



**CDLI Abertawe
Swansea LDP**
2023-2038



Options for Growth and Spatial Approaches

December 2024



Contents

1.0 Introduction	5
Overview.....	5
Purpose	5
2.0 Key influences and considerations	7
Guidance	7
Range of influences.....	7
Evidence Base.....	8
Consultation and Engagement	9
3.0 Options for Growth	11
Explanation and Overview	11
Current LDP Growth Levels & Past Trends	11
Forecasting Future Growth	13
Assessing the Options	15
ISA and Plan Objectives	15
Consultation responses.....	16
Other Options Considered	18
Constraints to Delivery.....	19
Building in Flexibility	21
Summary of Findings.....	22
4.0 Options for Spatial Approaches.....	24
Explanation and Overview	24
Current / Adopted LDP Spatial Strategy	25
Generation of alternative spatial approaches	27
Role and Function.....	28
Settlement Assessment and analysis.....	29
Assessing the approaches.....	32
ISA and Plan Objectives	34
Consultation responses.....	35
Evolving evidence base	36
Summary of Findings.....	37
5.0 Towards a preferred overall approach	39
Preferred Growth Option.....	39

ISA and Plan Objectives	41
Preferred Spatial Approach	42
ISA and Plan Objectives	44
6.0 Conclusion.....	46
Appendices.....	49
Appendix 1 Assessment of Growth Options	49
Appendix 2: Assessment of Spatial Approaches	60
Appendix 3: High level role and function review by Strategic Housing Policy Zone (May 2024)	80
Appendix 4: Strategic Housing Policy Zone Summary review (May 2024)	94

List of Tables

Table 1: The four growth options.....	13
Table 2 LDP2 Settlement Hierarchy (December 2024)	30
Table 3 Assessment of Growth Option 1 - Baseline economic forecast option	49
Table 4 Assessment of Growth Option 2 - Long-term population growth trend option	52
Table 5 Assessment of Growth Option 3 - WG Principal Population Projection Option	54
Table 6 Assessment of Growth Option 4 - Higher economic growth option	57
Table 7 Assessment of Urban/brownfield focus spatial approach	60
Table 8 Assessment of Strategic Placemaking focus spatial approach	64
Table 9 Assessment of Dispersal focus spatial approach	68
Table 10 Assessment of Highly connected communities spatial approach	72
Table 11 Assessment of Housing need clustering focus spatial approach.....	76
Table 12 Central SHPZ	80
Table 13 East SHPZ.....	82
Table 14 Gower SHPZ	84
Table 15 Gower Fringe SHPZ.....	86
Table 16 Greater North West SHPZ.....	88
Table 17 North SHPZ.....	90
Table 18 West SHPZ.....	92

List of Figures

Figure 1: Starting the Conversation on LDP2: Growth and Spatial Approaches	10
Figure 2 Analysis of growth options against Plan objectives	16
Figure 3 Assessing the Need and Requirement for Jobs and Homes	20
Figure 4 The Adopted LDP 2010-2025 Key Diagram.....	26
Figure 5 Future Wales Swansea Bay and Llanelli National Growth Area.....	26
Figure 6 National Growth Area refining work (2023)	27
Figure 7 Strategic Housing Policy Zones	31
Figure 8 Environmental Designations (Source: Future Wales).....	31
Figure 9 Summary Ecosystem Resilience Map (Source: SEWBREC)	31
Figure 10 Swansea Council Initial Green Infrastructure Assessment (December 2024) Extract.....	32
Figure 11 Regional SFCA (November 2022).....	32
Figure 12 Guidance on Development and Assessing Options for Growth.....	33
Figure 13 Analysis of spatial approaches against Plan objectives	35
Figure 14 Preferred Growth Scenario Assessed	41
Figure 15 The Preferred Spatial Approach (LDP2 Key Diagram - December 2024).....	44
Figure 16 Assessment of Preferred Spatial Approach (Hybrid).....	45
Figure 17 Assessment of overall preferred spatial and growth approach.....	47

1.0 Introduction

Overview

1.1 Work has recently commenced work on the Swansea Local Development Plan (LDP) 2023-2038. The role of the LDP is to make sure that the right development happens, in the right areas, for the right reasons. The new Plan will replace the existing Swansea Local Development Plan 2010-2025 and for this reason is referred to as 'LDP2'.

1.2 The Preferred Strategy is the 'Pre-Deposit' Plan for LDP2. The production of the Preferred Strategy is an important step in the LDP2 preparation process and sets the strategic direction and overarching principles from which the detailed plan - known as the 'Deposit Plan' will be drawn. The Deposit stage follows later in the process and will present a comprehensive set of planning policies, development proposals, and maps identifying settlement boundaries and land use allocations

Purpose

1.3 This paper has been prepared to support the Preferred Strategy. Its purpose is to review the various growth scenarios and spatial approaches that have been considered as part of the preparation of the Plan and how they have been assessed to inform the Preferred Strategy. Collectively, this can be termed to be the consideration of strategic options. The Paper concludes by setting out specific recommendations as to the preferred approaches to growth and spatial distribution in this regard.

1.4 This Paper sits alongside the 'Economic and Housing Growth Assessment' (July 2024) which has considered different datasets to produce realistic options for consideration by the Council. These include demographic projections, such as the WG official projections, economic datasets, an externally sourced employment

forecast, commercial floorspace statistics and housing market indicators. The work has also involved a process of engagement and primary data collection, which has included a business survey as well as separate targeted engagement with selected businesses and stakeholders.

1.5 An 'Integrated Sustainability Appraisal Report (ISA) of the Preferred Strategy' (December 2024) has been prepared on the LDP2 Preferred Strategy. The ISA iteratively reviews the LDP2 against the sustainability framework, thereby allowing for the full consideration of a range of social, economic and environmental matters as part of the formulation of the options. The key iterative role of the ISA is duly acknowledged, particularly in the assessment of options and alternatives.

2.0 Key influences and considerations

Guidance

2.1 [The Development Plans Manual \(Edition 3, Welsh Government, 2020\)](#) states that consideration of options is a fundamental part of Plan making. This should include a review of the appropriateness of those options previously considered for the current LDP, along with new alternatives. The Options should be:

- Genuine and reasonable;
- Reflect evidence and the Plan's issues/objectives;
- Meet the evidenced needs of the area;
- Be deliverable within the Plan period;
- Conform to national policy,
- Complement regional or local initiatives; and
- Be flexible and sustainable.

2.2 It is noted that LDP2 must meet the specific 'Tests of Soundness' set out in the Manual. Also, the ISA process requires that, in the consideration of options, 'reasonable and realistic alternatives' are assessed.

Range of influences

2.3 The range of influences considered as part of the consideration of options include the following:

- Accordance with Future Wales and regional implications;
- Accordance with the Local Wellbeing Plan;
- Extent to which evidenced economic needs are delivered;

- Extent to which evidenced social/housing needs are delivered;
- Environmental and climate change implications;
- Deliverability and capacity factors, and
- Consultation findings.

2.4 The Preferred Strategy has been prepared in accordance with the Swansea Public Service Board's [Well-being Plan 2023-2028](#). Of note is the fact that the LDP2 Objectives are grouped under the summary headings of the 4 local Well-being Plan objectives, whilst the key issues are grouped under the national well-being goals and linked in turn to the Plan objectives. Therefore, assessing the strategic growth and spatial options against the LDP2 objectives represents a proportionate and sound approach to consider accordance with the Local Well-being Plan. Reference should be made to the 'Compatibility Analysis and Alignment of Key Issues, Vision, Objectives and Strategic Policies' Report (December 2024) for more information on the strategic linkages that exist both within the Preferred Strategy itself, as well as with those wider strategies and Plans of relevance.

Evidence Base

2.5 In preparing this Paper, regard has been given to the wider and extensive evidence base which supports the LDP2 Preferred Strategy. Appendix A of the Preferred Strategy (December 2024) sets out a number of Supporting Documents/Background Evidence. Amongst those evidence/papers/reports that may be of particular relevance in this regard are the following:

- 'Integrated Sustainability Appraisal Report of the Preferred Strategy' (December 2024);
- 'Analysis of Housing Supply' (December 2024);
- 'Regional Collaboration' (December 2024)
- 'Starting the Conversation on LDP2: Engagement Report' (December 2024);
- 'Employment Land Review' (December 2024);
- 'Initial High-Level Viability Assessment' (December 2024);

- ‘Settlement Assessment’ (December 2024);
- ‘Initial Green Infrastructure Assessment’ (December 2024)
- ‘Compatibility Analysis and Alignment of Key Issues, Vision, Objectives and Strategic Policies’ (December 2024);
- ‘Economic and Housing Growth Assessment’ (July 2024);
- ‘Starting the Conversation on LDP2 - Growth Scenarios and Spatial Approaches’ (May 2024);
- ‘Draft Local Housing Market Assessment (LHMA)’ (2023);
- ‘LDP Review Report’ (July 2023), and
- ‘Swansea Bay and Llanelli National Growth Area (NGA) Definition Project’ (January 2023).

Consultation and Engagement

2.6 The Council ‘started the conversation’ on LDP2 by holding a public consultation on the draft key issues, vision, objectives, and options for growth from 18 April 2024 to 14 June 2024. Two technical papers were published to support this consultation on 17 May 2024, which were: ‘Starting the Conversation’ on LDP2 - Growth Scenarios and Spatial Approaches’ (May 2024) and ‘Starting the Conversation on LDP2’ – Key Issues, Vision and Objectives (May 2024).

2.7 The main outcomes of the consultation are captured within ‘Starting the Conversation on LDP2: Engagement Report’ (December 2024). The key messages to emerge from a range of respondents (including the development industry) have been captured and reflected upon in this Paper. As such, the early and constructive non statutory engagement initiated by the Council in advance of the preparation of the Preferred Strategy has directly influenced the consideration of strategic options in respect of growth and spatial approaches.



Figure 1: Starting the Conversation on LDP2: Growth and Spatial Approaches

3.0 Options for Growth

Explanation and Overview

3.1 The analysis presented in this chapter considers how many homes and how many additional jobs it may be necessary to provide for between 2023-38 (the LDP2 Plan period). The various growth options presented will influence the amount of land that will need to be made available for residential and business development.

3.2 The number of homes and the job levels have been considered collectively when assessing growth options, with a view to identifying an integrated, sustainable growth strategy. A range of national and local evidence sources have been used to produce these scenarios in-line with the Development Plans Manual, which includes the very latest Welsh Government (WG) Household projections. Also consistent with the Manual, the analysis has considered what constraints may apply that would influence the delivery of identified options.

Current LDP Growth Levels & Past Trends

3.3 The current LDP (2010-2025 – Adopted 2019) is based on the following growth policy targets across the Plan period 2010-25. To provide for:

- 15,600 homes (Policy PS 3); and
- 13,600 in additional employment with a requirement for 19ha of land for B class employment uses (Policy PS 4)

3.4 The current LDP evidence base was informed by the WG demographic projections available at the time of preparing that Plan, supplemented with locally and regionally specific information (for example, with regard to economic growth forecasts). The most recent previous evidence prepared on this topic was a comprehensive assessment undertaken by expert consultants in 2017. This

concluded that the housing and employment requirements identified in the Deposit Plan remained appropriate in the context of the latest available information ahead of the current LDP's examination and then subsequent adoption in 2019.

3.5 This information needs to be updated for the new LDP2. Such updates need to take into account important changes in context - including new demographic projections and economic forecasts which have superseded the evidence on which the existing LDP was based. In 2023, specialist analysts from Turley, SQW and Edge Analytics were commissioned to undertake an Economic and Housing Growth Assessment covering both Swansea and Neath Port Talbot (NPT)¹ to support the preparation of respective LDPs and to ensure an integrated and consistent approach across the City Region.

3.6 The evidence on which the current LDP was based created a very different picture of the levels of growth that could be anticipated. It was more suggestive of upward growth than the information now available to inform LDP2. Further information on the demographic and economic changes identified since the LDP was adopted is set out in detail in the 'Economic and Housing Growth Assessment' (July 2024). This was also summarised for the consultation on strategic options in 'Starting the Conversation on LDP2: Growth Scenarios and Spatial Approaches' (May 2024), and so it is not repeated in this Paper.

¹ In considering growth scenarios, the Council has worked closely with neighbouring NPT Council since there is overlap in housing and economic markets.

Forecasting Future Growth

3.7 As set out in the Development Plans Manual, it is important to consider all the evidence available to determine what the most appropriate growth might be over the Plan period.

3.8 The Council has worked with the expert analysts to produce a range of economic and population forecasts based on the use of different data sets. From the evidence set out in the 'Economic and Housing Growth Assessment' (July 2024), four scenarios have been developed as growth options and they are set out in Table 1 below, showing the range of potential homes and jobs growth². This analysis has identified that the proposed figures in these options are all lower than the annual delivery targets for homes and jobs growth identified in the current adopted LDP.

Table 1: The four growth options

	Homes per year	Homes 2023-38	Jobs 2023-38
1. Baseline economic forecast	514	7,710	7,875
2. Long-term population growth trend	562	8,430	8,085
3. WG principal population projection	634	9,510	8,415
4. Higher economic growth	634	9,510	10,238
<i>Comparisons...</i>			
<i>Average housing delivery 2010-23</i>	<i>485</i>	<i>7,275</i>	<i>6,480</i>
<i>WG Low variant population projection</i>	<i>416</i>	<i>6,240</i>	<i>6,480</i>
<i>WG High variant population projection</i>	<i>801</i>	<i>12,015</i>	<i>10,350</i>
<i>Adopted LDP requirement 2010-25</i>	<i>1,040</i>	<i>15,600</i>	<i>13,600</i>

² The relationship between population growth and the level of jobs supported is influenced by the projected age profile of the population. This varies between the demographic and employment-led projections thereby explaining why similar levels of population growth can be estimated to support differing levels of jobs growth

3.9 It is important that the most credible, sustainable and evidence driven growth option for LDP2 is identified so that the Plan will be sound and deliverable.

3.10 The four options developed were presented as part of the ‘Starting the conversation on LDP2’ consultation which ran from 18 April to 14 June 2024. These consultation options identified the links between estimated population and employment growth and provided clearly different scenarios. They were based on the emerging ‘Economic and Housing Growth Assessment’ (subsequently published in July 2024). It was made clear during the consultation that the final chosen option could be one of these or a different figure if that were considered more appropriate³. The consultation findings together with wider work undertaken, such as technical studies and the ISA, have enabled consideration of the advantages and disadvantages of the options to inform the LDP2 Preferred Strategy.

3.11 It should be noted that, for each of the four (economic and demographic based) options, the Council has chosen to address one consequence of past under-supply of homes, which has seen younger adults living in increasingly large households with the official WG projections assuming that this will continue. The modelling of each growth option has included a ‘membership rate sensitivity’ which allows for the potential impact of improved household formation in these younger age groups resulting from more homes being delivered to change this situation. This has been applied to recognise the potential consequences of worsening housing affordability on these age groups over the last 15 years. This is explained further in the ‘Economic and Housing Growth Assessment’ (July 2024).

3.12 In accordance with the Development Plans Manual, the creation of these options, which are described in the ‘Economic and Housing Growth Assessment’ (July 2024), has considered the employment space that would be needed to accommodate future job growth, complementing an approach based on ‘labour demand forecasting’ with further analysis based on past completions space requirements in line with guidance from the WG.

³ It should be noted that the employment growth figures presented in the earlier consultation paper differ slightly from the job growth figures presented in this paper because the former did not include an allowance for double jobbing which has now been applied.

3.13 This analysis suggests that between 11.0 and 25.2 hectares of employment land could be needed in Swansea, based on standard assumptions with allowances for losses, market choice and flexibility. Provision towards the upper end would support the employment led growth scenario and replace all losses of stock.

3.14 Further analysis of space requirements is set out in the ‘Economic and Housing Growth Assessment’ (July 2024). This analysis provides important reference points in developing the approach to employment land provision for LDP2, coupled with the need to provide a range of opportunities to ensure choice and flexibility to businesses and to allow for improvements to the quality of employment space available by enabling the delivery of more modern premises to replace older stock.

Assessing the Options

3.15 The four options have been reviewed and the findings are outlined in the section below, together with the tables [set out in Appendix 1](#). The Development Plans Manual states that the WG population and household projections should form the starting point for setting levels of growth in LDPs and makes it clear that any departure from these figures should be fully justified by demonstrable evidence. This section therefore considers the options against the degree to which they meet the WG projections and assesses against other factors (based on national guidance as set out in Chapter 2 of this Paper). This includes an assessment against the ISA and Plan objectives and the consultation responses received on the draft options.

ISA and Plan Objectives

3.16 A high-level assessment of the 4 options against the Plan’s Objectives (December 2024) is set out in Figure 2 below, building upon a previous review undertaken in May 2024. It should be noted that the objectives themselves have been subject to assessment against the Local Well-being Plan objectives, Future

Wales 2040 outcomes, Area Statement Themes, the LDP2 ISA objectives and the National Sustainable Placemaking Outcomes.

LDP2 Objective (December 2024)	1. Transformational Change	2. Centres First	3. Sustainable Economic and Employment Activity	4. The Visitor Economy	5. The Climate Emergency	6. The Nature Emergency	7. Renewable and Low carbon Energy	8. Sustainable Development	9. Waste and the Circular Economy	10. Mineral Resources	11. Delivering New Homes	12. Placemaking	13. Active Travel and Sustainable Integrated Transport	14. Infrastructural Capacity	15. The Cultural and Historic Environment	16. The Welsh Language	17. Well-being and Equality	18. Community Facilities
Baseline economic forecast	Orange	Green	Orange	Orange	Green	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Green
Long-term population growth trend	Orange	Green	Orange	Orange	Green	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Green
WG population projection	Orange	Green	Orange	Green	Orange	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Green
Higher economic growth	Green	Green	Green	Green	Orange	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Orange	Orange	Green	Orange	Green

Green	Potential Alignment
Orange	Limited Alignment

Figure 2 Analysis of growth options against Plan objectives

3.17 Commentary is provided within the tables for each option set out in Appendix 1. Reference should also be made to the Integrated Sustainability Appraisal Report of the Preferred Strategy’ (December 2024).

Consultation responses

3.18 A significant theme from the consultation responses received related to concerns that none of the 4 options contained a sufficient level of growth and that a higher level should be tested. It was stated that the growth levels proposed were not enough to fulfil Swansea’s role as the focal point of the Future Wales National Growth Area. Reference was also made to the need to provide for more growth due to the recorded ‘under delivery’ during the Current LDP period. In some instances, comparisons were made with growth levels/approaches of other Authorities across Wales, whilst comments also touched upon the regional context in South West

Wales through referencing Policy 28 of [Future Wales](#) and/or commenting on neighbouring Authorities' earmarked growth intentions.

3.19 There was concern that the conversation was framed within the context of Future Wales and the designation of Swansea as a National Growth Area, and that there was therefore an assumption that growth and development are interchangeable terms. It was opined that this is a questionable assumption on a finite planet and suggest that the terms of the conversation have already been firmly established.

3.20 Aside from growth, those wider messages to emerge included comments on strategic policy components, all of which provides useful context in the preparation of the Preferred Strategy.

3.21 To summarise, whilst growth scenario 4 (and to a lesser extent 3) drew some support, the main message to emerge (most notably from the development industry) was that a higher-level growth scenario should be considered. More information on the consultation undertaken is set out within the 'Starting the Conversation on LDP2: Engagement Report' (December 2024).

3.22 By way of response to the consultation responses received, it should be noted that the rationale for not pursuing other scenario/options, and/or introducing a higher-growth scenario, is clearly set out elsewhere within this Paper, including at paragraphs 3.24 and Paragraph 3.37. Also, in terms of those consultation comments that touched upon the regional context, due regard should be given to the 'Regional Collaboration' Paper (December 2024) which is available as part of the Preferred Strategy evidence base.

3.23 In noting the above, the options have been reviewed and a summary of findings is outlined in Appendix 1. Of note is the fact that the options are assessed against other factors as required by the guidance set out in Chapter 2 of this Paper.

