



**RTPI Cymru**  
Royal Town Planning Institute  
Sefydliad Cynllunio Trefol Brenhinol

# Cynllunio

The Journal of RTPI Cymru

**Winter 2024**



**The Housing Issue in Wales**

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Front Cover: Image by Oleksandr Pidvalnyi from Pixabay

## Editorial

Welcome to the final edition of Cynllunio for this year. As per the rest of 2024, it has been another action packed couple of months. You can read the highlights in the RTPI Cymru activities overview that opens this issue.

A huge thank you to all of our volunteers, speakers, sponsors and delegates. Whether you sit on one of our Committees or Forum, have spoken at a conference, written an article or blog, invited me to meet your team, become an ambassador, or simply attended one of our events, thank you. We couldn't do this without you.

We have a great article from Allan Archer reflecting on his very active year as 2024 Chair of the RTPI Cymru Executive Committee. The RTPI Cymru team is extremely grateful for Allan's enthusiasm and passion for planning, and I'm personally very grateful for the welcome and support he has given me. The Chair's role will now go to Aneurin Môn Parry for 2025.

This edition focuses on housing, which is clearly a hot topic at the moment, not only in Wales but also across the UK. We have contributions from Savills and Lichfields as well as articles about S.106 agreements and the Audit Wales report on social housing. The RTPI continues to campaign for properly resourced planning services, sustainable development and placemaking. This edition also includes a feature on Digital Planning Research in Wales, an RTPI Cymru project in collaboration with Cardiff University, and an article by Georgina Nee on a new GIS tool for assessing access to amenities.

As many of you will know, next year will be RTPI Cymru's 25th birthday. There's lots to look forward to, and we have given you the heads up of some of the dates already planned at the end of this edition. We're also planning other events and webinars, so if you have any ideas for topics, please do let us know.

As the RTPI Cymru office closes for the year, we would like to wish you all a wonderful Christmas, a restful festive season and a positive and sustainable 2025. Nadolig Llawen pawb.

*Mark Hand, Editor*

# RTPI Activities - Autumn 2024

## RTPI President 2024 visit to Wales



In October we welcomed Lindsey Richards FRTPI to her two day visit to Wales as the RTPI President for 2024.

We started off with a visit to the Sbarc|Spark building, winner of the RTPI Cymru Awards Excellence in Planning for a Successful Economy 2024 - first a tour of the facilities followed by a talk with Cardiff University staff and students, and a working lunch with Cardiff Capital Region staff hearing about the City Deal and emerging Regional Transport Plan and Strategic Development Plan.



We then met up with Monmouthshire County Council Planning team and Estates as well as Candleston to visit their recent residential development of 269 new homes in the village of Portskewett as well an innovative, dementia friendly care home with a bespoke environmental design, creating a homely environment for residents.



In the evening Lindsey met the members of the RTPI Cymru Executive Committee for dinner. The following day started with a a tour of Cardiff's first built to rent development at Grammercy Tower with spectacular views over the city, followed by our Autumn Briefing event (see next page).

Thank you to all involved in these two days.



# RTPI Activities - Autumn 2024

## Autumn Briefing 2024

Our Autumn Briefing event, set on the second day of Lindsey Richards FRTPI, RTPI President 2024 visit, was the occasion to hear from some of the winners of the RTPI Cymru Planning for Excellence Awards 2024, welcome our newly Chartered Members, and announce the winners of the RTPI Cymru Prizes for Academic Excellence, which are awarded annually for excellence in examinations and coursework in the first year of the BSc in Urban Planning and Development and the first year of the BSc in Geography and Planning at the School of Geography and Planning, Cardiff University. The winners for the academic year 2023/24 were Anna King for BSc in Urban Planning and Development, and Katlyn Davies-Shaw for BSc in Geography and Planning.



# RTPI Activities - Autumn 2024

## Professor Tony Hall Lecture

The second annual Professor Tony Hall lecture was held in November. This free event was made possible due to a fund bequeathed to the RTPI by Professor Tony Hall. We heard from two fantastic speakers presenting on the theme of AI and Digital Planning- Dr Ruth Potts MRTPI of Cardiff University and Nikki Webber, Digital Planning Team Lead at City of London Corporation. The event was live streamed and was followed by a drinks reception. We welcomed a range of planners from all sectors, some planning students and our Chief Executive Dr Victoria Hills FRTPI.



