VALE OF GLAMORGAN

REPLACEMENT LOCAL DEVELOPMENT PLAN

2021 - 2036

Housing and Employment Growth Options

September 2023

BACKGROUND PAPER - BP7

RLDP CDLN

VALE of GLAMORGAN BRO MORGANNWG

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I. Executive Summary

i. The Vale of Glamorgan Council is preparing a Replacement Local Development Plan (RLDP) for the plan period 2021 to 2036. Once adopted, the RLDP will set out the Council's planning framework for the development and use of land in the Vale of Glamorgan and form the basis for consistent and rational decision-making. The RLDP will also determine where new development will take place, and will allocate land for housing, employment, and infrastructure, as well as identify areas of land to be protected.

ii. One of the main functions of the RLDP is to ensure that there is sufficient land available within the Vale of Glamorgan to deliver the required future housing and employment requirements over the lifetime of the plan. These requirements depend on the number of people, so the future population level for which provision must be made is a key consideration of the plan.

iii. In preparing the RLDP, the Council is required to consider a range of population growth scenarios to assist in the identification of the level of housing and employment growth that will be provided over the plan period.

iv. The Council therefore commissioned Edge Analytics to produce a technical paper (Vale of Glamorgan Demographic Evidence February 2023) to provide a range of population, housing, and employment growth evidence to inform the emerging RLDP. The report builds on the Welsh Government household and population projections alongside demographic and dwelling and employment led scenarios.

v. To compliment the demographic evidence, the Council commissioned an Employment Land Study (ELS October 2022) to identify the employment land requirements for the Vale. In line with Welsh Government guidance, the ELS considered several trend-based scenarios to identify need over the lifetime of the plan and identified the employment land required for each option. The ELS recommends that the Council determine employment land provision based upon historic take up, requiring the provision of **67.80ha** of land with the capacity to support **5,338 jobs**[1] over the plan period.

vi. This Paper is one of several background documents prepared as a part of the evidence base supporting the RLDP and sets out alternative options considered that are based upon a range of alternative demographic, dwelling and employment-led scenarios and the potential implications arising from each.

vii. A total of 12 growth scenarios have been generated for the Vale of Glamorgan These include 4 population and demographic scenarios, 3 trend based migration scenarios, 2 dwelling led scenarios and 3 employment led scenarios.

[1] This is the number of jobs that could be generated through the land supply, however for the purposed of population modelling this had been adjusted to 5,112 to account for 'double jobbing' and relates to the number of persons employed not the number of jobs.

viii. Following assessment of the 12 scenarios, the Council considers that the projected housing, employment, and demographic forecasting presented by the 10 Year Dwelling scenario would represent the appropriate growth option for the RLDP. Under this option the Vale's population grow is projected to grow by 13,154 (9.7%) over the period 2021-2036.

ix. The housing requirement for the plan under the chosen scenario will be 7,890 dwellings, which would be a continuation of the average housing completions of 526 per year that has occurred within the Vale over the past 10 years. The inclusion of a 10% margin for flexibility to ensure deliverability, the RLDP will make provision for **8,679 dwellings.** Taking into account the contribution of the existing land supply, i.e., sites with planning permission, including those units under construction, and existing adopted LDP sites land for an additional **2,619** will be required to meet this requirement.

x. In terms of the employment growth, this option is anticipated to provide 4,870 additional jobs over the life of the plan, which closely align to the 5,338 jobs (adjusted to 5,112 people requiring jobs) that could be realised through the employment land supply recommended within the Employment Land Study (ELS). This has the potential for reducing outward commuting rates over plan period, which currently stand at some 13,000 residents commuting outside of the Vale for employment. The level of additional housing and jobs within this scenario would also compliment the Vale's role with the Future Wales growth area, without unduly resulting in high levels of inward migration that could unnecessarily redirect growth away from priority growth areas identified within Future Wales, particularly neighbouring Cardiff. It would also maximise opportunities for the delivery of affordable housing in accordance with Future Wales.

xi. This option would allow for a level of migration that would ensure that the working age population in the Vale would remain stable to offset the projected increase in the older age population. This would further support economic growth, alongside more demographically balanced communities.

Table i: Selected Growth Scenarios (Vale of Glamorgan Demographic Evidence, Edge Analytics February 2023)											
		Population and Household Change 2021-2036					Dwelling Requirement		Employment Growth		
Option	**Scenario**	**Population Change**	**Population Change %**	**Household Change**	**Household Change %**	**Average Net Migration per annum**	**Dwellings per annum**	**Additional Dwellings 2021-2036**	**Jobs per annum**	**Additional Jobs 2021-2036**	**Employment Land Requirement**
Welsh Government 2014 Projections	Replicates the WG 2014-based *Principal* population projection, using historical population evidence for 2001–2014	**13**	**0.0%**	**2,182**	**3.9%**	**64**	**151**	**2,265**	**-126**	**-1,890**	-5.16 ha
Welsh Government 2018 Projections	Replicates the WG 2018-based *Principal* population projection, using historical population evidence for 2001–2018.	**9,787**	**7.3%**	**6,214**	**10.6%**	**851**	**431**	**6,465**	**243**	**3,645**	9.96 ha
Welsh Government 2018 Projections HIGHPOP	Replicates the WG 2018-based *High* population projection, using historical population evidence for 2001–2018, incorporating high fertility, mortality, and migration assumptions.	**13,127**	**9.7%**	**7,500**	**12.7%**	**938**	**520**	**7,800**	**292**	**4,380**	11.97 ha
Welsh Government 2018 Projections LOWPOP	Replicates the WG 2018-based *Low* population projection, using historical population evidence for 2001–2018, incorporating low fertility, mortality, and migration assumptions.	**5,172**	**3.8%**	**4,559**	**7.8%**	**759**	**316**	**4,740**	**191**	**2,865**	7.82 ha

Table i: Selected Growth Scenarios (Vale of Glamorgan Demographic Evidence, Edge Analytics February 2023)

Option	Scenario	Population and Household Change 2021-2036					Dwelling Requirement		Employment Growth		
		Population Change	Population Change %	Household Change	Household Change %	Average Net Migration per annum	Dwellings per annum	Additional Dwellings 2021-2036	Jobs per annum	Additional Jobs 2021-2036	Employment Land Requirement
PG-Y5	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 5-year historical period (2015/16–2019/20).	**16,923**	**12.4%**	**9,187**	**15.4%**	**1,222**	**637**	**9,555**	**426**	**6,390**	**17.45 ha***
PG-Y10	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 10- year historical period (2010/11–2019/20)	**8,519**	**6.3%**	**5,695**	**9.6%**	**741**	**395**	**5,925**	**197**	**2,955**	**8.07 ha***
PG-Long Term	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 19-year historical period (2001/02–2019/20).	**8,561**	**6.3%**	**5,705**	**9.6%**	**739**	**396**	**5,940**	**210**	**3,150**	**8.60 ha***
Dwelling-led 5Y	Models the population impact of an average annual dwelling growth of +698 dwellings per annum (dpa), based on a 5-year history of housing completions in the Vale of Glamorgan (2017/18–2021/22).	**19,048**	**13.9%**	**10,062**	**16.9%**	**1,360**	**698**	**10,470**	**493**	**7,395**	**20.20 ha***

Option	Scenario	Population and Household Change 2021-2036	Dwelling Requirement	Employment Growth

		Population Change	Population Change %	Household Change	Household Change %	Average Net Migration per annum	Dwellings per annum	Additional Dwellings 2021-2036	Jobs per annum	Additional Jobs 2021-2036	Employment Land Requirement
Dwelling-led 10Y	Models the population impact of an average annual dwelling growth of +526 dwellings per annum (dpa), based on a 10-year history of housing completions in the Vale of Glamorgan (2011/12–2020/21).	**13,154**	**9.7%**	**7,587**	**12.8%**	**1,009**	**526**	**7,890**	**325**	**4,875**	**13.32 ha. ***
Employment-led OE	Models the population growth impact of an average employment growth of +25 per year for the Vale of Glamorgan, as implied by the Oxford Economics forecast.	**2,402**	**1.8%**	**3,041**	**5.2%**	**367**	**211**	**3,165**	**25**	**375**	**1.03 ha. ***
Employment-led ELR 1 **	Models the population impact of an average annual employment growth of +341 per year for the Vale of Glamorgan, as implied by the land requirement from the employment land review.	**13,224**	**9.8%**	**7,599**	**12.9%**	**1,020**	**527**	**7,905**	**341****	**5,338***	**67.80 Ha***
Employment-led ELR 1 (CR 1-1)**	Models the population impact of an average annual employment growth of +341 per year for the Vale of Glamorgan, as implied by the land requirement from the employment land review, including commuting ratio adjustments based on the assumption that for all future employment growth there is a 1:1 ratio with the increase in labour force.	**10,719**	**7.9%**	**6,548**	**11.1%**	**869**	**454**	**6,810**	**341****	**5,338***	**67.80 Ha***

* Modelled on the potential job capacity that could be supported by the employment land supply requirement of 67.80 ha over the plan period identified in the Employment Land Study 2022) **An adjustment has been made to the annual employment figure to account for ‘double jobbing’ (i.e., people who may have more than one job), to reduce the initial figures by 4.4% to 5,112 over the plan period. This double jobbing adjustment is based on the proportion of people with second jobs as recorded in the Annual Population Survey (APS), averaged over the 2017–2021 period. Therefore, the number of additional annual jobs is lower than the job capacity of 5,338 jobs identified in the employment land review.

1. Introduction

1.1 To inform the level of housing and employment provision within the Vale of Glamorgan Replacement Local Development Plan (RLDP), the Council is required to explore a range of growth options utilising the latest population and household projections alongside trend-based growth assumptions.

1.2 The Council therefore commissioned Edge Analytics to produce a technical paper (Vale of Glamorgan Demographic Evidence February 2023) to provide a range of population, housing, and employment growth evidence to inform the emerging RLDP. The report builds on the Welsh Government household and population projections alongside demographic, dwelling and employment led scenarios.

Linking Population, Household and Employment Growth

1.3 One of the aims of the RLDP will be to seek to achieve a balance between housing growth and jobs, accordingly Edge Analytics have considered the links between the changing size of the Vale's resident population with its labour force, alongside assumptions on economic activity, employment, and commuting.

1.4 To compliment the demographic evidence, the Council commissioned an Employment Land Study (ELS, October 2022) to identify the employment land requirements for the Vale. In line with Technical Advice Note (TAN) 23: Economic Development, the ELS study considered 3 trend-based scenarios to inform the employment needs for the plan period. The ELS recommended that the Council adopt an employment land provision based upon historic take up, requiring the provision of 67.80ha of land with the capacity to support 5,338 jobs over the plan period adjusted to 5,112 people requiring jobs to account for people who may be employed in more than one job.

1.5 To ensure consistency between the ELS and the Edge Demographic Report, the ELS has provided an assessment of the employment land needs arising from the additional jobs identified within each demographic scenario. The demographic report has considered the demographic and housing implications associated with the capacity of additional jobs that could potentially be supported by the recommended employment land supply option with the ELS.

1.6 This Paper sets out the alternative housing and employment growth and spatial options considered by the Council. It identifies the Council's preferred growth option in terms of the number of houses and land for employment uses that the RLDP will make provision for over the plan period.

2. Policy Context

National Context

Future Wales: The National Plan 2040

2.1 Future Wales is the National Development Framework for Wales, setting out the direction for development in Wales to 2040. The provision of housing across Wales to meet needs is a key priority of the Welsh Government and Future Wales identifies that the planning system must facilitate the provision of additional market and affordable housing.

2.2 As part of Future Wales, a range of estimates of additional housing need over the 20-year period up to 2038/39 have been published at a national level, and for the four regions of Wales, which includes South-East Wales.

2.3 Policy 7 of Future Wales clearly states that "the national and regional estimates of need do not reflect future policies or events and are not a Housing Requirement for Wales or the regions. However, the estimates do provide part of the evidence and context on which housing policy and requirements can be based. The estimates of market and affordable housing need should inform the housing requirements set out in Strategic and Local Development Plans and it is expected the housing requirements will differ from the estimates of housing need."

2.4 Future Wales provides area-specific policies for each of the four regions. The regional spatial diagram for South-East Wales (Figure 1 below) highlights that Cardiff, Newport, and the Valleys, including the Vale of Glamorgan, are part of a National Growth Area. Policy 33 of Future Wales states that "Strategic and Local Development Plans should recognise the National Growth Area (NGA) as the focus for strategic economic and housing growth."

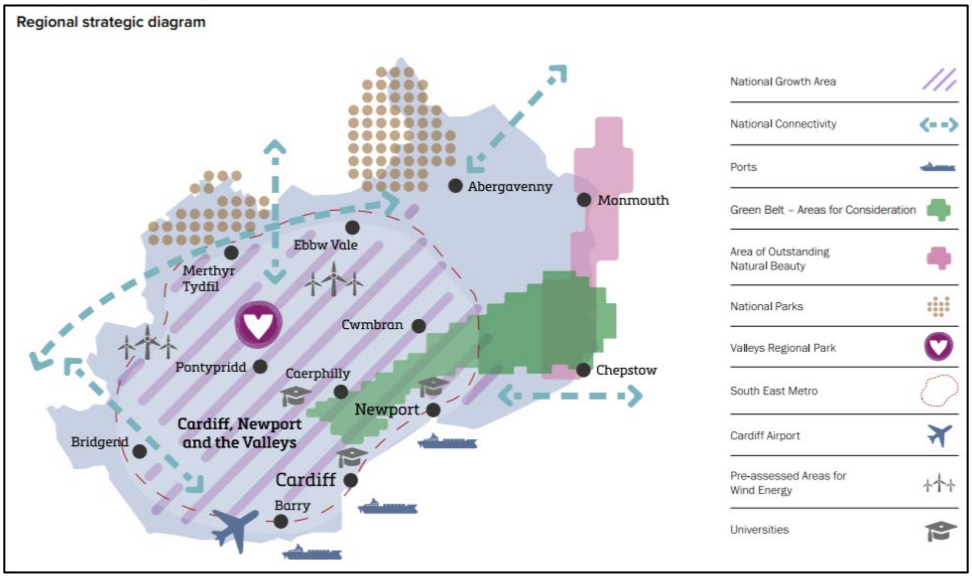


Figure 1: South East Wales Region: Future Wales 2040

2.5 To deliver these regional priorities and aspirations, Future Wales recognises that the 10 authorities within regions do not exist in isolation from each other and that in preparing Local Development Plans, planning authorities "*will need to consider the interdependence of Cardiff and the wider region, ensuring communities around the Capital are vibrant, prosperous and connected."*

2.6 For the Vale of Glamorgan RLDP this will require the plan to consider how the aspirations for the Vale of Glamorgan in terms of housing and economic growth align and compliment with the wider regional aspirations, particularly those of neighbouring Cardiff.

Planning Policy Wales

2.7 Planning Policy Wales (PPW) Edition 11 states in paragraph 4.2.6 that "*the latest Welsh Government local authority level Household Projections for Wales, alongside the latest Local Housing Market Assessment (LHMA) and the Well-being plan for a plan area, will form a fundamental part of the evidence base for development plans. These should be considered together with other key evidence in relation to issues such as what the plan is seeking to achieve, links between homes and jobs, the need for affordable housing, Welsh language considerations and the deliverability of the plan, in order to identify an appropriate strategy for the delivery of housing in the plan area. Appropriate consideration must also be given to the wider social, economic, environmental, and cultural factors in a plan area in order to ensure the creation of sustainable places and cohesive communities*."

2.8 It also states in paragraph 4.2.7 that "*household projections provide estimates of the future numbers of households and are based on population projections and assumptions about household composition and characteristics. Certain elements of the projections, such as births and deaths, will remain relatively constant throughout the plan period. However, other elements, such as migration and household formation rates, can influence outcomes significantly. Planning authorities need to assess whether the various elements of the projections are appropriate for their area, and if not, undertake modelling, based on robust evidence, to identify alternative options*."

Development Plans Manual

2.9 The Development Plans Manual (DPM) Edition 3, published in March 2020, provides detailed guidance on how to develop an evidence base to justify the level and distribution of economic growth and housing. The DPM recognises that there is not always a direct correlation between jobs and homes, but this is something that needs to be "*considered collectively when assessing growth levels and developing a sustainable strategy; the aim being to achieve a balance between homes and jobs thereby reducing the need for commuting*" (paragraph 5.25).

2.10 Links to the regional and sub-regional context should also be considered, taking account of functional linkages and geographical synergies between places to achieve better planning outcomes.

2.11 The DPM states that evidence will be required to demonstrate the current/baseline position of the plan and that "*trend-based forecasts quantify a variety of outcomes, based on a series of assumptions, extrapolating the level of need forward to cover the whole plan period. The forecasts used should relate directly to the range of issues and land uses the plan is seeking to address, for example changes in population and the need for additional homes to accommodate this change. All sources of evidence, including the latest Welsh Government Household Projections, should be used when preparing a plan*" (paragraph 5.28).

2.12 Once the total need has been determined, consideration should then be given to supply factors which could include the ability to deliver the level of growth within the timeframe of the LDP. The housing requirement is a policy decision which should balance need and supply factors, as well as clearly link to the vision and key objectives of the RLDP and ensure an appropriate balance between housing and jobs.

2.13 The DPM provides guidance on the demographic scenarios that should be considered when determining growth options. It is recognised in Paragraph 5.33 that *"trend-based projections inform plan preparation by extrapolating existing trends over the plan period, based on a series of assumptions. They provide a context within which a plan can be prepared. They are not a definitive statement about what will precisely happen, but illustrate what may happen, dependent on the assumptions used. Key to any projections will be the assumptions themselves."*

2.14 The latest Welsh Government Population and Household Projections are identified as a fundamental part of the LDP evidence base, and the DPM states that these projections, and the resultant housing numbers, should be considered as part of the evidence which should include a summary analysis of each variant projection, and the implications this has for population, households, and jobs growth in an area.

Local Context

Vale of Glamorgan Local Housing Market Assessment (LHMA 2021)

2.15 The delivery of affordable housing is a key objective of the LDP Strategy, with the relative strength of the Vale of Glamorgan's housing market over the last 10 years having resulted in many local people experiencing difficulties purchasing suitable housing on the open market.

2.16 The latest Vale of Glamorgan Local Housing Market Assessment (2021) was prepared in accordance with the Welsh Government approved methodology available at that time, enabling the Council to understand the level of affordable housing need within its area, using a range of information sources to feed into the assessment, including household projections, homelessness data, house prices, rental prices, household incomes, social housing stock turnover and projected housing supply data.

2.17 The LHMA calculates the net need for affordable housing, including social rented housing, intermediate rented housing, and low-cost home ownership housing products, over the period 2021- 2026. The identified headline annual need for affordable housing in the Vale of Glamorgan from 2021 to 2026 is 1,205 units per annum, comprising 915 social rented dwellings, 211 intermediate rented dwellings, and 79 low-cost home ownership dwellings.

2.18 Table 1 below provide a breakdown of the need by tenure.

Table 1: LHMA need by tenure

	Social Rent	Low-Cost Home Ownership	Intermediate Rent	Total
Newly arising need	143	87	98	328
Existing falling into need	118	0	0	118
Backlog	1387	32	138	1557
Sub Total	1648	119	236	2003
Supply	733	40	25	798
Net Annual Need	915	79	211	1205

2.19 The LHMA indicates that the across the Vale there is exists a deficit in social housing, whilst the highest areas of need are to be found within Barry, Penarth and Llandough and the larger urban areas. With the greatest demand being for smaller one- and two-bedroom properties which is a feature across all areas of the authority and reflects the longer trend of smaller household sizes nationally.