Other Options Considered

3.24 In-line with the Development Plans Manual, the Council considered other scenarios before taking forward the above four options.

3.25 For comparison purposes, a scenario which projects forward the average number of homes built (485 per annum) in the period 2010-2023 was considered. The projected housing growth required under all of the four growth options significantly exceeds this rate of housing delivery.

3.26 It is important to note that this 'dwelling-led' scenario would lead to a lower level of population growth and reduced levels of employment likely to be able to be supported. Projecting forward based on previous recorded levels of housebuilding is therefore not considered to represent a credible option to support future economic growth as when modelled, this level of housing delivery would not sustainably support a sufficient demographically generated labour force needed to support even the baseline level of economic growth and could as a result have implications for increasing levels of in-commuting and would not support the LDP's objectives. It is noted that concerns as to a 'dwelling-led' scenario were captured as part the 'Starting the Conversation on LDP2' consultation exercise.

3.27 Similarly, the lower and upper variant WG projections were considered. The lower variant WG projection proposes an even lower level of housing growth than the past delivery rate scenario and has been discounted with the same rationale that it would not support the LDP's objectives.

3.28 Conversely, the higher variant WG projection has been discounted on the basis that it would require a level of housing delivery that is significantly in excess of recent delivery, and also of what is required to have an integrated and sustainable employment/housing growth strategy to support the expected upper level of jobs growth. Detailed analysis of Option 4 shows that a comparable level of job growth could be achieved as in the higher variant of the WG 2018-based projections, despite assuming that there will be much less population growth (11,534 vs. 17,702) or homes needed. This is due to the differing age profiles in the two scenarios, with

the option 4 scenario taking the latest demographic data into account and drawing upon longer-term trends.

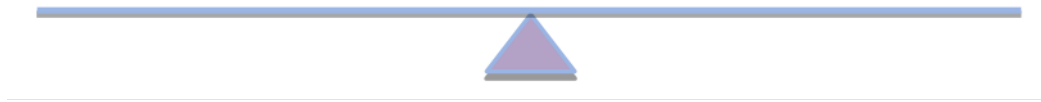
3.29 Similarly, the levels of growth set out in the current LDP (i.e. the “Business As Usual Scenario”- see paragraph 3.3) has also been discounted for similar reasons in that it would require significantly more development than justified by the updated evidence and would not be sustainable.

3.30 The merits of an affordable housing led scenario have been considered, as outlined in the ‘Economic and Housing Growth Assessment’ (July 2024). Following an initial review, a specific growth option has not been modelled on this basis due to the complex interrelationship between the overall need for housing and the need for affordable housing specifically, which can already be based on the demographic options set out in this section. However, each of the four (jobs led and demographic led) scenarios incorporate the modelling of a ‘membership rate sensitivity’ which allows for the potential impact of improved household formation in younger age groups which has been applied to recognise and account for the potential consequences of worsening housing affordability on these age groups over the last 15 years.

Constraints to Delivery

3.31 The Development Plans Manual specifies that “The scale of economic growth and housing expressed in the Plan should be a judgement between the need/demand aspects, the unconstrained need balanced against supply factors which constrain the ability of the plan to deliver, resulting in adjusted growth levels and the requirement of the Plan”. This process is illustrated in the following diagram taken directly from the Manual.

UNCONSTRAINED NEED Vs SUPPLY FACTORS = PLAN REQUIREMENT



Source: WG

Figure 3 Assessing the Need and Requirement for Jobs and Homes

3.32 A range of delivery considerations have been analysed. Impacts on lead in times and potential for delays in delivery when bringing developments forward have had a bearing on the ability to deliver a scale of growth, at the appropriate time. Recent AMR monitoring has identified issues that have resulted in time lags for delivery over the last 3-4 years. In particular, at times within this period dwelling completions have been impacted by the COVID-19 crisis impacting on site operations (closure of sites and social distancing), while labour supply issues, rising costs of materials and extended lead in times due to supply chain problems are also impacting the housebuilding industry.

3.33 Further factors which have affected housebuilding are the impact of sustainable drainage requirements, post planning highways consents and increased ecology requirements which have all had to be incorporated into the masterplanning process on sites and impacted on viability and in some cases delayed delivery, particularly on the complex large strategic sites. An up to date understanding on the likely lead in times for sites will need to be ascertained to inform the development trajectory for the Deposit Plan.

3.34 The range of different developers promoting sites in Swansea, and competing in the local housing market, along with realistic levels of build rates that can be achieved by different types of developers, is a further important consideration.

3.35 The evolving evidence base for LDP2 can evaluate these and some other factors that will determine what levels of growth can be delivered, including:

- environmental constraints;
- social and physical infrastructure capacity;
- the role and function of places;
- cultural issues (e.g. Welsh language);
- development financial viability in different areas and the ability of sites to support necessary infrastructure upgrades and affordable housing delivery, and
- levels of affordable housing need.

3.36 There are evidently a number of factors which have contributed to lower than expected rates of delivery. The extent to which LDP2's identification of new sites can address at least some of these issues will need to be considered in order to arrive at a judgement with regards the overall housing requirement. It would not appear realistic or sustainable to adopt a housing delivery scenario higher than any of the four options presented, on the basis of these delivery constraints outlined that would affect the ability to deliver the unconstrained need and the range of developers available to deliver such a step change in housing delivery that would be required.

Building in Flexibility

3.37 By way of response to the [consultation responses](#) received, it should be noted that the rationale for not pursuing other scenario/options, and/or introducing a higher-growth scenario, has been clearly set out previously within this Paper. Of note is the fact that paragraphs 3.39 and 3.40 below do acknowledge that there may be justification for adopting a higher than 10% flexibility allowance in LDP2.

3.38 The Development Plans Manual sets out that it will be extremely rare that all sites identified in a plan will come forward in the timescale anticipated and that there may be instances where site specific circumstances, unknown at the plan making stage, delay delivery. In order to enable LDP2 to be effective, it will need to be able to respond to changing circumstances. This means that a flexibility allowance must be embedded into the Plan. The Manual states that the level of flexibility will be for

each LPA to determine based on local issues, but that the starting point for such considerations could be 10% flexibility with any variation robustly evidenced. The level of flexibility chosen by the LPA when the Plan goes on deposit should be broadly maintained upon adoption of the Plan.

3.39 It is clear that there have been issues in Swansea during recent years which have led to delays in delivery, due in part to the complex nature of the larger strategic sites, and the issues that have been experienced on sites in general. In addition, Swansea is located at the heart of the NGA and will need to ensure sufficient flexibility is allowed to accommodate any changes in circumstances to deliver the national growth area objectives. In combination, these factors would suggest there is justification for adopting a higher than 10% flexibility allowance in the Plan. This is reinforced by the views of the development industry (taken from the ‘Starting the Conversation on LDP2’ consultation responses) where it was emphasised that a range and choice of sites should be provided to cater for unforeseen circumstances and so that the transformational regional regeneration objectives are not undermined. The flexibility allowance to be adopted in the Plan will need to reflect the latest evidence and development trajectories and will to an extent also be dependent on the nature and types of sites chosen to be allocated in the Plan.

3.40 In summary, the taking forward of a coherent and evidenced based approach to the consideration of a flexibility allowance may assist in addressing the concerns (most notably from the development industry), without distorting the soundness and effectiveness of the Preferred Strategy.

Summary of Findings

3.41 It is clear from the analysis that the demographic context is complex and has certainly changed since the current LDP was adopted, while the economic outlook has also changed since the current LDP was adopted and the outlook is currently not as positive. Latest employment forecasts suggest a relatively weak national economic outlook. As set out in the Manual, it is important to consider all the

evidence available to determine what the most appropriate growth might be over the Plan period. This analysis has identified four growth options that are all lower than the annual delivery targets for homes and employment growth identified in the current LDP.

3.42 The evidence presented in this chapter has, as outlined at the start, focused on unconstrained need. It has considered how higher and lower levels of housing provision could affect the ability to support jobs as well as other factors, including labour force behaviours which could change and affect the alignment of these factors. It has also considered the relationship between modelled need and past build out rates, acknowledging that certain scenarios suggest a need to boost the latter particularly when household membership rates are adjusted.

3.43 Overall, the analysis has demonstrated the level of housing delivery that would be required to support both the baseline and the upper level of job growth that can realistically be expected to come to fruition over the Plan period. If the latter is the path that the Plan seeks to adopt, then only the highest of the four scenarios would appear to provide the basis for a sustainable and integrated housing and employment growth strategy.

3.44 It would not appear realistic or sustainable to adopt a housing delivery scenario higher than any of the four options presented, on the basis of the delivery constraints outlined that would affect the ability to deliver the unconstrained need, and in terms of the number of homes needed to accommodate the most optimistic level of job growth.

4.0 Options for Spatial Approaches

Explanation and Overview

4.1 Alongside making decisions around the scale of future growth in Swansea, there are a range of approaches that could be taken in respect of where new development should be focused to deliver that growth. These are considered in this chapter and are termed ‘spatial approaches’.

4.2 Growth requirements are not only met by new allocations for development, as there will be existing commitments with planning permission as well as ‘windfall’ sites, that can contribute to the delivery of new homes and employment. The spatial approaches consider these aspects and focus on how the identified need for housing and employment land could be spatially accommodated across Swansea.

4.3 The consideration of spatial approaches is designed to inform the identification of an appropriate (or preferred) spatial strategy. The Development Plans Manual recognises that the spatial strategy underpins all elements of the Plan. It must clearly communicate where future development will be located; and how it will deliver the vision, key issues and objectives. The need to develop a robust understanding of the role and function of places is also emphasised in the Manual. The spatial strategy underpins all elements of the plan and must demonstrate compliance with the gateway test, search sequence and National Sustainable Placemaking Outcomes in Planning Policy Wales.

Current / Adopted LDP Spatial Strategy

4.4 The current LDP 2010-2025 was adopted on the 28th February 2019. The distribution of future sustainable growth across the County in the LDP follows a simple settlement hierarchy consisting of the urban area, Key Villages and the countryside. This approach identifies Swansea's urban area as the primary focus for growth and the most sustainable location for major development, reinforcing its position as the main centre for the Swansea Bay City Region. Away from the urban area, small-scale growth is focused on a number of defined key villages. A rural settlement appraisal process identified Key Villages as the most sustainable settlements within the rural area, to accommodate appropriate small scale housing, community facilities and sustainable rural enterprise development.

4.5 The Adopted LDP allows for the creation of a limited number of sustainable new neighbourhoods at Strategic Development Areas (SDAs), within, or close to the existing urban area which have the greatest potential to contribute to the Plan's Vision and Strategic Objectives and deliver well-being and sustainable development. The size of SDAs presents sufficient scale to enable careful strategic masterplanning to ensure they create sustainable, cohesive, well-designed and quality new places which are delivered through a strong placemaking approach. The economies of scale enable the level of new infrastructure required to be provided and through careful siting of SDAs.

4.6 The Adopted LDP Strategy also recognises that there is an important need to address the identified housing requirements of all communities in the County. A focus solely on SDAs, by virtue of the appropriate available development opportunities, would lead to an over concentration of development in certain SHPZs. To fulfil housing needs across the County, the SDAs were supported by a limited number of non-strategic medium scale edge of settlement extensions and more dispersed and smaller allocations to round off settlements. These support provision of a mix of housing development across the County where it is needed, including small scale appropriate development to provide Affordable Housing for Local Needs

in rural and semirural settlements where the existing character and cohesion of the community will be maintained or improved by development.

4.7 Reference should be made to the LDP Review Report (July 2023). This outlined that it was not anticipated that significant changes will be needed to the overarching Adopted LDP Spatial Strategy for LDP2. However, the way in which it is delivered would need to be reviewed against changes since the Plan’s adoption, including for example the relevant spatial aspects set out in **Future Wales**. Reference is made to the ‘Swansea Bay and Llanelli National Growth Area (NGA) Definition Project’ (January 2023) in addition.

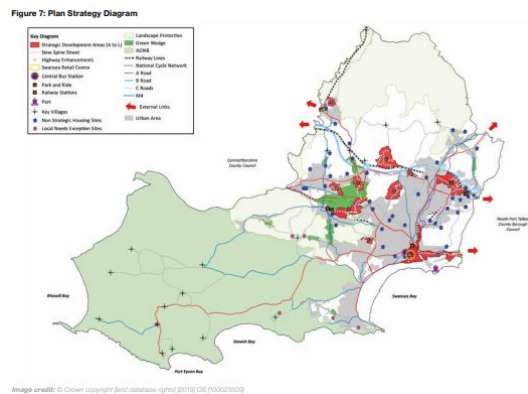


Figure 4 The Adopted LDP 2010-2025 Key Diagram

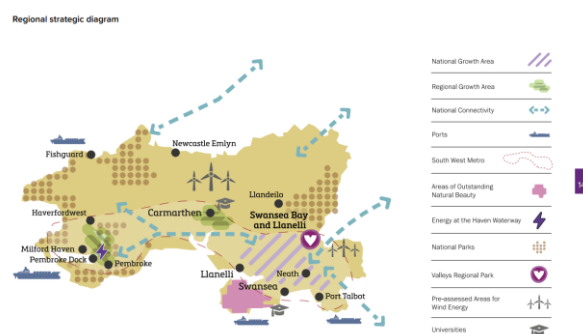


Figure 5 Future Wales Swansea Bay and Llanelli National Growth Area

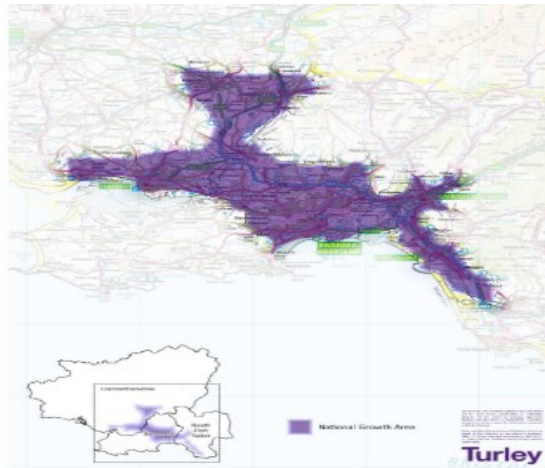


Figure 6 National Growth Area refining work (2023)

Generation of alternative spatial approaches

4.8 Paragraph 5.10 of the Development Plans Manual states that the LPA must consider and assess a number of realistic options for the spatial distribution of development across their area and take account of a number of factors when assessing spatial strategic options. Also, for revisions to adopted plans, the Manual notes that there will already be a large degree of contextual evidence and testing of options which, rather than start from scratch, would benefit from validating to understand if and/or where any new evidence for alternative options is required. The strategy should be clearly expressed and underpinned by robust evidence ensuring it is realistic. A robust understanding of the role and function of places, supply and demand factors, both within and beyond its administrative boundary, is fundamental to achieving an effective strategy and quality planning outcomes. This must be clearly articulated in the plan and evidence base.

4.9 Having regard to the foregoing, and reflecting on the emerging key issues, objectives, vision, context, and strategic policy issues (for example the Council's declaration of climate and nature emergencies and publication of Future Wales – all post the adoption of the current LDP), the following five potential spatial approaches were presented as part of the 'Starting the conversation on LDP2' consultation which ran from 18 April to 14 June 2024. Further information is set out within the following

reports: 'Starting the Conversation on LDP2 - Growth Scenarios and Spatial Approaches' (May 2024) and 'Starting the Conversation on LDP2: Engagement Report' (December 2024).

- Urban/Brownfield;
- Strategic Placemaking;
- Dispersal;
- Highly Connected Communities, and
- Housing Need Clustering.

Role and Function

4.10 The consideration of place based conversations recognises the importance of understanding 'Swansea in context'. It is recognised that the County of Swansea is one of significant contrasts, which is an important element of the area's distinctiveness. A comprehensive review of the opportunities and constraints were captured within the 'Starting the Conversation on LDP2 - Growth Scenarios and Spatial Approaches' (May 2024) Report as part of a review of headline developmental considerations. These considerations were broken down by Strategic Housing Policy Zones (SHPZs), which allowed a link to be made to the LHMA. The LDP2 constraints layer allows for acknowledgment of developmental constraints such as flood risk, whilst Best and Most Versatile Agricultural Land, Peat, and Common Land are also noted as key considerations.

4.11 The recognition of the importance of role and function is a fundamental influence on the assessment of approaches. It is recognised that in delivering the vision for 'Abertawe 2038', a 'one size fits all' approach in regards the scale and distribution of development across the County is inappropriate. It is vital to understand the opportunities, constraints and capacity of each SHPZ and the places

within them. Reference is made to Appendix 3 and 4 of this Paper where further information is set out.

Settlement Assessment and analysis

4.12 A 'Settlement Assessment' (December 2024) has been undertaken for LDP2 to help shape the spatial strategy for the Plan and provide a sustainable framework for growth, particularly to minimise unsustainable patterns in relation to the movement of people, including accessing local services and facilities.

4.13 Following a robust assessment using a clear and consistent methodology applied to each individual settlement, a number of conclusions and recommendations were reached, which have informed the Swansea Settlement Hierarchy for LDP2. Those headline recommendations include the following:

- Requirement for a more nuanced settlement hierarchy, with more levels; and
- Requirement for greater distinction between parts of the urban area.

4.14 Having regard to the outcomes of the Assessment, the resulting Swansea Settlement Hierarchy for LDP2 (December 2024) is set out in the Table overleaf. The outcomes of the Assessment have informed the consideration of growth and spatial approaches within this Paper.

