, resulting in a net out-commute. A commuting ratio less than 1.00 indicates that employment in the area exceeds the size of the labour

<sup>7</sup> OBR, Fiscal sustainability report – July 2018

force, resulting in a net in-commute. The 2011 Census recorded 43,210 resident workers and 38,458 jobs in Monmouthshire. This results in a commuting ratio of 1.12, which is applied in the trend and **Dwelling-led** scenarios, fixed throughout the forecast period.

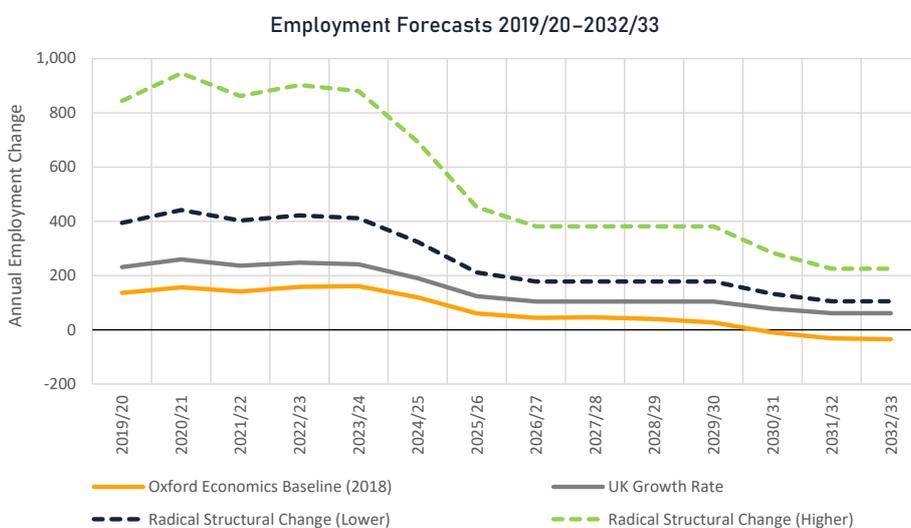
- E.29 A commuting ratio sensitivity has also been applied to the trend, **Dwelling-led** and **Employment-led** scenarios (**CR\_R**). Under each scenario, the commuting ratio reduces from its 2011 Census value (1.12) to 1.10 by the end of the plan period.

## Unemployment

- E.30 The unemployment rate is the proportion of unemployed people within the total economically active population. Historical unemployment rates are sourced from ONS model-based estimates. For Monmouthshire the 2019 rate of 2.9% has been applied in the trend, **Dwelling-led** and **Employment-led** scenarios, fixed throughout the forecast period.

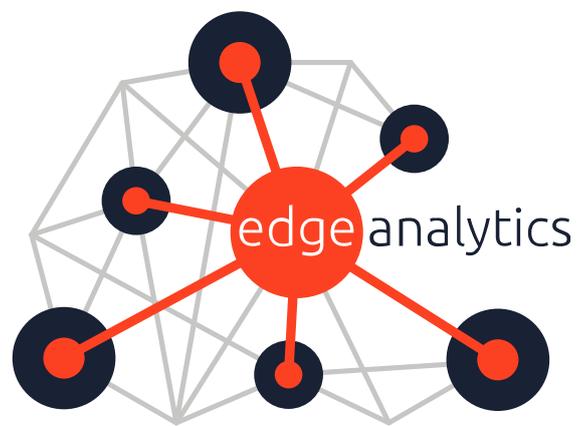
## Employment-led Scenarios

- 5.13 The **Employment-led** scenarios model the demographic impact of a pre-determined level of annual employment growth, measured as work-place based employment. Workplace-based employment is a ‘people-based’ measure, rather than a jobs measure of economic activity. The two measures are directly related, but the jobs-based measure is typically reported in employment forecasts, including both full-time and part-time positions. The workplace-based employment figure measures the number of people employed, linking directly to people-based measures of unemployment, commuting and economic activity.
- E.31 The **Employment-led** scenarios (**Employment-led Baseline**, **Employment-led UK Growth Rate**, **Employment-led RSC (Higher)**, and **Employment-led RSC (Lower)**) model the demographic impact of the annual workplace based employment growth outlined in the respective employment forecasts. Under each of the **Employment-led** scenarios, historical mid-year population estimates are used up to 2018/19 with the annual change in employment applied from 2019/20 onward, as illustrated in Figure 26.



(Source: Oxford Economics, 2018. Economies of the Future Report, 2018)  
 Figure 26: Annual Change in Employment, 2019/20–2032/33

- E.32 In running the **Employment-led** scenarios, economic activity rates and unemployment assumptions are consistent with the trend and **Dwelling-led** scenarios. A commuting ratio adjustment has been applied to all **Employment-led** scenarios, reducing from its 2011 Census value (1.12) to the 2001 Census value (1.10) over the plan period.



Edge Analytics Ltd

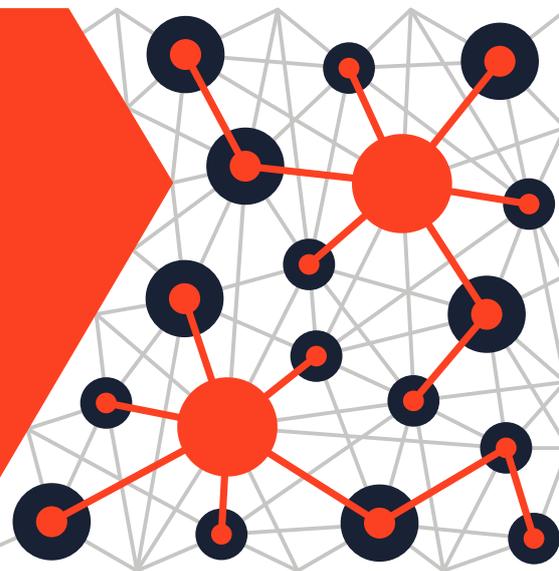
Nexus | Discovery Way | University of Leeds | Leeds | LS2 3AA

[www.edgeanalytics.co.uk](http://www.edgeanalytics.co.uk)

# Monmouthshire

## Affordable Housing Evidence

November 2020



---

## Acknowledgements

Demographic statistics used in this report have been derived from data from the Office for National Statistics licensed under the Open Government Licence v.3.0.

*The authors of this report do not accept liability for any costs or consequential loss involved following the use of the data and analysis referred to here; this is entirely the responsibility of the users of the information presented in this report.*

# Contents

Acknowledgements.....	i
Contents.....	ii
<b>1 Context.....</b>	<b>1</b>
Context.....	1
Approach.....	1
<b>2 Scenario Definition .....</b>	<b>2</b>
<b>3 Demographic Outcomes .....</b>	<b>4</b>
Population, Households and Migration .....	4
Linking Population and Employment.....	6
<b>4 Household Growth.....</b>	<b>7</b>
<b>5 Summary.....</b>	<b>8</b>

# 1 Context

## Context

- 1.1 This Addendum Report extends Monmouthshire’s demographic evidence and should be read in conjunction with the main RLDP Demographic Evidence report, produced for Monmouthshire County Council in November 2020.
- 1.2 The Council are seeking additional evidence on the impact of policy-driven affordable housing provision, based upon the projected dwelling requirements of the Council’s chosen scenario options.
- 1.3 The Council’s chosen scenario options, presented in the previous analysis, are as follows:
  - Net Nil (MR, CR\_R)
  - WG-2018 (Principal)
  - WG-2018 (Principal) (MR, CR\_R)
  - Dwelling-led (5yr)
  - PG Long Term Adj 5yr (MR, CR\_R)
  - Employment-led RSC (Higher) (CR\_R)

## Approach

- 1.4 POPGROUP technology has been used to configure a range of additional **dwelling-led** scenarios for Monmouthshire, considering a range of policy-led affordable housing options.
- 1.5 Section 2 of this Addendum outlines the assumptions used in the configuration of the policy-led affordable housing scenarios.
- 1.6 Section 3 illustrates the demographic and employment outcomes of the policy-led affordable housing scenario, accounting for ‘market’ housing only.
- 1.7 Section 4 presents the household growth outcomes of the policy-led affordable housing scenarios that incorporate both the ‘market’ and ‘affordable’ housing elements.
- 1.8 A summary of the evidence is provided in Section 5.

## 2 Scenario Definition

- 2.1 Twelve additional **dwelling-led** scenarios have been configured. The scenarios use the Council's chosen scenario options as a starting point, applying a dwelling growth uplift to account for policy-led affordable housing provision (Table 1).
- 2.2 Under each policy-led affordable housing scenario, the base year is consistent with the Council's respective chosen scenario, presented in the previous analysis.
- 2.3 All household and labour force assumptions are also consistent with the previous analysis, including sensitivities applied to household membership rates and the commuting ratio. These assumptions are detailed in the previous RLDP Demographic Evidence report.

Table 1: Scenario Definition

1. Dwelling-led -43 dpa (Net Nil (MR, CR_R))	Models the demographic and employment impact of an average dwelling growth of -43 dpa. Average dwelling growth is based on a total uplift of +396 dwellings to the projected dwelling growth under the <b>Net Nil (MR, CR_R)</b> scenario, reflecting 396 additional 'market' homes over the plan period, from policy-led affordable housing provision.
2. Dwelling-led -17 dpa (Net Nil (MR, CR_R))	Models the demographic and employment impact of an average dwelling growth of -17 dpa. Average dwelling growth is based on a total uplift of +792 dwellings to the projected dwelling growth under the <b>Net Nil (MR, CR_R)</b> scenario, reflecting 396 additional 'market' homes and 396 additional 'affordable' homes over the plan period.
3. Dwelling-led 226 dpa (WG-2018 (Principal))	Models the demographic and employment impact of an average dwelling growth of 226 dpa. Average dwelling growth is based on a total uplift of +533 dwellings to the projected dwelling growth under the <b>WG-2018 (Principal)</b> scenario, reflecting 533 additional 'market' homes over the plan period.
4. Dwelling-led 262 dpa (WG-2018 (Principal))	Models the demographic and employment impact of an average dwelling growth of 262 dpa. Average dwelling growth is based on a total uplift of +1,066 dwellings to the projected dwelling growth under the <b>WG-2018 (Principal)</b> scenario, reflecting 533 additional 'market' homes and 533 additional 'affordable' homes over the plan period.

- 
- |   |  |
|---|--|
| 5. Dwelling-led 280 dpa<br>(WG-2018 (Principal)<br>(MR, CR_R))      | Models the demographic and employment impact of an average dwelling growth of 280 dpa. Average dwelling growth is based on a total uplift of +570 dwellings to the projected dwelling growth under the <b>WG-2018 (Principal) (MR, CR_R)</b> scenario, reflecting 570 additional ‘market’ homes over the plan period.  |
| 6. Dwelling-led 318 dpa<br>(WG-2018 (Principal)<br>(MR, CR_R))      | Models the demographic and employment impact of an average dwelling growth of 318 dpa. Average dwelling growth is based on a total uplift of +1,140 dwellings to the projected dwelling growth under the <b>WG-2018 (Principal) (MR, CR_R)</b> scenario, reflecting 570 additional ‘market’ homes and 570 additional ‘affordable’ homes over the plan period.  |
| 7. Dwelling-led 362 dpa<br>(Dwelling-led 5yr)                       | Models the demographic and employment impact of an average dwelling growth of 362 dpa. Average dwelling growth is based on a total uplift of +601 dwellings to the projected dwelling growth under the <b>Dwelling-led (5yr)</b> scenario, reflecting 601 additional ‘market’ homes over the plan period.  |
| 8. Dwelling-led 402 dpa<br>(Dwelling-led 5yr)                       | Models the demographic and employment impact of an average dwelling growth of 402 dpa. Average dwelling growth is based on a total uplift of +1,202 dwellings to the projected dwelling growth under the <b>Dwelling-led (5yr)</b> scenario, reflecting 601 additional ‘market’ homes and 601 additional ‘affordable’ homes over the plan period.              |
| 9. Dwelling-led 460 dpa<br>(PG Long Term Adj (5yr)<br>(MR, CR_R))   | Models the demographic and employment impact of an average dwelling growth of 460 dpa. Average dwelling growth is based on a total uplift of +702 dwellings to the projected dwelling growth under the <b>PG Long Term Adj 5yr (MR, CR_R)</b> scenario, reflecting 702 additional ‘market’ homes over the plan period.   |
| 10. Dwelling-led 507 dpa<br>(PG Long Term Adj (5yr)<br>(MR, CR_R))  | Models the demographic and employment impact of an average dwelling growth of 507 dpa. Average dwelling growth is based on a total uplift of +1,404 dwellings to the projected dwelling growth under the <b>PG Long Term Adj 5yr (MR, CR_R)</b> scenario, reflecting 702 additional ‘market’ homes and 702 additional ‘affordable’ homes over the plan period. |
| 11. Dwelling-led 542 dpa<br>(Employment-led RSC<br>(Higher) (CR_R)) | Models the demographic and employment impact of an average dwelling growth of 542 dpa. Average dwelling growth is based on a total uplift of +933 dwellings to the projected dwelling growth under the <b>Employment-led RSC (Higher) (CR_R)</b> scenario, reflecting 933 additional ‘market’ homes over the plan period.                                      |
| 12. Dwelling-led 604 dpa<br>(Employment-led RSC<br>(Higher) (CR_R)) | Models the population impact of an average dwelling growth of 604 dpa. Average dwelling growth is based on a total uplift of +1,866 dwellings to the projected dwelling growth under the <b>Employment-led RSC (Higher) (CR_R)</b> scenario, reflecting 933 additional ‘market’ homes and 933 additional ‘affordable’ homes over the plan period.              |
-