2.20 In March 2022, a new methodology for the preparation of LHMAs was published by Welsh Government with the requirement that emerging LDPs must now be based on the outputs of an LHMA prepared using the new methodology. Work has progressed on the preparation of an updated LHMA using this new methodology. However, a new version of the LHMA tool was published on 30th June 2023, which updated the default data and included the new May 2022 electoral wards. Due to the timescales for the preparation of the Preferred Strategy, it was not possible to complete a new LHMA report utilising the new tool as part of the evidence base to inform the Preferred Strategy. However, an initial review of the high-level outputs of the draft LHMA indicates that the level of need for affordable housing remains high. It is intended that the final LHMA will be included as part of the evidence base for the Deposit Plan once signed off by Welsh Government.

The Vale of Glamorgan Older Persons Strategy (2020)

2.21 The Council's Older Persons Housing Strategy Creating Homes and Neighbourhoods for Later Life 2022-36 sets out a vision in the Vale of Glamorgan Council which is "*to secure the best quality of life for older people to live as independently as possible in later life. This means delivering a range of accommodation that enables older people to live fulfilling lives and enjoy* *good health in attractive homes that meet their needs and allow them to retain their independence as they age*".

2.22 The strategy highlights that latest 2021 Office for National Statistics (ONS) Census data indicates that the Vale's over 65 population saw the second largest percentage increase in Wales between 2001 and 2021, increasing by 24.9%. It is expected to increase by circa 27% by 2036 and that by 2037 there will be a need for some 1,357-specialist age designated homes, retirement housing (for social rent and for sale) and housing with care (extra care housing for social rent and for sale).

2.23 Specialist age designated housing need is anticipated to be required across the Vale of Glamorgan and is summarised in Table 2 below.

Table 2:Total Estimated Need for Older people's housing

Locality	Current Provision (units)	By 2027	By 2032	By 2037
Central Vale	297	367	445	513
Eastern Vale	445	495	549	598
Western Vale	57	140	196	246
Total	829	1,002	1,190	1,357

2.24 To address this forecast need, the strategy identifies a range of mechanisms for delivery including the LDP, which is seen to have a key role in encouraging private and social housing providers to develop a range of mainstream housing that is suited and attractive to older people.

Vale of Glamorgan Well-being Plan

2.25 Under the provisions of the Well-Being of Future Generations Act, a Public Service Board (PSB) must be set up for each Local Authority in Wales. Informed by a well-being assessment, the PSB have recently approved the second WBP (2023-2028) which sets the following 3 well-being objectives and explains how the PSB seeks to deliver them:

- A more resilient and greener Vale - by understanding and making the changes necessary as individuals, communities, and organisations in response to the climate and nature emergencies.
- A more active and healthier Vale - by encouraging and enabling people of all ages to be more active and to promote the benefits of embracing a healthier lifestyle.
- A more equitable and connected Vale- by tackling the inequities that exist across the Vale, engaging with our communities and providing better opportunities and support to make a lasting difference.

2.26 The WBP actions reflect where partners think their collective action can add the greatest value in contributing to the seven national well-being goals for Wales.

RLDP Vision and Objectives

2.27 The draft RLDP sets out a Vision for the Vale of Glamorgan up to 2036, which reflects the key Issues, challenges, and aspirations of the Council over the plan period. Central to this RLDP Vision is the delivery of both housing and employment growth to support inclusive, vibrant, and sustainable communities:

"The Vale of Glamorgan is a healthy and inclusive place for everyone, with equitable access to services and facilities both physically and digitally. Residents are proud of where they live and have access to the homes they need. Housing growth has delivered homes which caters for all, including affordable homes and older person's housing; contributing towards diverse and cohesive communities where residents can maintain their independence."

2.28 Consequently, to support this aspiration and to reflect the Vale's role in the wider region, the identification of a level of growth that supports this Vision will be central to the plan.

2.29 Objective 3 of the draft RLDP is 'Homes for All':

"*Ensure that all new residential developments provide high quality housing that includes the right mix, tenure and type of homes that respond to the changing needs of the Vale's population. This includes homes that are affordable, accessible and adaptable for people of all ages and that address the identified accommodation needs of all the Vale's communities through all stages of life*."

3. Context - Population, Demography and Economic Activity

3.1 A key element of the RLDP will be the identification of land to accommodate additional growth of new homes and jobs to meet the changes in the Vale's population over the next 15 years to 2036. A key factor in determining the level of housing growth for the Vale of Glamorgan is the projected changes that will take place to the population over the plan period.

Population and Demographics

3.2 The following section provides an overview of the latest available 2021 Census information for the Vale of Glamorgan, and headline findings of the Council's review into the Vale's economy, providing an insight into the economic profile of the Vale and future changes in employment over the plan period.

3.3 According to the ONS Mid-Year Estimates (MYEs), over the past 20 years, the Vale of Glamorgan has experienced annual population growth in all years apart from 2014/15, when there was estimated to be a small decline in population. Annual rates of growth were relatively high in the pre-2008 recession period, with rates falling in 2008/09. In the last five years, the rate of annual population growth has increased and exceeded pre-recession levels.

3.4 Out of all the unitary authorities across Wales, between 2001 and 2020, the Vale of Glamorgan has seen the fourth highest average annual rate of growth in its population, at 0.7%, exceeded only by Newport, Bridgend, and Cardiff (Figure 2). This is higher than the regional (0.6%) and national (0.5%) averages.

3.5 A comparison of growth rates seen since 2015 reveals the acceleration in growth in the Vale of Glamorgan relative to other parts of Wales (Figure 3). The average annual growth rate for the last five years has increased to the highest level across all authorities (1.1%), level with Newport and more than double the Welsh average (0.5%).

3.6 The largest growth in population (2001–2020) has been in the 65–79 age group, with growth accelerating in 2006 and again in 2011, resulting in an overall increase of almost 50% (Figure 3). The 80+ age group has also seen substantial growth, increasing by 38% over the historical period. The size of the working age population (15–64) has increased by 10%, whilst the population aged 0–4 has decreased by 2%. The population ageing seen in the Vale of Glamorgan is an inevitable feature of population change across the UK, as the larger birth cohorts of the post-war period move into the older age groups.

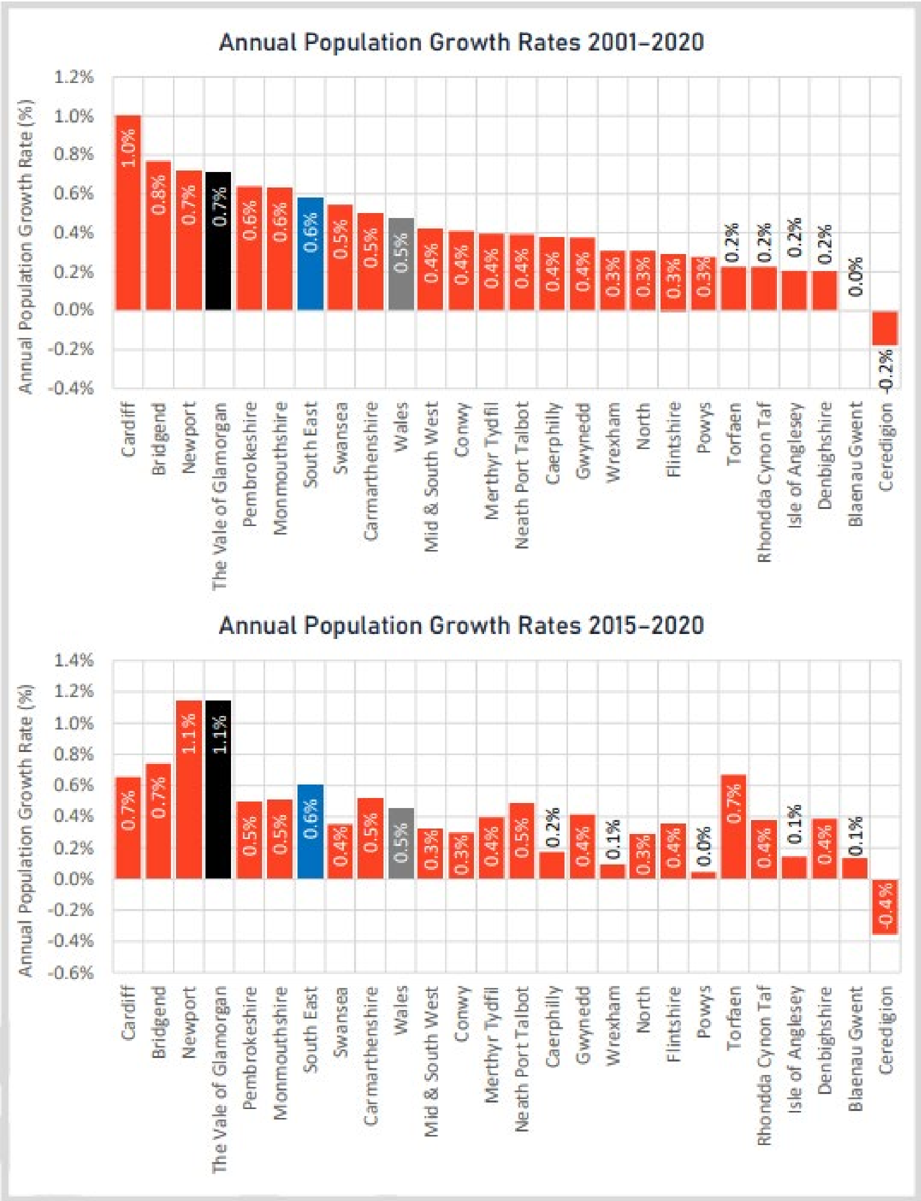


Figure 2: Annual population growth rate comparison, 2001–2020 & 2015–2020

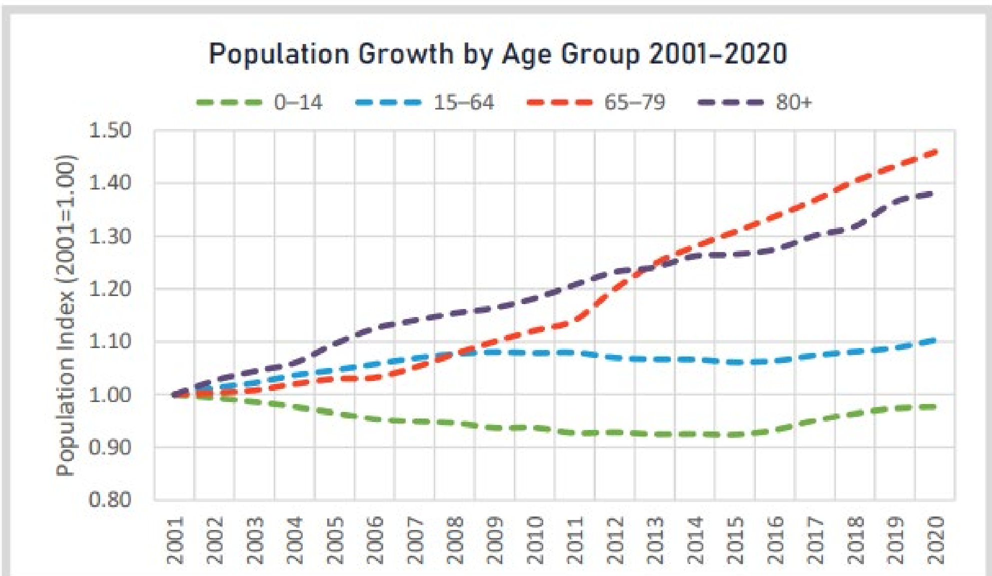


Figure 3: Vale of Glamorgan - Population growth index by age group, 2001–2020

3.7 Throughout the historical period, natural change has had minimal impact upon population change within the Vale of Glamorgan, with the difference between births and deaths remaining relatively small. However, in the latest three years of data, deaths have exceeded births, resulting in negative natural change. Over the 2001–2020 period, the number of births averaged 1,337 per year and deaths averaged 1,259 per year.

3.8 From 2001/02, the number of births in the Vale of Glamorgan gradually increased, peaking at 1,517 in 2009/10 (Figure 4). Since then, birth numbers have steadily reduced again, with 2019/20 seeing the lowest number of births since 2001/02.

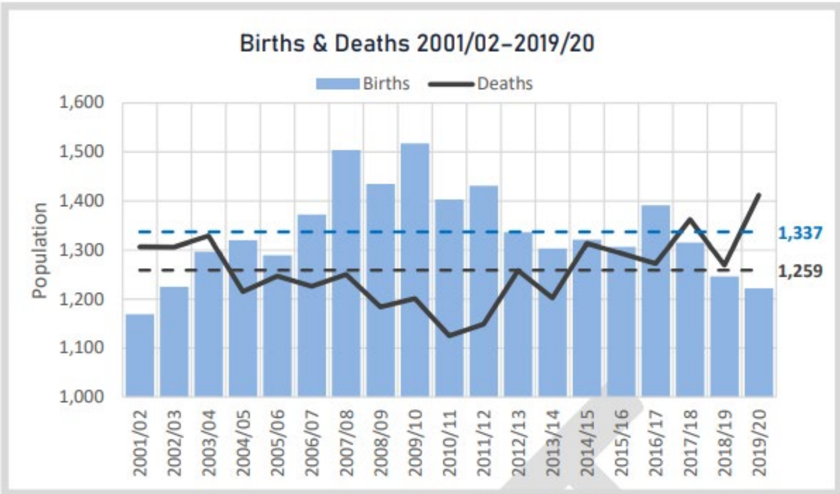


Figure 4: Vale of Glamorgan - Births & Deaths, 2001/02–2019/20 (ONS)

3.9 The number of deaths steadily declined from 2003/04, with the lowest number of deaths recorded in 2010/11 at 1,125. Since then, the number of deaths has fluctuated, but has generally shown an upward trend, with numbers remaining above the 20-year average since 2014/15. In 2019/20, there was a recorded uptick in the number of deaths, reflecting the impact of the first wave of the COVID19 pandemic; the leading cause of death in England and Wales in 2020.

Household Change

3.10 The number of recorded households in the Vale has steadily increased over time. In 2020, the number of recorded households in the Vale of Glamorgan was 58,879, this compares to 44,439 recorded in 1991. The largest increase in household growth has occurred since 2015 where the number of households increased from 54,977 to 58,879 households (Figure 5).

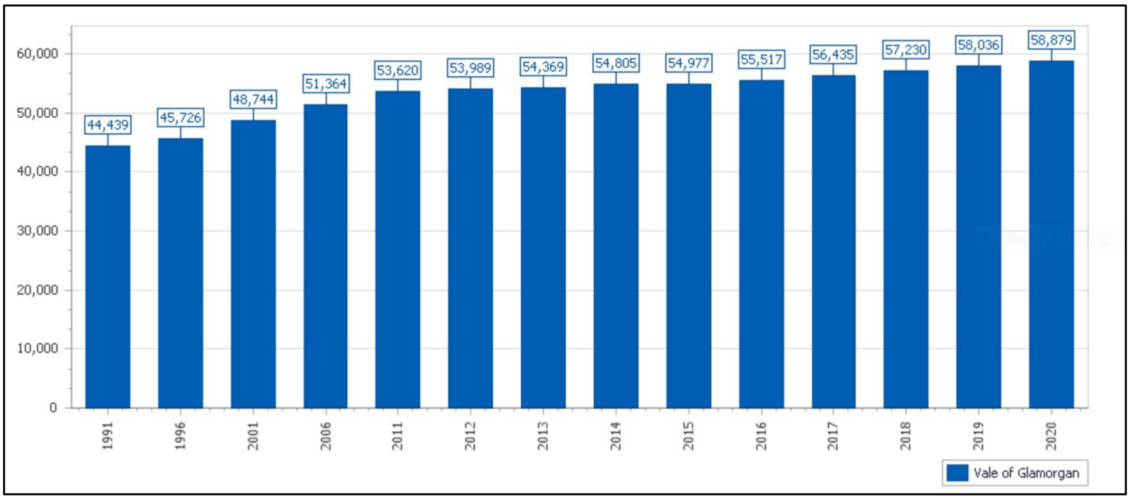


Figure 5: Vale of Glamorgan Recorded Households 1991:2020 (Source Stats Wales)

3.11 One key reason for this increase has been the steady decrease in the average household size in the Vale of Glamorgan, from 2.57 persons in 1991 to 2.26 persons per household in 2020 (Figure 6).

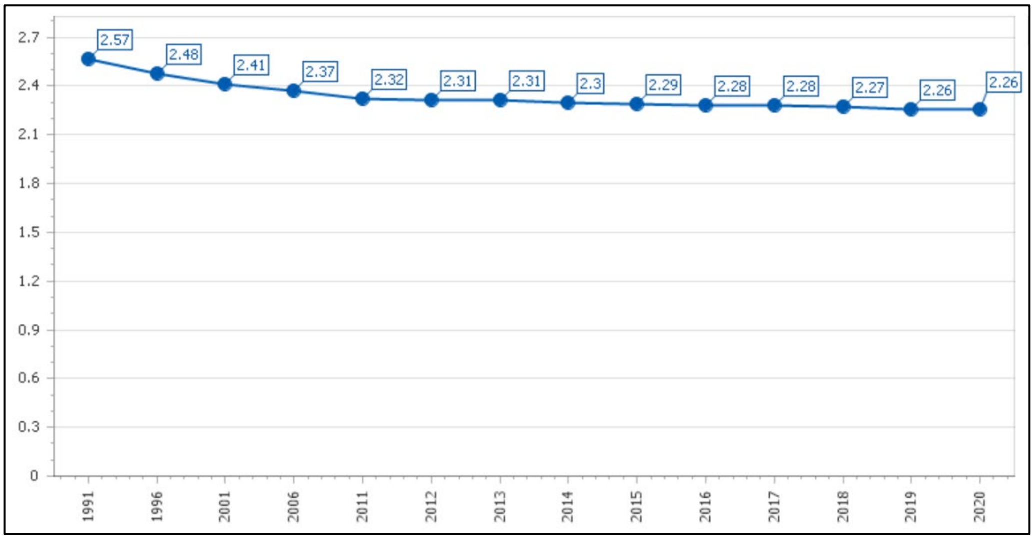


Figure 6: Vale of Glamorgan Average household size (persons) 1991-2020 (StatsWales)[2]

Internal Migration

3.12 A further contributing factor to the increase in the Vale's population and changes in the demographic profile is inward migration. Since 2001 there has been a net inflow into the Vale across all age groups except for the 15–19-year old population, where there has been a large outflow associated with young people leaving the area to study elsewhere in the UK (Figure 7).