Table 2 LDP2 Settlement Hierarchy (December 2024)

Tier No.	Tier Description	Settlements	Settlement Boundaries to be defined
1	<p>Urban Area Settlements</p> <p><i>The largest and most important within Swansea in terms of their role and function. Urban in nature with comprehensive range of facilities</i></p>	<ul style="list-style-type: none"> · Swansea Contiguous Urban Area (including at its outer edges travelling clockwise around the city - Mumbles, Upper Killay, Dunvant, Sketty, Gowerton, Fforestfach, Blaen-y-Maes, Llangyfelach, Morriston, Birchgrove, Winch-Wen, Bonymaen and Port Tennant) · Loughor, Gorseinon and Penllergaer Urban Area (including Penyrheol, Kingsbridge and Garden Village) · Pontarddulais · Clydach 	Yes
2	<p>Larger rural & semi-rural settlements</p> <p><i>Smaller than Urban Area, but still have a significant provision of services and facilities and some more urban characteristics</i></p>	<ul style="list-style-type: none"> · Murton and Bishopston · Crofty and Pen-clawdd · Pennard and Southgate · Pontlliw · Glais · Three Crosses 	Yes
3	<p>Smaller rural settlements</p> <p><i>Smaller than larger semi rural and rural with typically less of an urban character. Most have a moderate level of service and facility provision.</i></p>	<ul style="list-style-type: none"> · Craig-Cefn-Parc · Grovesend · Tircoed · Llanrhidian · Port Eynon · Scurlage · Reynoldston · Llangennith · Kittle · Rhossili · Llanmadoc 	Yes
4	<p>Countryside</p> <p><i>Lowest tier of the settlement hierarchy generally reflecting both a small size and very limited range of facilities</i></p>	Incorporates all settlements outside the boundaries of those locations defined in Tier's 1-3.	No

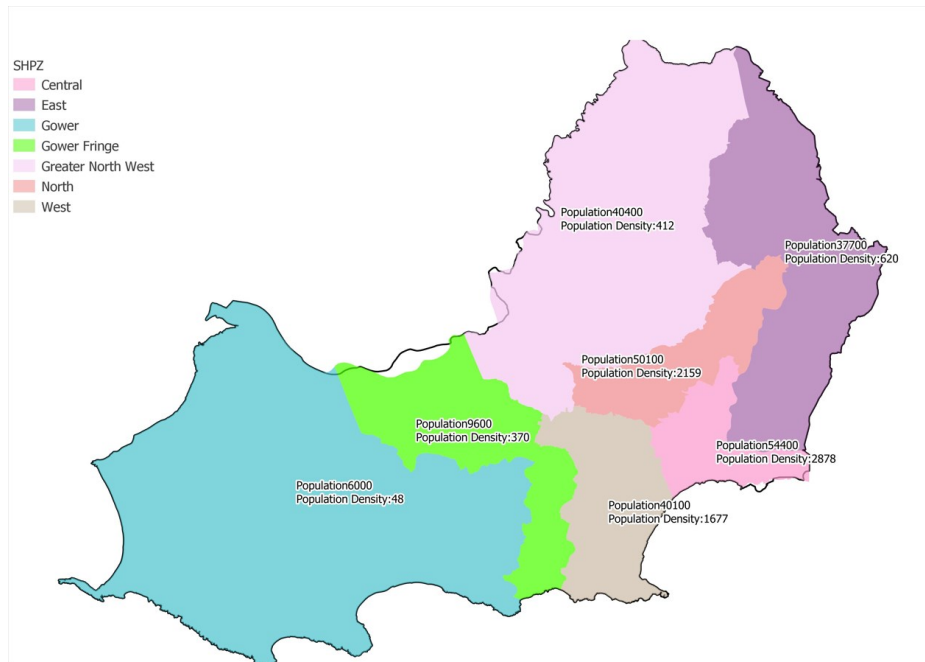


Figure 7 Strategic Housing Policy Zones

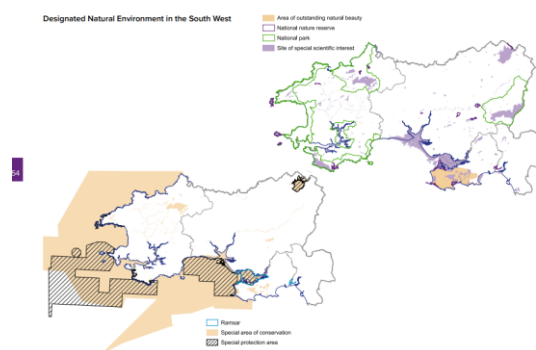


Figure 8 Environmental Designations (Source: Future Wales)

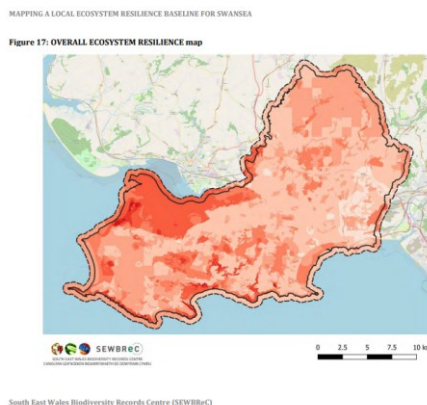


Figure 9 Summary Ecosystem Resilience Map (Source: SEWBREC)



Figure 10 Swansea Council Initial Green Infrastructure Assessment (December 2024) Extract

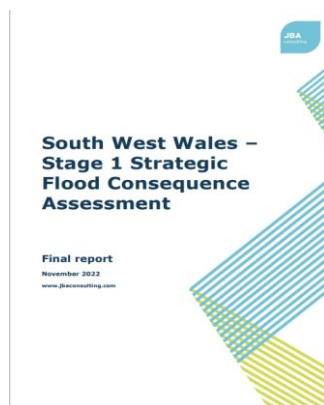


Figure 11 Regional SFCA (November 2022)

Assessing the approaches

4.15 As explained above, the current spatial strategy for the current / adopted LDP was a hybrid option pursuing a combination of approaches to deliver the land use requirements over the Plan period in a sustainable manner. This focused on the creation of a limited number of sustainable new neighbourhoods at Strategic Development Area (SDA) locations within, or close to, the established urban area.

To fulfil housing needs across the County this was supported by a limited number of non-strategic medium scale edge of settlement extensions and more dispersed and smaller allocations to round off settlements. For the purposes of this assessment, the Strategic Placemaking focus approach represents the current spatial strategy and will therefore be assessed as the ‘business as usual’ approach/option in this regard.

4.16 The five approaches have been reviewed and the findings are outlined in the section below, together with the tables [set out in Appendix 2](#). Reference should also be made to the Integrated Sustainability Appraisal Report of the Preferred Strategy’ (December 2024), where the options have been assessed against the Plan’s sustainability objectives.

4.17 Notable regard is given to the guidance set out within the Manual. The Figure below sets out an overview of the guidance on developing and assessing spatial growth options, whilst paragraph 4.18 below captures the factors that require considering when assessing spatial strategic options.

Diagram 13: Developing and Assessing Spatial Options for Growth

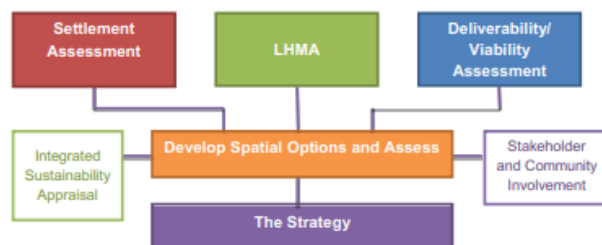


Figure 12 Guidance on Development and Assessing Options for Growth

4.18 The factors that require considering when assessing spatial strategic options are as follows:

- ✓ *Aspirations of the plan (areas for regeneration, wider regional context etc.)*
- ✓ *Availability and suitability of brownfield land in preference to greenfield land and land of high agricultural, ecological or landscape value Minimise the need to travel, especially by private vehicles, through the Sustainable Transport Hierarchy and Active Travel Plans*

- ✓ *Capacity of existing and potential infrastructure*
- ✓ *Scale and location of market and affordable housing required*
- ✓ *Scale and location of employment opportunities*
- ✓ *Environmental implications, e.g. energy consumption, greenhouse gas emissions, flood risk, biodiversity, green infrastructure, mineral resources and ground conditions, including mine gas*
- ✓ *Social and cultural factors, including consideration of the Welsh language*
- ✓ *Accessibility to jobs, shops and services*
- ✓ *Understand how different market areas can affect the viability of delivering private and affordable housing as well as associated infrastructure to support the level of development proposed*
- ✓ *Deliverability of key sites and overall strategy*
- ✓ *National strategies and priorities, such as decarbonisation and health.*

ISA and Plan Objectives

4.19 A high-level assessment of the 5 approaches against the Plan’s Objectives (December 2024) is set out in Figure 13 below, building upon a previous review undertaken in May 2024. It should be noted that the objectives themselves have subject to assessment against the Local well-being Plan objectives, Future Wales 2040 outcomes, Area Statement Themes, the LDP2 ISA objectives and the National Sustainable Placemaking Outcomes.

LDP2 Objective (December 2024)	1. Transformational Change	2. Centres First	3. Sustainable Economic and Employment Activity	4. The Visitor Economy	5. The Climate Emergency	6. The Nature Emergency	7. Renewable and Low Carbon Energy	8. Sustainable Development	9. Waste and the Circular Economy	10. Mineral Resources	11. Delivering New Homes	12. Placemaking	13. Active Travel and Sustainable Integrated Transport	14. Infrastructural Capacity	15. The Cultural and Historic Environment	16. The Welsh Language	17. Well-being and Equality	18. Community Facilities	
Urban Brownfield	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Strategic Placemaking	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Dispersal	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Connected Communities	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green
Housing Need Focus	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green

Green	Potential Alignment
Orange	Limited Alignment

Figure 13 Analysis of spatial approaches against Plan objectives

4.20 Commentary is provided within the tables for each option set out in Appendix 2. Reference should also be made to the Integrated Sustainability Appraisal Report of the Preferred Strategy’ (December 2024).

Consultation responses

4.21 The ‘Starting the Conversation on LDP2’ consultation exercise indicated that it would not appear that there was conclusive support for 1 approach in isolation. The comments received recognised there are different opportunities and challenges by each of the approaches and there is a balance to be struck between maximising the opportunities available. Overall, the majority of the supporting comments received were in regard to ‘Connected Communities’ in particular, as well as ‘Strategic Placemaking’, albeit elements of the other approaches were deemed to be appropriate for recognition as part of a wider strategic approach. Reference should

be made to the 'Starting the Conversation on LDP2: Engagement Report' (December 2024) for more information.

4.22 The responses received also highlighted a number of considerations which can be utilised to inform the ongoing assessment of approaches and their respective credentials. The responses also placed an emphasis on deliverability, viability and enabling a range and choice of sites.

4.23 It would not appear that there was any notable concern that an insufficient number and range of approaches had been tabled for consideration. A number of consultation comments touched upon the regional context, including the location of Swansea within the National Growth Area. Due regard should be given to the Paper prepared in support of the Preferred Strategy on 'Regional Collaboration' (December 2024).

Evolving evidence base

4.24 Whilst the Preferred Strategy (December 2024) will provide a strategic steer for the preparation of LDP2, a number of facets (including site specific considerations) will be subject to ongoing review.

4.25 A number of emerging evidential facets can contribute towards such ongoing assessment and refinement. Such matters can include:

- Ongoing viability work (including site specific work);
- Candidate Site and Housing Supply analysis, and
- Investment programmes and priorities of partners, such as Dwr Cymru Welsh Water AMP, and Transport for Wales Metro, and

4.26 The iterative nature of the Plan making allows for ongoing review, particularly in noting the ongoing production and evolution of the wider evidence base.

Summary of Findings

4.27 The assessment undertaken on the 5 approaches has indicated that there is no single approach in isolation that presents as wholly appropriate in isolation.

4.28 What is apparent is that there needs to be clear emphasis on deliverability and connectivity, particularly with reference to realising the Vision and Objectives of the Plan and in reflecting role and function/spatial context and in recognising Swansea's central position within the National Growth Area.

4.29 In noting that the declaration of climate and nature emergencies by the Council are key strategic themes in LDP2, the 'Connected Communities' approach would appear to offer significant potential, particularly in noting the Transport Hierarchy for Planning as set out in Planning Policy Wales. Furthermore, the 'continuity value' of the 'Strategic Placemaking' approach, acknowledging the current Spatial Strategy, should be given due weight – particularly in reflecting existing commitments and providing certainty (including to utility and service providers). Strategic Placemaking also captures placemaking, masterplanning and infrastructural investment gains (including GI) at scale. The National Sustainable Placemaking Outcomes are noted in this regard.

4.30 The work undertaken on role and function, particularly in terms of reviewing the respective developmental capacity within the SHPZs, further amplifies the credentials of the Connected Communities and Strategic Placemaking approaches, whilst the ISA and objective review has allowed for consideration of socio-economic matters.

4.31 The emphasis on regeneration and transformative change in the well connected Central SHPZ, along with the existence of existing SDAs in the North and Greater North West SHPZs (noting also the proposed Metro, key transport links and

the delineation of the NGA area) are noted in this regard. The identification of strategic development opportunities within the Preferred Strategy (December 2024) can align with (and strengthen such links). These SHPZs generally align also with the urban area as per the current Plan. Whilst there are development considerations that would apply (e.g. localised flood risk) these are not considered to be strategic impediments and there is also confidence in viability terms. In contrast, the role and function of the Gower SHPZ, and the associated environmental considerations, are noted. The majority of the Common Land is in Gower and Mawr, whilst The Gower Peninsula and west Swansea contain the majority of the highest grades of agricultural land.

4.32 The Dispersal approach does not appear to offer a way forward as a stand-alone approach. However, it is important to recognise the importance of a range and mix of sites (including smaller sites to augment the overall offer in conjunction with larger strategic allocations) so as to meet community need and provide an offer to a range of developers. It is also important to ensure that rural areas are not 'left behind' as part of a 'One Swansea' ethos.

4.33 Whilst not appearing to present as appropriate standalone approaches, factoring in 'housing need' and 'brownfield/urban' can be components parts of a wider overarching strategic approach (e.g. at site selection level – noting the sequential search sequence requirements). This would allow for important evidential components (most notably in terms of the LHMA, and with potential reference to the SHPZ) to be acknowledged also.

4.34 The above findings also align to the framework set out within the Swansea Settlement Hierarchy for LDP2 (December 2024), particularly in respect of acknowledging the contrasting role and function of those SHPZs that contain settlements that have a natural developmental focus (Tier 1) as opposed to those situated at lower Tiers.

5.0 Towards a preferred overall approach

5.1 Having regard to the options and approaches reviewed, the below sets out some key conclusions with a view to shaping the strategic direction of travel set for LDP2.

Preferred Growth Option

5.2 It is considered that The **Higher Economic Growth scenario** requiring **9,510 dwellings** over the plan period to support employment growth of **10,238 jobs** is considered to represent an appropriate way ahead for LDP2. This scenario includes positive adjustments based on local knowledge of the latest economic impact forecasts for pipeline projects regarded as having a realistic level of certainty of coming to fruition, while also balancing this optimism with wider uncertainty and risks. It represents a positive and ambitious job creation target reflective of local planned investments including strategic opportunities recognising the strategic location at the heart of the National Growth Area. It also represents an ambitious yet deliverable level of housing growth representing an uplift on past building rates to contribute to market and significant affordable housing needs.

5.3 Analysis has demonstrated the level of housing delivery that would be required to support the baseline and the upper level of job growth that could realistically be expected to come to fruition over the plan period. To sufficiently meet the regeneration aspirations for the County, and to ensure that the level of growth pays due regard to the County's strategic and important role at the heart of the National Growth Area, a sufficiently ambitious but deliverable level is necessary to deliver on the vision and objectives of the plan.

5.4 The higher economic growth scenario is considered the preferred growth level for the following reasons:

- Positive and ambitious job creation target reflective of local planned investments including strategic opportunities recognising the strategic location at the heart of the national growth area; and
- Represents an ambitious yet deliverable level of housing growth representing an uplift on past building rates to contribute to market and significant affordable housing needs.

5.5 The consultation held from April to June 2024 outlined a flexibility allowance of 10%. Upon reflection, it is noted that there have been issues in Swansea during recent years which have led to delays in delivery, due in part to the complex nature of strategic sites and the issues that have been experienced on sites in general. Furthermore, in recognising the National Growth Area location, it is accepted that sufficient flexibility needs to be allowed for in order to accommodate any changes in circumstances. Consideration has also been given to the consultation responses received, particularly from the development industry. As such, it is considered that a **20% flexibility allowance** is appropriate moving forward. This is to ensure a range and choice of sites are provided to cater for unforeseen circumstances and so that the transformational regional regeneration ambitions, as well as the delivery of the LDP2 Objectives, are not undermined.

5.6 Alongside the preferred level of housing and jobs growth, the potential amount of employment land to be provided for has been considered. This involves the conversion of jobs to floorspace and floorspace to hectares. Factors including employment densities, past take up, allowing for improved availability choice and flexibility, replacing losses and plot assumption ratios were considered. Analysis has concluded that circa 11-25.2ha of employment land could be needed. Provision towards the lower end of this range would enable a continuation of recent take up, with some losses replaced, while provision at the upper end would support the preferred growth scenario. In recognising the National Growth Area location as a focus for investment and economic growth, it is

considered that an **employment land provision at the higher end (i.e. 25ha)** represents an appropriate way ahead. This will provide greater choice and flexibility and to align with the Authority’s economic ambitions to improve the quality of employment space available in Swansea.

ISA and Plan Objectives

5.7 A high-level assessment of the preferred growth scenario against the Plan’s objectives (December 2024) is set out in Figure 14 below. It should be noted that the objectives themselves have been subject to assessment against the Local Well-being Plan objectives, Future Wales 2040 outcomes, Area Statement Themes, the LDP2 ISA objectives and the National Sustainable Placemaking Outcomes. Reference should also be made to the ‘Integrated Sustainability Appraisal Report of the Preferred Strategy’ (December 2024). In noting that the Higher Economic Growth scenario figure has been assessed already in Figure 2, the below re-assesses the scenario but with a 20% flexibility provided.

LDP2 Objective	1. Transformational Change	2. Centres First	3. Sustainable Economic and Employment Activity	4. The Visitor Economy	5. The Climate Emergency	6. The Nature Emergency	7. Renewable and Low Carbon Energy	8. Sustainable Development	9. Waste and the Circular Economy	10. Mineral Resources	11. Delivering New Homes	12. Placemaking	13. Active Travel and Sustainable Integrated Transport	14. Infrastructural Capacity	15. The Cultural and Historic Environment	16. The Welsh Language	17. Well-being and Equality	18. Community Facilities
Preferred approach Growth	Strong Alignment	Strong Alignment	Strong Alignment	Strong Alignment	Limited Alignment	Limited Alignment	Strong Alignment	Strong Alignment	Strong Alignment	Limited Alignment	Strong Alignment	Strong Alignment	Strong Alignment	Strong Alignment	Limited Alignment	Strong Alignment	Strong Alignment	Strong Alignment

Strong Alignment
Limited Alignment

Figure 14 Preferred Growth Scenario Assessed

5.8 The preferred approach regarding growth supports a level of housing and employment growth suitable to meet those Plan objectives that are focused on economic growth and transformational change. The approach will also contribute to achievement of meeting the need for new homes (including affordable). There is also alignment with those objectives focused on well-being/equality, the Welsh language and community facilities. In regards the Welsh language specifically, the approach can contribute towards the retention of younger age cohorts, noting that in the 16-19 age group, the increase in the number of Welsh speakers in Swansea between Censuses was 12.8%, with a similar increase for the 20-44 age group also.

Preferred Spatial Approach

5.9 A spatial approach that is a **hybrid of the 5 approaches** considered, particularly in regard to **strategic scale placemaking** for sustainable neighbourhoods and delivering **highly connected communities**, whilst recognising and reflecting some of the strongest features of the other 3 approaches, is considered to be an appropriate way ahead for LDP2.

5.10 Following the assessment of the 5 approaches (including the review of consultation responses and the wider evidence base), it is clear that no single approach in isolation is suitable and that a hybrid approach is the most sensible to pursue. What is apparent is that there needs to be clear emphasis on deliverability and connectivity, particularly with reference to realising the Vision and Objectives of the Plan and in reflecting role and function/spatial context. It is also important to recognise Swansea's central position within the National Growth Area.

5.11 The key features of a hybrid spatial approach include:

- Highly sustainable neighbourhoods, with location of future growth driven by accessibility to services and facilities and reducing reliance on the private car;
- Sites need to meet targets of 15/20 minutes to day to day services and facilities, by active travel and high quality public transport;
- Opportunity to create sustainable, well connected neighbourhoods that can easily access complementary uses and supporting infrastructure;
- Economies of scale to enable new infrastructure required to enable sustainable development;
- Significant number of Strategic Placemaking and Regeneration Areas of 400+ homes with supporting mixed uses;
- Mix and range of limited number of smaller scale allocations at sustainable locations;
- Maximise sustainable brownfield sites but recognising the need for greenfield release to deliver transformational regeneration objectives;
- Recognising the needs of rural communities and ensuring they are not 'left behind' through ensuring small scale housing and employment opportunities are facilitated;
- Maximising opportunities to strengthen Green Infrastructure connectivity through the Placemaking approach to contribute to addressing the nature and climate emergencies, and
- Aligning growth opportunities and key sites with emerging South West Wales Metro proposals and facilitating transport infrastructure improvements.