# 3 Demographic Outcomes

## Population, Households and Migration

- 3.1 In this section, the demographic and employment growth outcomes are presented for the policy-led affordable housing scenarios that account for ‘market’ housing provision only.
- 3.2 The 2001–2033 population growth trajectories for the scenarios are presented in Figure 1. In Table 2, each of the scenarios is summarised in terms of population and household growth outcomes for the 2018–2033 RLDP period, alongside the average annual net migration outcomes.
- 3.3 Over the plan period, the additional policy-led affordable housing provision results in greater average annual net migration and population growth than the Council’s chosen scenarios, with population growth ranging from -5.4% to 18.5% under the **Dwelling-led -43 dpa (Net Nil (MR, CR\_R))** and **Dwelling-led 542 dpa (Employment-led RSC (Higher) (CR\_R))** scenarios, respectively.
- 3.4 The **Dwelling-led 542 dpa (Employment-led RSC (Higher) (CR\_R))** projects the highest population growth of all the policy-led affordable housing scenarios at 18.5%.
- 3.5 The **Dwelling-led 460 dpa (PG Long Term Adj (5yr) (MR, CR\_R))** scenario, incorporating adjusted household membership rates, estimates population growth of 13.2%.
- 3.6 Based on the **Dwelling-led 5yr** scenario, the **Dwelling-led 362 dpa (Dwelling-led 5yr)** scenario estimates population growth of 11.3% over the plan period, with average annual net migration of +1,110 people.
- 3.7 The **Dwelling-led 226 dpa (WG-2018 (Principal))** scenario estimates population growth of 6.4%. Accounting for higher rates of household formation in the young adult age-groups, the **Dwelling-led 280 dpa (WG-2018 (Principal) (MR, CR\_R))** projects population growth of 6.5%.
- 3.8 Based on the **Net Nil (MR, CR\_R)** scenario, the **Dwelling-led -43 dpa (Net Nil (MR, CR\_R))** scenario projects population *decline* over the plan period, with decline of 5.4% estimated.

## Monmouthshire Growth Outcomes 2018–2033

### Policy-led Affordable Housing Scenarios

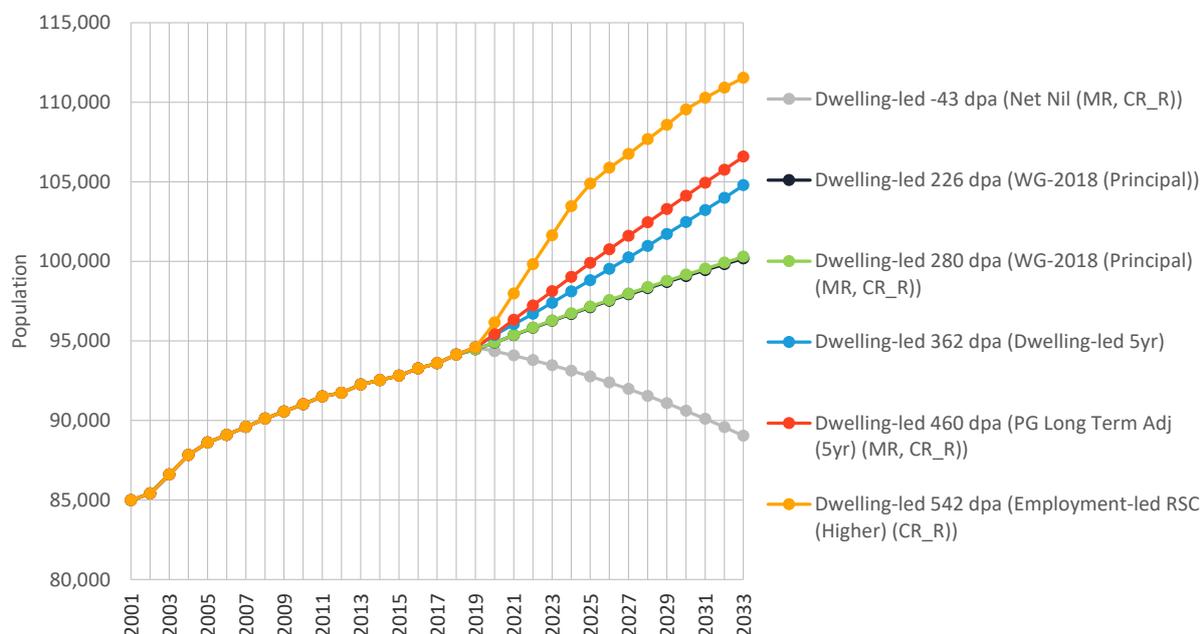


Figure 1: Monmouthshire Population Growth Scenarios, 2001–2033

Table 2: Population, Household, Migration, and Dwelling growth under each scenario, 2018–2033

Scenario	Change 2018–2033				Average per year	
	Population Change	Population Change %	Households Change	Households Change %	Net Migration	Dwellings
Dwelling-led 542 dpa (Employment-led RSC (Higher) (CR_R))	17,403	18.5%	7,762	19.3%	1,524	542
Dwelling-led 460 dpa (PG Long Term Adj (5yr) (MR, CR_R))	12,443	13.2%	6,585	16.4%	1,223	460
Dwelling-led 362 dpa (Dwelling-led 5yr)	10,641	11.3%	5,054	12.6%	1,110	362
Dwelling-led 280 dpa (WG-2018 (Principal) (MR, CR_R))	6,147	6.5%	4,007	10.0%	825	280
Dwelling-led 226 dpa (WG-2018 (Principal))	6,047	6.4%	3,240	8.1%	818	226
Dwelling-led -43 dpa (Net Nil (MR, CR_R))	-5,110	-5.4%	-618	-1.5%	108	-43

## Linking Population and Employment

- 3.9 The estimated impact of each policy-led affordable housing scenario upon employment growth in Monmouthshire, is presented for the plan period 2018–2033.
- 3.10 Estimates of average annual employment growth have been calculated using a combination of economic activity rates, an unemployment rate and a commuting ratio for the UA. In each scenario, the labour force assumptions are consistent with those applied in the Council’s respective chosen scenario.
- 3.11 Over the 2018–2033 plan period, the policy-led affordable housing scenarios result in a range of employment growth outcomes that varies from a decline of -120 per year under the **Dwelling-led -43 dpa (Net Nil (MR, CR\_R))** scenario to average annual employment growth of +642 under the **Dwelling-led 542 dpa (Employment-led RSC (Higher) (CR\_R))** scenario (Figure 2).

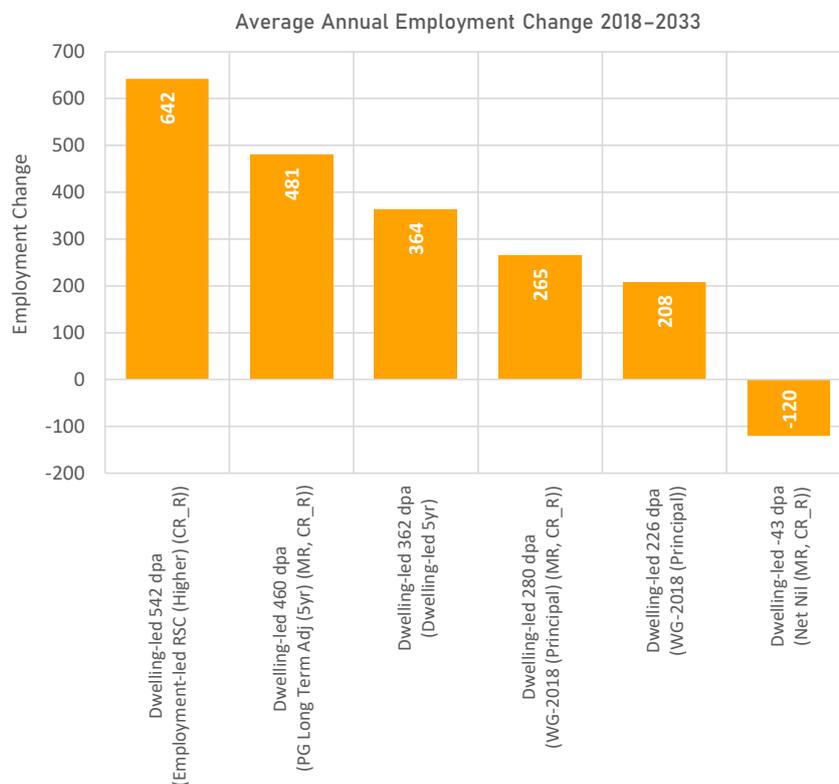


Figure 2: Average Annual Employment Change, 2018–2033

# 4 Household Growth

- 4.1 Section 4 outlines the household growth, by household type, under the policy-led affordable housing scenarios that include both the ‘market’ and ‘affordable’ housing elements.
- 4.2 Under each scenario, the change in households (by type) over the 2018–2033 plan period is presented in Table 3. Household growth is estimated under all policy-led affordable housing scenarios, with the exception of the **Dwelling-led -17 dpa (Net Nil (MR, CR\_R))**. Under all scenarios, one and two-person (no children) households have been projected to increase the most in absolute terms.

Table 3: Household Change by Household Type, 2018–2033

Household Type	Household Change 2018–2033					
	Dwelling-led -17 dpa (Net Nil (MR, CR_R))	Dwelling-led 262 dpa (WG-2018 (Principal))	Dwelling-led 318 dpa (WG-2018 (Principal) (MR, CR_R))	Dwelling-led 402 dpa (Dwelling-led 5yr)	Dwelling-led 507 dpa (PG Long Term Adj (5yr) (MR, CR_R))	Dwelling-led 604 dpa (Employment-led RSC (Higher) (CR_R))
1 person	1,074	1,680	2,372	2,145	3,104	2,914
2 person (No children)	248	1,372	1,718	1,928	2,537	2,845
2 person (1 adult, 1 child)	-72	24	73	80	156	169
3 person (No children)	-367	91	-30	241	159	454
3 person (2 adults, 1 child)	-244	136	174	306	414	578
3 person (1 adult, 2 children)	-24	90	70	131	124	198
4 person (No children)	-89	132	33	192	101	272
4 person (2+ adults, 1+ children)	-366	65	209	289	537	661
4 person (1 adult, 3 children)	-10	42	24	57	44	84
5+ person (No children)	-67	108	-41	133	-27	164
5+ person (2+ adults, 1+ children)	-322	-17	-64	94	84	271
5+ person (1 adult, 4+ children)	-1	25	13	32	21	44
<b>Total</b>	<b>-240</b>	<b>3,749</b>	<b>4,551</b>	<b>5,628</b>	<b>7,255</b>	<b>8,653</b>

# 5 Summary

- 5.1 POPGROUP technology has been used to configure a range of additional **dwelling-led** scenarios for Monmouthshire, which consider the impact of additional policy-driven affordable housing provision, based upon the projected dwelling requirements of the Council’s chosen scenario options. For each scenario, population, household, migration, dwelling and employment growth is presented over a 2018–2033 plan period.
- 5.2 Under each of the scenarios, household and labour force assumptions are consistent with the Council’s respective chosen scenario.
- 5.3 Over the 2018–2033 plan period, the uplift in policy-led housing provision, incorporated in the scenarios, results in higher population growth outcomes than the Council’s chosen scenario options. Accounting for both ‘market’ and ‘affordable’ policy-led housing provision, population change of 18.5% to -5.4% is estimated, with corresponding household growth of 21.6% to -1.5% (Figure 3).