[2] https://statswales.gov.wales/Catalogue/Housing/Households/Estimates/averagehouseholdsize-by-localauthority-year

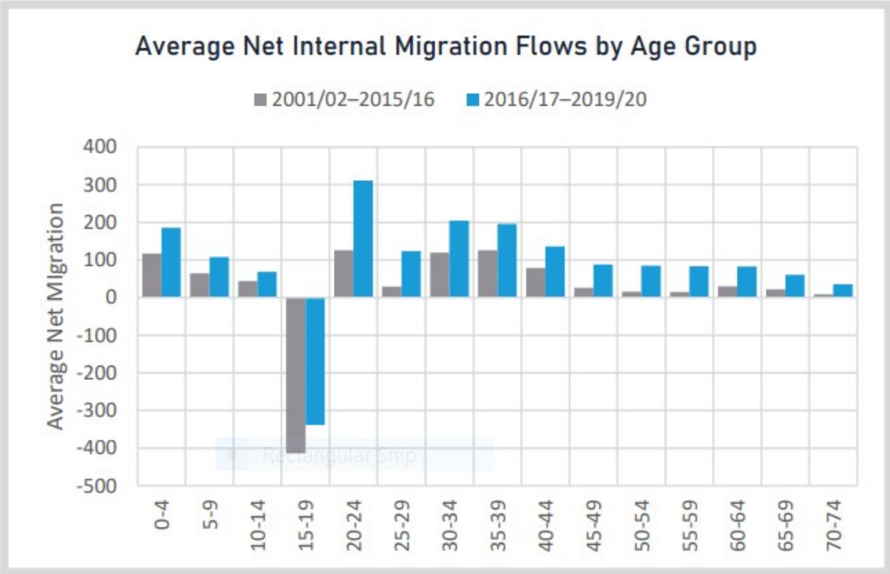


Figure 7: Vale of Glamorgan – Average net internal migration flows by age group (ONS)

3.13 Figure 8 provides an illustration of annual net migration between the Vale of Glamorgan and its neighbouring authorities across the 2001/02–2019/20 historical period. The net flow of migrants with Rhondda Cynon Taf has fluctuated around zero, as the number of people moving into Rhondda Cynon Taf has matched the number of people moving out into the Vale of Glamorgan. Migration exchange with Bridgend has predominately been a net outflow (average 91 persons annually). Whilst there has consistently been a net inflow from Cardiff (average 717 persons annually), the inflow decreased gradually between 2002/02 and 2009/10, but has since returned to the levels seen in 2001/02.

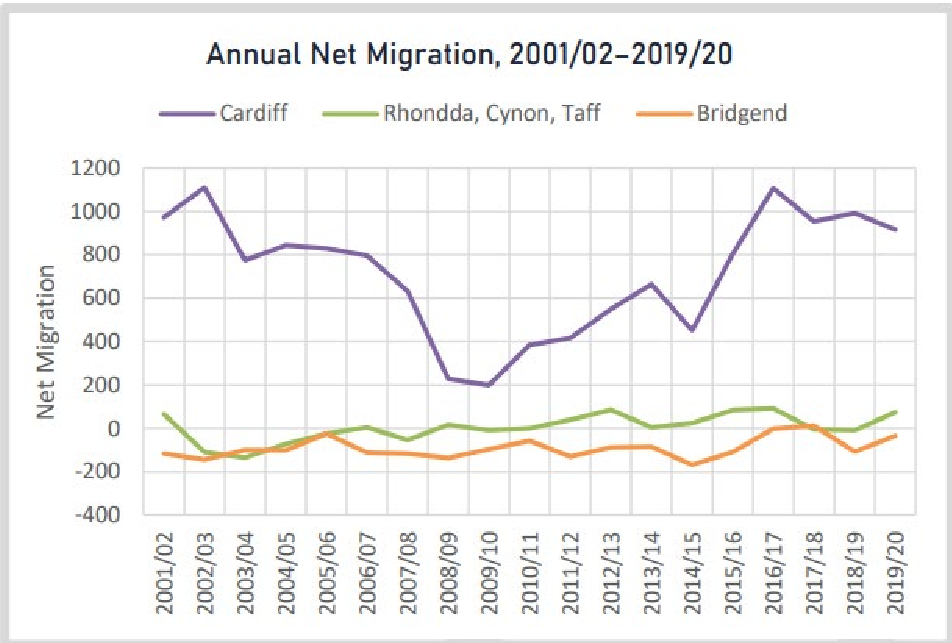


Figure 8: Annual Net Migration Flows in the Vale of Glamorgan (ONS)

3.14 The increase in internal migration to the Vale corresponded with an increase in new housing constructed in the Vale. Figure 9 below shows the annual dwelling completions within the Vale of Glamorgan for the period 2001-2021, illustrating how new housing completions have fluctuated over the past 20 years, primarily because of the 2008 economic recession, and the subsequent recovery in housebuilding since 2015.

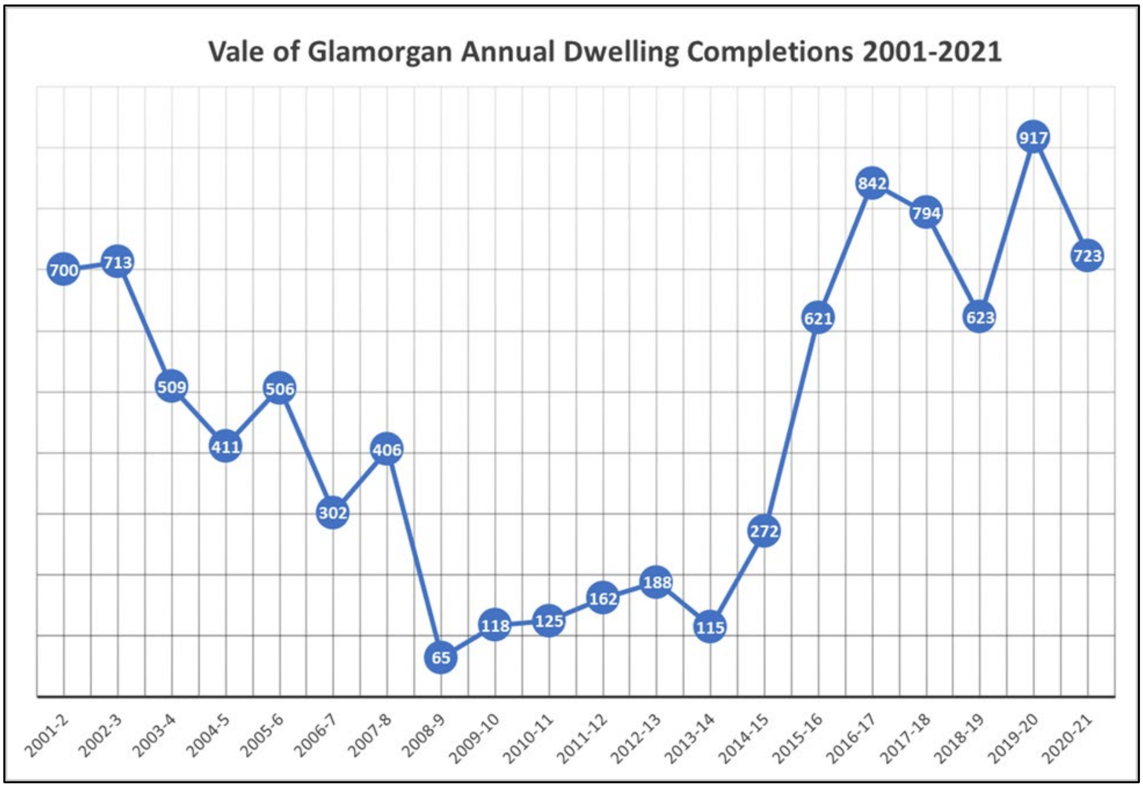


Figure 9 - Vale of Glamorgan Net Housing Completions (Vale of Glamorgan Council)

3.15 Figure 10 provides the 20, 15, 10 and 5-year annual average dwelling completions over this period. Since 2011/12, housing completions grew within the Vale by an average of 526 net dwellings per year, and between the years 2015/16 to 2019/20 the Vale saw an acceleration in new housing to an average of 780 dwellings per year. This latter period corresponded with the high net inflow of migrants presented in Figure 8, suggesting people moved into the Vale of Glamorgan due to the increased availability of new houses.

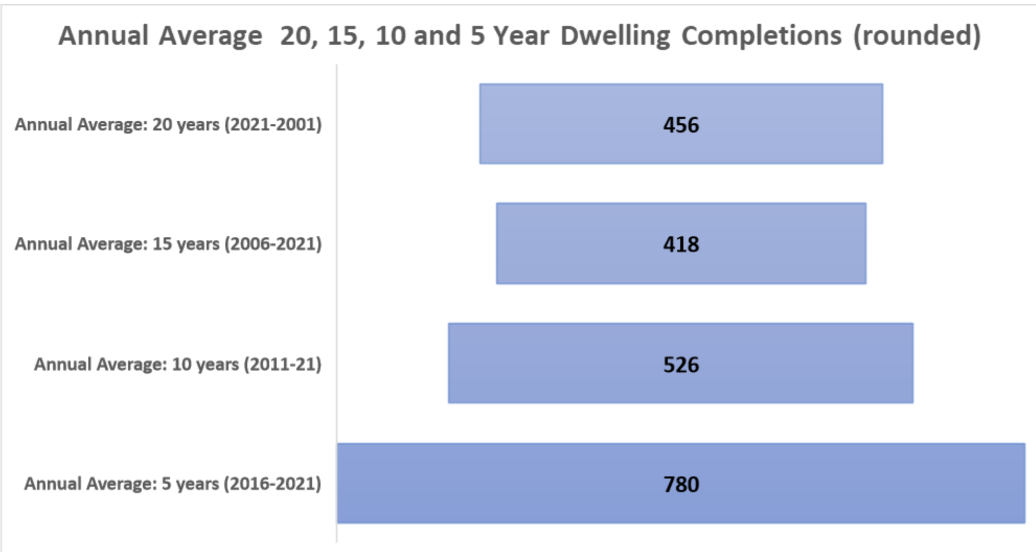


Figure 10 - Annual Average Dwelling Completions (Vale of Glamorgan Council)

International Migration

3.16 The level of net international migration in the Vale of Glamorgan has fluctuated throughout the historical period, but has been consistently positive since 2012/13, as immigration exceeded emigration (Figure 11). The latest three years of data 2017-2020 have shown the highest levels of net international migration seen throughout the 20-year period.

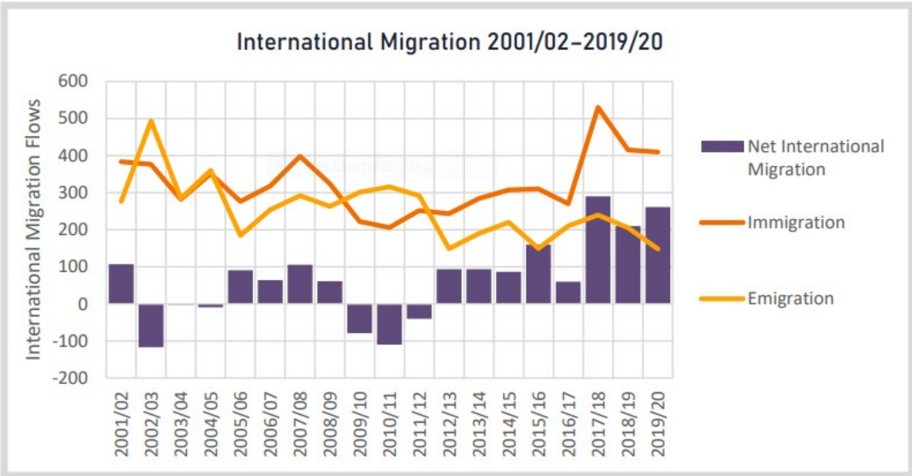


Figure 11: Vale of Glamorgan - International migration profile, 2001/02–2019/20

3.17 The Department for Work and Pensions NINo statistics provides an illustration of the international migration inflow to the Vale of Glamorgan. These statistics are different to the ONS migration estimates in that they refer only to work-based in-migration and include migrants whose stay may be shorter than 12 months. In the Vale of Glamorgan, NINo registrations peaked in 2007, with a smaller peak in 2017 (Figure 12). Since 2004, registrations have been primarily associated with workers from EU counties (EU13 and Other EU), with the 2017 peak associated with an influx of workers from Romania. Registrations saw a sharp decline in 2020, most likely a result of Brexit and the COVID-19 pandemic.

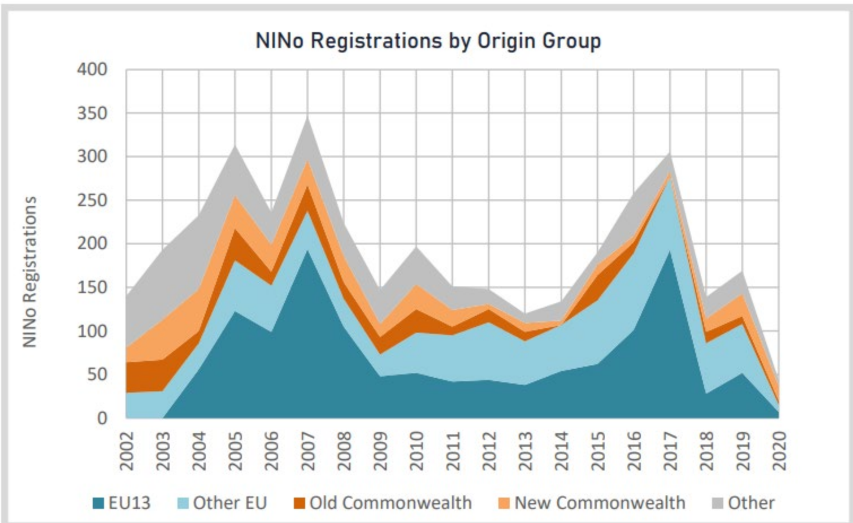


Figure 12: Vale of Glamorgan - NINo registrations by country-of-origin category, 2002–2020[3] Source: DWP.

[3] EU13 refers to countries who have joined the EU since 2004: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia.

Economy

3.18 The following section provides a profile of the Vale of Glamorgan's labour force, presenting rates of economic activity, together with a historical profile of unemployment and commuting patterns. The economic forecast from Oxford Economics for the Vale of Glamorgan is then presented, followed by the employment capacity derived from the Employment Land Requirement, identified by BE Group in the Vale of Glamorgan Employment Land Study. Assumptions on economic activity, unemployment, and commuting, along with the employment outcomes from the Oxford Economics forecast and the Employment Land Requirement, are used as key assumptions in the development of the growth scenarios.

Labour Force & Economic Activity

3.19 Economic activity rates are the proportion of population that is actively involved in the labour force, either employed or unemployed looking for work. At the 2011 Census, there were an estimated 63,384 people classified as 'economically active' in the Vale of Glamorgan, equivalent to 69% of the usual resident population aged 16–74 (Table 3). This is higher than the economic activity rate for Wales and South East Wales (both 66%).

Table 3: 2011 Census aggregate economic activity rates (Source: 2011 Census)

	Vale of Glamorgan	South East Wales	Wales
Usually resident population (age 16–74)	91,816	1,090,427	2,245,166
Economically active population	63,384	718,329	1,476,735
Economically active population (%)	69%	66%	66%

3.20 Figure 13 illustrates the economic activity rates by five-year age group (16–89), comparing profiles from the 2001 and 2011 Censuses, for males and females. This shows that economic activity in the Vale has been greater amongst males than females across all age groups, although female rates of activity increased between 2001 and 2011 across all age groups, except for the 16–19 age group, whilst males only saw substantial increases in the 50+ age groups, with the rates for other age groups showing very small increases or declining. The decline of the economic activity rate of the 16–19 age group is likely a reflection of a greater proportion of this age group staying in education/training beyond the age of 16.

3.21 Utilising the Office for Budget Responsibility's (OBR) analysis of labour market trends (2018), Figure 13 also provides an indication of potential changes in the long-term economic activity rates for the Vale over the plan period. This suggest that economic activity rates will increase in all but the youngest age group for females, and in the 55+ age groups for males.

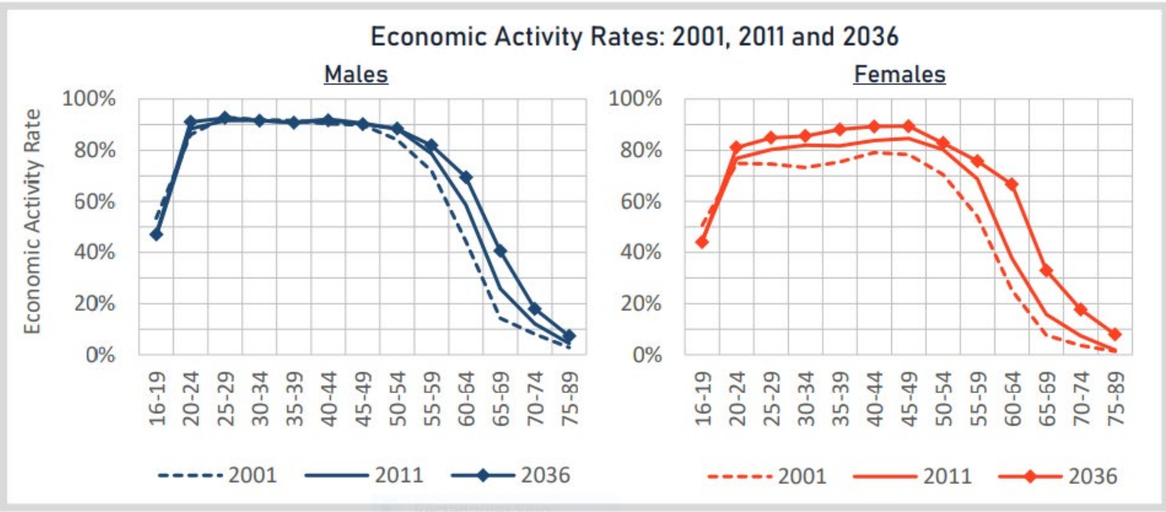


Figure 13: Vale of Glamorgan - Economic activity rates by sex and age (16–89), 2001, 2011 & 2036 Source: ONS, OBR

Commuting Patterns

3.22 According to the 2011 Census, the number of resident workers in the Vale of Glamorgan was approximately 59,274, with the number of people employed in the area at 45,864, resulting in a commuting ratio of 1.29, indicating a net out-commute. Data on travel to work has also been recorded as part of the 2021 Census.

3.23 Figure 14 presents the top 5 commuting inflows and outflows for the Vale of Glamorgan from the 2011 Census, highlighting the connectivity with its neighbouring authorities. The largest flow of commuters in the 2011 Census was from the Vale of Glamorgan to Cardiff (17,773), over 3 times the flows of commuters from Cardiff into the Vale of Glamorgan (5,576). The Vale of Glamorgan was a net exporter of workers to Cardiff (-12,197), Newport (-185) and Bridgend (-70) but a net importer of workers from Rhondda Cynon Taf (409) and Caerphilly (35).

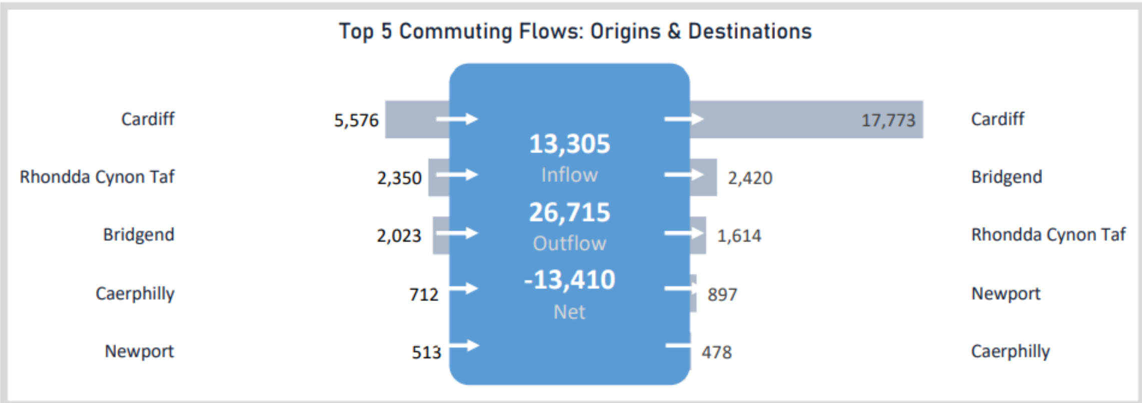


Figure 14: Vale of Glamorgan - 2011 Census commuting flows: Top 5 inflows and outflows Source: 2011 Census

3.24 The difference between the level of employment in an area and the size of the resident workforce (i.e., residents in employment) can be used to infer a ‘commuting ratio’. A ratio higher than 1.00 indicates net out-commuting (the number of resident workers exceeds the level of employment in the area). A commuting ratio lower than 1.00 indicates the reverse: net in-commuting (the level of employment in the area exceeds the size of the resident workforce).