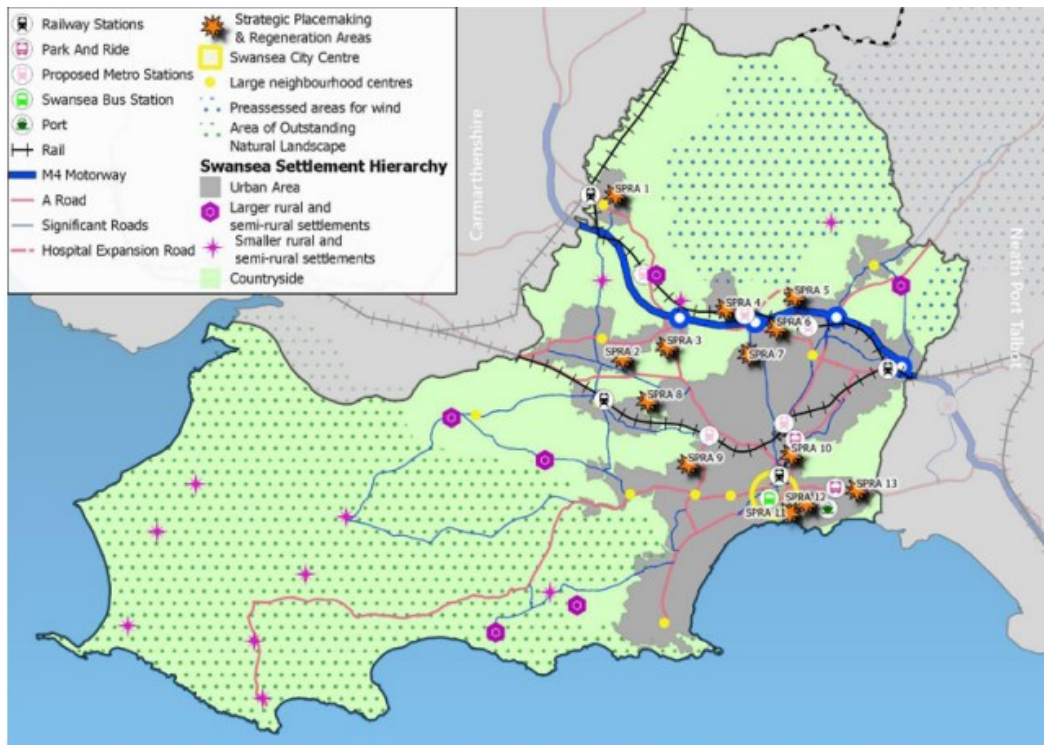


Figure 15 The Preferred Spatial Approach (LDP2 Key Diagram - December 2024)

ISA and Plan Objectives

5.12 A high-level assessment of the preferred spatial approach against the Plan's Objectives (December 2024) is set out in Figure 16 below. It should be noted that the objectives themselves have subject to assessment against the Local well-being Plan objectives, Future Wales 2040 outcomes, Area Statement Themes, the LDP2 ISA objectives and the National Sustainable Placemaking Outcomes. Reference should be made to the 'Integrated Sustainability Appraisal Report of the Preferred Strategy' (December 2024).

LDP2 Objective	18. Community Facilities	
	17. Well-being and Equality	
	16. The Welsh Language	
	15. The Cultural and Historic Environment	
	14. Infrastructural Capacity	
	13. Active Travel and Sustainable	
	12. Placemaking	
	11. Delivering New Homes	
	10. Mineral Resources	
	9. Waste and the Circular Economy	
	8. Sustainable Development	
	7. Renewable and Low Carbon Energy	
	6. The Nature Emergency	
	5. The Climate Emergency	
	4. The Visitor Economy	
	3. Sustainable Economic and Employment Activity	
	2. Centres First	
	1. Transformational Change	
Preferred Spatial approach		

	Strong Alignment
	Limited Alignment

Figure 16 Assessment of Preferred Spatial Approach (Hybrid)

5.13 The preferred spatial approach (hybrid) strongly aligns with those Plan objectives that focus on sustainable transport and ‘centres first’. It is also aligned with those objectives that focus on transformative change, employment/economic opportunities, delivering new homes, the climate and nature emergencies and placemaking. In terms of infrastructural capacity, well-being and community facilities, the inclusion of a strategic placemaking focus can also maximise potential to deliver new supporting infrastructure such as schools, play areas, local centres, etc. The approach aligns with health and wellbeing and equalities objectives by addressing the broader social, economic and environmental determinants of health (such as employment opportunities, access to housing and health environments). Due regard will be required in respect of any linguistic impact, notably in respect of large-scale release in the North /North West.

6.0 Conclusion

6.1 The extensive assessment and engagement undertaken has led to the identification of a preferred overall approach to growth and spatial distribution for LDP2. The higher economic growth scenario (with 20% flexibility), together with a hybrid spatial approach, represents a sustainable and integrated housing and employment land strategy.

6.2 This preferred approach will help minimise unsustainable commuting out of the county for work and will cater for the housing and employment growth required with regard to all known realistic pipeline investment opportunities. It is considered to represent a realistic, deliverable and evidence-based approach, which would also align to Future Wales (noting the Swansea Bay and Llanelli National Growth Area designation), thereby providing comfort in terms of the tests of soundness. Whilst a departure from the WG projection, by coincidence, the impact would be very similar in terms of numbers of homes required, but more positive in terms of supporting more jobs.

6.3 The chosen approach also draws from the strongest elements of the spatial approaches considered. Of particular note is the ‘continuity value’ provided by the strategic scale placemaking aspect, particularly in providing much needed certainty for the market/developers, as well as for infrastructure / service providers who align their investment decisions within a spatial planning context. Due regard is also given to the location of those existing housing commitments/plan period completions which are captured within the ‘Analysis of Housing Supply’ (December 2024). Due regard is also given to the ‘Employment Land Review’ (December 2024).

6.4 A high-level assessment of the preferred overall approach against the Plan’s Objectives (December 2024) is set out in Figure 17 below. It should be noted that the objectives themselves have been subject to assessment against the Local Well-being Plan objectives, Future Wales 2040 outcomes, Area Statement Themes, the LDP2 ISA objectives and the National Sustainable Placemaking Outcomes. Reference should be

made to the Integrated Sustainability Appraisal Report of the Preferred Strategy’ (December 2024) to view assessments against the sustainability objectives.

LDP2 Objective	1. Transformational Change	2. Centres First	3. Sustainable Economic and Employment Activity	4. The Visitor Economy	5. The Climate Emergency	6. The Nature Emergency	7. Renewable and Low Carbon Energy	8. Sustainable Development	9. Waste and the Circular Economy	10. Mineral Resources	11. Delivering New Homes	12. Placemaking	13. Active Travel and Sustainable Integrated Transport	14. Infrastructural Capacity	15. The Cultural and Historic Environment	16. The Welsh Language	17. Well-being and Equality	18. Community Facilities	
Preferred Strategy overall																			

	Strong Alignment
	Limited Alignment

Figure 17 Assessment of overall preferred spatial and growth approach

6.5 There is potential to contribute to the achievement of the Plan’s objectives in a number of ways. However, the policy framework of the Plan will need to consider the following aspects so that the contribution to those objectives identified as being of ‘limited alignment’ can be addressed:

- Renewable Energy;
- Waste and the circular economy;
- The Cultural and Historic Environment;
- Mineral Resources; and
- Well-being and equality.

6.6 The above matters can be suitably addressed through the policy framework and are not considered to be matters relating directly to growth and spatial distribution. However, in respect of well-being and equality, specific regard will be required as to the need to supplement strategic scale development with appropriate smaller scale opportunities and providing a range of site sizes in recognition of a ‘One Swansea’ ethos. Well-being and equality regarding rural areas will be of concern, notably in terms of accessibility to services, and meeting affordable housing need (notably in rural

areas), if these are not suitably considered within the policy framework and/or interventions made.

6.7 Furthermore, factoring in ‘housing need’ and sequentially focusing on ‘brownfield opportunities initially can be component parts of a wider overarching strategic approach (e.g. as part of the site selection process). This would allow for important evidential components (most notably in terms of the LHMA, and with potential reference to the SHPZ) to be acknowledged also.

6.8 The preferred approach also aligns to the framework set out within the Swansea Settlement Hierarchy for LDP2 (December 2024), particularly in respect of acknowledging the contrasting role and function of those SHPZs that contain settlements that have a natural developmental focus (Tier 1) as opposed to those situated at lower Tiers.

6.9 The identification of the preferred overall approach also reflects the viability context, with reference made to the ‘Initial High-Level Viability Assessment’ (December 2024).

6.10 The preferred overall approach also enables and reflects opportunities to allocate Strategic Placemaking and Regeneration Areas in the LDP2 Deposit Plan on a range of brownfield and greenfield sites within the North; East; West; Central; and Greater North West Strategic Housing Policy Zones.

6.11 In summary, a number of different approaches to growth and spatial distribution have been considered, consulted upon, and assessed (including through the ISA process). The preferred overall approach has emerged from such deliberations, and offers a robust and sound approach that will deliver the Plan’s objectives whilst also offering a suitable level of continuity from the approach that was set out within the Adopted LDP. It should be noted that the ISA process has played a key iterative role in this regard. The ISA conclusions confirm that the preferred overall approach (both in terms of growth and spatial distribution) is the most appropriate for LDP2.

Appendices

Appendix 1 Assessment of Growth Options

Table 3 Assessment of Growth Option 1 - Baseline economic forecast option

Name of Growth Option: Baseline Economic Forecast	
Brief Description: A nationally derived benchmark forecast produced by Cambridge Econometrics has been used to form a 'jobs led' baseline economic forecast for Swansea. Demographic modelling has been used to understand how this level of employment growth could impact on the changing size of the population, integrating reasonable labour-force behaviour assumptions. This suggests, following the conversion of the population to households and subsequently dwellings, growth would be needed of 7,710 dwellings over the Plan period to support employment growth of 7,875 jobs.	
Key considerations:	
Comparison to WG projections	This is a jobs-led scenario which suggests that fewer homes would be needed to support the baseline jobs growth rate compared to the WG principal population projection. It would therefore represent a departure from the WG projections, which would be difficult to justify on the basis of the analysis below.
Accordance with Future Wales and regional implications	Concern that the nationally derived jobs led baseline does not account for known investment opportunities in Swansea (including City Deal transformational projects) and that this baseline forecast may not sufficiently reflect Swansea's role at the heart of the National Growth Area (NGA). Could lead to more development in neighbouring Council areas further away from the commercial heart of the region and unsustainable commuting patterns.

Ability to deliver the Strategic Objectives of the Plan ⁴	Would undermine the Plan's ability to support transformational change through regeneration and wider economic objectives. Potential alignment with objectives focused on well-being, equality, Welsh language and community facilities.
Extent to which evidenced economic needs will be delivered	Would fail to meet strategic economic objectives (see above).
Extent to which evidenced social/housing needs will be delivered	Would only provide sufficient homes to accommodate the workforce required for the baseline jobs growth scenario, which is not sufficient to meet the Plan's economic objectives. Lower than the WG projections. Therefore, there is a danger of under provision for housing and jobs.
Environmental and climate change implications, including summary of ISA findings.	While the locations of growth are not decided at this stage, in general this would require fewer allocations than other options therefore less potential impact on greenfield sites and therefore landscape, biodiversity and soil resources. Lower growth in this scenario is likely to have less detrimental impact on transport congestion and energy consumption than other scenarios. However, not identifying sufficient sustainable land opportunities in the Plan for homes and jobs could lead to unsustainable commuting patterns and pressure for additional windfall development requirements which would be less strategically coordinated. The growth level falls below the WG principal projection, and so would represent a departure, which would be difficult to justify. By not delivering sufficient housing to meet housing need nor employment opportunities, there could be resultant potentially detrimental impacts on health and wellbeing and socio-economic disadvantages.
Deliverability and capacity factors ⁵	The required delivery rate for homes would be a similar level to that seen in recent years, and it would require fewer land allocations than other options.
Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)	Concern that scenario does not reflect Swansea and its status in Future Wales (noting the NGA). Comments made that this scenario needs to be discounted at this early-stage otherwise Swansea, as a whole, will not prosper and will decline with significant long reaching social and economic impacts.

⁴ Which are grouped /linked to achievement of the Local well-being objectives

⁵ With reference to Development Plans Manual Guidance and soundness tests

Brief conclusion: The required delivery rate for homes would be a similar level to that seen in recent years, and it would require fewer land allocations than other options. Concerns that it would undermine the Plan's ability to support transformational change through regeneration and the wider economic objectives, whilst the content of Future Wales (notably the Swansea Bay and Llanelli Growth Area) is also a consideration. It would represent a departure from the WG projection, which would be difficult to justify on the basis of the analysis.

Table 4 Assessment of Growth Option 2 - Long-term population growth trend option

Name of Growth Option: Long-Term Population Growth Trend	
Brief Description: Demographically based projection, which takes the 2013-18 trend based WG principal projection as a starting point, but up-to-date mid-year estimates have been used along with a longer term historic period (i.e. it is based on the trends from the period 2001/02 – 2021/22). This suggests growth of 8,430 dwellings over the Plan period which would support the growth of 8,085 jobs.	
Key considerations:	
Comparison to WG projections	Suggests a level of population growth that is between that indicated by the principal 2018-based projection and the lower variant. This is because it takes account of more up to date data. The ONS now believes that the population of Swansea in 2018 was roughly 7,280 persons (or 3%) lower than it did when these latest official projections were developed. Its latest estimate suggests that the population in mid-2022 was at least 3% below that envisaged by any of the three projections. Would represent a departure from the WG principal projection but could be justified on the basis of using up to date information, subject to other planning matters being acceptable below.
Accordance with Future Wales and regional implications	This level of growth would support slightly in excess of the baseline amount of job growth identified for the Plan period. But concern that the nationally derived baseline does not account for known investment opportunities in Swansea (including City Deal transformational projects) and that this baseline forecast may not sufficiently reflect Swansea’s role at the heart of the NGA. Could lead to more development in neighbouring Council areas further away from the commercial heart of the region and unsustainable commuting patterns
Ability to deliver the Strategic Objectives of the Plan	Would undermine the Plan’s ability to support transformational change through regeneration and wider economic objectives. Potential alignment with objectives focused on well-being, equality, Welsh language and community facilities.
Extent to which evidenced economic needs will be delivered	Would fail to meet strategic economic objectives (see above).

Extent to which evidenced social/housing needs will be delivered	Would provide sufficient homes to accommodate the workforce required for the baseline jobs growth scenario, but this is not sufficient to meet the Plan’s economic objectives. Lower than the WG projections. Therefore, there is a danger of under provision for housing and jobs. Uses the latest demographic data.
Environmental and climate change implications, including summary of ISA findings.	Requires fewer allocations than other higher options, but more than scenario 1. Therefore, there will be some detrimental impact on greenfield sites in terms of landscape, soils and biodiversity. Lower growth than scenarios 3 and 4 is likely to have less detrimental impact on transport congestion and energy consumption than other higher scenarios. However, not identifying sufficient sustainable land opportunities in the Plan for homes and jobs could lead to unsustainable commuting patterns and pressure for additional windfall development requirements which would be less strategically coordinated. Although more than scenario 1, the growth level still falls below the WG baseline scenario, thereby not delivering sufficient housing to meet housing need nor employment opportunities, with resultant potentially detrimental impacts on health and wellbeing and socio-economic disadvantages.
Deliverability and capacity factors	The required delivery rate for homes would be slightly higher than that seen in recent years, and it would require fewer land allocations than other higher options.
Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)	Concern that scenario does not reflect Swansea and its status in Future Wales (noting the NGA). Claimed that this scenario needs to be discounted at this early-stage otherwise Swansea, as a whole, will not prosper and will decline with significant long reaching social and economic impacts.
<p>Brief conclusion: The required delivery rate for homes would be slightly higher than that seen in recent years, and it would require fewer land allocations than other higher options. It would only accommodate the needs of slightly in excess of the baseline jobs growth forecast and so there are concerns that it could undermine the Plan’s ability to support transformational change through regeneration and the wider economic objectives, whilst the content of Future Wales (notably the Swansea Bay and Llanelli Growth Area) is also a consideration. It would represent a departure from the WG projection, which while using more up to date demographic information, would be difficult to justify on the basis of the analysis.</p>	

Table 5 Assessment of Growth Option 3 - WG Principal Population Projection Option

Name of Growth Option: WG Principal Population Projection	
Brief Description: Demographically based projection which uses the 2013-18 trend based WG principal projection. This suggests growth of 9,510 dwellings over the Plan period and is estimated to support employment growth of 8,415 jobs.	
Key considerations:	
Comparison to WG projections	This is the WG principal projection.
Accordance with Future Wales and regional implications	Based on the latest WG projection. However, concern that this projection would not require sufficient employment land to be provided in the Plan to meet all of the known investment opportunities over and above the baseline Employment led growth scenario and therefore would not support Swansea to fulfil its role as a NGA
Ability to deliver the Strategic Objectives of the Plan	Concern that this projection would not require sufficient employment land to be provided in the Plan to meet all of the known investment opportunities over and above the baseline Employment led growth scenario and therefore would not support Swansea to fulfil its role as an NGA. Potential alignment with objectives focused on well-being, equality, and community facilities.
Extent to which evidenced economic needs will be delivered	Would not provide sufficient employment land to support the known committed and realistic pipeline investments.
Extent to which evidenced social/housing needs will be delivered	While the overall population would grow by similar amounts compared to the employment-led growth scenario (option 4), working age residents aged 16 to 64 would account for only 31% of all growth (compared to over half (52%) in the option 4 scenario which uses more up to date data). Therefore, it would only generate sufficient population to support the baseline jobs forecast. Published in 2020 and based on the period before the COVID pandemic and ahead of the 2021 Census and subsequent revisions made to the inter-census mid-year estimates of population so does not reflect the latest demographic data.

<p>Environmental and climate change implications, including summary of ISA findings.</p>	<p>Greater housing and economic growth than options 1 and 2 is likely to require more allocations on greenfield sites for both housing and economic activity, thus having a detrimental impact on landscape, soils and biodiversity. The projection provides housing and employment growth which would contribute positively to people’s health and wellbeing, social inequalities and economic disadvantages. However, the scenario retains less working age population (31%) than scenario 4, with resultant less positive impacts in relation to integrated sustainable communities and greater pressure on social infrastructure associated with an ageing population. There is also concern that this projection would only support the baseline jobs led growth scenario and would not sustainably support the known levels of economic growth. Not identifying sufficient sustainable land opportunities in the Plan for jobs could lead to unsustainable commuting patterns out of the County for employment. Greater housing and level of jobs will result in increased energy consumption than lower options and mitigation will be required to ensure no detrimental impact on climate change.</p>
<p>Deliverability and capacity factors</p>	<p>Delivery of homes would be higher than the level seen in recent years but is realistically achievable. Requires fewer B use class land allocations than the higher option 4. However, not identifying sufficient sustainable land opportunities in the Plan for jobs could lead to unsustainable commuting patterns and pressure for additional windfall development requirements which would be less strategically coordinated.</p>
<p>Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)</p>	<p>Some support for this level of housing growth in meeting WG projection and being at the higher end of growth. But there was still concern (particularly amongst developers/agents) that the housing growth level was not ambitious enough, with Future Wales (NGA) cited. Concerns as to robustness of the projections also cited – e.g. COVID impact and Census not factored in.</p>
<p>Brief conclusion: Delivery of homes would be higher than the level seen in recent years but is realistically achievable. Requires a lower B use class land allocation than the higher option 4 but this would only provide sufficient B use class land to support the baseline jobs forecast. This is considered to represent a realistic, deliverable and evidence-based approach, which would also align to Future Wales (NGA), thereby providing comfort in terms of the tests of soundness. Concern however that with reference to LDP2 Objective 4 (sustainable economic activity and good quality jobs) that this scenario falls short of the job creation figure set out in Scenario 4, with resultant concerns about the level of integration between</p>	

employment and housing as strategy components. Therefore, an appropriate departure from the WG principal projection could be justified on this basis.