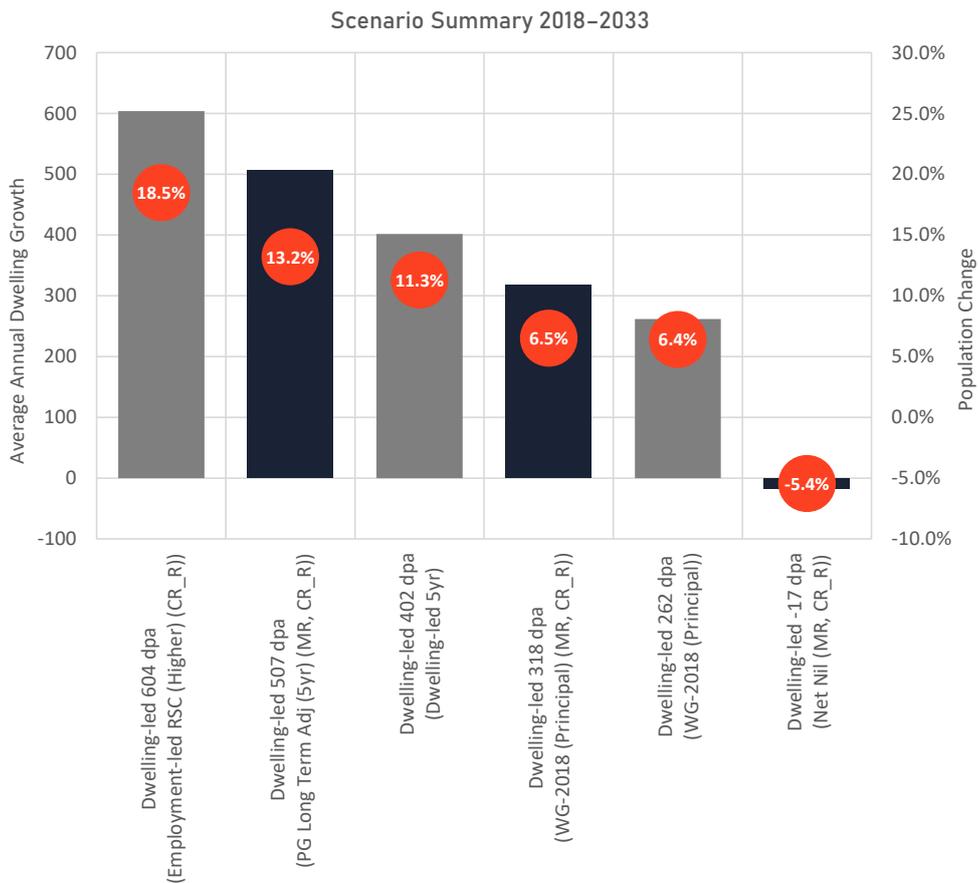
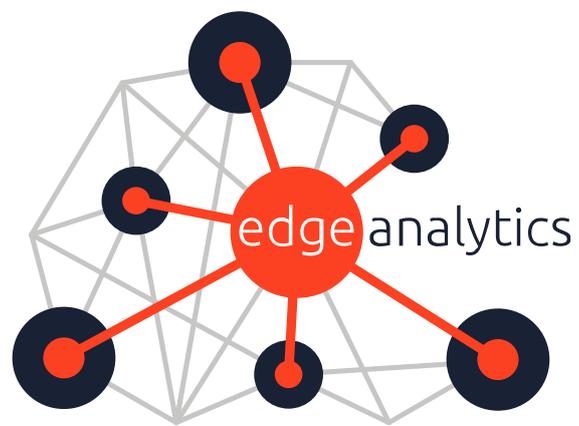


Figure 3: Scenario Summary, 2018–2033



Edge Analytics Ltd

Nexus | Discovery Way | University of Leeds | Leeds | LS2 3AA

[www.edgeanalytics.co.uk](http://www.edgeanalytics.co.uk)

## APPENDIX 3 – Replacement LDP Objectives

A Review of the Issues, Vision and Objectives was undertaken in June 2020 and incorporated into the RLDP Review of IVO and Evidence Base (September 2020)<sup>1</sup> which concluded the Plan’s Issues, Vision and Objectives remain relevant in light of Covid-19 and that it is appropriate to continue with the preparation of the RLDP on the basis of these values. However, some objectives were concluded to have increased emphasis and importance in light of Covid-19, consistent with the priorities identified in the Welsh Government Building Better Places document published in July 2020. These objectives are denoted with an \* in the table below for clarity. Please refer to the RLDP Review of IVO and Evidence Base for further details of how the current pandemic has impacted on the RLDP objectives.

LDP Objective Number	Headline	LDP Objective
<b>*Denotes those RLDP objectives that are considered to have increased emphasis and importance in light of Covid-19</b>		
<b>A Prosperous Wales (Well-being Goal 1)</b>		
<b>Objective 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.
<b>Objective 2</b>	Retail centres*	To sustain and enhance the County towns of Abergavenny, Chepstow, Monmouth, Caldicot and Usk 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.
<b>A Resilient Wales (Well-being Goal 2)</b>		
<b>Objective 3</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.
<b>Objective 4</b>	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

<sup>1</sup> <https://www.monmouthshire.gov.uk/planning-policy/development-of-an-evidence-base/>

LDP Objective Number	Headline	LDP Objective
		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.
<b>Objective 5</b>	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.
<b>Objective 6</b>	Land	To promote the efficient use of land, including the need to: <ul style="list-style-type: none"> <li>• maximise opportunities for development on previously developed land, whilst recognising that brownfield opportunities are limited in Monmouthshire.</li> <li>• protect the best and most versatile (BMV) agricultural land whilst at the same time recognising that this will not always be possible given high proportion of BMV land in the County and the limited opportunities for brownfield development.</li> </ul>
<b>Objective 7</b>	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.
<b>A Healthier Wales (Well-being Goal 3)</b>		
<b>Objective 8</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.
<b>A More Equal Wales (Well-being Goal 4)</b>		
<b>Objective 9</b>	Demography*	To increase opportunities for the younger population to both live and work within Monmouthshire to assist in ensuring a balanced demography.
<b>A Wales of Cohesive Communities (Well-being Goal 5)</b>		
<b>Objective 10</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.
<b>Objective 11</b>	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 accessible places to live, work and visit; and promote people's prosperity, health, happiness and well-being.
<b>Objective 12</b>	Communities	To build sustainable resilient communities where people have good access to employment, shops, housing, public

LDP Objective Number	Headline	LDP Objective
		transport, active travel, healthcare, community and cultural facilities.
<b>Objective 13</b>	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.
<b>Objective 14</b>	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.
<b>Objective 15</b>	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.
<b>A Wales of Vibrant Culture &amp; Thriving Welsh Language (Well-being Goal 6)</b>		
<b>Objective 16</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.
<b>A Globally Responsible Wales (Well-being Goal 7)</b>		
<b>Objective 17</b>	Climate Change*	To strive to limit the increase in global temperatures to 1.5°C, supporting carbon reduction through a variety of measures including the use of renewable energy, the design and location of new development, encouraging balanced job and population growth to reduce out-commuting, the provision of broadband connectivity to reduce the need to travel, the provision of ultra-low emission vehicle charging infrastructure to reduce emissions and improve air quality, and the provision of quality Green Infrastructure.

## APPENDIX 4 – Integrated Sustainability Appraisal (ISA) Objectives

ISA theme	ISA objective
<b>Economy and Employment</b>	To promote economic growth and maximise the economic contribution of the area to the Cardiff City Region, strengthening and diversifying the economy, promoting tourism, enhancing the vitality and viability of town centres and increasing prosperity for all.
	To increase levels of local employment and ensure distribution of opportunities, whilst improving educational attainment and increasing skill levels
<b>Population and Communities</b>	To provide a sufficient quantity of good quality market and affordable homes in sustainable locations to meet identified needs.
	To enhance design quality to create great places for people.
<b>Health and well-being</b>	To improve the health and well-being of the population including physical and mental health, social well-being and community safety.
<b>Equalities, diversity and social inclusion</b>	To reduce poverty and inequality; tackle social exclusion and promote community cohesion.
<b>Transport and Movement</b>	To improve access for all to the jobs, services and facilities they need whilst supporting a reduction in the use of private transport by promoting active travel and encouraging modal shift to sustainable transport, and improving access to high quality digital communications and utilities.
<b>Natural Resources (Air, Land, Minerals and Water)</b>	To identify and pursue any opportunities to reduce, or at least, minimise population exposure to air pollution.
	To make the best use of previously developed land and existing buildings to minimise pressure for greenfield development and protecting where possible higher grade agricultural land.
	To promote the circular economy by reducing waste generation and maximising reuse and recycling, ensuring the use of natural resources and the provision of an adequate supply of minerals.
	To conserve, protect and enhance the water environment, water quality and water resources.
<b>Biodiversity and Geodiversity</b>	To conserve, protect and enhance biodiversity and geodiversity interests within and surrounding Monmouthshire.
<b>Historic Environment</b>	To conserve and enhance the significance of the County's historic environment, cultural assets (including the use of the Welsh language) and heritage assets and their settings.
<b>Landscape</b>	To protect and enhance the quality and character of the landscape.

ISA theme	ISA objective
<b>Climate Change</b>	To mitigate and adapt to the effects of climate change through increasing energy efficiency and generation and use of low carbon and renewable energy sources.
<b>Flood Risk</b>	To reduce and manage the risk of flooding.

## APPENDIX 5 - Long list of Growth Scenarios

Scenario	Description	Initial Assessment	Take Forward
<b>Scenario 1 (version 1)</b>	WG 2018-based (Principal): this Replicates the WG 2018-based Principal population projection, using historical population evidence for 2001-2018.	This scenario is included within the options for further consideration in response to Welsh Government guidance which recommends that the latest local authority population and household projections should be used as a fundamental part of the evidence base for development plans. This includes the principal projection. However, LPAs retain the ability to alter some assumptions within the standardised modelling. This could be a result of localised factors which better reflect specific circumstances. Additional testing of the scenario has, therefore, been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing. This scenario with the benefit of the additional testing has been selected as an option for consultation purposes.	Yes – Option 2 in main report
<b>Scenario 1 (version 2)</b>	WG 2018-based (Principal): this Replicates the WG 2018-based Principal population projection, using historical population evidence for 2001-2018.	As stated above LPAs retain the ability to alter some assumptions within the standardised modelling to reflect localised factors that the Plan wishes to address. Sensitivity testing has been applied to the output from this scenario to establish the impact on the projection of modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34), whilst at the same time reducing out-commuting by retaining more of the resident workforce. Additional testing of the scenario has then been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing. This scenario with the benefit of the sensitivity and	Yes – Option 3 in main report

Scenario	Description	Initial Assessment	Take Forward
		additional testing has been selected as an option for consultation purposes.	
<b>Scenario 2</b>	WG 2018-based (High): replicates the WG 2018-based 'High' population projection, using historical population evidence for 2001-2018.	Welsh Government guidance states that in terms of considering the level of housing provision for a plan, the most up-to- date suite of Welsh Government population and household projections are a fundamental part of the evidence base. This includes both the principal and variant projections. As these variant projections are based on alternative future scenarios of fertility, mortality and migration compared with the principal projection they are a useful indication of the impact on growth of changes to fertility and life expectancy. The 'high population' variant (based on high fertility, life expectancy and migration assumptions), provides an indication of uncertainty, but does not represent an upper limit of future demographic behaviour. Whilst this scenario based on a variant projection is included within the modelling it is not intended to take it forward for consultation.	No
<b>Scenario 3</b>	WG 2018-based (Low): replicates the WG 2018-based 'Low' population projection, using historical population evidence for 2001-2018.	Welsh Government guidance states that in terms of considering the level of housing provision for a plan, the most up-to- date suite of Welsh Government population and household projections are a fundamental part of the evidence base. This includes both the principal and variant projections. As these variant projections are based on alternative future scenarios of fertility, mortality and migration compared with the principal projection they are a useful indication of the impact on growth of changes to fertility and life expectancy. The 'low population' variant (based on low fertility, life expectancy and migration assumptions), provides an indication of uncertainty, but does not represent a lower limit of future demographic behaviour. Whilst this scenario based on a variant projection is included within the modelling it is not intended to take it forward for consultation.	No

Scenario	Description	Initial Assessment	Take Forward
<b>Scenario 4</b>	PG Long Term: Uses an ONS 2019 MYE base year, with area specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Migration assumptions are derived from an 18 year historical period (2001/02-2018/19).	Represents what would happen over the plan period if migration flows remain the same as over the past 18 years. This scenario uses the same assumptions as Scenarios 5 and 6 but without the benefit of the additional assumptions to model the impact going forward of the removal of the Severn Bridge toll. As this has been shown to have had an impact on migration it is felt that it is important to model this. This option has not been selected as an option for consultation purposes.	No
<b>Scenario 5</b>	PG Long Term Adjusted (5yr): Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge toll. All other migration flows are consistent with the PG Long Term scenario.	This scenario is based on the same base assumptions as scenario 4 but takes account of the increase in in-migration associated with the removal of the Severn Bridge Tolls. Migration levels are therefore based on an 18 year period for all groups with the exception of in-migration from Bristol and South Gloucestershire over the past 5 years. By extrapolating the recent migration levels for these two groups over the Plan period this gives an indication of likely trends going forward. As this scenario takes account of a longer period than that since the tolls were removed, it is more robust than Scenario 6 as it is expected that migration levels would not continue at the higher level seen over the past 2 years. Sensitivity testing has been applied to the output from this scenario to establish the impact on the projection of modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34), whilst at the same time reducing out-commuting by retaining more of the resident workforce. Additional testing of the scenario has then been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing. This	Yes – Option 5 in main report