3.25 In terms of places of employment, 2021 data shows that 55.9 percent of the Vale of Glamorgan's resident population was also employed in the area. Whilst this is a relatively low rate of retention, it is comparable to that of other local authority areas which neighbour Cardiff, such as Caerphilly, Blaenau Gwent, and Torfaen. Table 4 shows that Cardiff and Newport were the main commuter destinations from in the region. The data is caveated that responses for work location relate to the respondent's usual working pattern if coronavirus restrictions were not in place. Therefore, data for 2020 and 2021 do not reflect actual commuting patterns observed during the pandemic.

Table 4: South East Wales Commuting Patterns by Welsh Local Authority 2021 (Source: Stats Wales)

Area	Out-Commuters	In-Commuters	Live and Work in Area	Percentage who Live and Work in area as a Percentage of the Total Employed, percent
Bridgend	16,300	16,000	48,900	75.1
Vale of Glamorgan	**26,800**	**8,100**	**34,000**	**55.9**
Cardiff	34,300	75,500	157,400	82.1
RCT	43,100	14,000	65,500	60.3
Caerphilly	36,100	17,800	44,200	55.0
Blaenau Gwent	14,100	6,000	16,500	54.1
Torfaen	18,000	17,600	21,300	54.2
Monmouthshire	17,100	14,300	27,100	61.2
Newport	27,400	34,100	42,000	60.4
Merthyr Tydfil	9,900	8,700	16,500	62.3

Economic Growth Forecast

3.26 As part of the Employment Land Study (ELS) prepared to support the RLDP, Oxford Economics were commissioned to prepare economic forecasts for the plan period. The forecasting model takes account of national and regional economic outlooks, historic area trends (such as supply and demand) and the economic relationship that interlink the various aspect of the economic outlook and are presented below.

3.27 It should be noted that this model is a 'policy off' scenario – i.e., it does not consider the impact of specific policies aimed at increasing job opportunities. These forecasts form part of the wider evidence base for employment, but the ELR considers a range of methods of forecasting as advocated in the Welsh Practice Guidance when determining the level of employment growth.

3.28 Oxford Economics forecast modelling for the Vale of Glamorgan (Figure 15) over the plan period 2021 - 2036 suggests that current trends in jobs change in the Vale shall continue over the plan period. This shows that the number of people employed in the Vale will increase by 463 jobs, a 0.96 percent increase, from 48,407 in 2021 to 48,870 in 2036.

3.29 Forecasting suggests the economy will grow gradually after the 2020/21 Covid-19 Pandemic with employment in the Vale increasing on average 0.47 percent/year until 2026. However, the number of jobs will only surpass pre-Pandemic levels of 49,433 (observed in 2019) in 2025 when the number of jobs will reach 49,436.

3.30 In 2027 the OE forecast suggest that the number of jobs will peak at 49,798, after which the economy will gradually shrink, losing 0.21 percent of the workforce annually. The modest increase in employment to 2036 will be focused on Health Services (687 extra jobs) and accommodation and Food Services sectors (428 extra jobs), with professional, scientific, and technical activities (373 extra jobs) and construction (143 extra jobs). This growth is offset by a projected loss of 996 jobs in the manufacturing sector, alongside 360 jobs in public administration and 173 jobs in transportation and storage (Figure 15).

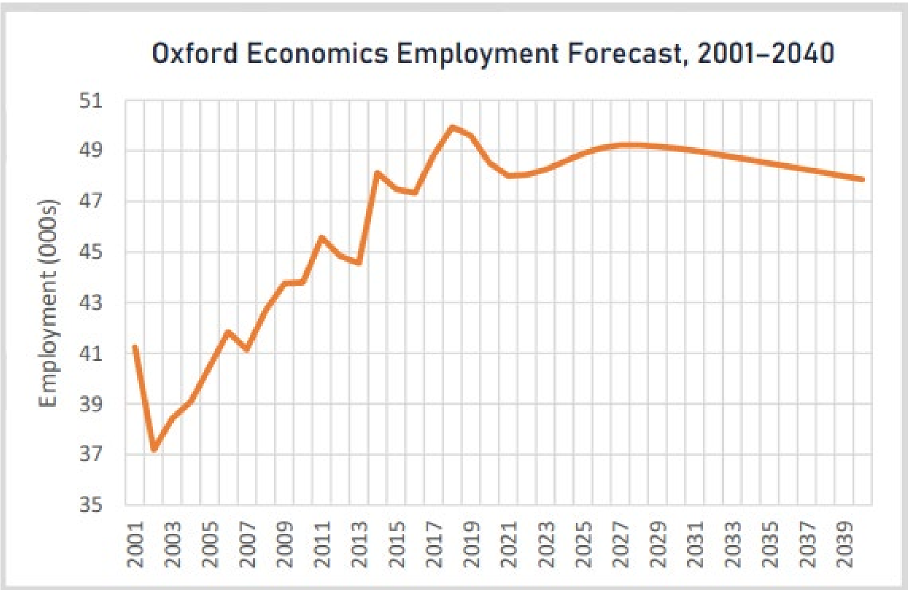


Figure 15: Oxford Economics people-based employment forecast, 2001–2040

4. Housing and Employment Growth Scenarios

4.1 This section presents the range of alternative demographic, dwelling and employment led growth scenarios that have been considered.

Welsh Government Household Projections

4.2 In considering housing growth options, Planning Policy Wales (Edition 11) states that local planning authorities should consider the latest Welsh Government (WG) local authority level Household Projections for Wales when preparing LDPs. In August 2020, the Welsh Government published 2018-based population and household projections, the first update since the 2014-based equivalents.

4.3 Accordingly, the latest WG projections provide the baseline for the Vale of Glamorgan LDP demographic evidence and have been considered alongside a range of alternative demographic trend based, housing-led and employment-led scenarios. These additional scenarios incorporate the latest Office for National Statistics (ONS) mid-year estimates which were published in June 2020.

4.4 Table 5 below provides headline summaries for each of the 12 scenarios in relation to population and household growth for the 2021–2036 plan period, alongside net migration, dwelling and jobs growth.

4.5 Under these 12 scenarios, population change for the 2021–2036 period ranges from 0.0% under the WG-2014 scenario, to 13.9% under the Dwelling-led 5Y scenario. This range of population growth equates to estimated dwelling growth outcomes between 151 and 698 dwellings per year and employment growth outcomes of between -126 and 493 jobs per year.

Linking Housing and Employment Growth

4.6 The Development Plans Manual (Edition 3) states that "*LPAs can choose to plan for a specific demographic, dwelling, job led strategy, or alternatively a hybrid approach may be appropriate. There may be commonalities between different scenarios in terms of the homes and jobs generated indicating more than one scenario, or a combination of several will deliver the LDP strategy. The evidence base should set out clearly why a growth level is preferred and demonstrate how it aligns with the evidence base and how it will deliver the key issues the plan is seeking to address, whilst minimising the need to commute*." This latter point is particularly relevant to the Vale given the levels of outward commuting highlighted above.

4.7 Accordingly, to ensure that housing and employment growth are considered collectively, 3 employment led scenarios have also been considered, one based upon the Oxford Economics Jobs forecasting utilised within the ELS, and two based upon the forecast jobs capacity arising from the employment land requirements for the Vale over the plan period.

4.8 For all 12 scenarios considered, Table 5 identifies the additional number of jobs arising from each, which have been converted into projected additional land using Welsh Government Guidance[4], thereby enabling the Council to compare jobs growth and land needs arising from each scenario with the recommended employment land and associated jobs growth in the ELS.

[4] Welsh Planning Practice Guidance Note 'Building an Economic Development Evidence Base to Support a Local Development Plan' (August 2015)
https://gov.wales/sites/default/files/publications/2018-09/economic-development-evidence-base.pdf

Table 5: Selected Growth Scenarios (Vale of Glamorgan Demographic Evidence, Edge Analytics October 2022)											
Option	**Scenario**	**Population and Household Change 2021-2036**					**Dwelling Requirement**		**Employment Growth**		
		Population Change	**Population Change %**	**Household Change**	**Household Change %**	**Average Net Migration per annum**	**Dwellings per annum**	**Additional Dwellings 2021-2036**	**Jobs per annum**	**Additional Jobs 2021-2036**	**Employment Land Requirement**
Welsh Government 2014 Projections	Replicates the WG 2014-based *Principal* population projection, using historical population evidence for 2001–2014	**13**	**0.0%**	**2,182**	**3.9%**	**64**	**151**	**2,265**	**-126**	**-1,890**	**-5.16 ha**
Welsh Government 2018 Projections	Replicates the WG 2018-based *Principal* population projection, using historical population evidence for 2001–2018.	**9,787**	**7.3%**	**6,214**	**10.6%**	**851**	**431**	**6,465**	**243**	**3,645**	**9.96 ha**
Welsh Government 2018 Projections HIGHPOP	Replicates the WG 2018-based *High* population projection, using historical population evidence for 2001–2018, incorporating high fertility, mortality, and migration assumptions.	**13,127**	**9.7%**	**7,500**	**12.7%**	**938**	**520**	**7,800**	**292**	**4,380**	**11.97 ha**
Welsh Government 2018 Projections LOWPOP	Replicates the WG 2018-based *Low* population projection, using historical population evidence for 2001–2018, incorporating low fertility, mortality, and migration assumptions.	**5,172**	**3.8%**	**4,559**	**7.8%**	**759**	**316**	**4,740**	**191**	**2,865**	**7.82 ha**

Table 5 (cont.): Selected Growth Scenarios (Vale of Glamorgan Demographic Evidence, Edge Analytics October 2022)

Option	Scenario	Population and Household Change 2021-2036					Dwelling Requirement		Employment Growth		
		Population Change	Population Change %	Household Change	Household Change %	Average Net Migration per annum	Dwellings per annum	Additional Dwellings 2021-2036	Jobs per annum	Additional Jobs 2021-2036	Employment Land Requirement
PG-Y5	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 5-year historical period (2015/16–2019/20).	**16,923**	**12.4%**	**9,187**	**15.4%**	**1,222**	**637**	**9,555**	**426**	**6,390**	**17.45 ha***
PG-Y10	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 10- year historical period (2010/11–2019/20)	**8,519**	**6.3%**	**5,695**	**9.6%**	**741**	**395**	**5,925**	**197**	**2,955**	**8.07 ha***
PG-Long Term	Uses an ONS 2020 MYE base year and calibrates its migration assumptions from a 19-year historical period (2001/02–2019/20).	**8,561**	**6.3%**	**5,705**	**9.6%**	**739**	**396**	**5,940**	**210**	**3,150**	**8.60 ha***
Dwelling-led 5Y	Models the population impact of an average annual dwelling growth of +698 dwellings per annum (dpa), based on a 5-year history of housing completions in the Vale of Glamorgan (2017/18–2021/22).	**19,048**	**13.9%**	**10,062**	**16.9%**	**1,360**	**698**	**10,470**	**493**	**7,395**	**20.20 ha***

Table 5 (cont.): Selected Growth Scenarios (Vale of Glamorgan Demographic Evidence, Edge Analytics October 2022)

Option	Scenario	Population and Household Change 2021-2036	Dwelling Requirement	Employment Growth

		Population Change	Population Change %	Household Change	Household Change %	Average Net Migration per annum	Dwellings per annum	Additional Dwellings 2021-2036	Jobs per annum	Additional Jobs 2021-2036	Employment Land Requirement
Dwelling-led 10Y	Models the population impact of an average annual dwelling growth of +526 dwellings per annum (dpa), based on a 10-year history of housing completions in the Vale of Glamorgan (2011/12–2020/21).	**13,154**	**9.7%**	**7,587**	**12.8%**	**1,009**	**526**	**7,890**	**325**	**4,875**	**13.32 ha. ***
Employment-led OE	Models the population growth impact of an average employment growth of +25 per year for the Vale of Glamorgan, as implied by the Oxford Economics forecast.	**2,402**	**1.8%**	**3,041**	**5.2%**	**367**	**211**	**3,165**	**25**	**375**	**1.03 ha. ***
Employment-led ELR 1 **	Models the population impact of an average annual employment growth of +341 per year for the Vale of Glamorgan, as implied by the land requirement from the employment land review.	**13,224**	**9.8%**	**7,599**	**12.9%**	**1,020**	**527**	**7,905**	**341****	**5,338***	**67.80 Ha***

Table 5 (cont.): Selected Growth Scenarios (Vale of Glamorgan Demographic Evidence, Edge Analytics October 2022)

Scenario	Population and Household Change 2021-2036	Dwelling Requirement	Employment Growth

		Population Change	Population Change %	Household Change	Household Change %	Average Net Migration per annum	Dwellings per annum	Additional Dwellings 2021-2036	Jobs per annum	Additional Jobs 2021-2036	Employment Land Requirement
Employment-led ELR 1 (CR 1-1) **	Models the population impact of an average annual employment growth of +341 per year for the Vale of Glamorgan, as implied by the land requirement from the employment land review, including commuting ratio adjustments based on the assumption that for all future employment growth there is a 1:1 ratio with the increase in labour force.	**10,719**	**7.9%**	**6,548**	**11.1%**	**869**	**454**	**6,810**	**341****	**5,338***	**67.80 Ha***

* Modelled on the potential job capacity that could be supported by the employment land supply requirement of 67.80 ha over the plan period identified in the Employment Land Study 2022) **An adjustment has been made to the annual employment figure to account for ‘double jobbing’ (i.e., people who may have more than one job), to reduce the initial figures by 4.4%. This double jobbing adjustment is based on the proportion of people with second jobs as recorded in the Annual population Survey (APS), averaged over the 2017–2021 period. Therefore, the number of additional annual jobs is lower than the job capacity of 5,338 jobs identified in the employment land review.

Growth Scenarios

4.9 The population growth trajectories for the Vale of Glamorgan are presented in Figure 16, showing actual population change up to 2020, then forecast change under each scenario thereafter.

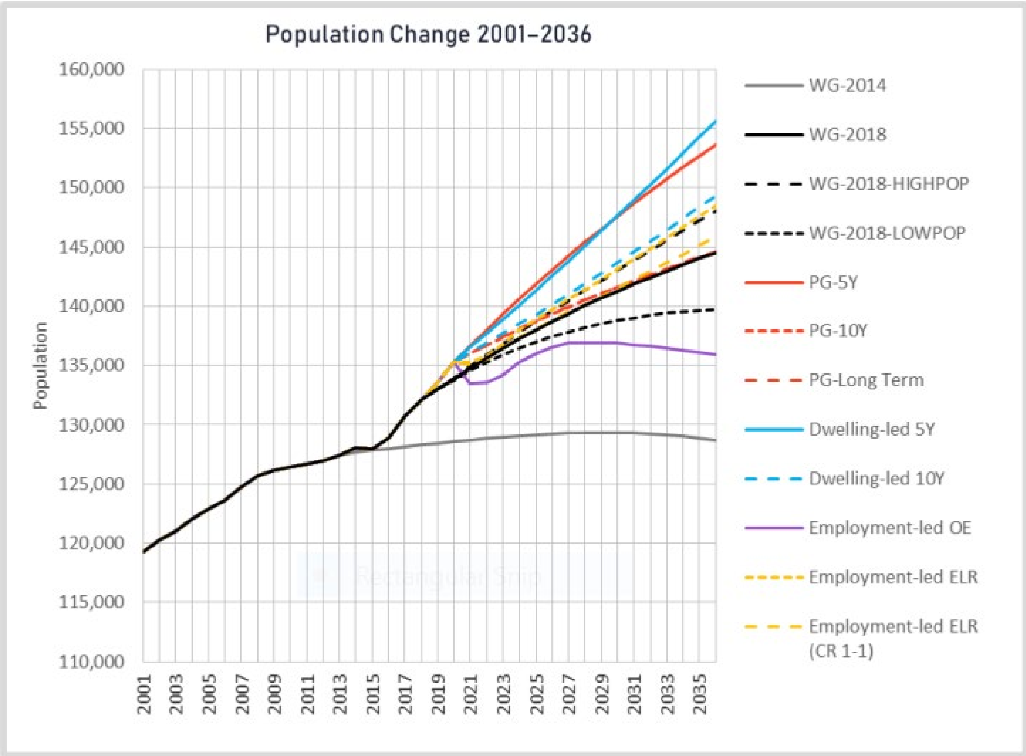


Figure 16: Vale of Glamorgan - Growth scenarios, 2001–2036 (Edge Analytics)

4.10 The following section provides a comparison between each of the 12 population, demographics, and employment outcomes.

4.11 To assist in comparing the broad range of outcomes presented by the 11 scenarios, and help determine the housing requirements of the RLDP, the scenarios have been grouped into sets of Low, Mid and High Growth Options. Within each, a summary of the population and demographic change as well as the associated dwelling and employment growth is provided. Section 5 provides analysis of the scenarios in terms of their outcomes and identifies the Council's preferred growth options and justification.

Low Growth Scenarios

4.12 The following 5 scenarios are considered low growth options due to the rate of population and household change and the resulting dwelling, and employment requirements within each when compared with the Council's housing land bank (section 6) and the projected employment growth arising from the recommendation within the ELS.

Table 6: Low Growth Scenarios

Scenario	Total Dwellings 2021-2036	Annual Dwellings	Additional Employment Growth 2021-36	Annual Employment Growth
1. WG-2014	2,265	151	-1,890	-126
2. OE Employment	3,165	211	375	25
3. WG LOW POP	4,740	316	2,865	191
4. PG-10Y	5,925	395	2,955	197
5. PG Long Term	5,940	396	3,150	210

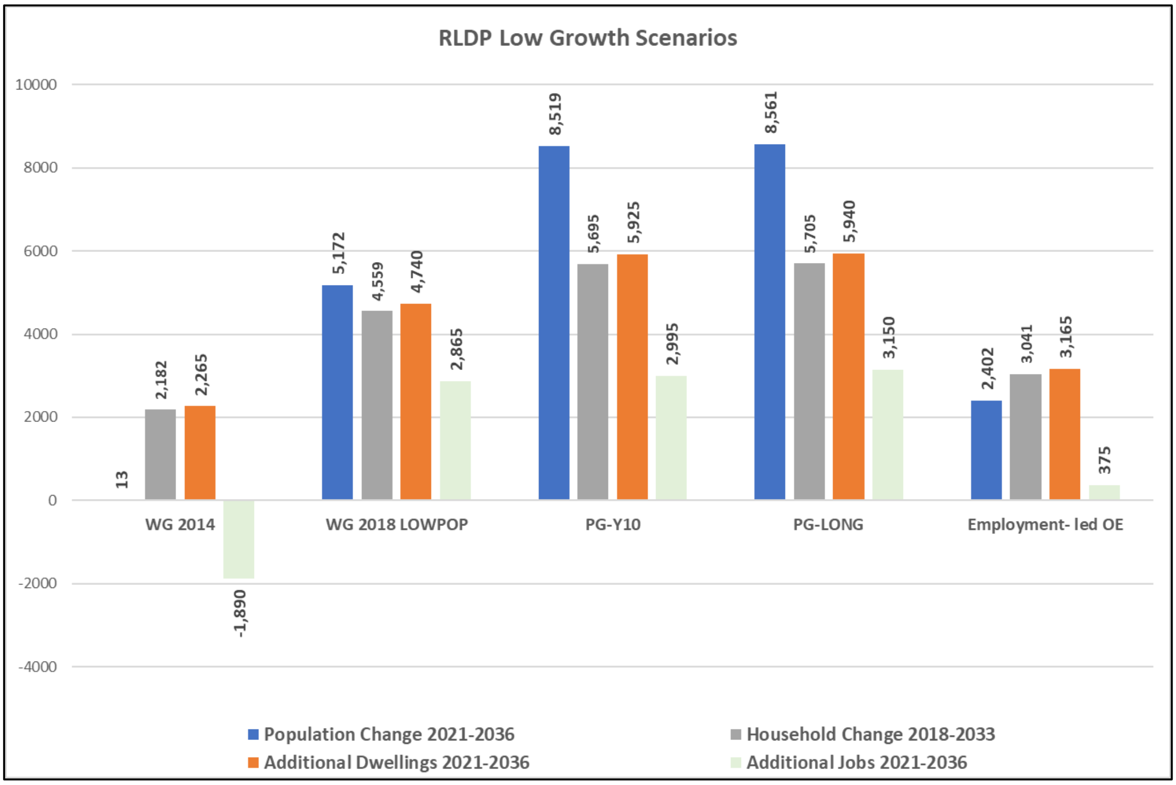


Figure 17. Population and Household Change and Associate Dwelling and Job Growth (Low)

Scenario 1: Welsh Government - 2014 based projection (WG-2014)

4.13 The Welsh Government 2014-based projection (WG-2014**)** projects that the total population of the Vale of Glamorgan over the plan period will remain largely static (an increase of only 13 people in 15 years). Whilst the population itself is not projected to grow, household sizes are projected to continue to decline, which means that new households will continue to form and these households will require dwellings. This scenario would generate an annual dwelling requirement of **2,265 dwellings** for the plan period 2021-2036 or **151 dwellings** per annum. Within this scenario there would be a 3.9% growth in total households, largely derived from new household formations with trends indicating that in most age groups there will be an increase in smaller person households.