Table 6 Assessment of Growth Option 4 - Higher economic growth option

Name of Growth Option: Higher Economic Growth	
Brief Description: This option adds positive adjustments to the baseline employment led scenario (discussed under Option 1) based on knowledge of the latest economic impact forecasts for pipeline projects regarded as having a realistic level of certainty of coming to fruition, while also balancing this optimism with wider uncertainty and risks. Demographic modelling has been used to understand how this level of employment growth could impact on the changing size of the population, integrating reasonable labour-force behaviour assumptions. This suggests, following the conversion of the population to households and subsequently dwellings, growth of 9,510 dwellings over the Plan period to support employment growth of 10,238 jobs.	
Key considerations:	
Comparison to WG projections	The same amount of housing growth as proposed by the WG principal projection would support this higher economic growth option due to more up to date data being used in this projection which shows a higher proportion of working age residents aged 16 to 64 would be generated. Therefore, while a technical departure from the WG projections, by coincidence, the impact would be similar in terms of numbers of homes required, but more positive in terms of supporting more jobs.
Accordance with Future Wales and regional implications	This option would support both a level of housing and employment growth suitable to enable the Plan to support Swansea's role as a NGA.
Ability to deliver the Strategic Objectives of the Plan	Would support a level of housing and employment growth suitable to meet the Plan's socio economic objectives and transformational change. Potential alignment with objectives focused on well-being, equality, Welsh language and community facilities.
Extent to which evidenced economic needs will be delivered	Would provide sufficient land to accommodate known and/ or plausible investments that are likely to take place, and which have the potential to generate additional employment over the baseline option.
Extent to which evidenced social/housing needs will be delivered	Takes the latest demographic data into account and draws upon longer-term trends. Sufficient homes would be delivered to support the employment investments expected providing a sustainable and integrated strategy. Working age residents (16 to 64) would account for over half (52%) of all growth in this scenario, compared to only 31% in the principal 2018-based WG projection which offers

	greater capacity to support job growth and reduces the need to provide additional homes to accommodate extra workers.
Environmental and climate change implications, including summary of ISA findings.	Greater levels of growth will potentially require greenfield land releases impacting on landscape, biodiversity and soils. The scenario provides housing to meet identified needs, and increased employment will have positive socio-economic impacts and on people's health and being. Retaining a younger demography will lead to more balanced, cohesive and sustainable communities. By retaining a working population, the same number of dwellings (as under option 3) can support a greater number of jobs. This sustainable and integrated housing and employment land strategy will help minimise unsustainable commuting out of the county for work.
Deliverability and capacity factors	Will represent a step change in delivery of homes but realistic this could be delivered. No downside adjustments have been made to the baseline as these are unknowable at this stage (i.e. this investment-led scenario is entirely adjusted on the upside ⁶) therefore it is considered that this option represents the realistic upper end of growth and caution should be applied in seeking to go higher than this option.
Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)	Some support for this scenario that it proposed the highest level of growth of the 4 tabled, albeit there was still some concern as to lack of aspiration. Emphasised that the employment element of the higher growth scenarios must be balanced and in doing so would seek to retain young people and limit out commuting, in the knowledge high quality employment opportunities are offered within the county together with a range of dwelling type, tenure, to seek to reduce the current trend of ageing population.
Brief conclusion: This scenario suggests that a comparable level of job growth could be achieved as in the higher variant of the WG 2018-based projections, despite assuming that there will be much less population growth (11,534 vs. 17,702) or homes needed. This is due to the differing age profiles in the two scenarios, with the employment-led scenario taking the latest demographic data into account and drawing upon longer-term trends. It provides a sustainable and integrated housing and employment land strategy which will help minimise unsustainable commuting out of the county for work and will cater for	

⁶ Note that the investment-led growth scenario was prepared in January 2023, after Tata Steel's restructuring announcement, but before the subsequent detailed economic impact analysis.

the housing and employment growth required with regard to all known realistic pipeline investment opportunities. Will represent a step change in delivery of homes but realistic this could be delivered. No downside adjustments have been made to the baseline therefore it is considered that this option represents the realistic upper end of growth. This is considered to represent a realistic, deliverable and evidence-based approach, which would also align to Future Wales (NGA), thereby providing comfort in terms of the tests of soundness. Potential to contribute to achievement of LDP2 objectives in a number of ways, not least of which are homes (including affordable) and transformative change/employment ambitions - but also those socio-economic related objectives such as the Welsh language (e.g. retention of younger age cohorts, noting that in the 16-19 age group, the increase in the number of Welsh speakers in Swansea between Censuses was 12.8%, with a similar increase for the 20-44 age group also). Therefore, while a technical departure from the WG projection, by coincidence, the impact would be similar in terms of numbers of homes required, but more positive in terms of supporting more jobs.

Appendix 2: Assessment of Spatial Approaches

Table 7 Assessment of Urban/brownfield focus spatial approach

Name of Spatial Approach: Urban/Brownfield focus	
Brief Description: This approach would focus development solely on Urban Centres and Brownfield land along with any existing greenfield commitments.	
Key considerations	
Accordance with Future Wales and regional implications	A focus on the urban area does offer potential alignment with Future Wales, noting its inclusion in the NGA. There is likely to be a limited growth emphasis on the Gower Fringe and Gower, both of which are outside the NGA. Specific reference is also made to potential cross-border context in regards regional implications, notably in respect of any existing greenfield commitments in the Greater North West (Carmarthenshire).
Ability to deliver the Vision and Strategic Objectives of the Plan ⁷	Alignment with those objectives that focus on regeneration benefits within existing urban centres such as those where transformative change is sought and can revitalise under-utilised or vacant sites. Concern as to the alignment with those objectives that reference the needs of rural communities (including housing need). Previously developed land is often lacking in rural areas, leading to concern at the contribution of this approach in regards the 'One Swansea' Visioning ethos. Also, notable concern in respect of alignment to the infrastructural capacity objective.
Extent to which evidenced economic needs will be delivered	There is potential in terms of accommodating employment growth needs within this approach – particularly demand of office use in central areas. However, there is a concern at a lack of flexibility by focusing solely on urban/brownfield. Also, this

⁷ Which are grouped /linked to achievement of the Local well-being objectives

	approach may place pressure on release of existing employment land to meet housing needs
Extent to which evidenced social/housing needs will be delivered	Likely opportunities within the following Strategic Housing Policy Zones - Central, East, North, West and Greater North West, but likely to be very limited opportunities in Gower Fringe and Gower. Reference is made to the need identified in the LHMA and as such the limited opportunities in the Gower and Gower fringe are noted.
Environmental and climate change implications, including summary of ISA findings.	From an ecological perspective the Urban/Brownfield approach is likely to have the greatest net benefit in theory, though it is noted that some brownfield sites can be particularly rich in biodiversity. It can also contribute towards protection of soil assets, including BMV agricultural land. A purely brownfield site led approach, as oppose a strategic place based approach, may raise concerns in respect of reflecting the strategic steer provided by the Green Infrastructure Assessment and Ecosystem Resilience Map. An urban focus could benefit in terms of access to sustainable transport and facilities, thereby reducing the need to travel by car. However notable considerations for an urban focus would be compliance with flood risk policy, whilst there may be amenity / air quality matters. Remediation requirements are noted in respect of brownfield sites.
Deliverability and capacity factors ⁸	Potential viability constraints on difficult / complex brownfield sites could deliver less affordable housing and potential deliverability concerns regarding availability of developers inclined to deliver brownfield sites. With reference to the wider evidence base of the Plan, lack of clear alignment in terms of the role and function of SHPZs, together with the settlement assessment and housing supply / commitment landbank.
Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)	Support for brownfield sites as a starting point and potential benefits from regeneration and ecology noted. Concern raised that this approach alone is unlikely to deliver a suitable range and choice of housing to serve the needs of the Authority.

⁸ With reference to Development Plans Manual Guidance and soundness tests

Gateway Test – Planning Policy Wales = Strategic and Spatial Choices

Search Sequence	The use of suitable and sustainable previously developed land and/or underutilised sites for all types of development should be prioritised. It is recognised, however, that not all previously developed land is suitable for development.
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National Sustainable Placemaking Outcomes	<i>Creating and Sustaining Communities: ?</i> <i>Making Best Use of Resources: ✓</i> <i>Growing Our Economy in a Sustainable Manner: ?</i> <i>Facilitating Accessible and Healthy Environments: ?</i> <i>Maximising Environmental Protection and Limiting Environmental Impact: ✓</i>
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Brief Conclusion on whether this approach clearly communicate where future development will be located, why and how it will deliver the vision, key issues and objectives: Potential growth opportunities would be on viable deliverable brownfield sites within the main urban centres and settlements within existing urban and village boundaries. Whilst the approach would offer benefits, particularly in terms of the focus on previously developed land, there is concern that it would deliver an insufficient number and choice of units in light of the lack of availability of such sites and the evidenced viability and deliverability constraints. In recognising that the objective to deliver upon the identified growth requirement within the Plan period, it is not considered that this approach in isolation presents as suitable and sound – albeit there are elements of that could be incorporated into a wider/hybrid approach.

Urban / Brownfield

Focus development solely on Urban Centres, villages and on brownfield land along with any existing greenfield commitments.

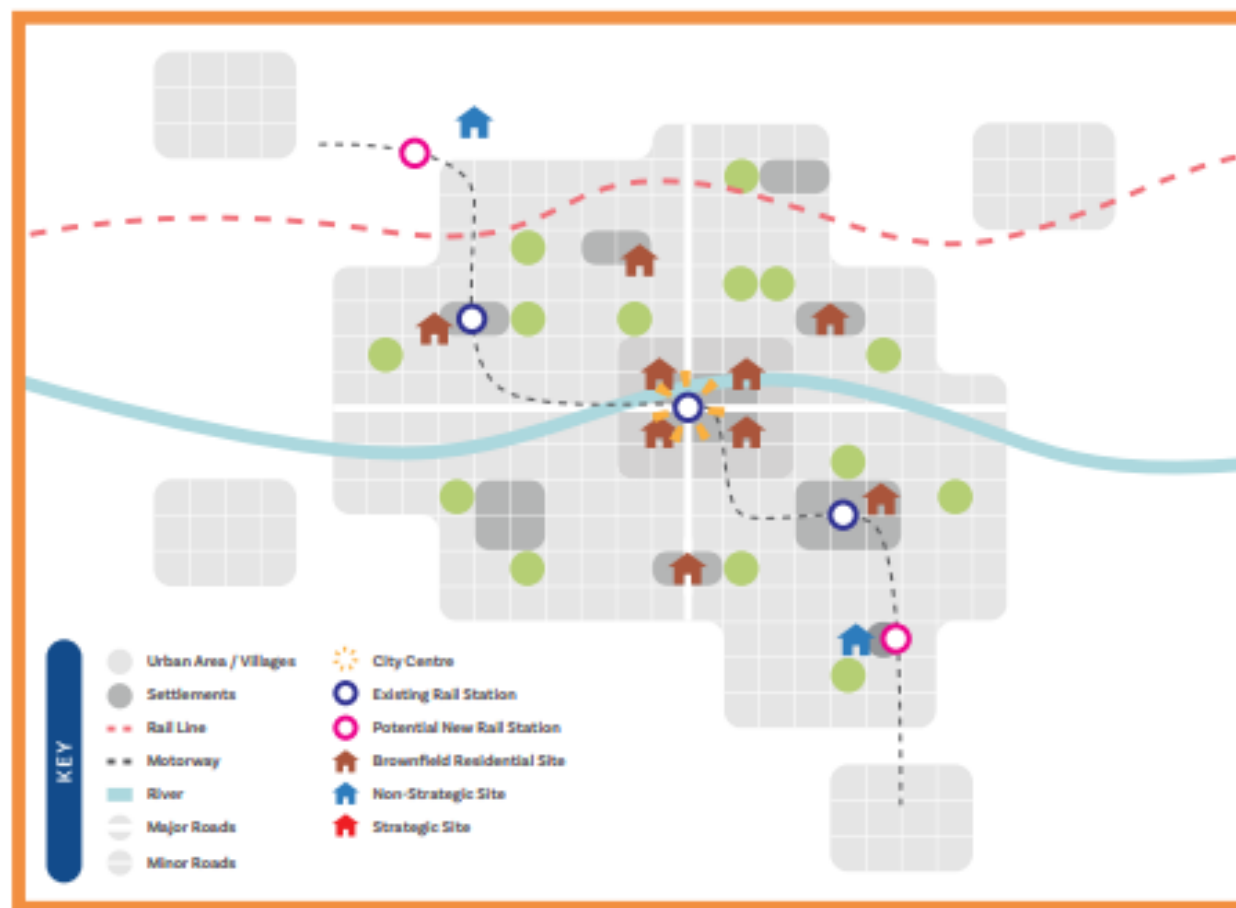


Table 8 Assessment of Strategic Placemaking focus spatial approach

<p>Name of Spatial Approach: Strategic Placemaking focus</p> <p>Brief Description: This approach is reflective of the existing strategy of the LDP with a focus on a significant number of strategic sites at key locations including on the edge of the urban area for both residential and mixed- use development. This approach is taken as the current LDP spatial strategy.</p>	
<p>Key considerations</p>	
<p>Accordance with Future Wales and regional implications</p>	<p>It is noted that strategic levels of growth will be focused at key locations, including at the edge of the urban area. Such an approach would demonstrate alignment with the Future Wales, noting the urban area’s inclusion within the NGA. There is likely to be a limited growth emphasis on the Gower Fringe and Gower, both of which are outside the NGA. Specific reference is also made to potential cross-border context in regards regional implications, notably in respect of any existing greenfield commitments in the Greater North West (Carmarthenshire).</p>
<p>Ability to deliver the Vision and Strategic Objectives of the Plan</p>	<p>Alignment with a number of objectives, including those focused on transformative change, employment opportunities, climate and nature emergencies and placemaking. In terms of infrastructural capacity, well-being and community facilities, a strategic scale focus can maximise potential to deliver new supporting infrastructure such as schools, play areas, local centres, etc. There is alignment with the Vision, notably in terms of the placemaking emphasis, albeit will be important to supplement strategic urban area opportunities with appropriate rural development and a range of site sizes in recognition of a ‘One Swansea’ ethos. Alignment with the sustainable transport focused objective will be key. Due regard will be required in respect of any linguistic impact, notably in respect of large scale release in the North /North West.</p>
<p>Extent to which evidenced economic needs will be delivered</p>	<p>There is potential in terms of assisting in the viability of bringing employment related development as part of a wider strategic allocation. Opportunities to align large scale</p>

	housing and mixed use release with existing and proposed employment opportunities.
Extent to which evidenced social/housing needs will be delivered	Likely opportunities within the following Strategic Housing Policy Zones - Central, East, North and Greater North West. Fewer opportunities within West, Gower and Gower Fringe. Reference is made to the need identified in the LHMA and as such the fewer opportunities in the West, Gower and Gower fringe are noted.
Environmental and climate change implications, including summary of ISA findings.	This approach would benefit for a landscape approach to Green Infrastructure in the widest sense. This is important both for biodiversity and to maximise ecosystem services. The consideration of placemaking at a strategic scale can reflect the strategic steer provided by the Green Infrastructure Assessment and Ecosystem Resilience Map. These concepts are best delivered over the longer term and wider geographical areas so that the benefits of strategic solutions are explored. The alternative of short term, small scale, incremental and dispersed change will not yield the same overall benefits. Whilst brownfield land is exploited as far as possible, the approach will likely require greenfield sites given scale of developments on strategic sites. As such, consideration will need to be given to protection of soil assets, including BMV agricultural land. A strategic approach which is guided by role and function can allow for an avoidance of flood risk, however in order to deliver upon climate change through reducing the need to travel by car, it will be important to reconcile strategic release with provision of sustainable transport.
Deliverability and capacity factors	Recognition that viability with regard to greenfield sites and strategic scale of delivery could enhance Affordable Housing delivery. Delivery of significant proportion of new homes dependent on bringing forward small number of sites. Strategic sites can be complex with longer 'lead in times' for delivery. With reference to the wider evidence base of the Plan, there is an alignment in terms of the role and function of SHPZs, together with the settlement assessment and housing supply / commitment landbank. Continuity value also in respect of the Adopted LDP.
Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)	Felt that the approach can ensure the delivery of housing at a scale where it can be provided as part of a mix of uses, alongside meaningful active travel and public transport improvements, and incorporating a landscape-led approach and incorporation of green infrastructure. Concern raised however that the previous

	strategic development and placemaking approach hasn't performed and 'delivered' in respect of delivering the housing target identified in the LDP.
Gateway Test – Planning Policy Wales = Strategic and Spatial Choices	
Search Sequence	A balance should be achieved between the number of homes provided and expected job opportunities. Where there is a need for sites, but it has been clearly demonstrated that there is no previously developed land or underutilised sites (within the authority or neighbouring authorities), consideration should then be given to suitable and sustainable greenfield sites within or on the edge of settlements. Spatial strategies should be consistent with the Key Planning Principles and contribute towards the National Sustainable Placemaking Outcomes.
National Sustainable Placemaking Outcomes	<i>Creating and Sustaining Communities: ✓</i> <i>Making Best Use of Resources: ✓</i> <i>Growing Our Economy in a Sustainable Manner: ✓</i> <i>Facilitating Accessible and Healthy Environments: ?</i> <i>Maximising Environmental Protection and Limiting Environmental Impact: ✓</i>
<p>Brief Conclusion on whether this approach clearly communicate where future development will be located, why and how it will deliver the vision, key issues and objectives: Potential growth opportunities would be on viable and deliverable sites at strategic locations with good access to services capable of delivering Placemaking at a strategic scale. The approach does offer benefits, particularly in terms of the focus on strategic placemaking. Furthermore, the continuity value of reflecting the approach set out within the Adopted LDP provides continued certainty for developers and infrastructure / utility providers and would capture strategic planning commitments / completions as well as align with the role and function of SHPZs, together with the spatial strategy. It will be important that an appropriate range and mix of development opportunities are provided to supplement strategic proposals within and adjacent to the urban area so that the needs of rural areas are also met as part of a 'One Swansea' approach. In noting the credentials of the approach, its suitability as a 'standalone' approach would require review in terms of spatial sustainability / access to sustainable transport – particularly in recognition of the declaration of the climate emergency and emphasis on the Sustainable Transport Hierarchy for Planning.</p>	

Strategic Placemaking

This approach is reflective of the existing strategy of the LDP with a **focus on a significant number of strategic sites at key locations** including on the edge of the urban area for both residential and mixed- use development.

This is also considered to represent the 'business as usual' – Adopted LDP 2010-2025 option.