Scenario	Description	Initial Assessment	Take Forward
		scenario with the benefit of the sensitivity and additional testing has been selected as an option for consultation purposes.	
<b>Scenario 6</b>	PG Long Term Adj (2yr) - Uses an ONS 2019 MYE base year, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 2-years) from Bristol and South Gloucestershire, following the removal of the Severn Bridge toll. All other migration flows are consistent with the PG Long Term scenario.	This scenario is based on the same base assumptions as scenario 4 but takes account of the increase in in-migration associated with the removal of the Severn Bridge Tolls. Migration levels are therefore based on an 18 year period for all groups with the exception of in-migration from Bristol and South Gloucestershire over the past 2 years. By extrapolating the recent migration levels for these two groups over the Plan period this gives an indication of likely trends going forward. However, as this scenario is based on a short time frame it is felt that Scenario 5 is more robust for establishing trends going forward. This scenario has not been selected as an option for consultation purposes.	No
<b>Scenario 7</b>	Net Nil – Uses an ONS 2019 MYE, with area-specific fertility and mortality assumptions derived from the WG 2018-based Principal projection. Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration.	This scenario provides a baseline of what would happen if there was to be no net migration into Monmouthshire, with all growth reliant on natural change i.e. the balance between births and deaths. Sensitivity testing has been applied to the output from this scenario to establish the impact on the projection of modelling adjustments to the household membership rates for three key younger age groups (19-24, 25-29, 30-34), whilst at the same time reducing out-commuting by retaining more of the resident workforce. Additional testing of the scenario has been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing. The addition of the affordable housing element	Yes – Option 1 in main report

Scenario	Description	Initial Assessment	Take Forward
		results in a low level of net migration. This scenario with the benefit of the sensitivity and additional testing is to be taken forward for consultation.	
<b>Scenario 8</b>	Dwelling-led (5yr Average): Annual dwelling growth is applied from 2020/21 onward, based on the last five years of completions (2015/16–2019/20). An annual dwelling growth of +310 is applied.	This scenario is based on dwelling completions from the past 5 years, as such it takes account of the recent completion rate as sites allocated in the Adopted LDP have come forward. At the same time as it is the same time period as Scenario 5 it will also take account of any impacts on dwelling delivery of the removal of the Severn Bridge Toll. Additional testing of the scenario has been undertaken to establish the impact on demography, dwellings, household type and employment of an affordable-housing policy-led strategy which aims to meet 10% of the LHMA need arising from this option on housing sites which deliver 50% affordable housing. This scenario with the benefit of the additional testing has been selected as an option for consultation purposes.	Yes – Option 4 in main report
<b>Scenario 9</b>	Dwelling-led (10yr Average): Annual dwelling growth is applied from 2020/21 onward, based on the last ten years of completions (2010/11–2019/20). An average annual dwelling growth of +285 pa is applied.	This scenario is based on dwelling completions from the past 10 years. As such completions are based on a period prior to the adoption of the LDP. Dwelling growth under the previous Plan, the Unitary Development Plan, was planned to be at a much lower level and as such would not address the issues and objectives that the RLDP needs to address. A continuation of this trend would not achieve the Plan’s vision of creating sustainable and resilient communities. This scenario has not been selected as an option for consultation purposes.	No
<b>Scenario 10</b>	Dwelling-led (15yr Average): Annual dwelling growth is applied from 2020/21 onward, based on the last fifteen years of completions (2005/06–2019/20). An average	This scenario represents what would happen over the plan period if dwelling delivery remains the same as over the past 15 years, i.e. ‘business as usual’. A continuation of this trend would not address the issues and objectives that the RLDP needs to address. A continuation of this trend would not achieve the Plan’s vision of creating sustainable and	No

Scenario	Description	Initial Assessment	Take Forward
	annual dwelling growth of +269 pa is applied.	resilient communities. This scenario has not been selected as an option for consultation purposes.	
<b>Scenario 11</b>	Baseline (CR reducing): Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (2.9%).	The baseline is an employment-led scenario which sets economic growth on a low trajectory in the County, this would not support the Council's economic aspirations or meet key RLDP objectives with regard to the economy and demography. It is deemed unrealistic to assume that there would be a reduced commuting ratio by the end of the plan period without any significant employment growth, although it is recognised that there is likely to be an increased propensity for people to work at home as a result of Covid-19. This scenario has not been selected as an option for consultation purposes.	No
<b>Scenario 12</b>	UK Growth Rate (CR reducing): Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (2.9%).	Whilst this scenario models the implications of bringing Monmouthshire's employment growth in underperforming sectors in line with that of the UK, this would not support the Council's economic aspirations or meet key RLDP objectives with regard to the economy and demography. It is deemed unrealistic to assume that there would be a reduced commuting ratio by the end of the plan period without significant employment growth across all sectors, although it is recognised that there is likely to be an increased propensity for people to work at home as a result of Covid-19. This scenario has not been selected as an option for consultation purposes.	No
<b>Scenario 13</b>	Radical Structural Change Lower (CR reducing): Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (2.9%).	This scenario considers the impact of employment growth above the baseline, so would support the Council's economic aspirations and would begin to address the RLDPs key objectives. It also considers the impact on commuting of this higher level of job provision. However, even at this higher level of economic growth it is questioned whether this would be sufficient to impact to this degree on the commuting ratio, although it is recognised that there is likely to be an increased propensity for people to	No

Scenario	Description	Initial Assessment	Take Forward
		work at home as a result of Covid-19. This scenario has not been selected as an option for consultation purposes.	
<b>Scenario 14</b>	Radical Structure Change Higher (CR reducing): Assumes the commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains fixed at current value (2.9%).	This scenario considers the potential impact of a radical structural change in Monmouthshire's economy. This would support the Council's economic aspirations and would address the RLDPs key objectives. It is a useful scenario which shows the implications of going for this high level of growth over the plan period. This scenario is included within the options for further consideration as it is realistic to assume that the commuting ratio would reduce if this high level of growth was considered, with more of Monmouthshire's residents employed within the County.	Yes - Option 6 in main report

## APPENDIX 6 - Long list of Spatial Options

Option	Description	Initial Assessment	Take Forward
<b>Option 1 – Continuation of existing LDP Strategy</b>	Growth would be distributed around the County with a particular focus on Main Towns <sup>1</sup> , with some development in Severnside <sup>2</sup> and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development would be accompanied by new employment opportunities, where possible.	<p>This option replicates the existing strategy of the Adopted LDP. Evidence from the Annual Monitoring Report’s suggest progress continues to be made towards the implementation of the spatial strategy, however, it does identify that the current housing provision policies are not being delivered as quickly as anticipated which in turn impacts on housing land supply, progress is nevertheless still being made in bringing the strategic sites forward. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints, affordable housing and employment provision.</p> <p>This option is considered to be realistic and has been selected as an option for consultation purposes.</p>	Yes
<b>Option 2 – Distribute growth Proportionately across the County’s most</b>	Growth, including jobs and affordable housing, would be distributed across the County’s most sustainable settlements <sup>3</sup> , with the level of growth proportionate to that settlement’s size and	This option would support the delivery of housing land in sustainable locations for development through distribution of growth in both sustainable urban areas and the most sustainable rural areas, in accordance with PPW 10. It would also direct affordable housing to areas identified in the LHMA as having the greatest need. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints and employment provision.	Yes

<sup>1</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014)

<sup>2</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014)

<sup>3</sup> A Sustainable Settlement Appraisal will be published in preparation for the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.

Option	Description	Initial Assessment	Take Forward
<b>Sustainable Settlements</b>	amenities, affordable housing need as identified in the LHMA, the capacity for growth and/or the need for development to sustain the community.	This option is considered to be realistic and has been selected as an option for consultation purposes.	
<b>Option 3 – Focus Growth on the M4 corridor</b>	Growth would be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections, including via the South Wales Main rail line at Severn Tunnel Junction. Affordable Housing would be directed to those sustainable areas in the South of the County identified in the LHMA as having the greatest housing need.	<p>This option focusses growth in areas in Severnside close to the M4/M48 corridor. Impact on housing need across the County as a whole, including, rural areas will need to be factored into a full appraisal. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints, affordable housing and employment provision.</p> <p>This option is considered to be realistic and has been selected as an option for consultation purposes.</p>	Yes
<b>Option 4 – Focus Growth</b>	Growth would be predominantly located in the most sustainable settlements	This option focusses growth in the most sustainable settlements in the North of Monmouthshire i.e. Abergavenny, Raglan and Monmouth. Impact on housing need across the County as a whole, including, rural areas and the South of the	Yes

Option	Description	Initial Assessment	Take Forward
<b>in the North of the County</b>	within the North of the County to capitalise on its strategic links to the Heads of the Valleys and wider Cardiff Capital Region via the A465, and towards Herefordshire via the A449 and A40, along with rail links to Newport, Cardiff and the north via the Welsh Marches line. Affordable Housing would be directed to those sustainable areas in North of the County identified in the LHMA as having the greatest housing need.	<p>County will need to be factored into a full appraisal. Further consideration will be given to a range of factors as part of the assessment of the option including infrastructure capacity, policy constraints, affordable housing and employment provision.</p> <p>This option is considered to be realistic and has been selected as an option for consultation purposes.</p>	
<b>Option 5 – Former Option A of Adopted Local Development Plan</b>	Focus development within or adjoining the three main towns of Abergavenny, Chepstow and Monmouth where there is the best access to jobs services and public transport.	<p>This relates to an option considered previously in the Adopted LDP.</p> <p>There is limited scope for significant or long term expansion of the Main Towns within the County due to a mix of physical, environmental and Policy constraints. Further significant or long term expansion in these areas would place additional pressure which outweighs the balance of benefits in terms of accessibility to existing services and jobs. This option would not meet housing or economic need across the County as a whole.</p> <p>This option is not considered to be realistic and as a consequence has not been selected as an option for consultation purposes.</p>	No

Option	Description	Initial Assessment	Take Forward
<b>Option 6 – Former Option D of Adopted Local Development Plan</b>	<p>Focus development on sites and settlements where opportunities exist for large scale mixed development to enable new residential development to be accompanied by an associated increase in employment opportunities.</p>	<p>This relates to an option considered previously in the Adopted LDP. The current LDP Strategy includes a number of Strategic Mixed Use Sites, however the provision of employment opportunities together with residential developments has not been fulfilled in all of the Strategic Mixed Use Sites allocated in the adopted LDP. This option would take this further by only allocating Mixed Use Sites which based on previous experience are likely to be subject to viability and deliverability issues and would not be a realistic option going forward. While a focus on mixed use sites would not be appropriate, where such sites are considered to be viable and deliverable they should be given further consideration. It would nevertheless be more beneficial to allocate Employment land in line with the findings of the Employment Land Review and other Council aspirations.</p> <p>This option would not meet housing need across Monmouthshire as a whole, particularly in rural areas of need. The inclusion of large scale development would also likely impact build rates, with a preference towards large house builders limiting the amount of small/medium house builders working across the County.</p> <p>This option is not considered to be realistic and as a consequence has not been selected as an option for consultation purposes.</p>	<p>No</p>

## APPENDIX 7 – Summary Matrix of Growth Options against the RLDP Objectives

	Option 1 – Balanced Migration (with added policy assumptions) (Net Nil Migration (MR, CR_R), AH )	Option 2 – WG 2018-based Principal Projection (AH)	Option 3 – WG 2018-based Principal Projection (with added policy assumptions) (WG 2018-based Principal (MR, CR_R), AH)	Option 4 – Dwelling-led Average (based on dwelling completion rates) (Dwelling-led 5 year average, AH)	Option 5 _ Population-led projection(with added policy assumptions) (PG Long Term (adjusted) (5yr) (MR, CR_R), AH)	Option 6 – Employment-led projection (with added policy assumptions) (Radical Structural Change Higher (CR_R), AH)
Economic Growth/Employment	Red	Red	Yellow	Green	Green	Green
Retail centres	Red	Yellow	Yellow	Green	Green	Green
Green Infrastructure, Biodiversity and Landscape	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Flood risk	Green	Green	Green	Green	Green	Green
Minerals and Waste	Green	Green	Green	Green	Yellow	Red
Land	Green	Yellow	Yellow	Yellow	Yellow	Yellow
Natural resources	Yellow	Green	Green	Green	Green	Green
Health and Well-being	Red	Red	Yellow	Green	Green	Green
Demography	Red	Red	Red	Yellow	Green	Green
Housing	Red	Red	Yellow	Green	Green	Green
Place-making	Red	Red	Yellow	Green	Green	Green
Communities	Red	Red	Yellow	Yellow	Green	Green
Rural Communities	Red	Red	Red	Yellow	Green	Green
Infrastructure	Red	Red	Red	Green	Green	Green
Accessibility	Red	Red	Yellow	Yellow	Green	Green
Culture, Heritage and Welsh Language	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow
Climate Change	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow

## APPENDIX 8 – Summary Matrix of Growth Options against the ISA Objectives

ISA theme		Categorisation and rank					
		Option 1 – Balanced Migration (with added policy assumptions) (Net Nil Migration (MR, CR_R), AH )	Option 2 – WG 2018-based Principal Projection (AH)	Option 3 Option 3 – WG 2018-based Principal Projection (with added policy assumptions) (WG 2018-based Principal (MR, CR_R), AH)	Option 4 – Dwelling-led Average (based on dwelling completion rates) (Dwelling-led 5 year average, AH)	Option 5 – Population-led projection(with added policy assumptions) (PG Long Term (adjusted) (5yr) (MR, CR_R), AH)	Option 6 – Employment-led projection (with added policy assumptions) (Radical Structural Change Higher (CR_R), AH)
Economy and employment	Rank	5	4	3	2	1	1
	Significant effect?	Yes - negative	Uncertain	Uncertain	Uncertain	Yes - positive	Yes - positive
Population and communities	Rank	5	4	3	2	1	1
	Significant effect?	Yes - negative	Uncertain	Uncertain	Uncertain	Yes - positive	Yes - positive
Health and wellbeing	Rank	5	4	3	2	1	1
	Significant effect?	Yes - negative	Uncertain	Uncertain	Uncertain	No	No
Equalities, diversion and social inclusion	Rank	5	4	3	2	1	1
	Significant effect?	Yes - negative	Uncertain	Uncertain	Uncertain	No	Uncertain
Transport and movement	Rank	2	2	2	1	1	1
	Significant effect?	No	No	No	No	No	No
Natural resources (air, land, minerals and water)	Rank	1	2	3	4	5	6
	Significant effect?	No	Uncertain	Uncertain	Uncertain	Uncertain	Uncertain
Biodiversity and geodiversity	Rank	1	2	3	4	5	6
	Significant effect?	No	No	No	Uncertain	Uncertain	Uncertain
Historic environment	Rank	1	2	3	4	5	6
	Significant effect?	No	Uncertain	Uncertain	Uncertain	Uncertain	Uncertain

ISA theme		Categorisation and rank					
		Option 1 – Balanced Migration (with added policy assumptions) (Net Nil Migration (MR, CR_R), AH )	Option 2 – WG 2018-based Principal Projection (AH)	Option 3 Option 3 – WG 2018-based Principal Projection (with added policy assumptions) (WG 2018-based Principal (MR, CR_R), AH)	Option 4 – Dwelling-led Average (based on dwelling completion rates) (Dwelling-led 5 year average, AH)	Option 5 _ Population-led projection(with added policy assumptions) (PG Long Term (adjusted) (5yr) (MR, CR_R), AH)	Option 6 – Employment-led projection (with added policy assumptions) (Radical Structural Change Higher (CR_R), AH)
Landscape	Rank	1	2	3	4	5	6
	Significant effect?	No	Uncertain	Uncertain	Uncertain	Uncertain	Uncertain
Climate change (including flood risk)	Rank	6	5	4	3	2	1
	Significant effect?	No	No	No	No	No	No

## APPENDIX 9 – Summary Matrix of Spatial Options against RLDP Objectives

	Option 1 -Continuation of existing LDP Strategy	Option 2 – Distribute Growth across most sustainable settlements	Option 3 – Focus Growth on the M4 corridor	Option 4 – Focus Growth in the north of the County
Economic Growth/Employment	Green	Green	Yellow	Yellow
Retail centres	Green	Green	Red	Red
Green Infrastructure, Biodiversity and Landscape	Yellow	Yellow	Yellow	Yellow
Flood risk	Green	Green	Green	Green
Minerals and Waste	Green	Green	Red	Green
Land	Yellow	Yellow	Yellow	Yellow
Natural resources	Green	Green	Green	Green
Health and Well-being	Green	Green	Green	Green
Demography	Green	Green	Red	Red
Housing	Green	Green	Red	Red
Place-making	Green	Green	Green	Green
Communities	Green	Green	Red	Red
Rural Communities	Green	Green	Red	Red
Infrastructure	Green	Green	Yellow	Yellow
Accessibility	Green	Green	Yellow	Yellow
Culture, Heritage and Welsh Language	Yellow	Yellow	Yellow	Yellow
Climate Change	Yellow	Yellow	Yellow	Yellow

## APPENDIX 10 – Summary Matrix of Spatial Options against the ISA Objectives

ISA Themes	Rank/Significant effects	Categorisation and rank			
		Option 1 – Continuation of the Existing LDP Strategy	Option 2 – Distribute Growth Proportionately across the County's most Sustainable Settlements	Option 3 – Focus Growth on the M4 Corridor	Option 4 – Focus Growth in the North of the County
Economy and employment	Rank	1	1	2	2
	Significant effect?	Yes - Positive	Yes - Positive	Uncertain	Uncertain
Population and communities	Rank	1	1	2	2
	Significant effect?	Yes - Positive	Yes - Positive	Uncertain	Uncertain
Health and wellbeing	Rank	1	1	3	2
	Significant effect?	Yes - Positive	Yes - Positive	Uncertain	Uncertain
Equalities, diversion and social inclusion	Rank	1	1	2	2
	Significant effect?	Yes - Positive	Yes - Positive	Uncertain	Uncertain
Transport and movement	Rank	1	1	2	3
	Significant effect?	Uncertain	Uncertain	Uncertain	Uncertain
Natural resources (air, land, minerals and water)	Rank	1	1	3	2
	Significant effect?	Yes - Negative	Yes - Negative	Yes - Negative	Yes - Negative
Biodiversity and geodiversity	Rank	=	=	=	=
	Significant effect?	Uncertain	Uncertain	Uncertain	Uncertain
Historic environment	Rank	=	=	=	=
	Significant effect?	Uncertain	Uncertain	Uncertain	Uncertain
Landscape	Rank	2	2	1	2
	Significant effect?	Uncertain	Uncertain	Uncertain	Uncertain
Climate Change	Rank	2	2	1	2
	Significant effect?	Uncertain	Uncertain	Uncertain	Uncertain

### Executive Summary

- i. The Council is preparing a Replacement Local Development Plan (RLDP) for Monmouthshire (excluding the part of the County that is within the Brecon Beacons National Park). The RLDP will identify where and how much new development will take place during the 'Plan period' (2018-2033). It will allocate land for development, identify areas to be protected, and contain policies to guide decisions on applications for planning permission. We aim to adopt the RLDP in Autumn 2023.
- ii. The RLDP will be accompanied by an Integrated Sustainability Appraisal (ISA) which will consider the environmental, equalities, health and well-being impacts of the Plan. The Integrated Sustainability Appraisal is a working document, updated as the RLDP progresses. The RLDP will include an Infrastructure Plan, setting out what is needed to support the development of the allocated sites, and will sit alongside a Local Transport Plan and Economic Strategy. Together, these Plans will seek to deliver on the Council's economic ambition and its core purpose to build sustainable and resilient communities that support the well-being of current and future generations.
- iii. We originally consulted on a range of growth and spatial options in the summer of 2019, the decision has been made, however, to revisit this stage of the Plan process. The Welsh Government population and household projections form the starting point for the RLDP evidence on growth levels, onto which policy choices can be added as needed, for example to ensure that the County's identified issues are addressed, objectives met and vision achieved. The publication of corrected Welsh Government 2018-based population and household projections in August 2020 comprise important new evidence that requires consideration to ensure that the evidence base for the RLDP is robust and based on the most up to date information. Consequently we need to revisit both the Growth and Spatial Options and Preferred Strategy stages of the plan preparation process.
- iv. This Paper sets out alternative growth and spatial options for the RLDP, together with the implications of each option and the extent to which they will achieve the RLDP and Integrated Sustainability Appraisal (ISA) objectives. The options presented in this Paper provide an indication of the scale of growth (housing and employment) that the RLDP will potentially need to include and broad options of where that growth could be located (spatial option), having regard to the evidence base and policy aspirations.

### Growth Options

- v. Section 2 of the Paper presents a range of alternative demographic, dwelling and employment-led growth options for consideration to inform the RLDP (2018-2033).
- vi. In light of the publication of corrected Welsh Government 2018-based projections Monmouthshire has commissioned Edge Analytics to prepare a range of up-dated demographic, dwelling and employment growth scenarios to inform the RLDP growth options.
- vii. A total of fourteen different scenarios have been generated for Monmouthshire, together with further sensitivity testing for all of the demographic and dwelling-led scenarios with regard to household formation and commuting ratios. From these fourteen different scenarios, six growth options have been selected for consultation

(see Table below). These six options have been the subject of further testing to establish the impact on demography, household formation and employment of an affordable-housing policy-led strategy. It should be noted that the growth outcomes of each scenario generated includes that part of Monmouthshire that falls within the Brecon Beacons National Park.

- viii. This Paper considers the population, household, dwelling and employment implications associated with each of the alternative growth options set out below, together with their wider implications for the County and the extent to which they will achieve the RLDP's and ISA objectives. A summary of the implications associated with each option is provided in Table 6.
- ix. Based on the assessment of the growth options our preferred option to address the County's issues/challenges and meet the RLDP and ISA objectives is Growth Option 5, Population-led (with added policy assumptions).<sup>1</sup>
- x. To provide an indication of the baseline position, the 2019 Office for National Statistics Mid-Year Estimate gives Monmouthshire a population of 94,590; the 2011 Census recorded 38,233 households in Monmouthshire; and the 2011 Census recorded 40,044 dwellings in Monmouthshire. The preferred Growth Option (5) would result in a population increase 12,443 (13.2%) and an additional 7,605 homes over the Plan period (2,945 new homes once existing commitments and windfall allowances are taken into account).

---

<sup>1</sup> This is the PG Long Term (adjusted) (5yr) (MR, CR\_R), AH) scenario from the Edge Analytics Reports.

## Summary of Selected Growth Options

Options (type)		Assumptions	Additional homes by 2033	Additional jobs by 2033
Option 1 (Demographic)	<b>Balanced Migration (with added policy assumptions)</b> (Net Nil Migration (MR, CR_R), AH )	Internal and international migration flows are balanced between in- and out-flows, resulting in zero net migration. Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. An average of 53dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	-255 homes	-1800 jobs
Option 2 (Demographic)	<b>WG 2018-based Principal Projection (AH)</b>	Replicates the WG 2018-based population projection. Migration assumptions are based on the five-year period prior to 2018 (i.e. 2013/14–2017/18). An average of 71dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+3930 homes	+3,120 jobs
Option 3 (Demographic)	<b>WG 2018-based Principal Projection (with added policy assumptions)</b> (WG 2018-based Principal (MR, CR_R), AH)	Replicates the WG 2018-based population projection. Migration assumptions are based on the five-year period prior to 2018 (i.e. 2013/14–2017/18). Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. An average of 76dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+4770 homes	+3975 jobs
Option 4 (Dwelling)	<b>Dwelling-led Average (based on dwelling completion rates)</b> (Dwelling-	Annual dwelling growth is applied from 2020/21 onward, based on the last five years of completions (2015/16–2019/20). This gives an average annual dwelling growth of +310 pa in Monmouthshire. An average of 80dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the	+6030 homes	+5460 jobs

	led 5 year average, AH)	projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.		
Option 5 (Demographic)	<b>Population-led projection(with added policy assumptions)</b> (PG Long Term (adjusted) (5yr) (MR, CR_R), AH)	Internal in-migration rates are adjusted to reflect higher in-migration (based on the last 5-years) from Bristol and South Gloucestershire, to take account of the removal of the Severn Bridge tolls. All other migration flow assumptions are consistent with the PG Long Term scenario. Household membership rates for the young adult age-groups (19-24, 25-29, 30-34) have been adjusted to 'return' to their 2001 values between 2018-2033. Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. An average of 94dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+7605 homes	+7215 jobs
Option 6 (Employment)	<b>Employment-led projection (with added policy assumptions)</b> (Radical Structural Change Higher (CR_R), AH)	Commuting ratio reduces from 2011 Census value (1.12) to 2001 Census value (1.10) over the plan period. Economic activity rate adjustments in line with the OBR forecast, unemployment rate remains at current value (2019) (2.9%). An average of 124dpa is added to the projected dwelling growth under this scenario between 2018-2033. This will meet a policy-led objective of achieving 10% of the projected need arising from this option, as evidenced by the LHMA, on sites with 50% affordable housing.	+9060 homes	+9630 jobs
*Radical Structural Change' (RSC) scenarios consider the potential impact of substantial economic changes in Monmouthshire's economy, resulting in a significantly higher employment growth range than under the 'Baseline' and UK Growth equivalent. Under these scenarios, employment growth ranges from +3,866 to +8,273 jobs over the plan period, averaging +258 and +552 pa respectively.				