4.14 Figure 18 shows the change in the population by age group between 2021 and 2036. This is characterised by growth in 65+ age groups, with particularly high growth in the 85+ age group and small growth in the 15–19-year age group. This is countered by a decline across all other age groups and therefore would have consequences for economic growth and employment due to a decline in the working age population. This is illustrated by the forecast decline by -1,869 jobs by 2036.

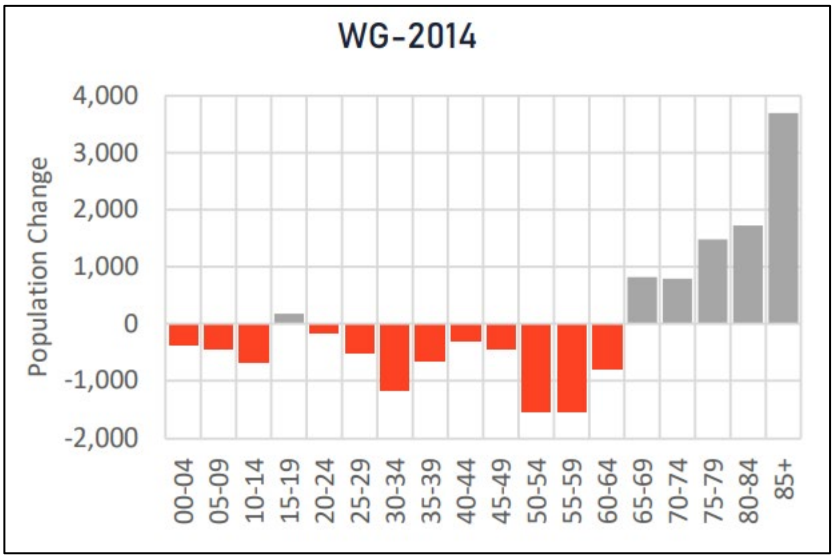


Figure 18 Source: WG-2014 Demographic Profile (ONS, Edge Analytics POPGROUP modelling)

4.15 The forecast within this scenario indicates that there would be a significant decline in both the school age population and the working age population, and an increase in the older population. The large proportion of over 65s would have an impact in the demand for key services in the Vale such as health and social care, with delivery of such services constrained by a decline in the working age population alongside the increased demand for older person accommodation. This would also likely lead to increased demand for smaller properties as the trends indicate that in most age groups there will be an increase in smaller person households, meaning that even a declining population will need more housing to support the existing residents. Conversely, the decline in school age groups could have a negative effect on the sustainability of existing schools.

4.16 The projected change in household formation and type would mean that this scenario would generate a small housing requirement of 2,265 dwellings (151 dwellings per annum), aligned with a decline in employment by 1,869 jobs. The number of dwellings required would be significantly lower than past housing completion rates (an average of 526 dwellings per annum over the last 10 years) and would limit the ability of the RLDP to address the backlog and future levels of affordable housing need within the Vale. The decline in numbers employed would have a negative impact on the ability of the Vale to deliver the potential jobs identified in the Council's ELS. Accordingly, it is considered that the social and economic implications of this scenario would not be desirable to plan for.

Scenario 2: Oxford Econometrics Employment Led

4.17 As part of the Employment Land Study (ELS) prepared to support the RLDP, Oxford Economics were commissioned to prepare economic forecasts for the plan period. The forecasting model takes account of national and regional economic outlooks, historic area trends (such as supply and demand) and the economic relationship that interlink the various aspect of the economic outlook.

4.18 It should be noted that this model is a 'policy off' scenario – i.e. it does not take into account the impact of specific policies aimed at increasing job opportunities. These forecasts form part of the wider evidence base for employment, but the ELR considers a range of methods of forecasting as advocated in the Welsh Practice Guidance when determining the level of employment growth.

4.19 Utilising the above, the Oxford Economics scenario presents the second lowest low growth outcome for the Vale of Glamorgan, resulting in population growth of just 1.8%, and household formation of 5.2%. This would require dwelling growth of **211 dwellings annually** and a dwelling requirement of **3,165 dwellings** for the plan period 2021-2036. The resulting employment growth under this scenario would be 375 **additional jobs**.

4.20 Under this scenario, the population age structure of the Vale would see a decline across most of the working age population, apart from the 40–49-year age group. The most significant population growth would be amongst those aged 65+ (Figure 19)

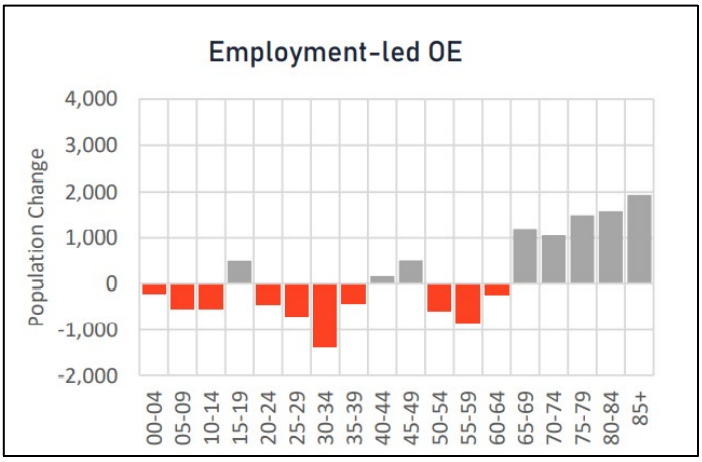


Figure 19: Employment Led Demographic Profile Source: ONS, Edge Analytics POPGROUP modelling

4.21 The forecast within this scenario indicates that there would be a significant decline in both the school age population and the working age population, and an increase in the older population. The large proportion of over 65s would have an impact on the demand for key services in the Vale such as health and social care, with delivery of such services constrained by a decline in the working age population alongside the increased demand for older person accommodation. This would also likely lead to increased demand for smaller properties as the trends indicate that in most age groups there will be an increase in smaller person households, meaning that even a declining population will need more housing to support the existing residents. Conversely, the decline in school age groups could have a negative effect on the sustainability of existing schools.

4.22 The projected change in household formation and types means that this scenario would generate a small housing requirement of 2,265 dwellings (211 dwellings per annum), with an increase in only 25 jobs per annum. The number of dwellings required would be significantly lower than past housing completion rates (an average of 526 dwellings per annum over the last 10 years) and also would limit ability for the RLDP to address the backlog and future levels of affordable housing need within the Vale. Accordingly, whilst this scenario would result in higher growth than the WG 2014 based projections scenario, the implications of this scenario in terms of social and economic outcomes would still not be desirable to plan for.

Scenario 3: WG 2018-based LOWPOP

4.23 The WG 2018-based LOWPOP (Figure 16) utilises historical population evidence (2001-2018) and incorporates lower fertility, mortality, and migration assumptions than assumed in the WG 2018 projections. Under this scenario, growth in the Vale's population would increase by 3.8%. The low fertility rates assumed would result in a decline in the number of people in the 0–14-year groups as a result of fewer projected births than the WG-2018 projections indicate (Figure 20). This scenario would also see a decline across all working age groups apart from the 40–49-year age group. The most significant growth would be in the population aged 65+, although there are fewer people projected in this age group compared to the 2018 WG projections, because of lower life expectancy within the scenario.

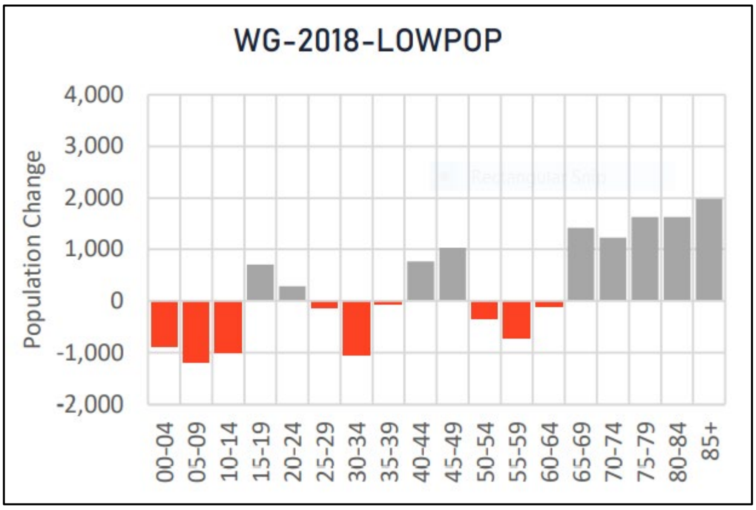


Figure 20: WG-2018-LOWPOP Demographic Profile Source: ONS, Edge Analytics POPGROUP modelling

4.24 Household projections indicate that the number of households would increase by 4,559 and would result in an annual dwelling requirement of **316 dwellings, or 4,740** dwellings for the plan period 2021-2036. The decline in working age population would mean a low employment growth of **2,865 additional jobs.**

4.25 The Low Population Variant scenario identifies that the population grow at a rate of 3.8% by 2036, due to lower births, lower life expectancy and lower rates of migration. This will result in a significant decline across much of the school age population and the working age population, and an increase in the older population, coinciding with low employment forecast of 2,865 additional jobs by 2036.

4.26 The projected change in household formation and types means that this scenario would generate a housing requirement which is lower than past completions rates (316 dwellings compared to a 10-year average past build rate of 526 dwellings). This scenario would result in similar social and economic impacts associated with a decline in the number of working age people and an increasing ageing population.

Scenario 4: PG-10Y

4.27 The PG-10Y scenario calibrates the migration assumptions for a 10-year period (2010-2020) with the 2020 Mid-Year Estimate and assumes that migration will reflect trends for the last 10 years.

4.28 This scenario estimates an annual dwelling requirement of **395 dwellings, or 5,925 dwellings** for the plan period 2021-2026. The resulting employment growth under this scenario would be 2,995 additional jobs.

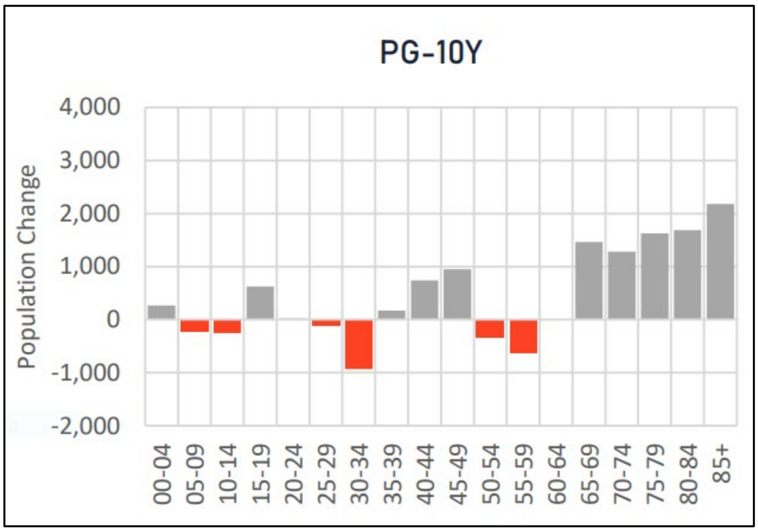


Figure 21. PG-10Y Term Demographic Profile Source: ONS, Edge Analytics POPGROUP modelling

4.29 Under this scenario, the Vale would see population growth of 8,519 (6.3%) people, which would correspond with continued growth in the 65+ age group, with particularly high growth in 85+population, whilst the working age population is predicted to decline in all but the 35-49 age groups. There would also be a decline in children aged 5-14 (Figure 21). This scenario projects an older demographic profile for the Vale, that coincides with lower rate of employment growth over the plan period.

Scenario 5: PG- Long Term

4.30 The PG- Long Term scenario utilises migration assumption from a 19-year period (2001/02-2019/20) with a 2020 Mid-Year Estimate and assumes that migration will reflect the long-term trends for the last 19 years – from the 2001 Census onwards.

4.31 This scenario estimates household change of +9.6% and an annual dwelling requirement of **396 dwellings, or 5,940 dwellings** for the plan period 2021-2026. The resulting employment growth under this scenario would be 3,150 additional jobs. This scenario provides similar results to the PG-10Y scenario, as past migration figures over 10 years and 19 years have been broadly similar.

4.32 Under this scenario, the Vale would see population growth of 8,561 (6.3%) people, which would correspond continued growth in the 65+age group, particularly high growth in 85+population, whilst the working age population is predicted to decline in all but the 35-49 age groups. There would also be a decline in children aged 5-14 (Figure 22). This scenario projects an older demographic profile for the Vale, that coincides with lower rate of employment growth over the plan period.

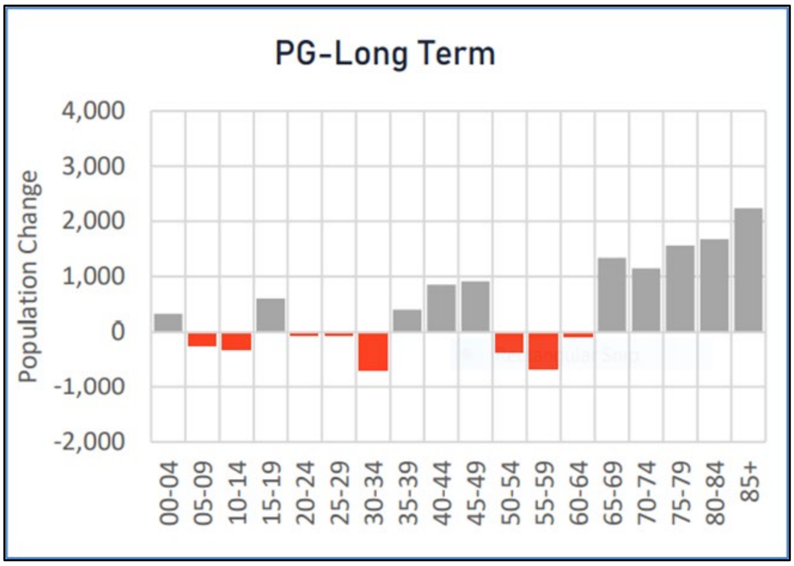


Figure 22. PG-Long Term Demographic Profile Source: ONS, Edge Analytics POPGROUP modelling

4.33 The Long-Term Average Migration (19 Years) scenario identifies that the Vale of Glamorgan would experience population growth, and an older population demographic, and a decline in both the school age population and much of the working age population. As was the case with other similar scenarios, this is not a sustainable population structure. The projected change in household formation and types means that this scenario would generate a small housing requirement that is significantly lower than past housing completion rates (396 per annum compared to a 10-year average past build rate of 526). When compared to the existing land supply, this level of growth could primarily be accommodated by existing housing commitments but would limit the plan’s ability to support the provision of affordable housing to meet the identified need.

Medium Growth Scenarios

4.34 The following 5 scenarios are considered to present medium growth options requiring between 6,345 to 8,295 dwellings and jobs growth ranging from 3,645 to 4,875.

Table 7: Medium Growth Scenarios

Scenario	Total Dwellings 2021-2036	Annual Dwellings	Additional Employment Growth 2021-36	Annual Employment Growth
6. Employment Led ELR1 (CR1-1)	6,810	454	5,112	341
7. WG-2018	6,465	431	3,645	243
8. Employment Led ELR1	7,905	527	5,112	341
9. WG 2018 HIGH POP	7,800	520	4,380	292
10. Dwelling Led 10 Year 2011-2021	7,890	526	4,875	325

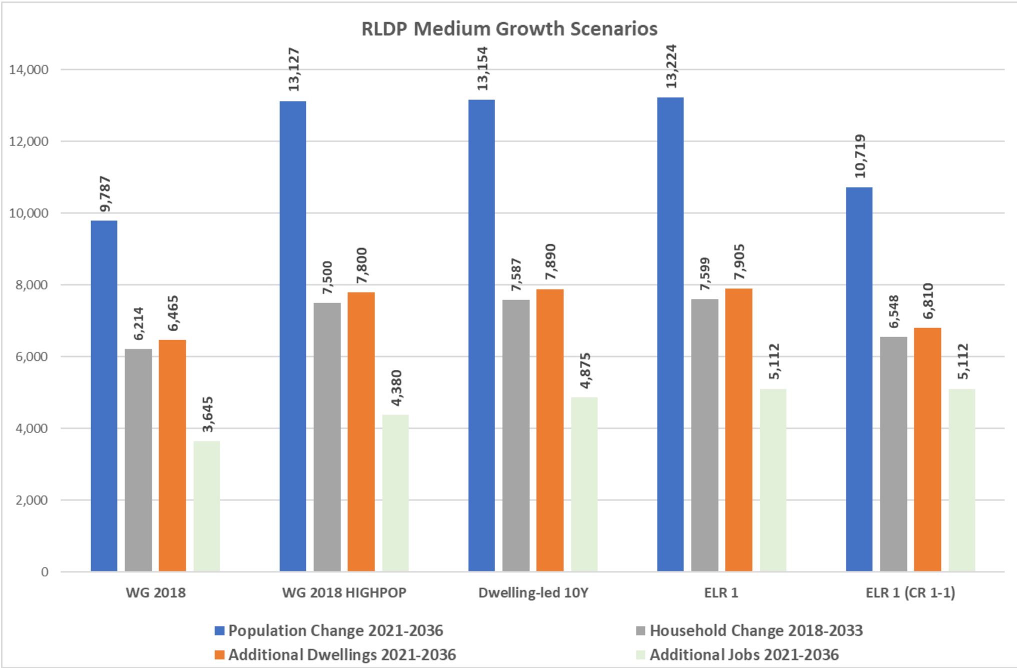


Figure 23: Population and Household Change and Associate Dwelling and Job Growth (Medium)

Scenario 6: Welsh Government -2018 Principal Projection

4.35 The WG-2018 principal population and household projections for the Vale of Glamorgan sits in the middle of the range of scenarios and produces a population growth outlook of 7.3%, and 12.7% increase in households resulting in a dwelling requirement of **6,465 dwellings** for the plan period 2021-2036 or **431 dwellings** per annum.