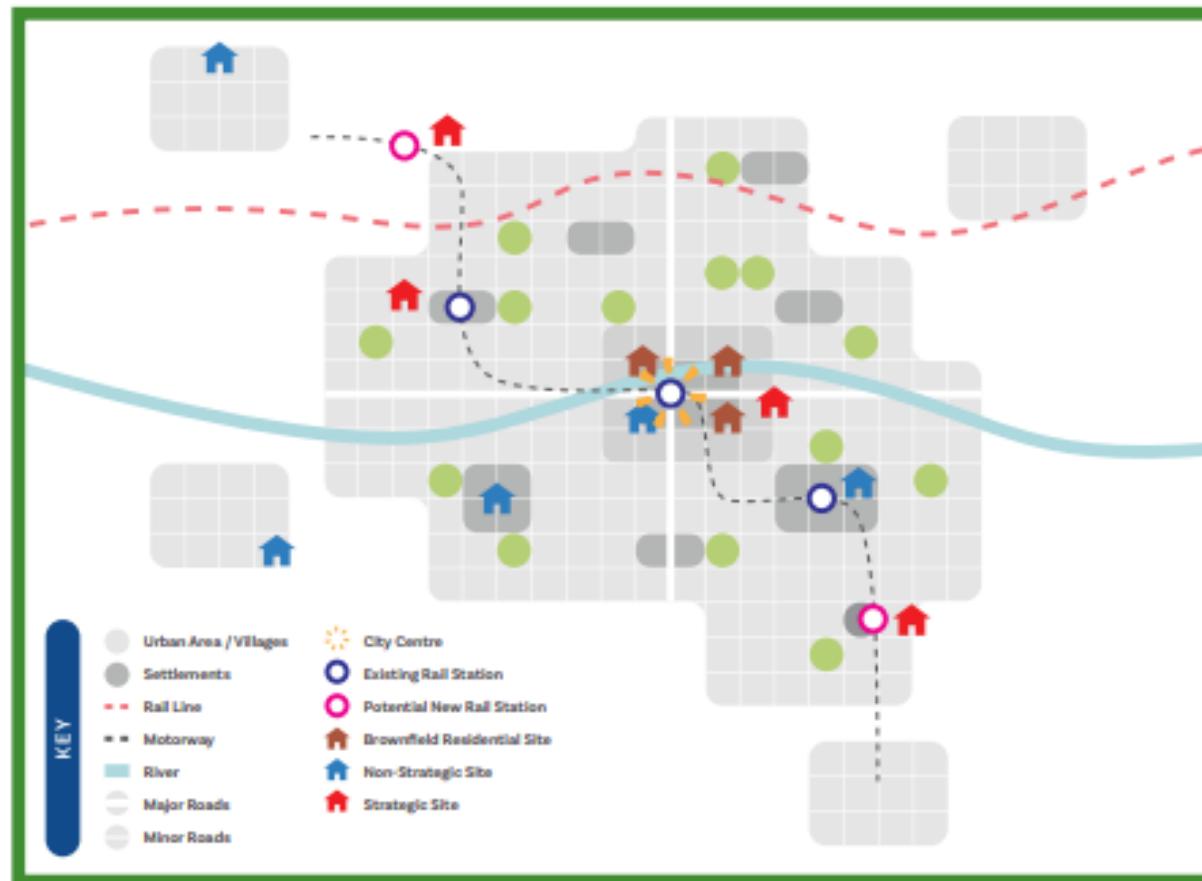


Table 9 Assessment of Dispersal focus spatial approach

<p>Name of Spatial Approach: Dispersal focus</p> <p>Brief Description: This approach would focus on a higher number of smaller scale sites and a much more dispersed approach to growth across the County.</p>	
<p>Key considerations</p>	
<p>Accordance with Future Wales and regional implications</p>	<p>It is considered that the level of alignment with Future Wales may be limited. A spread approach would potentially lead to the Gower Fringe and Gower (both of which are outside the NGA) becoming a focus for growth. It may be difficult to reconcile the emphasis on regional collaboration as part of a dispersal approach.</p>
<p>Ability to deliver the Vision and Strategic Objectives of the Plan</p>	<p>Potential to meet the objectives that refer to the needs of rural communities (including housing and employment). However, there is concern about the ability of this approach to deliver those objectives that focus on regeneration benefits within existing urban centres such as those where transformative change is sought and can revitalise under-utilised or vacant sites. Notable concern in respect of alignment to objectives that focus on infrastructural capacity, transport/active travel and the climate and nature emergencies. Unlikely to achieve key aspects of the Vision, notably net zero transition and the reference to the National Growth Area.</p>
<p>Extent to which evidenced economic needs will be delivered</p>	<p>There is potential in terms of accommodating the employment growth needs of rural communities within this approach. However, there is concern that a spread approach would lead to a lack of linkage between housing and employment growth, and the extent to which such growth can be suitably serviced by sustainable transport and infrastructure.</p>
<p>Extent to which evidenced social/housing needs will be delivered</p>	<p>Likely opportunities within the following Strategic Housing Policy Zones - Central, East, North, West, Greater North West, Gower and Gower Fringe. Reference is made to the need identified in the LHMA and as such the opportunities presented are readily apparent.</p>

Environmental and climate change implications, including summary of ISA findings.	Concern that the approach will result in pressures on natural heritage and GI assets in attempting to spread opportunities to more rural communities There would be concerns in respect of the protection of soil assets, including BMV agricultural land. A spread approach, as oppose a strategic place based approach, may raise concerns in respect of reflecting the strategic steer provided by the Green Infrastructure Assessment and Ecosystem Resilience Map. There would be concerns in respect of access to sustainable transport and facilities, thereby limiting the emphasis on reducing the need to travel by car. In summary, concern at environmental impacts and lack of sustainable transport and placemaking alignment.
Deliverability and capacity factors	Viability variable across wards so may be more challenging and difficult to deliver supporting infrastructure and Affordable Housing. Puts pressures on natural heritage and GI assets in attempting to spread opportunities to more rural communities. With reference to the wider evidence base of the Plan, concern at lack of clear alignment in terms of the role and function of SHPZs, together with the settlement assessment and housing supply / commitment landbank.
Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)	Support in principle of seeking to disperse growth to individual communities, but concerns raised that this is unlikely to deliver the benefits that a strategic placemaking approach can. Stated that the inclusion of a greater number of more widely distributed non-strategic allocations will assist in ensuring a range/choice, however, concerns also conveyed that smaller scale allocations provide less certainty in terms of benefits, sustainability, environmental impacts, sustainable transport and placemaking.
Gateway Test – Planning Policy Wales = Strategic and Spatial Choices	
Search Sequence	The identification of sites in the open countryside, including new settlements, must only be considered in exceptional circumstances.
National Sustainable Placemaking Outcomes	<i>Creating and Sustaining Communities: ✓</i> <i>Making Best Use of Resources: ?</i> <i>Growing Our Economy in a Sustainable Manner: ?</i> <i>Facilitating Accessible and Healthy Environments: ?</i> <i>Maximising Environmental Protection and Limiting Environmental Impact: ?</i>

Brief Conclusion on whether this approach clearly communicate where future development will be located, why and how it will deliver the vision, key issues and objectives: Potential Growth Opportunities would be on seeking viable and deliverable sites in all settlements. Whilst the approach does offer credentials in terms of meeting localised need and recognising the importance of rural and urban communities, there are notable concerns as to its alignment with key policy drivers such as Future Wales, together with the role of function of settlements /SHPZs. Furthermore, there are concerns as to the sustainability credentials of this approach, particularly in terms of meeting the nature and climate emergencies – along with net zero transition. It is not considered that this approach in isolation presents as suitable and sound – albeit there are elements of that could be incorporated into a wider/hybrid approach.

Dispersal

This approach would focus on a **higher number of smaller scale sites** and a **much more dispersed approach** to growth across the County.



Table 10 Assessment of Highly connected communities spatial approach

<p>Name of Spatial Approach: Highly Connected Communities</p> <p>Brief Description: This approach would focus development on highly connected sustainable sites that would promote a reduction in car use.</p>	
<p>Key considerations</p>	
<p>Accordance with Future Wales and regional implications</p>	<p>It is noted that strategic levels of growth will be focused at accessible locations. Such an approach offers alignment with Future Wales, and also allows for integrated with the emerging regional transport plan / metro. There is likely to be a limited growth emphasis on the Gower Fringe and Gower, both of which are outside the NGA. Specific reference is also made to potential cross-border context in regards regional implications, notably in respect of regional transport alignment.</p>
<p>Ability to deliver the Vision and Strategic Objectives of the Plan</p>	<p>Notable alignment with the objectives that focus on sustainable transport and centres first. Also, with reference to the climate emergency objective, this approach seeks to reduce car use. Alignment with the Vision emphasis on net zero transition and climate resilience. Whilst there are benefits in terms of ‘spatial sustainability’ , there may be concern for ‘unconnected’ communities that may be ‘left behind’ - with notable concern in regards the ‘One Swansea’ ethos.</p>
<p>Extent to which evidenced economic needs will be delivered</p>	<p>There is potential in terms of assisting in the viability of bringing employment related development along keynote transport nodes. Due regard would be required to any requirements in regards employment growth in those rural areas.</p>
<p>Extent to which evidenced social/housing needs will be delivered</p>	<p>Likely opportunities within the following Strategic Housing Policy Zones - Central, East, North, West and Greater North West. Likely to be very limited opportunities in Gower Fringe and Gower. Reference is made to the need identified in the LHMA and as such the fewer opportunities in the Gower and Gower Fringe are noted.</p>

<p>Environmental and climate change implications, including summary of ISA findings.</p>	<p>The sustainable element of this approach (i.e. facilitating less dependence on cars) can be beneficial for climate change which is a cause of biodiversity decline at all levels. It would promote co-location of homes and jobs, which would reduce out-commuting and promote an active and healthy lifestyle through directing the majority of growth to the most sustainable locations with Active Travel and Public Transport infrastructure. A purely accessibility led approach may not fully reflect the strategic steer provided by the Green Infrastructure Assessment and Ecosystem Resilience Map in the same way as a strategic placed based approach would. There may be a need to reconcile and mediate where the most sustainable locations from a transport perspective are subject to environmental (e.g. air quality) or policy based considerations (e.g. flood risk).</p>
<p>Deliverability and capacity factors</p>	<p>Deliverability of ‘metro node’ concept requires alignment with emerging and proposed investment and policy programmes, including the Metro – together with availability of deliverable sites in sustainable locations. Approach would be in alignment with national policy and presents as a sound approach. With reference to the wider evidence base of the Plan, there is an alignment in terms of the role and function of SHPZs, together with the settlement assessment and housing supply / commitment landbank.</p>
<p>Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)</p>	<p>The benefits of sustainable 15/20-minute neighbourhoods in terms of spatial sustainability acknowledged. It was felt that the approach will promote co-location of homes and jobs, which would reduce out-commuting and promote an active and healthy lifestyle, particularly where neighbourhoods have mixed land uses. Concerns raised however that that such a strategy would not deliver an appropriate level of growth across the County, resulting in a lack of development/investment in less connected areas / unconnected communities.</p>
<p>Gateway Test – Planning Policy Wales = Strategic and Spatial Choices</p>	
<p>Search Sequence</p>	<p>An important consideration is minimising the need to travel, reducing reliance on the private car and increasing walking, cycling and use of public transport. Spatial strategies should support the objectives of minimising the need to travel, reducing reliance on the private car and increasing walking, cycling and use of public transport.</p>

National Sustainable Placemaking Outcomes	<i>Creating and Sustaining Communities: ?</i> <i>Making Best Use of Resources: ✓</i> <i>Growing Our Economy in a Sustainable Manner: ✓</i> <i>Facilitating Accessible and Healthy Environments: ✓</i> <i>Maximising Environmental Protection and Limiting Environmental Impact: ✓</i>
<p>Brief Conclusion on whether this approach clearly communicate where future development will be located, why and how it will deliver the vision, key issues and objectives: Potential Growth Opportunities would be on viable and deliverable sites well served by services and transport networks or have the economies of scale to create sustainable 15/20-minute neighbourhoods. The approach does offer benefits, particularly in terms of the focus on sustainable transport and connectivity, particularly in recognition of the declaration of the climate emergency and emphasis on the Sustainable Transport Hierarchy for Planning. It would also align to emerging regional proposals, including the Metro. The approach would respond to a number of key drivers for the Plan, including the declaration of a climate emergency and the Net Zero transition focus. In noting the credentials of the approach, its suitability as a ‘standalone’ approach would require review in terms of its place based potential. The ability to deliver placemaking goals would be predicated on the availability of appropriate sites, whilst the needs of rural communities would need some recognition so as to deliver upon the ‘One Swansea’ ethos.</p>	

Highly Connected Communities

This approach would focus development on **highly connected sustainable sites** that would promote a reduction in car use.

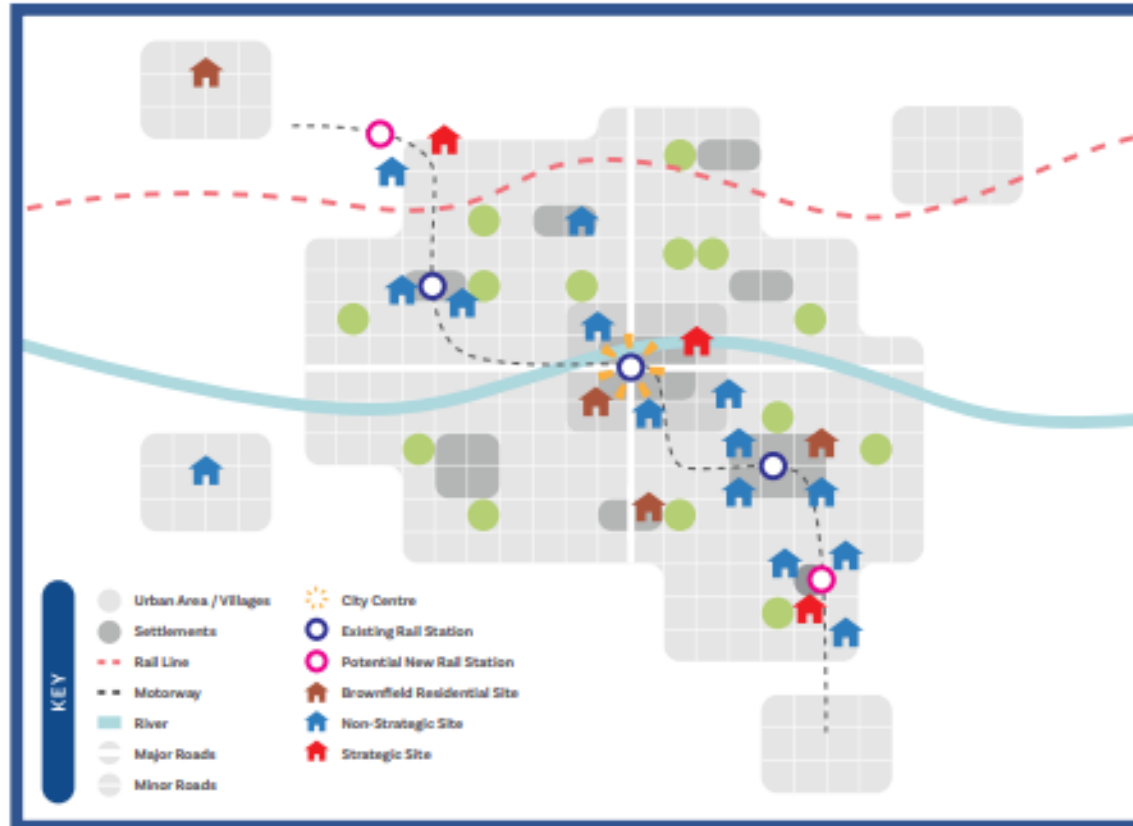


Table 11 Assessment of Housing need clustering focus spatial approach

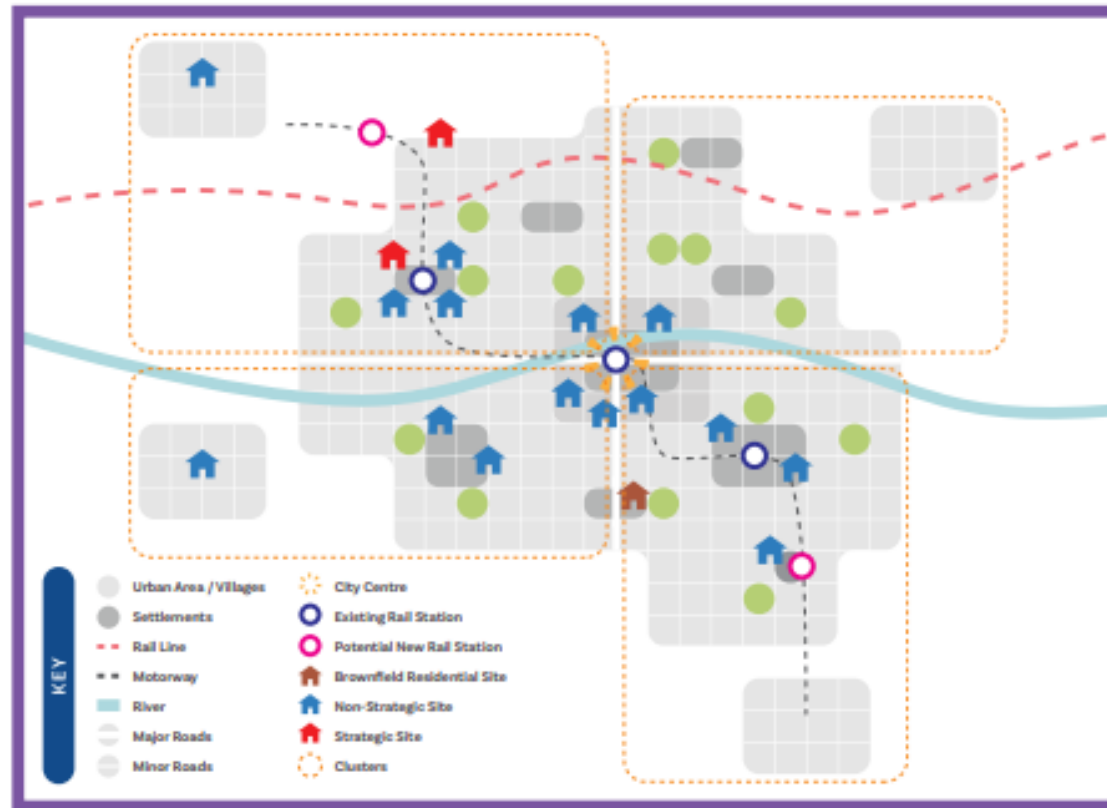
<p>Name of Spatial Approach: Housing Need Clustering Focus</p> <p>Brief Description: This approach would focus development in areas to meet greatest identified housing need as defined by the Local Housing Market Assessment.</p>	
<p>Key considerations</p>	
<p>Accordance with Future Wales and regional implications</p>	<p>It is considered that the level of alignment with Future Wales may be limited. A purely housing needs led approach would potentially lead to the Gower Fringe and Gower (both of which are outside the NGA) becoming a focus for growth. It may be difficult to reconcile the exclusive emphasis on local need on regional collaboration as part of a dispersal approach.</p>
<p>Ability to deliver the Vision and Strategic Objectives of the Plan</p>	<p>Clear alignment with the objective focused on delivering new homes, particular potential contribution in terms of affordable housing. It is noted that a range and choice of high-quality homes is referenced in the Vision. Concern however at alignment with a range of wider objectives – including natural environment and infrastructure and employment focused objectives.</p>
<p>Extent to which evidenced economic needs will be delivered</p>	<p>There is potential in terms of accommodating the employment growth needs of rural communities within this approach. However, there is concern that a housing needs based approach would lead to a lack of linkage between housing and employment growth, and the extent to which such growth can be suitably serviced by sustainable transport and infrastructure.</p>
<p>Extent to which evidenced social/housing needs will be delivered</p>	<p>Likely opportunities within the following Strategic Housing Policy Zones - Central, East, North, West, Greater North West, Gower and Gower Fringe. The LHMA indicates greatest affordable need is within the Central and North followed by East, West, Greater North West, Gower Fringe, and Gower. The nature of this approach as ‘LHMA led’ would naturally indicate a high level of alignment.</p>

<p>Environmental and climate change implications, including summary of ISA findings.</p>	<p>Concern that the approach will result in pressures on natural heritage and GI assets as part of a needs led approach as oppose a strategic place based approach (notably the Gower). There would be concerns in respect of the protection of soil assets, including BMV agricultural land. This approach may raise concerns in respect of reflecting the strategic steer provided by the Green Infrastructure Assessment and Ecosystem Resilience Map. There would be concerns in respect of access to sustainable transport and facilities, thereby limiting the emphasis on reducing the need to travel by car. In summary, concern at environmental impacts and lack of sustainable transport and placemaking alignment. Furthermore, a purely needs based approach may not align with developmental considerations such as flood risk.</p>
<p>Deliverability and capacity factors</p>	<p>The areas of greatest need may not be the most sustainable locations or viable locations affecting delivery potential, with less focus on role and function of settlements. This could lead to overconcentration in certain areas and pressure on infrastructure, ecology and GI corridors. With reference to the wider evidence base of the Plan, concern at lack of clear alignment in terms of the role and function of SHPZs, together with the settlement assessment and housing supply / commitment landbank.</p>
<p>Summary of consultation feedback (Starting the Conversation on Growth and Spatial Approaches April-June 2024)</p>	<p>Support for an approach that seeks to maximise addressing housing need. It was stressed however that housing need ought to be one of a number of factors considered in feeding into spatial distribution of growth alongside matters including sustainability and placemaking objectives. Concerns towards the deliverability of this approach across the County and that it could encounter difficulties in gaining support due to viability issues.</p>
<p>Gateway Test – Planning Policy Wales = Strategic and Spatial Choices</p>	
<p>Search Sequence</p>	<p>Planning authorities should adopt policies to locate major generators of travel demand, such as housing, employment, retailing, leisure and recreation, and community facilities (including libraries, schools, doctor’s surgeries and hospitals), within existing urban areas or areas which are, or can be, easily reached by walking or cycling, and are well served by public transport.</p>

National Sustainable Placemaking Outcomes	<i>Creating and Sustaining Communities: ?</i> <i>Making Best Use of Resources: ✓</i> <i>Growing Our Economy in a Sustainable Manner: ✓</i> <i>Facilitating Accessible and Healthy Environments: ✓</i> <i>Maximising Environmental Protection and Limiting Environmental Impact: ✓</i>
<p>Brief Conclusion on whether this approach clearly communicate where future development will be located, why and how it will deliver the vision, key issues and objectives: Potential Growth Opportunities would be on viable and deliverable sites that can provide maximum affordable housing within settlements, village boundaries and outside settlements in sustainable locations well located to the urban area. Whilst the approach does offer credentials in terms of meeting localised need and affordable housing, there are notable concerns as to its alignment with key policy drivers such as Future Wales, together with the role of function of settlements /SHPZs. Furthermore, there are concerns as to the sustainability credentials of this approach, particularly in terms of meeting the nature and climate emergencies – along with net zero transition. It is not considered that this approach in isolation presents as suitable and sound – albeit there are elements of that could be incorporated into a wider/hybrid approach.</p>	

Housing Need Clustering

This approach would **focus development in areas to meet greatest identified housing need** as defined by the Local Housing Market Assessment.