## Spatial Strategy Options

- xi. Section 3 of the Paper sets out four spatial strategy options for accommodating the proposed level of housing and employment growth:
- **Option 1: Continuation of the Existing LDP Strategy** – Growth would be distributed around the County with a particular focus on Main Towns<sup>2</sup>, with some development in Severnside<sup>3</sup> and some development in the most sustainable rural areas to enable provision of affordable housing throughout the County. New residential development to be accompanied by new employment opportunities, where possible.
  - **Option 2: Distribute Growth Proportionately across the County's most Sustainable Settlements<sup>4</sup>** – Growth, including jobs and affordable housing, would be distributed across the County's most sustainable settlements, with the level of growth proportionate to that settlement's size and amenities, affordable housing need as identified in the LHMA, the capacity for growth and/or the need for development to sustain the community.
  - **Option 3: Focus Growth on the M4 corridor** – Growth would be predominantly located in the South of the County in the Severnside area close to the M4/M48, to capitalise on its strategic links to the Cardiff Capital Region and South West England, existing economic opportunities and regional infrastructure connections, including via the South Wales Main rail line at Severn Tunnel Junction. Affordable Housing would be directed to those sustainable areas in the South of the County identified in the LHMA as having the greatest housing need.
  - **Option 4: Focus Growth in the North of the County** – Growth would be predominantly located in the most sustainable settlements within the North of the County to capitalise on its strategic links to the Heads of the Valleys and wider Cardiff Capital Region via the A465, and towards Herefordshire via the A449 and A40, along with rail links to Newport, Cardiff and the North via the Welsh Marches line. Affordable Housing would be directed to those sustainable areas in the North of the County identified in the LHMA as having the greatest housing need.
- xii. The advantages and disadvantages of each spatial option and the extent to which they will achieve the RLDP and ISA objectives are set out in Section 3, together with an indicative map of each option. Based on the assessment of the spatial options our preferred option to address the County's issues/challenges and meet the RLDP and ISA

---

<sup>2</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014), now renamed to Primary Settlements and includes the addition of Llanfoist.

<sup>3</sup> As identified in Policy S1 of the Adopted Local Development Plan (2014), with the addition of Crick.

<sup>4</sup> A Sustainable Settlement Appraisal will be published to inform the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.

objectives is Spatial Option 2 to Distribute Growth Proportionately across the County's most Sustainable Settlements<sup>5</sup>.

### **Engagement/Consultation**

- xiii. There is no statutory requirement for consultation on the Growth and Spatial Options. However, in accordance with the RLDP Revised Delivery Agreement (October 2020) and as with the original growth and spatial options, it is considered appropriate to continue to engage with stakeholders/our communities at this key stage of the process to help build consensus on the growth levels and spatial strategy of the RLDP and to fully understand the implications of the options.
- xiv. Non-statutory engagement and consultation on the Growth and Spatial Options Paper will take place for a four-week period from 4<sup>th</sup> January 2021 to 1<sup>st</sup> February 2021, whereby comments will be invited on the consultation questions set out in Sections 2 and 3. An Easy Read version of this document has also been prepared which is available to view via the Planning Policy pages of the Council's website.
- xv. Feedback from the consultation/engagement on the Growth and Spatial Options Paper will be considered and, where appropriate, will inform the preferred growth and spatial strategy options which will be set out in the Preferred Strategy. The RLDP Preferred Strategy will be the subject of engagement/consultation in May/June 2021.

---

<sup>5</sup> A Sustainable Settlement Appraisal will be published to inform the Preferred Strategy to identify these settlements. This will consider settlements in terms of their location, level of service provision, capacity and their role and function within the area.



**Name of the Officer** completing the evaluation  
Mark Hand

**Phone no:** 07773478579

**E-mail:** markhand@monmouthshire.gov.uk

**Please give a brief description of the aims of the proposal**

The **Growth and Spatial Options Paper** sets out a number of alternative growth and spatial strategy options for consideration having regard to the Plan's evidence base and policy aspirations. The options presented provide an indication of the scale of growth (housing and employment) that the RLDP will need to address, together with spatial strategy options for accommodating that growth. The consideration of realistic growth and spatial options is an important part of the preparation of the RLDP which are intended to facilitate discussion and inform the Preferred Strategy.

The Growth and Spatial Options Paper identifies our preferred growth and spatial options that are considered to best address the County's key issues/challenges and meet the RLDP objectives.

The Growth and Spatial Options Paper sets out the population, household, dwelling and employment implications associated with each of the selected growth options, together with their wider implications for the County and the extent to which they will achieve the RLDP objectives. The options have also been assessed through the Integrated Sustainability Appraisal process.

We originally consulted on a range of growth and spatial options in the summer of 2019, the decision has been made, however, to revisit this stage of the Plan process. The Welsh Government population and household projections form the starting point for the RLDP evidence on growth levels, onto which policy choices can be added as needed, for example to ensure that the County's identified issues are addressed, objectives met and vision achieved. The publication of corrected Welsh Government 2018-based population and household projections in August 2020 comprise important new evidence that requires consideration to ensure that the evidence base for the RLDP is robust

	and based on the most up to date information. Consequently we need to revisit both the Growth and Spatial Options and Preferred Strategy stages of the plan preparation process.
<b>Name of Service area</b> Planning (Planning Policy)	<b>Date</b> 17/11/2020

**1. Are your proposals going to affect any people or groups of people with protected characteristics?** Please explain the impact, the evidence you have used and any action you are taking below.

<b>Protected Characteristics</b>	<b>Describe any positive impacts your proposal has on the protected characteristic</b>	<b>Describe any negative impacts your proposal has on the protected characteristic</b>	<b>What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?</b>
Age	The Growth and Spatial Options Paper considers the demographic profile of Monmouthshire and aims to have a positive impact on people of all ages, particularly through increasing opportunities for the younger population to both live and work with Monmouthshire to assist in ensuring a balanced demography whilst also supporting the needs of the older population.	None.	The Growth and Spatial Options Paper considers how much growth is needed over the RLDP period and where this growth should take place. It sets out options to provide a more balanced demographic profile for Monmouthshire. The Growth and Spatial Options will inform the RLDP Preferred Strategy which will set out the Preferred Options for growth and spatial distribution. COVID-19 has demonstrated the importance of sustainable communities and a balanced demography to support the older age groups.

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Disability	The Growth and Spatial Options paper includes the need to ensure the provision of a wide-ranging choice of homes including meeting affordable and accessible housing needs as far as possible. The Growth and Spatial Options recognise the importance of the health and well-being of people and aims to create attractive, safe and accessible places to live, work and visit	None.	The Growth and Spatial Options aim to support the well-being of current and future generations that are more inclusive, cohesive, prosperous and vibrant. The Growth and Spatial Options will inform the RLDP Preferred Strategy which will set out the Preferred Options for growth and spatial distribution.
Gender Reassignment	None.	None.	N/A.
Marriage or civil partnership	None.	None.	N/A.
Pregnancy or maternity	None.	None.	N/A.
Race	None.	None.	N/A.
Religion or Belief	None.	None.	N/A.
Sex	One of the challenges facing the County is the imbalance between male and female earnings, although this situation is improving. The Growth and Spatial Options aim to provide economic growth and employment provision, which could indirectly impact on wage equality.	None.	The Growth and Spatial Options aim to support economic growth and prosperity. The Growth and Spatial Options will inform the RLDP Preferred Strategy which will set out the Preferred Options for growth and spatial distribution.

12399327

Protected Characteristics	Describe any positive impacts your proposal has on the protected characteristic	Describe any negative impacts your proposal has on the protected characteristic	What has been/will be done to mitigate any negative impacts or better contribute to positive impacts?
Sexual Orientation	None.	None.	N/A.
Welsh Language	The Welsh Language is a material planning consideration. The Growth and Spatial Options are assessed against the RLDP Objective relating to Culture, Heritage and Welsh Language to ensure there is no impact.	None.	The Growth and Spatial Options aim to support culture and the Welsh Language. The Growth and Spatial Options will inform the RLDP Preferred Strategy which will set out the Preferred Options for growth and spatial distribution.
Poverty	None.	None.	N/A

Page 328

**Does your proposal deliver any of the well-being goals below?** Please explain the impact (positive and negative) you expect, together with suggestions of how to mitigate negative impacts or better contribute to the goal. There's no need to put something in every box if it is not relevant!

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<b>A prosperous Wales</b> Efficient use of resources, skilled, educated people, generates wealth, provides jobs	<b>Positive:</b> The Growth and Spatial Options Paper considers how much growth is needed over the RLDP period and where this growth should take place. It sets out the growth and spatial options which as well as housing growth aim to provide economic growth and employment provision in both urban and rural areas.  <b>Negative:</b> None.	The Growth and Spatial Options are assessed against the RLDP Objectives relating to economic growth/employment and retail centres, which have been set in order to address the identified issues relating to creating a prosperous Wales.

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
<p><b>A resilient Wales</b>  Maintain and enhance biodiversity and ecosystems that support resilience and can adapt to change (e.g. climate change)</p>	<p><b>Positive:</b> The Growth and Spatial Options Paper considers how much growth is needed over the Replacement LDP period and where this growth should take place. It sets out the growth and spatial options which are assessed against the Replacement LDP Objectives including the impact of development on the natural environment in already constrained areas. It is however recognised that developments could improve connectivity through opportunities to create new linkages. The limited supply of brownfield land within the County is a common theme for all of the spatial options presented in the paper. A climate change objective is included in the assessment of each option which recognises that we are in a climate emergency and has committed to strive to limit the increase in global temperatures to 1.5°C. Resilience of new development to aspects of Climate Change can be achieved via the design and location of new developments. Developments can provide opportunities to minimise carbon by providing opportunities for renewable energy generation, seeking to reduce commuting, supporting use of ultra-low emission vehicles and public transport, and the provision of quality Green Infrastructure. The current pandemic has emphasised the need to enable such responses in delivering sustainable and resilient communities. The Covid-19 pandemic has also emphasised the importance of place-making and green infrastructure for the provision of open spaces</p>	<p>The Growth and Spatial Options are assessed against the RLDP Objectives relating to Green Infrastructure, Biodiversity and Landscape, Flood risk, Minerals and Waste, Land and Natural Resources which have been set in order to address the identified issues relating to creating a resilient Wales.</p>

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p>in close proximity to homes for physical and mental wellbeing.</p> <p><b>Negative:</b> None.</p>	
<p><b>A healthier Wales</b> People's physical and mental wellbeing is maximized and health impacts are understood</p>	<p><b>Positive:</b> The Growth and Spatial Options Paper considers how much growth is needed over the RLDP period and where this growth should take place. It is recognised that any developments will be encouraged to support healthier lifestyles and provide sufficient open space. The Covid-19 pandemic has emphasised the vulnerability of those in our communities with underlying health conditions, as well as the importance of place-making and green infrastructure for the provision of open spaces in close proximity to homes for physical and mental wellbeing.</p> <p><b>Negative:</b> None.</p>	<p>The Growth and Spatial Options area are assessed against the RLDP Objectives including Health and Well-being in order to address the identified issues relating to creating a healthier Wales. The Covid-19 pandemic has emphasised the vulnerability of those in our communities with underlying health conditions, as well as the importance of place-making and green infrastructure for the provision of open spaces in close proximity to homes for physical and mental wellbeing.</p>
<p><b>A Wales of cohesive communities</b> Communities are attractive, viable, safe and well connected</p>	<p><b>Positive:</b> The Growth and Spatial Options Paper considers how much growth is needed over the RLDP period and where this growth should take place. It sets out the growth and spatial options which considers the balance of housing, employment and infrastructure in both urban and rural areas. The Covid-19 pandemic has emphasised the importance of socially sustainable communities and ensuring a balanced demography. The role of younger age cohorts providing voluntary support to the over 70s who have been self-isolating has been vital. Unchecked, our ageing demography presents a very</p>	<p>The Growth and Spatial Options area are assessed against the RLDP draft Objectives including housing, place-making, communities, rural communities, infrastructure and accessibility in order to address the identified issues relating to creating a Wales of cohesive communities. The Covid-19 pandemic has emphasised the importance of socially sustainable communities and ensuring a balanced demography. The role of younger age cohorts providing voluntary support to the over 70s who have been self-isolating has been vital. Unchecked, our ageing demography presents a</p>