4.36 It should be noted that these projections are trend based and therefore the births, deaths and international migration that were experienced in the 5 years prior to 2018 have been extrapolated forward throughout the projection period. For internal migration, rates rather than numbers have been used, with the internal outward migration being calculated as a rate relative to the resident population of the local authority, and the internal inward migration being calculated as a rate relative to the rest of the UK population.

4.37 Whilst it is considered appropriate to use recent trends to inform growth scenarios, it should be recognised that this does not take account of any policy decisions taken at the local, regional, or national level that may influence population change. Notably, the 2018-based projections were prepared before the COVID-19 pandemic, which resulted in an increase in deaths associated with COVID-19 and implications for migration patterns. Furthermore, the implications of Brexit and other regional influences, such as the abolition of the Severn bridge tolls, which have resulted in migration from the wider Bristol area to South East Wales, will not be reflected in the figures.

4.38 As a result of the increased level of net in-migration seen in the 2018-based official projection for the Vale of Glamorgan, the WG 2018 scenario predicts a more youthful profile for the Vale (Figure 24) when compared to the lower growth scenarios. The 65+ age groups are projected to increase significantly and there will also be growth in the 15-24 population and 35-49 population when compared to 2021. However, some age groups will see an overall decline, including the school age population, the 30-34 age groups and the 50-64 age groups. Whilst this presents a more balanced population than in the low growth scenarios, the decline in population for some age groups is still a matter of concern. However, the growth in some age groups of working age would help support an employment growth of 3,645 additional jobs.

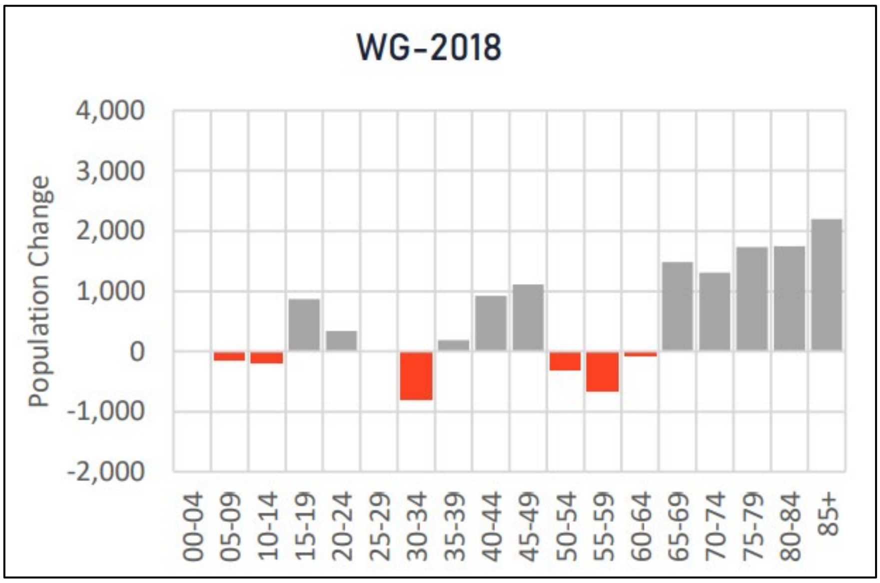


Figure 24. WG-2018 Demographic Profile Source: ONS, Edge Analytics POPGROUP modelling

4.39 The Principal Projections scenario is proposing a moderate level of population growth (7.3%) over the next 15 years, driven by net migration. The employment land required to accommodate the projected of 3,465 jobs is 9.96 ha which could be accommodated within the existing supply but would be considerably lower than the potential 5,338 jobs (adjusted to 5,112 people requiring jobs) that could be supported under the employment land option recommended within the Employment Land Study.

Scenarios 7 and 8 Employment-led ELR 1 and ELR 2 (CR 1-1)

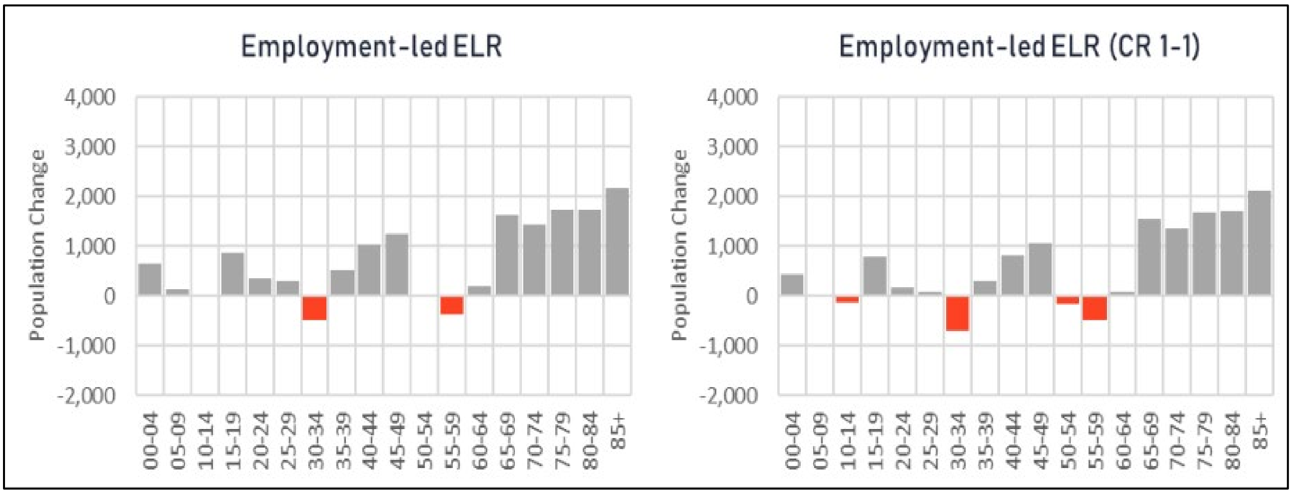
4.40 Edge Analytics have provided 2 scenarios that model the potential population and housing requirements arising from recommendations on the Council's ELS which identified that the employment land requirement over the plan period could potentially support jobs growth of 5,338 jobs over the plan period.

4.41 Since the demographic modelling considers the number of persons employed rather than the number of jobs, it has been necessary to adjust ELR 1 and ELR 1 (CR 1-1) scenarios to account for potential 'double jobbing' (i.e., people who may have more than one job). Accordingly, the 5,338-job capacity identified within the ELS has been reduced by 4.4% to reflect the proportion of people with second jobs as recorded in the Annual Population Survey (APS), averaged over the 2017–2021 period. This reduces the overall number of additional jobs to 5,112, equal to annual employment growth of +341 per year.

4.42 **Employment-led ELR 1 scenario forecasts a 9.8%** growth in population aligned with a 12.9% increase in households and a dwelling requirement of **527 per year or 7,905** for the plan period 2011-2026.

4.43 In the **Employment-led ELR (CR 1-1)** scenario, it is assumed that for every new job created in the Vale of Glamorgan, there is a resident worker available to fill it. This slightly reduces the net out-commute over the forecast period, compared to the commuting ratio used in the Employment-led ELR scenario, which is based on the existing position. A reduced net out-commute means fewer people are brought in through internal migration to balance population and employment growth, resulting in reduced net migration. This results in a **population growth of 7.9%, with an annual dwelling requirement of 454, or 6,810 dwellings** aligned to a smaller increase in households over the plan period at 11.1%.

4.44 The demographic forecast within the Employment-led ELR scenario projects a higher cohort across all age groups, than that within the ELR (CR1-1) primarily due to the inward migration associated with the increase in jobs, (Figures 25 and 26) and would therefore be a more balanced scenario. In the CR1-1 scenario, there would be an overall decline in the school age population and some of the working age cohorts resulting from the applied assumption that all new jobs growth would be taken up by the existing residential population.



Figures 25 and 26: ELR and CR1-1 Demographic Profiles
Source: ONS, Edge Analytics POPGROUP modelling

Scenario 9: WG 2018-based HIGHPOP

4.45 The WG 2018-based HIGHPOP (Figure 27) scenario indicates population growth of 9.7% and a 12.7% increase in households over the plan period, aligned to a dwelling requirement of **7,800 dwellings** for the plan period 2021-2036 or 520 dwellings per annum. The resulting employment growth under this scenario would be **4,380 additional jobs.**

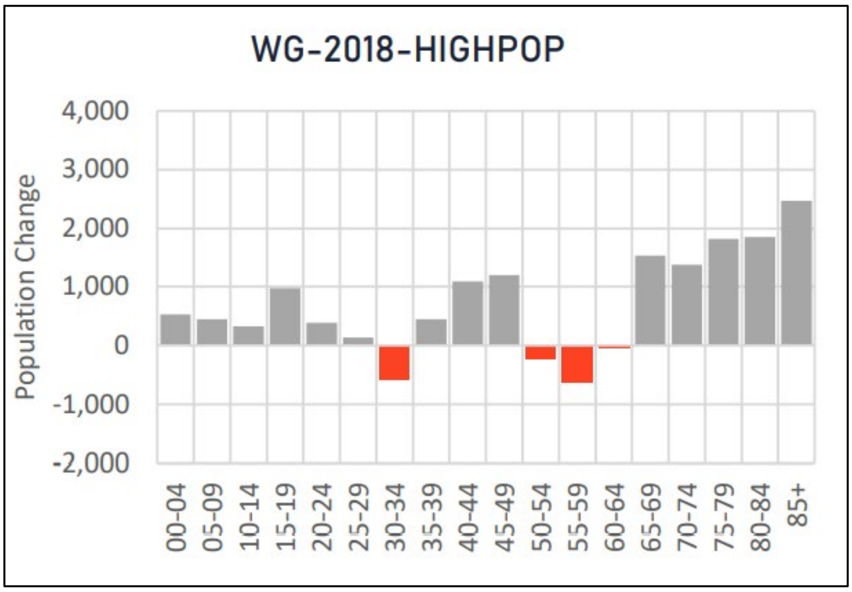


Figure 27. WG-2018-HIGHPOP Demographic Profile
Source: ONS, Edge Analytics POPGROUP modelling

4.46 The WG 2018 high population projection scenario projects a higher level of population growth (9.7%) over the next 15 years than the WG 2018 principal projections, due to higher assumptions for births, longer life expectancy and increased inward migration assumptions. As a result, whilst natural change is still projected to be negative (more deaths than births) the extent to which this affects the overall population is less significant. As the assumptions in this scenario are higher than past trends would indicate, it does, however, raise concerns about how realistic this scenario is, particularly as since the base date of 2018, there has been a further decrease in birth rates.

4.47 The projected population growth of 13,127 is driven primarily by inward migration of 938 persons annually, and a 12.7% increase in the number of households. This equates to a housing requirement of 520 dwellings a year, which is slightly below the average 10 year past building rate of 526.

4.48 This scenario would result in a larger proportion of the population being within the over 65+age range, which coincides with a negative decline in the 50-64 age groups. However, the WG HIGH POP scenario would see a higher proportion of 0-24 age cohorts, and therefore provide for a more youthful population than the 2018 WG principal scenario. Whilst this would see a slightly higher rate of decline in the 30-35 and 19-64 age groups (and therefore slightly lower jobs growth) this younger cohort could ensure that schools are more viable in the longer term.

4.49 Notwithstanding this, the 4,380 jobs projected is relatively strong when compared with the WG-2018 and 2018 – based LOWPOP, however this is still below the 5,338 jobs (adjusted to 5,112 people requiring jobs) figure identified within the ELS.

Scenario 10: Dwelling-led 10 Year

4.50 The Dwelling-led 10Y scenario (Figure 28), is based upon the historic 10-year dwelling completions that have taken place in the Vale (2011-2021), continuing a 10-year average history of housing completions of **526 dwellings annually.** This would result in a population change of 9.7%, and a 12.8% increase in households which would generate a need for **7,890 additional dwellings** over the plan period. The resulting employment growth under this scenario would be **4,875 additional jobs**.

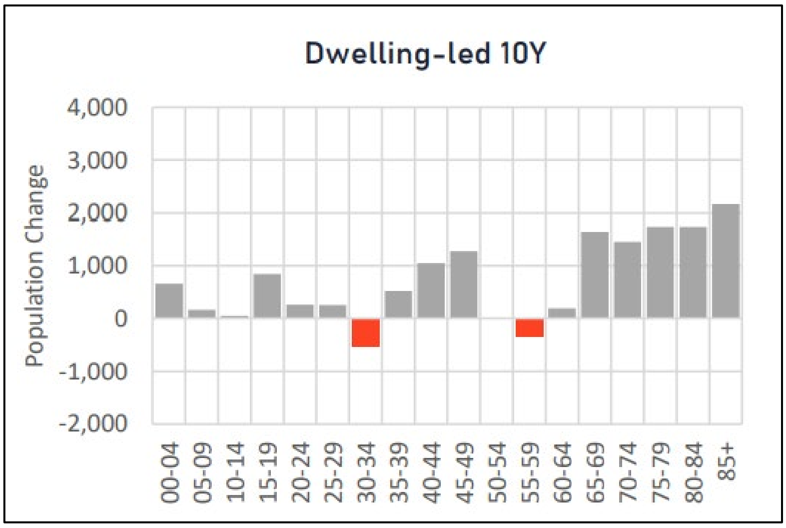


Figure 28. Dwelling-led 10Y Demographic Profile Source: ONS, Edge Analytics POPGROUP modelling

4.51 Whilst the dwelling growth under the Dwelling-Led (10 Year Average) is lower than the 5-year average (see scenario 11 below), this nevertheless would result in population change of +9.7%, equal to that under the WG 2018 HIGHPOP.

4.52 The dwelling led scenario would see similar growth in the over 65+ age range, as in the WG-2018 HIGHPOP but a lower decline in the 50-64 age groups. However, this would be offset by fewer primary and secondary age children (0-14 years) because of the fertility assumptions applied within the 10Y scenario which are based on past trends, rather than the higher assumptions utilised within the WG-2018 HIGHPOP scenario.

4.53 Notwithstanding this, due to a larger cohort of working age people, the number of projected 4,875 jobs under this scenario would more closely align with the 5,338 jobs (adjusted to 5,112 people requiring jobs) identified within the Council's ELS, whilst the number of dwellings would provide a continuation of the annual average dwellings completed within the current adopted LDP period to date.

High Growth Scenarios

4.54 The following two scenarios are the highest growth options considered, resulting in housing requirement of between 9,555 and 10,470 dwellings and jobs growth ranging from 6,390 to 7,395.

Table 8: High Growth Scenarios

Scenario	Total Dwellings 2021-2036	Annual Dwellings	Additional Employment Growth 2021-36	Annual Employment Growth
11. PG-5Y	9,555	637	6,390	426
12. 5-year dwelling	10,470	698	7,395	493

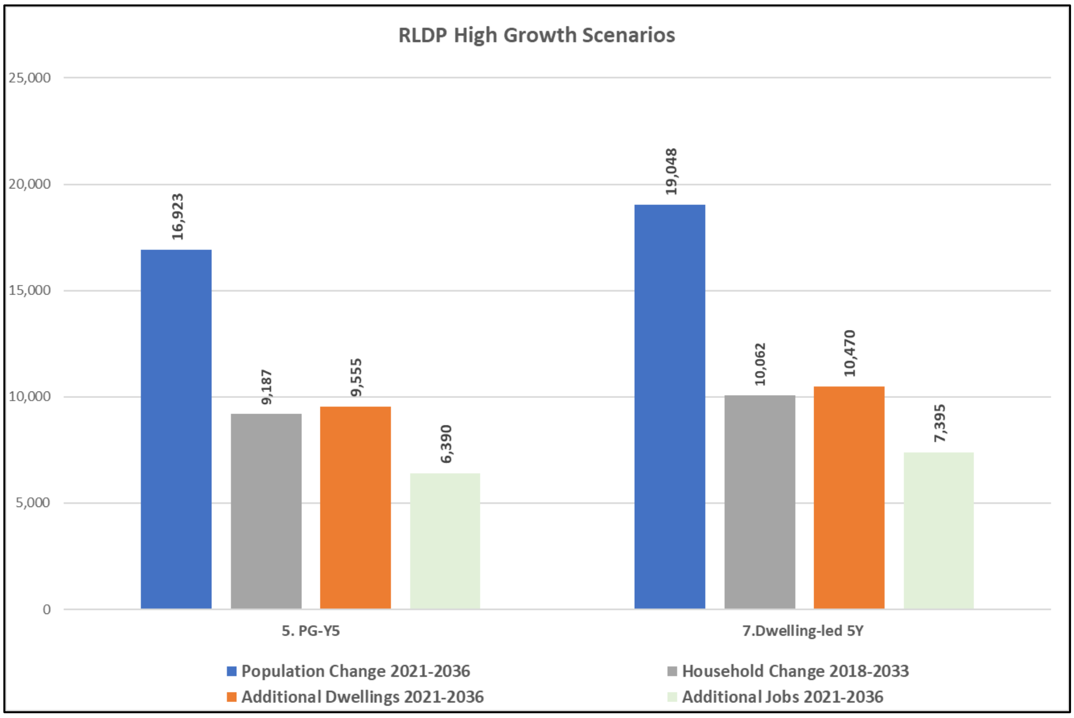


Figure 29: Population and Household Change and Associate Dwelling and Job Growth (High)

Scenario 11: PG 5-Y (5 Year Migration Growth)

4.55 The PG 5-Y (Figure 30) utilises migration assumptions taken from a 5 year period (2015/16-19/20). This scenario projects high levels of net migration (+1,222 per year), associated with a high annual dwelling requirement of **637 dwellings**, **or 9,555 dwellings** for the plan period 2021-2036. The resulting employment growth under this scenario would be **6,390 additional jobs.**

4.56 Under this scenario, the Vale's population would grow by 16,923 (12.4%) and a 15.4% increase in the number of households. The age structure of the Vale under this scenario would see a growth in all but the 30-34 and 55-59 cohorts and portrays a slightly more balanced demographic than the 2018 WG projection. Nevertheless, common with all scenarios the most significant growth is amongst the 65+, again this is marginally lower than that predicted within the 2018-WG projection.

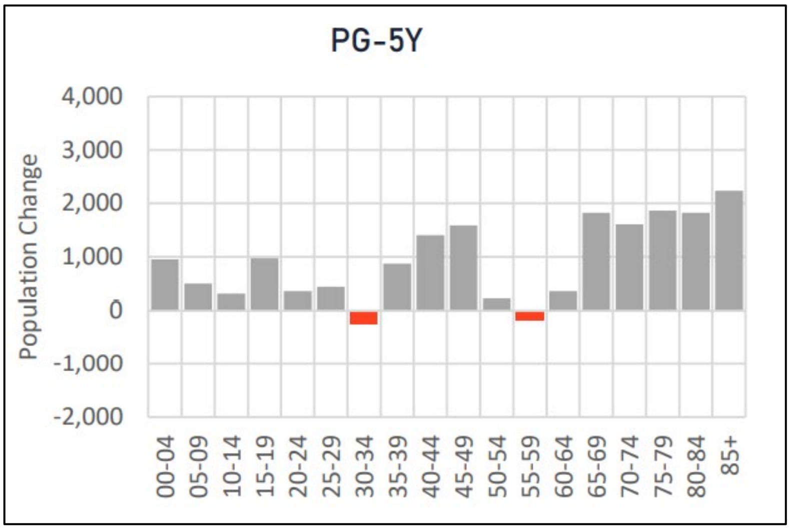


Figure 30: PG-5Y Demographic Profile. Source: ONS, Edge Analytics POPGROUP modelling

4.57 This scenario would see a high rate of inward migration of some 1,222 persons per year and would generate a dwelling requirement of 637 dwellings annually, which is comparable to that annual dwelling requirement of the current adopted LDP (630 dwellings per annum).