Appendix 3: High level role and function review by Strategic Housing Policy Zone (May 2024)

Table 12 Central SHPZ

Central SHPZ	
<p>Introduction - The Central SHPZ largely comprises the Swansea Central Area, which includes the main retail centre and City Waterfront areas including the Maritime Quarter and SA1. Also in this zone are well-established residential areas such as Sandfields, Brynmill, Mount Pleasant and Uplands. This zone features a population of approximately 54,400 over an 18.9km² area, with a population density of 2878. This area does not form part of the existing Welsh Language Sensitive Area designated under Policy HC 3. The central area has seen a focus on regeneration activity and commercial investment, reflecting the corporate ambitions of Swansea Council and its partners in delivering transformative change, including through the Swansea Bay City Deal portfolio.</p>	
Category	Summary
Housing	<ul style="list-style-type: none"> • There is a total of 917 unit commitments and 1,504 unit allocations within this SHPZ, as well as 411 units forecasted in Windfall developments. This equals a total provision of 2,382 units. • The Council's Fourth Annual Monitoring Report (AMR 4) highlights that this SHPZ has a capacity for 2,201 units on allocated sites and 88 units at unallocated sites, totalling 2,289 units. • Under LDP Policy H 3, proposals for residential development within this SHPZ are generally expected to provide Affordable Housing at a target percentage of at least 20%. The viability assessments conducted when preparing the Adopted LDP have informed this target percentage. • Since the Swansea LDP was adopted in 2019, the subsequent Annual Monitoring Reports (AMRs) have provided the following figures for new dwellings within this SHPZ: <ul style="list-style-type: none"> - 2019/20 (AMR 1) – 44 dwellings. - 2020/21 (AMR 2) – 85 dwellings. - 2021/22 (AMR 3) – 59 dwellings. - 2022/23 (AMR 4) – 35 dwellings. - Total since 2019 – 223 dwellings (approx. 56 per annum).
SDAs in Zone	<ul style="list-style-type: none"> • There are two mixed-use SDAs primarily located within this SHPZ (SD J / SD L), while part of the mixed-use SD K Fabian Way Corridor is also located within this Zone. • Under LDP Policy PS 4, 4 Ha of employment land is allocated to site SD J, totalling 4 Ha for this SHPZ.

<p>Services and Facilities in Zone</p>	<ul style="list-style-type: none"> • Good access to employment, services and facilities in this SHPZ: <ul style="list-style-type: none"> - The City Centre retail and complementary areas form the focus of this Zone. - Under LDP Policy RC 5, there is one District Centre serving the residential area in the Uplands. - Under LDP Policy RC 6, there are several Local Centres embedded within the dense urban residential areas (including Brynymor Road / Neath Road / Maritime Quarter / Gors Avenue / Mayhill Road / St Helens Road / Graiglyydd Square / Penygraig Road / Port Tennant). • There are various general employment sites in this Zone: The Central Area, SA1, the docks, and mixed commercial uses in the Tawe Riverside Corridor.
<p>Headline Developmental Considerations</p>	<ul style="list-style-type: none"> • Area is predominantly characterised as a high-density urban area. Development potential likely to be focused on brownfield regeneration opportunities with limited greenfield options. • As displayed on the LDP2 Constraints and Information map, the following Headline Developmental Considerations are relevant within this SHPZ; <ul style="list-style-type: none"> - Historic and Cultural Environment (Ancient Monuments / Archaeological Sensitive Areas / Listed Buildings / Conservation Areas / Historic Parks and Gardens). - Ecosystem and Resilience (Mineral Resource Layers / Regionally Important Geodiversity Sites / Current SINC's / Sites of Special Scientific Interest / Ancient Woodland). - Resources and Public Health Protection (Air Quality Management Zones / Flood Zones / Agricultural Land Classification / Historic Contaminated Land / Quiet Areas).
<p>Renewable Energy</p>	<ul style="list-style-type: none"> • The Swansea LDP Proposals map highlights that no areas within this SHPZ are allocated for Renewable and Low Carbon Energy development under LDP Policy EU 1. • Since the Swansea LDP was adopted, Future Wales: The National Plan 2040 has been published, which notes under Policy 16 that there are no pre-assessed areas for wind energy in this SHPZ.
<p>Regional Role</p>	<ul style="list-style-type: none"> • This SHPZ is included within the Swansea Bay and Llanelli National Growth Area, although the zone does not have any direct cross-border connections with any neighbouring local authorities.
<p>Connectivity and Active Travel</p>	<ul style="list-style-type: none"> • Relatively good connectivity in this Zone: • There is one train station on the South Wales Main Line located in this SHPZ (Swansea) and, as part of the Swansea Bay and West Wales Metro, one new train station is proposed to open (Landore). Enhancements are proposed under the Metro to improve the local station of Swansea and the interchanges from that station. Rail frequency enhancements, bus corridor improvements and integration projects are also included in this SHPZ with the Metro. • Good bus links within this Zone • There are four completed active travel routes located within this SHPZ (Dyfatty Interchange / St Helens Link / The Ravine, Townhill / Townhill Road). There are also two current active travel projects that are ongoing in their delivery (Walter Road and Sketty Road / Tawe Riverside Corridor).

Table 13 East SHPZ

East SHPZ	
<p>Introduction - The East SHPZ largely comprises the urban area East of the River Tawe and extends as far North as Clydach. It includes employment and mixed-use locations, such as Swansea Enterprise Park, Swansea Vale, Swansea Port and SA1 Swansea Waterfront. This zone features a population of approximately 37,700 over a 60.8km² area, with a population density of 620. Under LDP Policy HC 3, the Welsh Language Sensitive Area is evident within this SHPZ under the Clydach ward. The zone has seen a focus on regeneration activity, including the appropriate re-use of previously developed land.</p>	
Category	Summary
Housing	<ul style="list-style-type: none"> • There is a total of 1,397 unit commitments and 1,686 unit allocations within this SHPZ, as well as 96 units forecasted in Windfall developments. This equals a total provision of 3,179 units. • The Council's Fourth Annual Monitoring Report (AMR 4) highlights that this SHPZ has a capacity for 1,308 units on allocated sites and 122 units at unallocated sites, totalling 1,430 units. • Under LDP Policy H 3, proposals for residential development within this SHPZ are generally expected to provide Affordable Housing at a target percentage of at least 10%. The viability assessments conducted when preparing the Adopted LDP have informed this target percentage. • Since the Swansea LDP was adopted in 2019, the subsequent Annual Monitoring Reports (AMRs) have provided the following figures for new dwellings within this SHPZ; <ul style="list-style-type: none"> - 2019/20 (AMR 1) – 88 dwellings. - 2020/21 (AMR 2) – 151 dwellings. - 2021/22 (AMR 3) – 63 dwellings. - 2022/23 (AMR 4) – 21 dwellings. - Total since 2019 – 323 dwellings.
SDAs in Zone	<ul style="list-style-type: none"> • There are two SDAs located within this SHPZ (SD I / SD K). • Under LDP Policy PS 4, 4 Ha of employment land is allocated to site SD I and a further 12 Ha of employment land is allocated to site SD K, totalling 16 Ha for this SHPZ.
Services and Facilities in Zone	<ul style="list-style-type: none"> • Under LDP Policy RC 5, there is one District Centre (Clydach) located within this SHPZ. • Under LDP Policy RC 6, there are two Local Centres (Port Tennant Road / Trallwn Road) located within this SHPZ. • The previous UDP listed various general employment sites under Policy EC 1, five of which are located within this SHPZ (SA1 / Swansea Vale / Docks / Swansea Enterprise Park / Players Estate, Clydach).

<p>Headline Developmental Considerations</p>	<ul style="list-style-type: none"> • As displayed on the LDP2 Constraints and Information map, the following Headline Developmental Considerations are relevant within this SHPZ; <ul style="list-style-type: none"> - Historic and Cultural Environment (Ancient Monuments / Archaeological Sensitive Areas / Listed Buildings / Conservation Areas / Welsh Language Sensitive Area). - Ecosystem and Resilience (Mineral Resource Layers / National Nature Reserve / Peat Soils / RAMSAR / Current SINC's / Special Areas of Conservation / Sites of Special Scientific Interest / Ancient Woodland / Special Landscape Area / Green Wedge). - Resources and Public Health Protection (Air Quality Management Zones / TAN-15 Defended Zones / Flood Zones / Agricultural Land Classification / Noise Action Plan Priority Areas / Historic Contaminated Land / Quiet Areas).
<p>Renewable Energy</p>	<ul style="list-style-type: none"> • The Swansea LDP Proposals map highlights that there are Local Search Areas within this SHPZ which are allocated for Renewable and Low Carbon Energy development under LDP Policy EU 1. • Since the Swansea LDP was adopted, Future Wales: The National Plan 2040 has been published, which notes under Policy 16 that there are some pre-assessed areas for wind energy in this SHPZ.
<p>Regional Role</p>	<ul style="list-style-type: none"> • This SHPZ is included within the Swansea Bay and Llanelli National Growth Area and features a cross-border role with the neighbouring local authority of Neath Port Talbot.
<p>Connectivity and Active Travel</p>	<ul style="list-style-type: none"> • There is one train station on the South Wales Main Line located in this SHPZ (Llansamlet), although no new stations are proposed as part of the Swansea Bay and West Wales Metro. Rail frequency enhancements, bus corridor improvements and integration projects are also included in this SHPZ with the Metro. • There are two completed active travel routes located within this SHPZ (Swansea Canal / Craig Cefn Parc / Jersey Road Link). There are also two current active travel projects that are ongoing in their delivery (Ynysallan Road / Fabian Way Innovation Corridor).

Table 14 Gower SHPZ

Gower SHPZ	
<p>Introduction - The Gower SHPZ is characterised by small and large villages located in rural and semi-rural landscapes, some near the Western fringe of the urban area. This zone features a population of approximately 6,000 over a 124.4km² area, with a population density of 48. Under LDP Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ. The zone can be considered to play a key role in the County’s overall visitor economy offer, whilst Gower AONB is a notable consideration.</p>	
Category	Summary
Housing	<ul style="list-style-type: none"> • There is a total of 89 unit commitments and 25 unit allocations within this SHPZ, although there are no units forecasted in Windfall developments. This equals a total provision of 114 units. • The Council’s Fourth Annual Monitoring Report (AMR 4) highlights that this SHPZ has a capacity for 36 units on allocated sites, although there is no capacity for units at unallocated sites. • Under LDP Policy H 3, proposals for residential development within this SHPZ are generally expected to provide Affordable Housing at a target percentage of at least 50%. The viability assessments conducted when preparing the Adopted LDP have informed this target percentage. • Since the Swansea LDP was adopted in 2019, the subsequent Annual Monitoring Reports (AMRs) have provided the following figures for new dwellings within this SHPZ; <ul style="list-style-type: none"> - 2019/20 (AMR 1) – 1 dwelling. - 2020/21 (AMR 2) – 7 dwellings. - 2021/22 (AMR 3) – 7 dwellings. - 2022/23 (AMR 4) – 1 dwelling. - Total since 2019 – 16 dwellings.
SDAs in Zone	<ul style="list-style-type: none"> • There are no SDAs located within this SHPZ. • Under LDP Policy PS 4, there is no employment land allocated to any sites within this SHPZ.
Services and Facilities in Zone	<ul style="list-style-type: none"> • Under LDP Policy RC 5, there are no District Centres located within this SHPZ. • Under LDP Policy RC 6, there are no Local Centres located within this SHPZ. • The previous UDP listed various general employment sites under Policy EC 1, although none of these are located within this SHPZ.
Headline Developmental Considerations	<ul style="list-style-type: none"> • As displayed on the LDP2 Constraints and Information map, the following Headline Developmental Considerations are relevant within this SHPZ;

	<ul style="list-style-type: none"> - Historic and Cultural Environment (Ancient Monuments / Listed Buildings / Conservation Areas / Historic Landscapes / Historic Parks and Gardens). - Ecosystem and Resilience (AONB / Mineral Resource Layers / National Nature Reserve / Peat Soils / RAMSAR / Regionally Important Geodiversity Sites / Current SINCs / Special Areas of Conservation / Special Protection Areas / Sites of Special Scientific Interest / Ancient Woodland / Heritage Coast). - Resources and Public Health Protection (Flood Zones / Agricultural Land Classification / Historic Contaminated Land).
Renewable Energy	<ul style="list-style-type: none"> • The Swansea LDP Proposals map highlights that no areas within this SHPZ are allocated for Renewable and Low Carbon Energy development under LDP Policy EU 1. • Since the Swansea LDP was adopted, Future Wales: The National Plan 2040 has been published, which notes under Policy 16 that there are no pre-assessed areas for wind energy in this SHPZ.
Regional Role	<ul style="list-style-type: none"> • This SHPZ is not included within the Swansea Bay and Llanelli National Growth Area and, therefore, does not have any cross-border role with any neighbouring local authorities.
Connectivity and Active Travel	<ul style="list-style-type: none"> • There are no train stations located within this SHPZ, and no new stations are proposed as part of the Swansea Bay and West Wales Metro. There are no bus corridor improvements and integration projects included in this SHPZ with the Metro. • There are no completed active travel routes located within this SHPZ and there are no current active travel projects ongoing here either.

Table 15 Gower Fringe SHPZ

Gower Fringe SHPZ	
<p>Introduction - The Gower Fringe SHPZ is characterised by small and large villages located in rural and semi-rural landscapes, some near the Western fringe of the urban area. This zone features a population of approximately 9,600 over a 25.9km² area, with a population density of 370. Under LDP Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ.</p>	
Category	Summary
Housing	<ul style="list-style-type: none"> • There is a total of 66 unit commitments and 95 unit allocations within this SHPZ, as well as 194 units forecasted in Windfall developments. This equals a total provision of 355 units. • The Council's Fourth Annual Monitoring Report (AMR 4) highlights that this SHPZ has a capacity for 105 units on allocated sites, although there is no capacity for units at unallocated sites. • Under LDP Policy H 3, proposals for residential development within this SHPZ are generally expected to provide Affordable Housing at a target percentage of at least 50%. The viability assessments conducted when preparing the Adopted LDP have informed this target percentage. • Since the Swansea LDP was adopted in 2019, the subsequent Annual Monitoring Reports (AMRs) have provided the following figures for new dwellings within this SHPZ; <ul style="list-style-type: none"> - 2019/20 (AMR 1) – 2 dwellings. - 2020/21 (AMR 2) – 18 dwellings. - 2021/22 (AMR 3) – 56 dwellings. - 2022/23 (AMR 4) – 26 dwellings. - Total since 2019 – 102 dwellings.
SDAs in Zone	<ul style="list-style-type: none"> • There are no SDAs located within this SHPZ. • Under LDP Policy PS 4, there is no employment land allocated to any sites within this SHPZ.
Services and Facilities in Zone	<ul style="list-style-type: none"> • Under LDP Policy RC 5, there are no District Centres located within this SHPZ. • Under LDP Policy RC 6, there are two Local Centres (Pennard Road, Manselfield Road, Station Square) located within this SHPZ. • The previous UDP listed various general employment sites under Policy EC 1, one of which is located within this SHPZ (Crofty Industrial Estate).

<p>Headline Developmental Considerations</p>	<ul style="list-style-type: none"> • As displayed on the LDP2 Constraints and Information map, the following Headline Developmental Considerations are relevant within this SHPZ; <ul style="list-style-type: none"> - Historic and Cultural Environment (Ancient Monuments / Listed Buildings / Conservation Areas / Historic Parks and Gardens). - Ecosystem and Resilience (AONB / Local Nature Reserve / Mineral Resource Layers / RAMSAR / Regionally Important Geodiversity Sites / Current SINCs / Special Areas of Conservation / Special Protection Areas / Sites of Special Scientific Interest / Ancient Woodland Heritage Coast / Special Landscape Area / Mineral Buffer Zone / Green Wedge). - Resources and Public Health Protection (TAN-15 Defended Zones / Flood Zones / Agricultural Land Classification / Historic Contaminated Land).
<p>Renewable Energy</p>	<ul style="list-style-type: none"> • The Swansea LDP Proposals map highlights that no areas within this SHPZ are allocated for Renewable and Low Carbon Energy development under LDP Policy EU 1. • Since the Swansea LDP was adopted, Future Wales: The National Plan 2040 has been published, which notes under Policy 16 that there are no pre-assessed areas for wind energy in this SHPZ.
<p>Regional Role</p>	<ul style="list-style-type: none"> • This SHPZ is not included within the Swansea Bay and Llanelli National Growth Area and, therefore, does not have any cross-border role with any neighbouring local authorities.
<p>Connectivity and Active Travel</p>	<ul style="list-style-type: none"> • There are no train stations located within this SHPZ and no new stations are proposed as part of the Swansea Bay and West Wales Metro. However, bus corridor improvements and integration projects are included in this SHPZ with the Metro. • There are no completed active travel routes located within this SHPZ, however, there is one current active travel project that is ongoing in its delivery (Clyne Common).

Table 16 Greater North West SHPZ

Greater North West SHPZ	
<p>Introduction - The Greater North West SHPZ encompasses former industrial communities such as Gorseinon and Pontarddulais, which have become primarily dormitory settlements served by large District Centres. This zone features a population of approximately 40,400 over a 98km² area, with a population density of 412. Under LDP Policy HC 3, the Welsh Language Sensitive Area is evident within this SHPZ under every in-zone ward. The zone has been a focus for growth – including through the previous UDP. It contains a number of sizable settlements which (whilst considered subordinate to the main regional centres of Swansea and Llanelli) do make a key local contribution in terms of facilities and services whilst retaining their own distinct identity and community character.</p>	
Category	Summary
Housing	<ul style="list-style-type: none"> • There is a total of 1,478 unit commitments and 3,405 unit allocations within this SHPZ, as well as 96 units forecasted in Windfall developments. This equals a total provision of 4,979 units. • The Council’s Fourth Annual Monitoring Report (AMR 4) highlights that this SHPZ has a capacity for 5,370 units on allocated sites and 501 units at unallocated sites, totalling 5,871 units. • Under LDP Policy H 3, proposals for residential development within this SHPZ are generally expected to provide Affordable Housing at a target percentage of at least 15%. The viability assessments conducted when preparing the Adopted LDP have informed this target percentage. • Since the Swansea LDP was adopted in 2019, the subsequent Annual Monitoring Reports (AMRs) have provided the following figures for new dwellings within this SHPZ; <ul style="list-style-type: none"> - 2019/20 (AMR 1) – 126 dwellings. - 2020/21 (AMR 2) – 55 dwellings. - 2021/22 (AMR 3) – 87 dwellings. - 2022/23 (AMR 4) – 152 dwellings. - Total since 2019 – 420 dwellings.
SDAs in Zone	<ul style="list-style-type: none"> • There are five SDAs located within this SHPZ (SD A / SD B / SD C / SD G / SD H). • Under LDP Policy PS 4, 14 Ha of employment land is allocated to site SD G and a further 26 Ha of employment land is allocated to site SD H, totalling 40 Ha for this SHPZ.
Services and Facilities in Zone	<ul style="list-style-type: none"> • Under LDP Policy RC 5, there are three District Centres (Gorseinon / Gowerton / Pontarddulais) located within this SHPZ. • Under LDP Policy RC 6, there are no Local Centres located within this SHPZ. • The previous UDP listed various general employment sites under LDP Policy EC 1, five of which are located within this SHPZ (Felindre Business Park / Bryngwyn Works, Gorseinon / Garngoch Industrial Estate / Land at Bryntywod, Felindre / Penllergaer Business Park).