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p>real challenge to how such support would be offered in the future.</p> <p><b>Negative:</b> None.</p>	<p>very real challenge to how such support would be offered in the future.</p>
<p><b>TA globally responsible Wales</b>          Taking account of impact on global well-being when considering local social, economic and environmental wellbeing</p>	<p><b>Positive:</b> The Growth and Spatial Options Paper considers how much growth is needed over the RLDP period and where this growth should take place. It sets out the growth and spatial options which are assessed against the RLDP Objectives including the impact of options on climate change. A climate change objective is included in the assessment of each option which recognises that we are in a climate emergency and has committed to strive to limit the increase in global temperatures to 1.5°C. The Covid-19 pandemic has demonstrated that a significant proportion of our communities can work from home. Home/agile working combined with school closures and reduced leisure-based travel has significantly reduced congestion and evidence suggests air quality has improved markedly. The RLDP seeks to reduce the commuting ratio and to enable home-working: Covid-19 has demonstrated that this is achievable.</p> <p><b>Negative:</b> None.</p>	<p>The Growth and Spatial Options are assessed against the RLDP Objectives including climate change which has been set in order to address the identified issues relating to creating a globally responsible Wales. A climate change objective is included in the assessment of each option which recognises that we are in a climate emergency and has committed to strive to limit the increase in global temperatures to 1.5°C. The Covid-19 pandemic has demonstrated that a significant proportion of our communities can work from home. Home/agile working combined with school closures and reduced leisure-based travel has significantly reduced congestion and evidence suggests air quality has improved markedly. The RLDP seeks to reduce the commuting ratio and to enable home-working: Covid-19 has demonstrated that this is achievable.</p>
<p><b>A Wales of vibrant culture and thriving Welsh language</b>          Culture, heritage and Welsh language are promoted and protected. People are encouraged to do sport, art and recreation</p>	<p><b>Positive:</b> The Growth and Spatial Options Paper considers how much growth is needed over the RLDP period and where this growth should take place. It sets out the growth and spatial options which are assessed against the RLDP Objectives including the</p>	<p>The Growth and Spatial Options are assessed against the RLDP Objectives including Culture, Heritage and the Welsh Language which has been set in order to address the identified issues relating</p>

Well Being Goal	Does the proposal contribute to this goal? Describe the positive and negative impacts.	What actions have been/will be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p>impact of options on Culture, Heritage and the Welsh Language.</p> <p><b>Negative:</b> None.</p>	<p>to creating a Wales of vibrant culture and thriving Welsh Language.</p>
<p><b>A more equal Wales</b>            People can fulfil their potential no matter what their background or circumstances</p>	<p><b>Positive:</b> The Growth and Spatial Options Paper considers how much growth is needed over the RLDP period and where this growth should take place. It sets out the growth and spatial options which through housing and economic growth in both urban and rural areas aims to assist in balancing the demography across the County. The assessment of Growth Options in particular considers the impact each Growth Option will make to the demography of the County, in order to address the higher proportion of older age groups and lower proportion of young adults compared to the Welsh average. The Covid-19 pandemic has highlighted the links between poverty and resilience as well as the higher level of homelessness. The RLDP Options seek to maximise affordable housing delivery to help tackle this.</p> <p><b>Negative:</b> None.</p>	<p>The Growth and Spatial Options are assessed against the RLDP Objective relating to demography which has been set in order to address the identified issues relating to creating a more equal Wales. The Covid-19 pandemic has highlighted the links between poverty and resilience as well as the higher level of homelessness. The RLDP Options seek to maximise affordable housing delivery to help tackle this.</p>

**3. How has your proposal embedded and prioritised the sustainable governance principles in its development?**

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Balancing short term need with long term and planning for the future</p> <p>Long Term</p>	<p>The Growth and Spatial Options Paper will play a key role in informing the Replacement Local Development Plan (RLDP) Revised Preferred Strategy which will be made available for consultation in Spring/Summer 2021. The Revised Preferred Strategy will set out the Preferred Options for housing/employment growth and spatial distribution of this growth across the County, including the identified level of growth and broad locations for development for the period 2018 - 2033. The Revised Preferred Strategy will also set out the RLDP vision, the role of which is to clarify the core purpose of the Replacement Plan and provide a framework for developing the Revised Preferred Strategy and future detailed policies. The Vision will set the overarching context for Monmouthshire for the period up to 2033</p> <p>Some of the long term implications of COVID-19 are not yet known, for example the impact longer term on our High Streets. The RLDP can incorporate flexible policies to seek to adjust to the unknown longer term implications.</p>	<p>The Growth and Spatial Options have been prepared and assessed against the RLDP Objectives in order to address the issues, challenges, opportunities and drivers facing the County.</p> <p>Some of the long term implications of COVID-19 are not yet known, for example the impact longer term on our High Streets. The RLDP can incorporate flexible policies to seek to adjust to the unknown longer term implications.</p>

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Working together with other partners to deliver objectives</p> <p><b>Collaboration</b></p>	<p>The Growth and Spatial Options Paper has been informed by a range of evidence. There is no statutory requirement for formal consultation on the growth and spatial options, however, in accordance with the RLDP Revised Delivery Agreement (October 2020) we are engaging with consultees at this early stage to help build consensus on the options.</p>	<p>Following consultation the Preferred Options for housing/employment growth and spatial distribution of this growth will be set out in the Preferred Strategy which will be made available for further engagement/consultation with a wide range of internal and external stakeholders in Spring/Summer 2021.</p> <p>A number of events have been held/attended to seek to integrate the RLDP and Climate Emergency declaration.</p> <p>The Public Service Board will be involved at key stages of Plan-making.</p> <p>The Revised Delivery Agreement (October 2020) ensures full stakeholder /community's involvement to shape the RLDP.</p> <p>Future key stages of the RLDP process will be subject to engagement/consultation with a wide range of internal and external stakeholders.</p>
 <p>Involving those with an interest and seeking their views</p> <p><b>Involvement</b></p>	<p>The Growth and Spatial Options Paper has been informed by a range of evidence. An informal consultation on the Options is taking place for a four week period between 4 January 2021 and 1 February 2021.</p> <p>The revised DA (October 2020) Community Involvement Scheme sets out the way in which the Council proposes to involve the local community and other stakeholders in the preparation of the RLDP. Future community engagement on the RLDP will incorporate any COVID-19 and social distancing requirements, the revised DA considers alternative methods further allowing for a flexible approach.</p>	<p>There is no statutory requirement for formal consultation on the growth and spatial options, however, in accordance with the revised DA (October 2020) we are engaging with consultees at this early stage to help build consensus on the options. Feedback from these meetings will be noted and considered, and, where appropriate inform the preferred growth and spatial option which will be set out in the Preferred Strategy. The Revised Preferred Strategy will be subject to engagement/consultation with a wide range of internal and external stakeholders.</p> <p>The Revised Delivery Agreement ensures full stakeholder /community's involvement to shape the RLDP.</p>

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
 <p>Putting resources into preventing problems occurring or getting worse</p>	<p>The Growth and Spatial Options Paper will play a key role in informing the RLDP Revised Preferred Strategy which will be made available for consultation in Spring/Summer 2021. The Revised Preferred Strategy will set out the Preferred Options for housing/employment growth and spatial distribution of this growth across the County, including the identified level of growth and broad locations for development for the period 2018 – 2033 to address housing and employment needs, assist in ensuring a balanced demography and support sustainable, resilient communities. A climate change objective is included in the assessment of each option which recognises that we are in a climate emergency and has committed to strive to limit the increase in global temperatures to 1.5°C.</p>	<p>The Growth and Spatial Options Paper will inform the RLDP Revised Preferred Strategy which will be subject to statutory consultation in Spring/Summer 2021. The RLDP will seek to address the issues/challenges/opportunities identified (in a land use context) and support delivery of the Council's vision for the future of the County and its communities.</p> <p>A number of events have been held/attended to seek to integrate the LDP and Climate Emergency declaration.</p> <p>The Public Service Board will be involved at key stages of Plan-making.</p> <p>The Revised Delivery Agreement (October 2020) seeks to ensure that the Plan will be delivered in accordance with the amended timetable and ensures full stakeholder /community's involvement to shape the RLDP.</p>



Considering impact on all wellbeing goals together and on other bodies

Sustainable Development Principle	Does your proposal demonstrate you have met this principle? If yes, describe how. If not explain why.	Are there any additional actions to be taken to mitigate any negative impacts or better contribute to positive impacts?
	<p>The Growth and Spatial Options Paper will play a key role in informing the RLDP Revised Preferred Strategy which will be made available for consultation in Spring/Summer 2021. The Preferred Strategy will set out the Preferred Option for housing/employment growth and spatial distribution of this growth across the County, including the identified level of growth and broad locations for development for the period 2018 – 2033. The Growth and Spatial Options Paper has been informed by the PSB Well-being Plan and are assessed against the RLDP Objectives which seek to address the issues/challenges/opportunities identified (in a land use context) and support delivery of the Council's vision/objectives for the future of the County and its communities. The RLDP Options have been subject to an Integrated Sustainability Appraisal (including Strategic Environmental Assessment (SEA). The RLDP will also be subject to a Well-being of Future Generations Assessment (WBFG), Health Impact Assessment (HIA), Equality Impact Assessment (EqIA), and Welsh Language Impact Assessment (WLIA)), whose findings will be used to inform the development of the RLDP strategy, policies and site allocations in order to ensure that the Plan will be promoting sustainable development.</p> <p>The RLDP will also set out the Vision which will set the overarching context for Monmouthshire for the period up to 2033. MCC recognises that we are in a climate emergency and has committed to strive to limit the increase in global temperatures to 1.5°C. The importance of carbon reduction is recognised as a key issue that the RLDP should seek to address.</p>	<p>The Growth and Spatial Options Paper will inform the RLDP Revised Preferred Strategy which will be subject to statutory consultation in Spring/Summer 2021. The RLDP Options have been subject to an Integrated Sustainability Appraisal (including Strategic Environmental Assessment (SEA). The RLDP will also be subject to a Well-being of Future Generations Assessment (WBFG), Health Impact Assessment (HIA), Equality Impact Assessment (EqIA), and Welsh Language Impact Assessment (WLIA)), whose findings will be used to inform the development of the RLDP strategy, policies and site allocations in order to ensure that the Plan will be promoting sustainable development.</p> <p>We will continue to work closely with our neighbours, both in Wales and England, including the joint procurement of evidence as applicable.</p> <p>The RLDP will align with the new Integrated Network Maps for Active Travel, and will be accompanied by an Infrastructure Plan and revised Local Transport Plan.</p>

4. Council has agreed the need to consider the impact its decisions has on the following important responsibilities: Social Justice, Corporate Parenting and Safeguarding. Are your proposals going to affect any of these responsibilities?

	<b>Describe any positive impacts your proposal has</b>	<b>Describe any negative impacts your proposal has</b>	<b>What will you do/ have you done to mitigate any negative impacts or better contribute to positive impacts?</b>
Social Justice	The Social Justice strategy focuses on three main areas: tackling loneliness and isolation; tackling poverty and promoting equitable economic prosperity; and giving children the best start in life. The RLDP Options seek to tackle house price unaffordability, which currently prevents some of our communities accessing suitable housing within the County. This is likely to benefit younger people in particular, which in turn will make our ageing communities more socially sustainable. Good quality and affordable housing is important in achieving poverty reduction and equitable prosperity, and supporting the best start in life. Good spatial planning helps to build cohesive communities.	None.	<p>We will consider the need for planning policies to control the housing mix of the market housing on development sites, to ensure it helps create mixed communities and supports the retention of younger people who can afford an open market home were there sufficient supply of 2 and 3 bedroom homes.</p> <p>We will consider the need for small affordable housing schemes in rural settlements similar to the current LDP's 60/40 sites.</p> <p>We will consider a range of policies around the climate change theme to minimise the carbon footprint of new development, and therefore mitigate negative impacts associated with the proposed growth.</p>
Safeguarding	None.	None.	N/A.
Corporate Parenting	None.	None.	N/A.