4.58 Whilst the high net migration would result in a relatively strong working age population generating 6,390 (+493 annually) additional jobs, this is greater that the anticipated 5,338 jobs (adjusted to 5,112 people requiring jobs that could be supported under the recommended employment land supply identified within the Council's ELS. This would inevitably create a mismatch between housing and employment growth, and as such there is a likelihood that this would lead to commuting in-flows.

Scenario 12: Dwelling Led 5 -Year

4.59 The Dwelling-led 5Y scenario, utilises the latest 5-year historical housing completions (2016-2021) and would result in the highest rate of population growth at 13.9%, household change of 16.9% and a corresponding dwelling requirement of **698 per annum**, or **10,470 dwellings** for the plan period 2011-2026. The average annual dwelling requirement would be 145 dwellings higher per year than that built in the past 10 years.

4.60 The resulting employment growth under this scenario would be **7,395 additional jobs** compared to the 5,338 jobs (adjusted to 5,112 people requiring jobs) that could be supported under the ELS recommendations.

4.61 The Dwelling-led 5Y scenario, driven by a relatively high dwelling growth target would see a high rate of inward migration of some 1,360 persons per year, based on past trends.

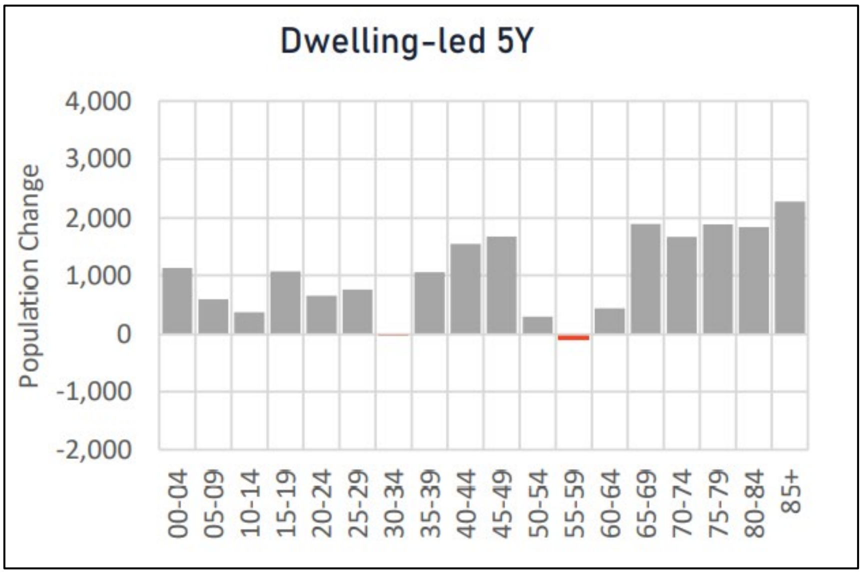


Figure 31 Source: Demographic Profile Dwelling-led 5Y Source: ONS, Edge Analytics POPGROUP modelling

4.62 The high net migration would result in a relatively high school and working age population compared to the scenarios considered, however this would also see a proportionate increase in the 65+age groups (Figure 31). The high proportion of jobs is considerably higher than the anticipated 5,338 jobs (adjusted to 5,112 people requiring jobs) that would be supported by the recommended employment land requirement identified within the Council's ELS. This would result in a mismatch between the housing and employment growth and could exacerbate outward commuting because of this misalignment.

Census 2021 and Future Implications

4.63 In addition to the scenarios presented above, the Edge Analytics report also includes a series of scenarios rebased to the Census 2021 population and figures. To generate these scenarios, the 2020 mid-year population has been 'aged on' and rebased to the 2021 Census population, with the households rebased to the 2021 Census household total, providing a consistent (2021) starting point for all scenarios. It should be noted that these scenarios have just changed the starting population and have not recalibrated the other components of change as the rebased MYE for 2012-2020 are not due to be published by ONS until November 2023. On this basis, it is considered more appropriate to consider the base populations set out in the main Edge Analytics report rather than the 2021 based scenarios. An analysis of the revised MYEs and any implications will be considered by the Council in preparation of the Deposit RLDP.

4.64 Whilst there are concerns about using the 2021 Census figures without full recalibration, Table 9 sets out a comparison between the two sets of scenarios. In the dwelling led scenarios, the number of dwellings and therefore households remain constant, but there is an increase in the population growth and annual net migration. The extent of the change is relatively small – in the case of the dwelling led 5Y scenario, annual migration would need to increase from 1,360 per annum to 1,405 per annum, and in the dwelling led 10Y scenario the annual migration assumption would increase from 1,009 to 1,047. There would be no change to the housing requirement using these scenarios.

4.65 In the WG 2018, HIGHPOP and LOWPOP scenarios, there would be a small increase in both population, households, migration and dwellings. For the WG 2018 principal projection, this would increase the housing requirement by 8 units per annum.

4.66 There are more significant changes for the PG scenarios (PG-long Term, PG 10Y and PG 5Y) as these are based on historical migration data. However, as only the 2021 population has been updated and not the historic migration assumptions from the rebased MYE from 2012-2020, as these have yet to be published, it is difficult to draw conclusions at this stage.

Table 9: Comparison of Base Scenarios with 2021 Census Population Scenarios

	Population change - base projections	Population change – 2021 Census update	**Households change – base projections**	**Households change** – 2021 Census update	**Annual Net migration – base projection**	Annual Net migration – 2021 Census update	**Annual Dwellings – base projection**	Annual Dwellings – 2021 Census update
Dwelling-led 5Y	**19,048**	19,475	**10,062**	10,062	**1,360**	1,405	**698**	698
PG-5Y	**16,923**	18,750	**9,187**	9,759	**1,222**	1,352	**637**	677
Employment-led ELR	**13,224**	12,411	**7,599**	7,108	**1,020**	976	**527**	493
WG-2018-HIGHPOP	**13,127**	13,319	**7,500**	7,587	**938**	951	**520**	526
Dwelling-led 10Y	**13,154**	13,558	**7,587**	7,587	**1,009**	1,047	**526**	526
Employment-led ELR (CR 1-1)	**10,719**	10,007	**6,548**	6,102	**869**	830	**454**	423
WG-2018	**9,787**	10,056	**6,214**	6,335	**851**	869	**431**	439
PG-Long Term	**8,561**	10,528	**5,705**	6,352	**739**	868	**396**	440
PG-10Y	**8,519**	10,452	**5,695**	6,332	**741**	867	**395**	439
WG-2018-LOWPOP	**5,172**	5,523	**4,559**	4,714	**759**	782	**316**	327
Employment-led OE	**2,402**	1,936	**3,041**	2,733	**367**	326	**211**	189
WG-2014	**13**	-482	**2,182**	1,966	**64**	31	**151**	136

5. Assessment of Growth Scenarios and Recommended Growth Option

5.1 The Growth Options presented provide 12 alternative growth strategy options to inform the level of dwelling and employment provision within the RLDP, having regard to national policy, the evidence base and policy aspirations. The population changes and dwelling need for each scenario for the 2021–2036 period ranges from 0.0% under the WG-2014 scenario, to 13.9% under the Dwelling-led 5Y scenario. This range of population growth equates to estimated dwelling growth outcomes of between 151 and 698 dwellings per year and employment growth outcomes of between -126 and 493 per year, and an additional employment land need of -5.16 hectares to 20.20 hectares.

5.2 Within each of the scenarios, the Vale of Glamorgan is projected to continue to experience an increase in the 65+ population over the 15-year plan period 2021-26, reflecting the wider national trend of an increasingly aging population. Similarly, the trend for reducing household sizes in the Vale is anticipated to continue, and this in combination with a steadily growing older population, raises challenges for the Council not only in respect of the type, size and number of homes required in the future, but also how the RLDP can provide homes that residents will require throughout their lives, as well as the types of employment available as people are projected to work into older age.

5.3 As part of the Cardiff, Newport and the Valleys National Growth Area, the Vale of Glamorgan will have an important role to play in supporting the strategic priorities for growth in the region. This will require the Vale's RLDP to strike a balance between delivering the RLDP's vision for delivering economic and social prosperity for its residents, with the need to ensure that growth is both sustainably located and complimentary to the wider aspiration for the region set out in Future Wales, most notably supporting the growth aspiration of neighbouring Cardiff as the primary settlement within the National Growth Area.

Analysis: High Growth Scenarios

5.4 Most recent population trends have indicated that the Vale in the past 5 years has experienced a high level of inward migration from Cardiff, coinciding with a period of high levels of additional new housing being developed in the Vale, as presented by the **5-Year Dwelling and PG-5Y** scenarios. Whilst a continuation of this trend may have benefits in providing a balanced demographic in the Vale of Glamorgan as suggested under the high growth scenarios, this would not reverse the trend of an increasingly ageing population. Both scenarios project the highest levels of housing growth, which would require higher levels of investment in infrastructure and potentially additional school places to support the growth in school age resulting from high inward migration.

5.5 Under both the 5-Year Dwelling and PG-5Y growth scenarios, high levels of inward migration from Cardiff would be likely to continue and is likely to further exacerbate outward commuting from the Vale to Cardiff due to the imbalance between housing and employment. This is evident when comparing the additional jobs growth under both the 5-year dwelling led scenario (7,395 jobs) the PG-5Y growth scenario (6,390 jobs), and the 5,338 jobs (adjusted to 5,112 people requiring jobs) recommended within the ELS.

5.6 In this regard it is considered that the outcome of these scenarios would be contrary to the Development Plan Manual which emphasises the need to ensure that both economic and housing growth are broadly aligned to reduce the need for commuting.

Analysis: Low Growth Scenarios

5.7 A similar mismatch of homes to jobs would also be a feature under the low population and housing growth scenarios under the **WG-2014, WG LOW POP, PG-Long, PG-10Y and Oxford Economics** scenarios.

5.8 Under the low growth scenarios, additional job growth would be varied between a net loss of 1,890 jobs under the WG-2014 scenario to 3,150 jobs under the PG-Long scenario, which are considerably less than the 5,338 jobs (adjusted to 5,112 people requiring jobs) capacity suggested by the ELS. This would also necessitate a dwelling requirement of between 151 and 396 dwelling per year over the plan period which is considerably below that achieved within the Vale over the current adopted plan.

5.9 Demographic change within all five low growth scenarios forecast a significant decline in both the school and working age populations, and an increase in the older population. The large proportion of over 65s would have an impact on demand for key services in the Vale such as health and social care, with delivery of such services constrained by a decline in the working age population alongside the increased demand for older person accommodation. This would also likely lead to increased demand for smaller properties as the trends indicate that in most age groups there will be an increase in smaller person households. The result would mean that even with a declining population there will need to be more housing to support the existing residents, whilst at the same time restricting the plan's ability to contribute towards the pressing need for affordable housing within the Vale. These points, combined with a projected decline in school age groups could have a negative effect on the demand for school places, which could impact on their sustainability as well as the viability of local services and facilities, and less socially balanced communities.

5.10 Consequently, there are concerns that the low levels of both housing and employment growth projected within these scenarios, alongside propensity for an increasingly older demographic would be contrary to the role of the Vale in the National Growth Area in delivering the wider regional aspirations of Future Wales. This acknowledges that the success of Cardiff as the Capital City and primary settlement within the region is reliant on the interdependence that exists between the Capital City stating that "*Cardiff relies on people from across the full region and ensuring communities around the Capital are vibrant, prosperous and connected helps to maximise the strength of the region"* (Future Wales, Page 164).

Analysis: Medium Growth Options

5.11 Of the 5 medium growth scenarios, the **WG-2018** scenario would result in the lowest housing requirement of 6,465 dwellings (431 per annum) and is lower than the annual average level of housing growth that has occurred within the Vale of Glamorgan over the last 10 years (526 per annum), and below the longer term 20-year annual average of 456 dwellings (Figure 10 above). Under the WG-2018 scenario, the number of jobs forecast would also be below the potential jobs growth identified within the ELS. Whilst the demographic structure under this option would be more balanced than the low growth scenarios, there is concern that there will be a decline in some age groups.

5.12 In respect of the 2-employment led mid growth options **ELR (CR1-1)** would see the second lowest increase in the housing requirement of 454 dwellings annually, again below both the 10 year and 20-year annual averages. This is due to the assumption that all employment growth would be taken up by existing residents, therefore fewer people are brought in through migration. However, this also has implications for population balance, as there will be a decline in some age groups, particularly amongst 0–14-year cohorts.

5.13 Under the employment led scenario **ELR1,** the Vale population is projected to grow by 9.8%, slightly above the 9.7% growth projected under both the **WG2018-HIGHPOP** and **Dwelling Led 10 Year scenario.** However, under ELR1, the projected housing requirement of 7,905 dwellings (527 dwellings annually), would be higher than that under the WG2018-HIGHPOP of 7,800 dwellings (520 dwellings annually), but would align with the 10 year past build rate requirement of 7,890 dwellings (526 dwellings annually).

5.14 In terms of employment growth, the 10-year past dwelling led scenario would see employment grow by 4,875 persons, slightly below the 5,338 jobs (adjusted to 5,112 people requiring jobs) growth capacity in the ELS, but higher than that 4,380 projected growth under the 2018-HIGHPOP scenario.

5.15 In terms of demographic profile for the Vale, under the ELR1, 2018-HIGHPOP and 10Y dwelling scenarios, demographic change within the Vale would be characterised by an ageing population over the plan period, although higher growth in the 85+ cohort is projected under the 2018 HIGHPOP scenario. Under the ELR1 and 10 - year dwelling led scenarios there would be similar demographic outcomes for the Vale of Glamorgan across all age groups.

5.16 Whilst under the 2018 HIGHPOP scenario, there would be greater decline in the 50-64 cohorts, there would be higher proportion of residents within the school age cohorts as the birth rate is higher, and therefore provide for a more youthful population than would be realised under the ELR1 and 10 Year Dwelling scenarios.

5.17 However, it is questionable whether the assumptions on higher numbers of births would be realised, particularly as the latest trends since 2018 show that birth rates have declined even further. It is important that assumptions are realistic and it is therefore considered that even though the overall dwelling requirements under the two scenarios are broadly the same, the assumptions underpinning the 10 Year Dwelling are more robust as they are informed by the WG 2018 principal projections assumptions on births and life expectancy, but have been adjusted to take account of in-migration as a driver for a level of growth that is considered to be achievable based on past trends.

5.18 In respect of the 10Y dwelling led scenario, this provides a scenario that reflects the long-term delivery of housing that has occurred in the Vale in the decade following the recession, and therefore forecasts a lower dwelling growth of 526 dwellings per year compared to the 698 dwellings under the 5-year dwelling scenario, and therefore represents a more long term view of the housing market, taking into account low housing growth post-recession and a shorter period of historically high dwelling completions between 2016/17 to 2020/21. Additionally, the 10Y dwelling led scenario would closely align with the level of projected jobs growth identified within the ELS and reflect the annual dwelling requirement of 527 dwellings necessary to support the level of employment growth modelled within employment scenario ELR1.

5.19 Projecting annual average housing and employment growth based on a longer period of past trends can be considered a more pragmatic approach that is more akin to normal economic conditions, providing a benchmark for future housing growth and delivery, and highlighted within the DPM (paragraphs 5.55-5.57), stating that:

"*Extrapolating forward past take-up rates for both jobs and homes over various time periods gives a factual representation of what has been delivered in the past. This approach can provide a useful benchmark against which to compare future employment and household growth, assuming previous conditions remained constant. However, this may have been constrained by contextual influences applicable at a previous point in time, for example global economic markets, or have led to undesirable outcomes which should not be repeated, such as a mismatch between the number of homes and jobs.*

It will be important to understand the relationship between the past and the future direction of the plan, including such contextual circumstances. If there are/were limitations that hindered the ability to deliver growth previously, then until mechanisms are in place to address such matters this could have a bearing on future growth levels. Understanding the context within which delivery was/can be achieved will be important, particularly when considering a housing trajectory as this could influence the speed and increase delivery rates, or conversely result in a delivery cap until such matters are resolved.

Just relying on past build rates as the sole evidence base to quantify future employment and housing land requirements is not sufficient on its own. Additional evidence will be required to identify the scale of new jobs and homes necessary and the related land requirement."

6. Findings of Engagement on Growth Options

6.1 In considering the 12 growth Options, a series of engagement workshops were held with Elected Members, Town and Community Councils, the Vale of Glamorgan Public Service, and Senior Council Officers[5]. At these workshops was the low, medium, and high growth options to were presented and the pros and cons of each growth option were discussed within the context of the Vale of Glamorgan.

6.2 Stakeholders at each workshop were invited to express their preference as to which of the 12 growth options they considered to be the most appropriate to the Vale of Glamorgan. Aggregated data collected from these surveys shows that stakeholders had a clear preference for Medium Growth, over the other two options, with 72% of votes in favour of this Option, as shown by Figure 32 below.

[5] Vale of Glamorgan Pre-Deposit Engagement Report

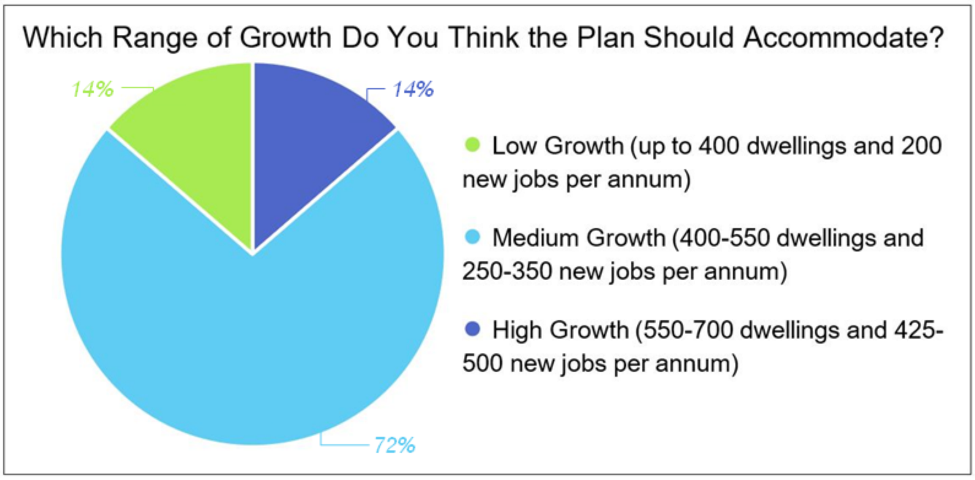


Figure 32: Vale of Glamorgan Growth Options Stakeholder Preference

7. Integrated Sustainable Assessment

7.1 As part of the Integrated Sustainable Assessment (ISA) of the emerging Preferred Strategy, the low, medium and high level growth options were appraised against each of the ISA environmental social and economic topics. The following provides a summary of the assessment. Further details are set out in the Initial Integrated Sustainability Appraisal (ISA) for the Replacement Local Development Plan.