<p>Headline Developmental Considerations</p>	<ul style="list-style-type: none"> • As displayed on the LDP2 Constraints and Information map, the following Headline Developmental Considerations are relevant within this SHPZ; <ul style="list-style-type: none"> - Historic and Cultural Environment (Ancient Monuments / Archaeological Sensitive Areas / Conservation Areas / Historic Park and Gardens / Welsh Language Sensitive Area). - Ecosystem and Resilience (Mineral Resource Layers / Peat Soils / RAMSAR / Current SINCs / Special Areas of Conservation / Special Protection Areas / Site of Special Scientific Interest / Ancient Woodland / Special Landscape Area / Green Wedge). - Resources and Public Health Protection (TAN-15 Defended Zones / Flood Zones / Agricultural Land Classification / Noise Action Plan Priority Areas / Historic Contaminated Land). - A notable developmental consideration has been the position with Gowerton and Llannant WWTW, with due reference to the Carmarthen Bay and Estuaries European Marine Site.
<p>Renewable Energy</p>	<ul style="list-style-type: none"> • The Swansea LDP Proposals map highlights that there are Local Search Areas within this SHPZ which are allocated for Renewable and Low Carbon Energy development under LDP Policy EU 1. • Since the Swansea LDP was adopted, Future Wales: The National Plan 2040 has been published, which notes under Policy 16 that there are some pre-assessed areas for wind energy in this SHPZ.
<p>Regional Role</p>	<ul style="list-style-type: none"> • This SHPZ is included within the Swansea Bay and Llanelli National Growth Area and features a cross-border role with the neighbouring local authority of Carmarthenshire.
<p>Connectivity and Active Travel</p>	<ul style="list-style-type: none"> • There is one train station on the West Wales Line located in this SHPZ (Gowerton), although no new stations are proposed as part of the Swansea Bay and West Wales Metro. Rail frequency enhancements, bus corridor improvements and integration projects are also included in this SHPZ with the Metro. • There are two completed active travel routes located within this SHPZ (Pontarddulais Link / Gowerton to Kingsbridge). There are also five current active travel projects that are ongoing in their delivery (Penllergaer to Gorseinon / Penllergaer to Fforestfach / Pontarddulais Connect / Pont Y Cob Road / Penllergaer Woods to Tircoed).

Table 17 North SHPZ

North SHPZ	
<p>Introduction - The North SHPZ incorporates largely residential urban areas around the fringes of Central Swansea, including Penlan, Mynyddbach, Llangyfelach, and Morryston; and also established business parks at Fforestfach and Waunarlywydd. The allocations in this Plan need to provide a different offer. This zone features a population of approximately 50,100 over a 23.2km² area, with a population density of 2,159. Under LDP Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ.</p>	
Category	Summary
Housing	<ul style="list-style-type: none"> • There is a total of 432 unit commitments and 2,754 unit allocations within this SHPZ, as well as 44 units forecasted in Windfall developments. This equals a total provision of 3,230 units. • The Council's Fourth Annual Monitoring Report (AMR 4) highlights that this SHPZ has a capacity for 3,244 units on allocated sites and 403 units at unallocated sites, totalling 3,647 units. • Under LDP Policy H 3, proposals for residential development within this SHPZ are generally expected to provide Affordable Housing at a target percentage of at least 10%. The viability assessments conducted when preparing the Adopted LDP have informed this target percentage. • Since the Swansea LDP was adopted in 2019, the subsequent Annual Monitoring Reports (AMRs) have provided the following figures for new dwellings within this SHPZ; <ul style="list-style-type: none"> - 2019/20 (AMR 1) – 66 dwellings. - 2020/21 (AMR 2) – 72 dwellings. - 2021/22 (AMR 3) – 87 dwellings. - 2022/23 (AMR 4) – 118 dwellings. - Total since 2019 – 343 dwellings.
SDAs in Zone	<ul style="list-style-type: none"> • There are three SDAs located within this SHPZ (SD E / SD F / SD G). • Under LDP Policy PS 4, there is no employment land allocated to any sites within this SHPZ.
Services and Facilities in Zone	<ul style="list-style-type: none"> • Under LDP Policy RC 5, there is one District Centre (Morryston) located within this SHPZ. • Under LDP Policy RC 6, there are seven Local Centres (Broughton Avenue / Llangyfelach Road / Rheidol Avenue / Carmarthen Road / Conway Road / Crwys Terrace / Caereithin Cross) located within this SHPZ. • The previous UDP listed various general employment sites under Policy EC 1, one of which is located within this SHPZ (Swansea West Industrial Park).

<p>Headline Developmental Considerations</p>	<ul style="list-style-type: none"> • As displayed on the LDP2 Constraints and Information map, the following Headline Developmental Considerations are relevant within this SHPZ; <ul style="list-style-type: none"> - Historic and Cultural Environment (Ancient Monuments / Listed Buildings / Conservation Areas / Historic Parks and Gardens). - Ecosystem and Resilience (Local Nature Reserve / Mineral Resource Layers / Current SINCS / Ancient Woodland / Special Landscape Area /). - Resources and Public Health Protection (Air Quality Management Zones / TAN-15 Defended Zones / Flood Zones / Agricultural Land Classification / Noise Action Plan Priority Areas / Ground Stability / Historic Contaminated Land).
<p>Renewable Energy</p>	<ul style="list-style-type: none"> • The Swansea LDP Proposals map highlights that no areas within this SHPZ are allocated for Renewable and Low Carbon Energy development under LDP Policy EU 1. • Since the Swansea LDP was adopted, Future Wales: The National Plan 2040 has been published, which notes under Policy 16 that there are no pre-assessed areas for wind energy in this SHPZ.
<p>Regional Role</p>	<ul style="list-style-type: none"> • This SHPZ is included within the Swansea Bay and Llanelli National Growth Area, although the zone does not have any cross-border role with any neighbouring local authorities.
<p>Connectivity and Active Travel</p>	<ul style="list-style-type: none"> • There are no train stations located within this SHPZ but, as part of the Swansea Bay and West Wales Metro, one new train station is proposed to open (Cockett). Rail frequency enhancements, bus corridor improvements and integration projects are also included in this SHPZ with the Metro. • There are two completed active travel routes located within this SHPZ (Clasemont Road / Morriston South Link). There are also four current active travel projects that are ongoing in their delivery (A48 Clasemont Road to Pentrepoeth Road / Morriston South Link Extension / DVLA to Morriston Hospital / Morriston to Llansamlet).

Table 18 West SHPZ

West SHPZ	
<p>Introduction - The West SHPZ rapidly expanded in the late Twentieth Century, expanding to its environmental limits from the waterfront through to the Gower AONB boundary. The zone comprises primarily residential settlements, including Sketty and Mumbles. This zone features a population of approximately 40,100 over a 23.9km² area, with a population density of 1,677. Under LDP Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ.</p>	
Category	Summary
Housing	<ul style="list-style-type: none"> • There is a total of 789 unit commitments and 461 unit allocations within this SHPZ, as well as 210 units forecasted in Windfall developments. This equals a total provision of 1,460 units. • The Council's Fourth Annual Monitoring Report (AMR 4) highlights that this SHPZ has a capacity for 92 units on allocated sites and 559 units at unallocated sites, totalling 651 units. • Under LDP Policy H 3, proposals for residential development within this SHPZ are generally expected to provide Affordable Housing at a target percentage of at least 35%. The viability assessments conducted when preparing the Adopted LDP have informed this target percentage. • Since the Swansea LDP was adopted in 2019, the subsequent Annual Monitoring Reports (AMRs) have provided the following figures for new dwellings within this SHPZ; <ul style="list-style-type: none"> - 2019/20 (AMR 1) – 70 dwellings. - 2020/21 (AMR 2) – 58 dwellings. - 2021/22 (AMR 3) – 15 dwellings. - 2022/23 (AMR 4) – 17 dwellings. - Total since 2019 – 160 dwellings.
SDAs in Zone	<ul style="list-style-type: none"> • There are no SDAs located within this SHPZ. • Under LDP Policy PS 4, there is no employment land allocated to any sites within this SHPZ.
Services and Facilities in Zone	<ul style="list-style-type: none"> • Under LDP Policy RC 5, there are three District Centres (Killay / Mumbles / Sketty) located within this SHPZ. • Under LDP Policy RC 6, there is one Local Centre (Sketty Park Drive) located within this SHPZ.
Headline Developmental Considerations	<ul style="list-style-type: none"> • As displayed on the LDP2 Constraints and Information map, the following Headline Developmental Considerations are relevant within this SHPZ; <ul style="list-style-type: none"> - Historic and Cultural Environment (Ancient Monuments / Archaeological Sensitive Areas / Listed Buildings / Conservation Areas / Historic Parks and Gardens).

	<ul style="list-style-type: none"> - Ecosystem and Resilience (AONB / Local Nature Reserve / Mineral Resource Layers / Current SINCs / Sites of Special Scientific Interest / Ancient Woodland / Special Landscape Area / Green Wedge). - Resources and Public Health Protection (Air Quality Management Zones / Flood Zones / Agricultural Land Classification / Noise Action Plan Priority Areas / Historic Contaminated Land / Quiet Areas).
Renewable Energy	<ul style="list-style-type: none"> • The Swansea LDP Proposals map highlights that no areas within this SHPZ are allocated for Renewable and Low Carbon Energy development under LDP Policy EU 1. • Since the Swansea LDP was adopted, Future Wales: The National Plan 2040 has been published, which notes under Policy 16 that there are no pre-assessed areas for wind energy in this SHPZ.
Regional Role	<ul style="list-style-type: none"> • This SHPZ is included within the Swansea Bay and Llanelli National Growth Area, although the zone does not have any cross-border role with any neighbouring local authorities.
Connectivity and Active Travel	<ul style="list-style-type: none"> • There are no train stations located within this SHPZ, and no new stations are proposed as part of the Swansea Bay and West Wales Metro. However, bus corridor improvements and integration projects are included in this SHPZ with the Metro. • There are three completed active travel routes located within this SHPZ (Mayals Road Link / Olchfa Link / Sketty Park Link), however, there are no current active travel projects ongoing here.

Appendix 4: Strategic Housing Policy Zone Summary review (May 2024)

Strategic Housing Policy Zone – Central



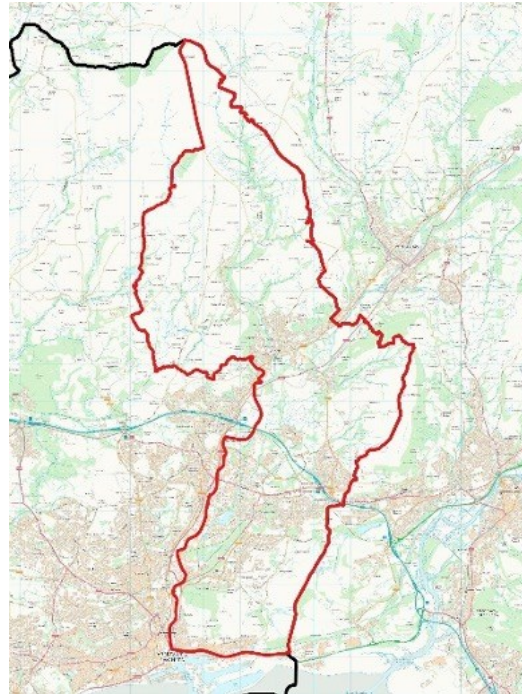
C1 The Central SHPZ largely comprises the Swansea Central Area, which includes the main retail centre and City Waterfront areas including the Maritime Quarter and SA1. Also in this zone are well-established residential areas such as Sandfields, Brynmill, Mount Pleasant and Uplands. The zone includes the Tawe Riverside Corridor, which is identified as a mixed-use Strategic Development Area (SDA) in the LDP, with important heritage and leisure led regeneration opportunities including the proposed

Skyline project. The Zone also includes the operational docks and adjacent vacant/underutilised brownfield land in the Fabian Way Corridor and borders the NPT administrative area.

C2 This zone features a population of approximately 54,400 over an 18.9km² area, with a population density of 2,878. This area does not form part of the existing Welsh Language Sensitive Area designated under Policy HC 3.

C3 This Zone is densely populated and contains Swansea Central Area and other key regeneration priorities. The Zone offers the main Retail Centre and complementary areas which acts as the service centre for the County and wider region. Within the Zone there is also one district centre and several local centres. There are various general employment sites within the Zone. There is a substantial amount of new residential development currently allocated in the Zone via a mixture of strategic and non-strategic housing sites. There are a number of Development Constraints to be considered. There have been significant improvements to Active Travel routes in the Zone. The zone contains the central rail station furthermore there are proposals for a new station to be opened within Landore as part of the proposed South West Metro. There are also regeneration proposals along the Fabian Way Corridor as part of the Blue Eden project.

Strategic Housing Policy Zone – East



E1 The East SHPZ largely comprises the urban area East of the River Tawe and extends as far North as Clydach. It includes employment and mixed-use locations, such as Swansea Enterprise Park and the Swansea Vale business parks. The area has been subject to significant regeneration. This zone features a population of approximately 37,700 over a 60.8km² area, with a population density of 620. Under Policy HC 3, the Welsh Language Sensitive Area is evident within this SHPZ under the Clydach ward.

E2 The large linear zone offers a mix of large residential settlements stretching from St Thomas/Port Tennant North of Fabian Way in the South to Clydach in the North. There is significant open countryside spread throughout the zone. There are two mixed-use SDAs within the zone, notably these are anticipated to deliver 16ha of employment land. Residential Development is currently focused on SDA's and non-strategic allocations within settlements throughout the zone. There are a number of Development Constraints to be considered. There have been significant improvements to Active Travel routes in the Zone. There is an existing rail station (Llansamlet) within the Zone however there are no plans for a new station considered within the proposed South West Metro.

Strategic Housing Policy Zone – Gower



G1 The Gower SHPZ is characterised by small and large villages located in rural and semi-rural landscapes. This zone covers a large part of the AONB. It features a population of approximately 6,000 over a 124.4km² area, with a population density of 48. Under Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ.

G2 This is the largest Zone in the County but also the least populated. The Zone contains open countryside and beaches; and small and large villages. There are no District or local centres within the Zone and no areas designated for employment. There are limited opportunities for renewable energy development within the Zone. This area contains some of the highest house prices in

the County. There are a number of Development Constraints to be considered. There are no existing improvements to an Active Travel route in the Zone or metro proposals.

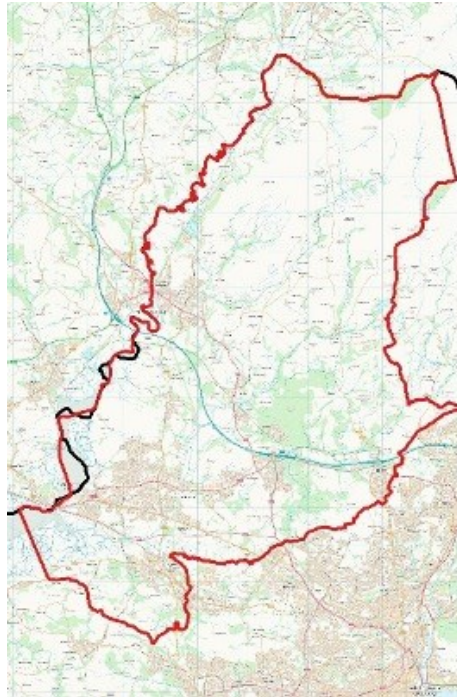
Strategic Housing Policy Zone – Gower Fringe



GF1 The Gower Fringe SHPZ is characterised by small and large villages located in rural and semi-rural landscapes, near the Western fringe of the urban area. This zone features a population of approximately 9,600 over a 25.9km² area, with a population density of 370. Under Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ. This linear zone encompasses the settlement of Bishopston to the south and Penclawdd to the North, in-between is the settlement of Upper Killay and the popular village of Three Crosses.

GF2 There are two local centres within the Zone, but it does not feature a District Centre; the only employment area of note is at Crofty Industrial estate. There is significant open countryside spread throughout the Zone. There are limited opportunities for renewable energy development within the Zone. This area contains some of the highest house prices in the County. There are a number of Development Constraints to be considered. There is one ongoing improvement to an Active Travel route in the Zone and no metro proposals.

Strategic Housing Policy Zone – Greater North West



GNW1 The Greater North West SHPZ encompasses former industrial communities such as Gorseinon, Loughor and Pontarddulais, which have primarily become dormitory settlements served by large District Centres. It also includes Penllergaer, which has been a focus for new development near to the M4 junction, and key villages Grovesend and Pontlliw. The UDP and LDP strategies delivered new growth during their plan periods. This zone features a population of approximately 40,400 over a 98km² area, with a population density of 412. Under Policy HC 3, the Welsh Language Sensitive Area is evident within this SHPZ covering every ward.

GNW2 This represents the second largest Zone in terms of area. There is a significant population density in the Zone when considering its size which is due to the large settlements within the Zone. The Zone offers three district centres and a number of existing employment locations. The Zone is considered highly sustainable and therefore a substantial amount of new residential development was allocated in the Zone via a mixture of strategic and non-strategic housing sites in the current LDP. There are opportunities for renewable energy development with designated local and national areas within the Zone. There are a number of development constraints to be considered. There have been significant improvements to Active Travel routes in the Zone. There is an existing rail station (Gowerton) within the Zone. There are proposals for a new station to be opened in the area North of the M4 as part of the proposed South West Metro, but the timescales for this need to be fully understood in terms of whether they will be deliverable within the LDP2 period.

Strategic Housing Policy Zone – North



N1 The North SHPZ incorporates largely residential urban areas around the fringes of Central Swansea, including Penlan, Mynyddbach, Llangyfelach, and Morriston; and also established business parks at Fforestfach and Waunarlwydd. In recent decades there have been low levels of house building and a lack of developer interest in parts of the zone. This zone features a population of approximately 50,100 over a 23.2km² area, with a population density of 2,159. Under Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ.

N2 This Zone is densely populated and made up of mostly urban areas with some pockets of open countryside and open space. The Zone offers one district centre, seven local centres and a number of existing employment locations. A substantial amount of new residential development was allocated in parts of the Zone in the current LDP via a mixture of strategic and non-strategic housing sites. There are limited opportunities for renewable energy development within the Zone. There are a number of development constraints to be considered. There have been significant improvements to Active Travel routes in the Zone. There are no existing rail stations within the Zone although there are proposals for a new station to be opened within Cockett as part of the proposed South West Metro, though timescales for this need to be fully understood.

Strategic Housing Policy Zone – West



W1 The West SHPZ rapidly expanded in the late Twentieth Century, largely to its environmental limits from the waterfront through to the AONB boundary. The zone comprises primarily residential settlements, including Sketty and Mumbles. The residential development allocated in the current LDP in this Zone is led by local needs housing exception sites, and the strategic site at Cefn Coed. Due to the constrained nature of the West zone, though, the majority of new housebuilding has recently been on small-scale infill and windfall redevelopment sites rather than large allocations. This zone features a population of approximately 40,100 over a

23.9km² area, with a population density of 1,677. Under Policy HC 3, there is no incursion of the Welsh Language Sensitive Area into this SHPZ.

W2 This Zone is densely populated and made up of mostly urban areas with some pockets of open space and Swansea Bay. The Zone offers three district centres and one local centre but has no existing employment locations. Due to the environmental constraints surrounding the existing urban area in this Zone, there may be limited opportunities for new greenfield sites of significance. There are limited opportunities for renewable energy development within the Zone. There are a number of development constraints to be considered. There have been significant improvements to Active Travel routes in the Zone. There are no existing rail stations within the Zone nor are there any proposals for a new station as part of the proposed South West Metro.