5. What evidence and data has informed the development of your proposal?

An extensive range of data sets have been used to prepare the Growth and Spatial Options Paper, from a wide range of sources both internal and external to the Council. These are clearly referenced in the Paper and appendices, but include:

- Issues, Vision and Objectives Paper (June 2019) <https://www.monmouthshire.gov.uk/planning-policy/pre-deposit-ldp-documents/>
- Monmouthshire Public Service Board Well-being Plan (April 2018) [https://www.monmouthshire.gov.uk/app/uploads/2017/10/Monmouthshire-PSB\\_well-being-plan\\_3.0.pdf](https://www.monmouthshire.gov.uk/app/uploads/2017/10/Monmouthshire-PSB_well-being-plan_3.0.pdf)
- Monmouthshire County Council Corporate Business Plan 2017 – 2022 (February 2018) [https://www.monmouthshire.gov.uk/app/uploads/2018/03/Monmouthshire-Council\\_Corporate-Plan\\_1.0.pdf](https://www.monmouthshire.gov.uk/app/uploads/2018/03/Monmouthshire-Council_Corporate-Plan_1.0.pdf)
- Monmouthshire Local Development Plan Review Report (March 2018) <https://www.monmouthshire.gov.uk/app/uploads/2018/03/Final-Review-Report-1.pdf>
- Monmouthshire Local Development Plan Annual Monitoring Reports (2015- 2018) <https://www.monmouthshire.gov.uk/planning-policy/annual-monitoring/ldp-annual-monitoring-report>
- Updating the RLDP Demographic Evidence produced by Edge Analytics (November 2020)
- Monmouthshire Affordable Housing Evidence produced by Edge Analytics (November 2020)
- Monmouthshire Replacement Local Development Plan Candidate Sites Register (February 2019): <https://www.monmouthshire.gov.uk/planning-policy/candidate-sites/monmouthshire-replacement-ldp-candidate-sites-register-february-2019/>
- Monmouthshire Public Service Board Well-being Plan (April 2018) [https://www.monmouthshire.gov.uk/app/uploads/2017/10/Monmouthshire-PSB\\_well-being-plan\\_3.0.pdf](https://www.monmouthshire.gov.uk/app/uploads/2017/10/Monmouthshire-PSB_well-being-plan_3.0.pdf)
- Monmouthshire County Council Corporate Business Plan 2017 – 2022 (February 2018) [https://www.monmouthshire.gov.uk/app/uploads/2018/03/Monmouthshire-Council\\_Corporate-Plan\\_1.0.pdf](https://www.monmouthshire.gov.uk/app/uploads/2018/03/Monmouthshire-Council_Corporate-Plan_1.0.pdf)
- Monmouthshire Local Development Plan Review Report (March 2018) <https://www.monmouthshire.gov.uk/app/uploads/2018/03/Final-Review-Report-1.pdf>
- Monmouthshire Local Development Plan Annual Monitoring Reports (2015- 2020) <https://www.monmouthshire.gov.uk/planning-policy/annual-monitoring/ldp-annual-monitoring-report/>
- Replacement LDP Sustainability Appraisal Scoping Report (As amended December 2018) <https://www.monmouthshire.gov.uk/app/uploads/2020/03/Final-SA-Scoping-Report-Dec-2018-1.pdf>
- Monmouthshire LDP 'Retail Background Paper', March 2020. <https://www.monmouthshire.gov.uk/app/uploads/2020/03/Final-Report-March-2020.pdf>
- Monmouthshire LDP 'Employment Background Paper', September 2020. <https://www.monmouthshire.gov.uk/app/uploads/2020/09/Final-Report-September-2020.pdf>
- Monmouthshire Housing Land Availability Schedules (2018-2019) <https://www.monmouthshire.gov.uk/planning-policy/housing-land-supply/?preview=true> .

- Review of the RLDP Issues, Vision, Objectives and Evidence Base in light of Covid-19 (September 2020) <https://www.monmouthshire.gov.uk/app/uploads/2020/11/Monmouthshire-RLDP-Review-of-Issues-Vision-Objectives-and-Evidence-Base-in-Light-of-Covid.pdf>
- Integrated Sustainability Appraisal Report produced by AECOM (November 2020)

The Revised Delivery Agreement (October 2020) is also available to view via the Planning Policy webpages of the Council's website <https://www.monmouthshire.gov.uk/app/uploads/2020/11/Revised-DA-October-2020-Final.pdf>

External sources of data include Welsh Government, Cadw, Natural Resources Wales, Hometrack, Office for National Statistics and Stats Wales.

An extensive range of background evidence and data has been used to date, from a wide range of sources both internal and external to the Council. These include:

- Initial Habitat Regulations Assessment Screening Report (December 2018)
- MCC Economies of the Future Reports (2018) and associated economic ambition (November 2019)
- Monmouthshire RLDP Issues, Vision and Objectives Paper (June 2019, as amended March 2020)
- Review of the RLDP Issues, Vision, Objectives and Evidence Base in light of Covid-19 (September 2020)
- Monmouthshire RLDP Candidate Sites Register (February 2019)
- Monmouthshire RLDP Revised Delivery Agreement (October 2020)
- Monmouthshire Updating the RLDP Demographic Evidence produced by Edge Analytics (November 2020)
- Monmouthshire RLDP Affordable Housing Evidence Addendum Report produced by Edge Analytics (November 2020)
- Integrated Sustainability Appraisal Report produced by AECOM (November 2020)

**6. SUMMARY: As a result of completing this form, what are the main positive and negative impacts of your proposal, how have they informed/changed the development of the proposal so far and what will you be doing in future?**

**Positive -**

The Growth and Spatial Options will play a key role in informing the RLDP Preferred Strategy which will set out the Preferred Options for growth and spatial distribution. In the creation of sustainable places, the first step is to consider the level of development required, and the location of where any growth should go within the County. This paper sets out a number of growth and spatial options to achieve this over the RLDP period. The Preferred Strategy will be the subject of further engagement/consultation and political reporting as the RLDP is progressed.

**Negative –** None. There are no implications, positive or negative, for corporate parenting or safeguarding.

**7. ACTIONS: As a result of completing this form are there any further actions you will be undertaking? Please detail them below, if applicable.**

What are you going to do	When are you going to do it?	Who is responsible
Inform the Economy and Development Select Committee of the non-statutory consultation on the Replacement Local Development Plan (RLDP) Growth and Spatial Options Paper, and to seek Committee's feedback/comments on the Paper..	Scrutiny by Economy & Development Select Committee on 10 <sup>th</sup> December 2020.  Consultation on the Growth and Spatial Options will take place in January/February 2021.	Head of Placemaking, Housing, Highways and Flooding  Head of Planning Planning Policy Team
Seek Cabinet's endorsement of the Growth and Spatial Options Paper and issue for a four week non-statutory consultation, including identifying growth option 5 and spatial option 2 as the preferred options at this stage of the process.	16 <sup>th</sup> December 2020	Head of Placemaking, Housing, Highways and Flooding  Head of Planning  Planning Policy Team

page 340

**8. VERSION CONTROL: The Equality and Future Generations Evaluation should be used at the earliest stage, such as informally within your service, and then further developed throughout the decision making process. It is important to keep a record of this process to demonstrate how you have considered and built in equality and future generations considerations wherever possible.**

Version No.	Decision making stage	Date considered	Brief description of any amendments made following consideration
0.0	LDP Review Report and Delivery Agreement	20/04/2018	Draft for Council 10 <sup>th</sup> May 2018

1.0	Issues, Vision and Objectives scrutiny	01/02/2019	Draft for Economy & Development Select Committee 14 <sup>th</sup> February 2019
1.1	Issues, Vision and Objectives endorsement following consultation	09/04/2019	Draft for Cabinet 5 <sup>th</sup> June 2019
1.2	Issues, Vision and Objectives endorsement following consultation	14/06/2019	Amended for Cabinet 3 <sup>rd</sup> July 2019 to reflect 16 <sup>th</sup> May 2019's Climate Emergency declaration by Council
2.0	Growth and Spatial Options endorsement to consult	07/06/2019	Draft for Cabinet 3 <sup>rd</sup> July 2019
2.1	Growth and Spatial Options scrutiny	09/07/2019	Draft for Economy & Development Select Committee 17 <sup>th</sup> July 2019
3.0	Revised Growth and Spatial Options scrutiny	10/12/2020	Draft for Economic Development Select Committee 10/12/2020
3.1	Revised Growth and Spatial Options endorsement to consult, including identifying growth option 5 and spatial option 2 as the preferred options at this stage of the process.	16/12/2020	Draft for Cabinet report 16/12/2020

This page is intentionally left blank

## Monmouthshire's Scrutiny Forward Work Programme 2020-21

Adults Select Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
10 <sup>th</sup> December 2020  Joint Select with Adults Select Committee	Gypsy, Traveller and Showperson's Accommodation Assessment 2021-2033	Pre-decision scrutiny of the Gypsy, Traveller and Showperson's Accommodation Assessment (GTAA) 2021 – 2033.	Stephen Griffiths	Pre-decision Scrutiny
	Local Housing Market Assessment	Pre-decision scrutiny of the Local Housing Market Assessment, prior to submission to Welsh Government.	Mark Hand	Pre-decision Scrutiny
	Local Development Plan Growth Options	To consider the Local Development Growth Options, invite Edge Analytics to explain the modelling and scenarios.	Mark Hand	Policy Development
26 <sup>th</sup> January 2021	Budget Scrutiny	Pre-decision scrutiny of the Council's budget proposals.	Peter Davies	Pre-decision Scrutiny
16 <sup>th</sup> March 2021	To be confirmed			

Page 343

### Future Agreed Work Programme Items: Dates to be determined

- ✓ **Mental Health Services** ~ Jointly with Children and Young People's Select Committee (ABUHB and Eve Parkinson)
- ✓ **Community Development and Well-being** ~ results of most significant change ~ possible workshop
- ✓ **Market place for social care** ~ better understanding of services, play space community staff, integrated workspace, hub services, Turning the world upside down. Housing element.
- ✓ **Performance reporting (normal plus other things Homefirst)**
- ✓ **Annual Complaints Report for Social Services**
- ✓ **Housing register allocations policy** ~ Nov/December

## ***Monmouthshire's Scrutiny Forward Work Programme 2020-21***

- ✓ **Housing Support Grant ~ replaces the supporting people grant (children and communities grant ~ Sharran Lloyd) ~ how is the money used (homeless prevention ~ difficult places) ~ homelessness ~ late autumn (discussion with Sharran Lloyd)**

### **Joint Scrutiny with Children and Young People's Select Committee:**

- ✓ **Mental Health Capacity Act and Learning Disabilities ~ linked to implications of the DOLS (Deprivation Liberty Safeguards) Grant**
- ✓ **Adults Carers Strategy and Children and Young People's Carers Strategy.**
- ✓ **Safeguarding Performance Reporting and Progress of Regional Safeguarding Boards ~ Violence against Women, Domestic Abuse and Sexual Violence (Wales) Act 2015**
- ✓ **Regional Integrated Autism Service**
- **Regional partnership boards and integrated care fund transformation funding and impact, risks associated with funding stream**

*Monmouthshire's Scrutiny Forward Work Programme 2019-20*

Economy Select Committee				
Meeting Date	Subject	Purpose of Scrutiny	Responsibility	Type of Scrutiny
8 <sup>th</sup> December 2020	Local Development Plan WORKSHOP 1	Revised Growth Options (2018 Projections) pre-consultation	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
10 <sup>th</sup> December 2020  Joint Select with Adults Select Committee	Gypsy, Traveller and Showperson's Accommodation Assessment 2021-2033	Pre-decision scrutiny of the Gypsy, Traveller and Showperson's Accommodation Assessment (GTAA) 2021 – 2033.	Stephen Griffiths	Pre-decision Scrutiny
	Local Housing Market Assessment	Pre-decision scrutiny of the Local Housing Market Assessment, prior to submission to Welsh Government.	Mark Hand	Pre-decision Scrutiny
	Local Development Plan Growth Options	To consider the Local Development Growth Options, invite Edge Analytics to explain the modelling and scenarios.	Mark Hand	Policy Development
15 <sup>th</sup> December 2020	Local Development Plan WORKSHOP 2	Future of our town centres Retail A1/A3 uses , future of High Streets	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
21 <sup>st</sup> January 2021	Budget Scrutiny	Pre-decision scrutiny of the Council's budget proposals.	Peter Davies	Pre-decision Scrutiny
19 <sup>th</sup> January 2021	Local Development Plan WORKSHOP 3	New homes: disrupting the market: carbon reduction, energy efficiency, minimum house size standards and housing mix policies. Broadband, utilities and EV charging	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
26 January 2021	Local Development Plan WORKSHOP 4	Employment	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
9 <sup>th</sup> February 2021	Local Development Plan WORKSHOP 5	Infrastructure 1 – Education	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development

*Monmouthshire's Scrutiny Forward Work Programme 2019-20*

23 <sup>rd</sup> February 2021	Local Development Plan WORKSHOP 6	Infrastructure 2 - Primary Health Care	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
25 <sup>th</sup> February 2021	To be confirmed			
9 <sup>th</sup> March 2021	Local Development Plan WORKSHOP 7	Infrastructure 3 - Local Transport Plan, sustainable transport	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
23 <sup>rd</sup> March 2021	Local Development Plan WORKSHOP 8	Adopted NDF and implications for the RLDP (once published Early 2021)	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
30 <sup>th</sup> April 2021	Local Development Plan WORKSHOP 9	Preferred Strategy	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
25 <sup>th</sup> May 2021	Local Development Plan WORKSHOP 10	Landscape and natural environment – including: <ul style="list-style-type: none"> <li>• GW /GB</li> <li>• GI</li> </ul>	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
13 <sup>th</sup> July 2021	Local Development Plan WORKSHOP 11	Affordable housing 2 – with viability evidence	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development

**Monmouthshire's Scrutiny Forward Work Programme 2019-20**

<b>12 October 2021</b>	<b>Local Development Plan WORKSHOP 12</b>	Once Candidate Sites have been assessed: Site allocations (residential, employment, tourism, renewable energy)	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development
<b>28<sup>th</sup> June 2022</b>	<b>Local Development Plan WORKSHOP 13</b>	Deposit Plan Member workshop	Mark Hand Rachel Lewis	Scrutiny Workshop ~ Policy Development

**Future Meeting Items: Agreed Scrutiny Focus for 2018-19**

- Affordable housing, transport and the LDP
- Tourism and enterprise
- Business and Enterprise Strategy
- Asset Investment Strategy and progress of projects

**Items to diarise:**

- Supplementary Planning Guidance on S106 Agreements

This page is intentionally left blank