ISA theme	Rank/ Significant effects	Option 1: Low growth 151 – 211 dpa	Option 2: Medium growth 316 – 527 dpa	Option 3: High growth 637 – 698 dpa
Economy and employment	Rank	**3**	**2**	**1**
	Significant effects?	**Uncertain**	**Yes – Positive**	**Yes – Positive**
Population and community	Rank	**3**	**2**	**1**
	Significant effects?	**No**	**Yes – Positive**	**Yes – Positive**
Health and wellbeing	Rank	**No**	**Yes – Positive**	**Yes – Positive**
	Significant effects?	**3**	**2**	**1**
Equality, diversity, and social inclusion	Rank	**3**	**2**	**1**
	Significant effects?	**No**	**Yes – Positive**	**Yes – Positive**
Climate change (mitigation and adaptation)	Rank	**1**	**2**	**3**
	Significant effects?	**Yes – Positive**	**Uncertain**	**Uncertain**
Transport and movement	Rank	**1**	**2**	**3**
	Significant effects?	**Yes – Positive**	**Uncertain**	**Uncertain**
	Rank	**1**	**2**	**3**

ISA theme	Rank/ Significant effects	Option 1: Low growth 151 – 211 dpa	Option 2: Medium growth 316 – 527 dpa	Option 3: High growth 637 – 698 dpa
Natural resources (air, soil, minerals, and water)	Significant effects?	**No**	**Uncertain**	**Yes – Negative**
Biodiversity and geodiversity	Rank	**1**	**2**	**3**
	Significant effects?	**Uncertain**	**Uncertain**	**Uncertain**
Historic environment	Rank	**2**	**1**	**3**
	Significant effects?	**Uncertain**	**Uncertain**	**Uncertain**
Landscape	Rank	**1**	**2**	**3**
	Significant effects?	**No**	**Uncertain**	**Yes – Negative**

7.2 The following conclusions are drawn for each ISA theme:

Economy and employment	The high growth option is ranked first, followed by the medium growth option and then the low growth option. The first two options are considered likely to lead to significant long-term positive effects as they will both likely deliver enough new jobs per year to support the growing population. Meanwhile, uncertainty is noted under the low growth option as growth is unlikely to be distributed evenly across the Vale, and one of the scenarios under this option (WG-2014) could even lead to a shrinking local economy. However, it is recognised that housing growth may stimulate the economy through an increase in the population, as well as the short-term employment opportunities associated with construction. Still, this is unlikely to be significant given the low housing growth projections for the scenarios under this option.
Population and community	It is considered that as the level of growth increases, so does the likelihood for significant positive effects in relation to this ISA topic. Therefore, the options are ranked according to the level of growth they deliver, with the high growth option ranked first, followed by the medium growth option and then the low growth option. The first two options are considered likely to lead to **significant long-term positive effect** as they support high/ moderate population growth. No significant effects are anticipated for the low growth option as the level of growth delivered through this option is unlikely to deliver a good range of house types and tenures across the entire local authority area and could lead to affordability issues.
Health and wellbeing	The high and medium growth options are considered likely to lead to **significant long-term positive effects** as they deliver a high/ moderate level of housing and employment

	growth, which will positively impact the health and wellbeing of new and existing residents through the benefits associated with growth. However, it is considered that the high growth option has the greatest potential to deliver such benefits, and therefore this option is ranked first. No significant effects are anticipated for the low growth option, as whilst the scenarios under this option deliver some housing growth, they deliver little (25 new jobs per year under the employment-led OE scenario) to no (-126 jobs per year under the WG-2014 scenario) employment growth.
Equality, diversity, and social inclusion	The high and medium growth options are considered likely to **significant long-term positive effects** as they deliver the highest/ second highest level of growth and therefore have the greatest potential to lead to investment into opportunities across the Vale, whilst delivering a variety of housing types and tenures and increasing services across the local authority area. No significant effects are anticipated for the low growth option due to the mismatch between housing and employment growth under the scenarios in this option. In terms of ranking, the options are ranked according to the level of growth they deliver.
Climate change (mitigation and adaptation)	Ultimately, the nature and significance of the effects will be dependent on where development is located, as well as the infrastructure improvements that will accompany development. However, when considering the level of housing and employment growth alone, the low growth option is considered likely to lead to **significant long-term positive effects** because it provides the greatest opportunity to prioritise sites in sustainable locations with existing sustainable transport connections. **Uncertainty** is noted for the remaining two options as some development may need to be located in less sustainable locations, which would rely on the delivery of new infrastructure, and the potential of these options to deliver this is not clear at this stage. The options are ranked from lowest to highest level of growth.
Transport and movement	Ultimately, the nature and significance of effects will be dependent on where development is located, as well as the infrastructure improvements that will accompany development. However, when considering the level of housing and employment growth alone, the low growth option is likely to lead to **significant long-term positive effects** because it provides the greatest opportunity to prioritise sites in sustainable locations with existing sustainable transport connections. **Uncertainty** is noted for the high and medium growth options because some development may need to be located in less sustainable locations, which would rely on the delivery of new infrastructure, and the potential of these options to deliver

	this is not clear at this stage. The options are ranked from lowest to highest level of growth.
Natural resources (air, soil, minerals, and water)	The low growth option is ranked first and considered most likely to avoid significant impacts arising. The medium growth option is ranked second, with **uncertainty** noted, whilst the high growth option is ranked last and considered most likely to lead to **significant long-term negative effects** due to the amount of land that will likely be required to deliver the level of growth required of this option.
Biodiversity and geodiversity	The low growth option is ranked first, followed by the medium and then high growth option. **Uncertainty** is noted across all three options as the location of growth is unknown at this stage, which will determine the impact of development on designated sites.
Historic environment	**Uncertainty** is noted under all three options as the precise location of development under each option is not known at this stage. In terms of rankings, the medium growth option is ranked highest as it delivers a moderate level of growth, limiting the potential of development to negatively impact heritage assets when compared to the high growth option. At the same time, it offers greater potential to boost the tourism and heritage sector when compared to the low growth option. The low growth option is ranked second, above the high growth option, as it is less likely to negatively impact the setting of heritage assets due to increased flexibility in choosing sites.
Landscape	The low growth option is ranked highest under this ISA topic as it is most likely to preserve existing landscape/ townscape/ villagescape character across the Vale. No significant effects are predicted under the low growth option. The remaining two options are ranked according to increasing growth quantum, with the high growth option ranked last. Whilst **uncertainty** is noted under the medium growth option, **significant long-term negative effects** are predicted under the high growth option as this option is most likely to negatively impact landscape/ townscape/ villagescape character across the Vale.

8. Preferred Housing and Employment Growth Option

8.1 Based on the assessment of the growth options, the Council considers that the projected housing, employment, and demographic forecasting presented within the 10 Year Dwelling scenario represents the most appropriate growth option for the RLDP. This option will require the provision of 7,890 dwellings, 526 dwellings annually, which is considered deliverable over the lifetime of the plan, and which a large proportion can be met through existing housing commitments and provide the scope to secure complementary infrastructure. This would also provide a level of housing growth that has not been affected by external economic conditions.

8.2 In terms of employment growth, the 10 Year Dwelling scenario is anticipated to provide 4,875 additional jobs over the life of the plan, comparable to the projected jobs growth of 5,338 jobs (adjusted to 5,112 people requiring jobs) forecast within the ELS. Additionally, the number of homes that would be provided would align with that projected with the ELR employment led scenario.

8.3 Consequently, adopting this growth option would provide a balanced level of housing and jobs growth within the Vale as advocated by the Development Plans Manual. This level of growth would be compatible with the Vale's role within the South East Wales growth area and would assist in supporting the housing and job aspirations of Cardiff set out in Future Wales by providing a sustainable level of housing growth that would assist in reducing levels of outward migration by Cardiff residents into the Vale as highlighted by the latest ONS internal migration data.

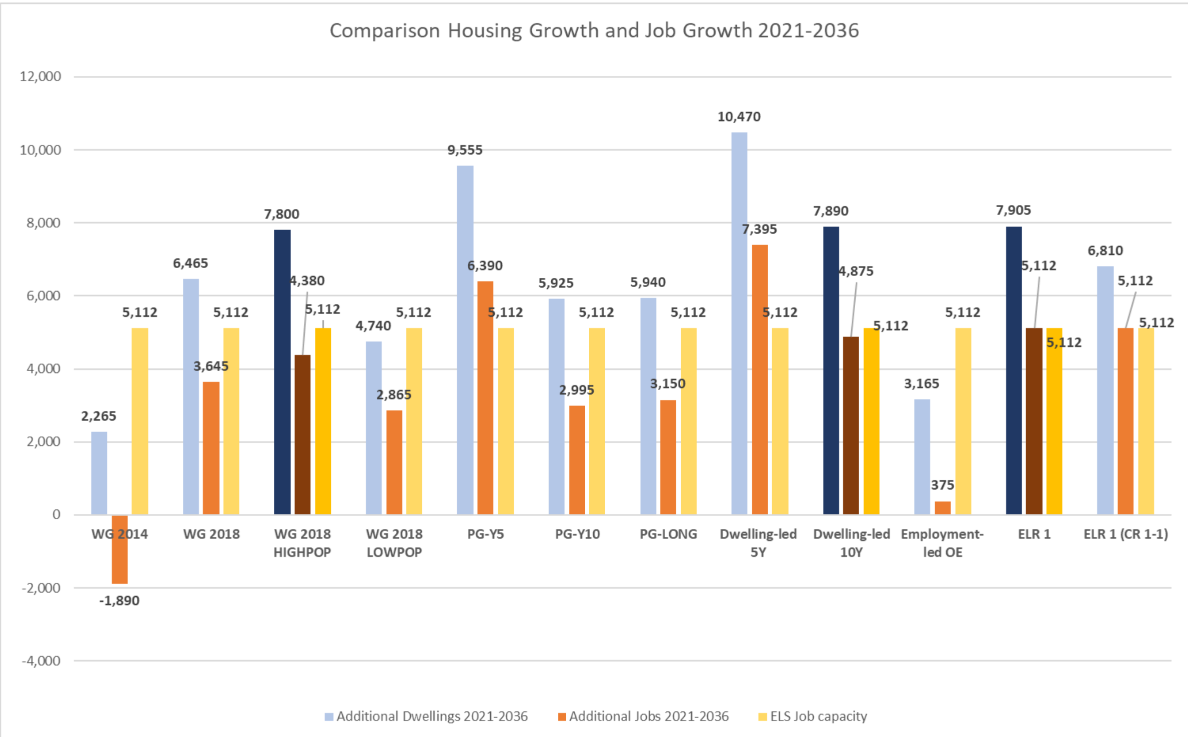


Figure 33: Comparison of Housing and Jobs Recommended Growth Option and Employment Land Study (2022) Jobs Capacity

8.4 The Vale has an ageing population, and it is important that any growth option seeks to encourage net migration of the working age population to help economic prosperity. This would need to be achieved by offering existing residents the range and choice of jobs and homes to encourage them to stay (reducing out-migration) and encouraging those residents that may have left the Vale to study to return, as well as providing employment opportunities and homes an appropriate level of new residents.

8.5 The 10 Year Dwelling scenario would result in a balanced population which would see a growth in the school aged population and in most cohorts of the working age population, which will help to support sustainable communities. Furthermore, it is considered that the 10 Year Dwelling scenario would support the plan's vision and objectives by providing an appropriate level of growth to support some economic growth, improve the resilience of the local economy, and provide opportunities to address the housing needs of the community.

8.6 In terms of affordable housing need, the Council's latest Published Local Housing Market (2021) identifies an annual need for 1,205 affordable units (rounded) to address existing backlog and future need arising over the period 2021-2026. The medium growth option would enable the RLDP to contribute towards addressing this need whilst alongside supporting employment growth to deliver more balanced communities.

9. Comparison with the Housing Land Supply with the Growth Options

9.1 To assess how much additional housing land would need to be released under the each of the growth options, consideration needs to be given to the existing land supply. Full details on the components of the housing land supply ae set out within the **Housing Land Supply Background Paper** and have been summarised here.

9.2 A review of the existing housing land supply has been undertaken as part of the Council's annual monitoring of the existing LDP. This indicates that since the start of the plan period, 785 dwellings have been completed and a further 513 units are under construction.

9.3 In addition to this, there is a significant existing supply of housing, with 1,449 dwellings on sites with planning permission including sites subject to S106 agreements and a further 1,710 units on allocations carried forward from the adopted plan which the Council deem to be deliverable. I

9.4 In addition, when calculating housing land supply, the Council can also include allowances for future windfall development (unallocated housing sites) that can contribute to meeting the over housing requirement. Based on historic delivery of such sites, it is considered that large windfall and small sites (less than 10 dwellings) would provide a further 1,603 dwellings over the plan period. Together the existing supply plus windfall would contribute 6,060 dwellings to meeting the future housing requirement for the plan.

9.5 In providing sufficient and appropriate land to meet the housing requirement, in accordance with the Development Plans Manual, Council's must also include a flexibility allowance to allow for changing circumstances. The flexibility allowance is a matter for the Council to decide, but the starting point is usually 10%.

Table 10: Housing Supply and Housing Requirement

	Component of Supply	Number of Dwellings	Notes
	Housing Provision	**8,679**	Housing requirement for 2021-2036 (7,890 dwellings + 789 (10%) flexibility allowance)
A	Completions 21/22 and 22/23	785	Comprising 700 dwellings on large sites and 85 dwellings on small sites
B	Units under construction 1st April 2023	513	
C	Units within planning permission	1,449	Includes sites that have S106 agreements pending where it is realistic that the agreement will be signed
D	Rolled forward LDP sites	1,710	Only those that are realistically likely to be developed – some are subject to planning applications
	Total Existing Supply (A+B+C+D)	**4,457**	
E	Large Sites Windfall Allowance (10 or more dwellings):	888 (74 dwellings p.a. x 12 years)	A large sites windfall allowance of 74 dwellings p.a. is forecast over the plan period. To avoid double counting of large windfall sites already within the land supply, this allowance has been applied to 12 of the remaining years of the plan 2024-2026
F	Small Sites Windfall Allowance (9 or less dwellings):	715 (55 dwellings p.a. x 13 years)	An allowance of 55 dwellings p.a. has been included, which is based on an average of small site completions over the last 10 Years. This allowance has been applied to remaining years of the plan 2023-2026.
	Total Windfall allowance (E+F)	**1,603**	
	Total	**6,060**	Existing supply plus windfall

9.6 Table 11 draws comparisons between the dwelling requirements including flexibility in each of the scenarios, and the supply, including windfalls in order to identify how many additional units would need to be identified over and above what has already been allocated.

Table 11: Comparison of Existing Housing Land Supply with Growth Options

	Annual Dwellings	Total dwellings	Total dwellings + 10% flexibility	Existing Housing Land Supply plus windfalls	Additional land to be allocated
Dwelling-led 5Y	698	10,470	11,517	6,060	5,457
PG-5Y	637	9,555	10,511	6,060	4,451
Employment-led ELR	527	7,905	8,696	6,060	2,636
WG-2018-HIGHPOP	520	7,800	8,580	6,060	2,520
Dwelling-led 10Y	526	7,890	8,679	6,060	2,619
Employment-led ELR (CR 1-1)	454	6,810	7,491	6,060	1,431
WG-2018	431	6,465	7,112	6,060	1,052
PG-Long Term	396	5,940	6,534	6,060	474
PG-10Y	395	5,925	6,518	6,060	458
WG-2018-LOWPOP	316	4,740	5,214	6,060	-846
Employment-led OE	211	3,165	3,482	6,060	-2,579
WG-2014	151	2,265	2,492	6,060	-3,569

9.7 In the high growth scenarios there would be a need for between 4,500 and 5,500 additional units over and above what is already committed. Given the spatial constraints experienced in the Vale, as set out in the Spatial Options Background Paper, there would be concern as to whether this scale of growth could be accommodated in a manner that is sustainable and would not have significant environmental implications. The deliverability of such a high number of units over the plan period is also questioned.

9.8 The low growth scenarios would result in the need for only very limited new allocations – less than 500 units across the whole plan period for the PG Long Term and PG-10Y and in the case of the other options, there would be no need for any additional allocations. This would have a significant impact on the ability to deliver much needed affordable housing, both through Section 106 agreements on private sites and for RSLs and the Council to bring forward their own schemes. It would also limit opportunities for other infrastructure improvements that would be delivered through Section 106.

9.9 The medium growth options would require between approximately 1,000 and 2,600 new units to be allocated above what has already been committed. It is considered that this level of growth could be accommodated on sites within sustainable locations and would make an appropriate contribution to the delivery of affordable housing.

10. Conclusions

10.1 This background paper has considered a range of scenarios for the total population, households, dwellings, and the working age population to inform the housing requirements of the RLDP. Planning Policy Wales is clear that the latest Welsh Government projections will form a fundamental part of the evidence base for the plan, but that planning authorities need to consider whether the various elements of the projections are appropriate for their area, and if not, undertake modelling, based on robust evidence, to identify alternative options.

10.2 Following an assessment of the implications arising from each scenario, it is recommended that the Dwelling Led (10 Year) scenario would be the most appropriate, providing balanced housing and jobs growth within the Vale of Glamorgan over the plan period. This would require the provision of 526 additional dwellings annually, which would be a continuation of average housing provision over the current adopted plan and is therefore considered to be a deliverable rate of growth.

10.3 The existing housing land supply, considering the potential contributions from windfall allowances over the plan period would assist in meeting the housing requirement (including flexibility allowance), but there would be a need for new sites to accommodate 2,619 dwellings.

10.4 When determining housing requirements, PPW also states that the projections should be considered alongside other evidence including:

- the Well-being plan for a plan area.

- other key evidence in relation to issues such as what the plan is seeking to achieve.
- links between homes and jobs.
- the need for affordable housing.
- Welsh language considerations.
- the deliverability of the plan.
- wider social, economic, environmental, and cultural factors in a plan area to ensure the creation of sustainable places and cohesive communities.

10.5 These matters have been considered in the preparation of the RLDP and are also reflected in the RLDP Vision and Objectives. Additionally, consideration of how the plan adheres to these issues will be given through the Integrated Sustainability Appraisal.

Appendix 1 - Assessment against PPW requirements

An assessment of how each of the requirements of PPW have been considered when determining the level of growth are summarised in the Table below.

PPW requirement	**How it has been considered**
The latest Welsh Government Projections	In accordance with PPW and the Development Plans Manual, an assessment has been undertaken on the various elements of the projections to determine if they are appropriate for the area. Modelling, based on robust evidence to identify alternative options, has also been undertaken.
Local Housing Market Assessment (LHMA) and need for affordable housing	LHMA is an integral background evidence to the LDP. The Council's latest 2021 LHMA was published in early 2022 and identifies a net annual requirement of 1205 affordable units in the Vale of Glamorgan during the next five-year period 2021- 2026 (4,450 over the full period). A higher housing requirement will maximise the opportunities for the delivery of housing through the housing system, although this needs to be balanced with the deliverability and sustainability of sites. An updated LHMA which reflects the recently published new methodology on preparing an LHMA is currently being prepared at will be used to support the Deposit LDP.
Well-being plan	The provision of housing, particularly affordable housing and housing for older people, will contribute to meeting the Council's Well-being plan objectives, particularly in relation to the priority workstreams of 'working with the people in our communities that experience the highest levels of deprivation' and 'becoming an age friendly Vale'.
Links between homes and jobs	Section 4 sets out how the jobs requirements have been considered as part of each of the growth scenarios, and how this has been aligned with the findings of the Employment Land Study.

Welsh language considerations	The Integrated Sustainability Appraisal scoping report, which incorporates a Welsh Language Impact Assessment identifies the Welsh Language as a consideration. This issue will be considered in more detail in subsequent stages of the ISA process.
Deliverability	The deliverability of the growth options has been considered within the context of past build rates for housing and this is included in the commentary. Additional work will be undertaken in the identification of deliverability of sites prior to their inclusion in the Deposit LDP.
Wider social, economic, environmental, and cultural factors	The Integrated Sustainability Appraisal scoping report identifies a range of social economic, environment and cultural factors relevant to the LDP, and which the plan will be appraised against at each stage of the plan preparation.

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