## RTPI Cymru Enforcement Conference 2024



Our annual Enforcement conference was back in November in Llandrindod Wells.

The conference saw contributions from FTB, Welsh Water, an introduction to the RTPI National Association of Planning Enforcement (NAPE) network and some case studies from Local Planning Authorities. Delegates took part in a practical workshop organised by PEDW on enforcement notices in the afternoon.

Thank you to our speakers and to POSW for sponsoring this event.

## North Wales Conference 2024

This year the Spring Conference was moved to Autumn and saw a record number of delegates!

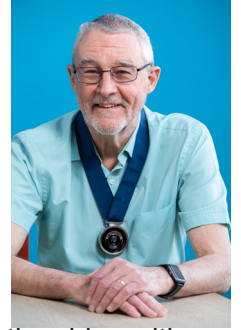
Themed as *Planning for Sustainable Communities*, the conference explored the themes of the role of planning in supporting the Welsh language, rural affordable homes, the new Article 4 directions on second homes in Gwynedd and Yr Eryri planning authorities, community engagement in shaping places and Welsh language matters at appeal. Some of these themes are to be explored at the Report from Commission for Welsh Language Conference on 21st Feb. The now renamed North Wales Conference will be back on 16th October 2025.



## Reflections on 2024- RTPI Cymru Chair Allan Archer

Firstly, this was a year of change for RTPI Cymru and planning in Wales.

At the end of 2023, RTPI Cymru said farewell to Roisin Wilmott after around 17 years in the Director role. I was particularly pleased to be able to thank Roisin at the Annual Wales Planning Conference in June and for delegates to show their appreciation with a well-deserved and spirited round of applause. In addition, it was also extremely pleasing to hear Julie James MS, the Welsh Government's Secretary of State for Planning (at the time) add her personal words of appreciation.



This, for me, underlined the important role of the Director in establishing positive working relationships with Welsh Government ensuring that the Institute is recognised as an authoritative voice on planning matters in Wales. This was evident from the very positive address from the Secretary of State at the conference in support of planning and planners.

Little did any of us know at the time that, not long after, there would be such political upheavals arising from the First Minister changes, resulting, eventually, in the appointment of a new Cabinet Secretary, Rebecca Evans MS, with responsibility for Planning as part of a new portfolio covering Economy, Energy and Planning. Hopefully, we will hear from the new Secretary of State at one of our 2025 events.

Incidentally, Julie James MS, will still have a connection with planning in the next couple of years. Appointed as Counsel General and Minister for Delivery, she will have the responsibility of introducing the proposed planning consolidation legislation to the Senedd. The current Welsh Government consultation on the proposed 'Preserving Trees and Woodlands Regulations' states that the Planning (Wales) Bill "is expected to be laid before the Senedd towards the end of this Senedd term".

Turning back to RTPI Cymru business, it has also been a pleasure to welcome Mark Hand to take over the reins as the new Director (with responsibilities not only for Wales but also for Northern Ireland and Planning Aid England). Starting at the beginning of March, Mark had to hit the ground running and pitched enthusiastically into the role with the annual online Planning Law Update event taking place on his first day in the job. He hasn't stopped running since as far as I can tell, as is evidenced by his regular posts (which you can follow) on LinkedIn which provide details about all the activities he has been carrying out.

Mention of the Planning Law event reminds me to thank all those who have generously sponsored RTPI Cymru events throughout the year and those who have given up their time to speak at face to face and online events – this is much appreciated and enables RTPI Cymru to provide a high level of relevant CPD events throughout the year. Through the combination of three main conferences – one each in North, Mid and South Wales – and online events, such as the Phosphates series and the Planning Law Update, RTPI Cymru seeks to provide convenient access to members across Wales. It was encouraging and gratifying that all three conferences were fully subscribed and numbers for the online events were 100+.

From my perspective, it was good to see the conference venues filled with so many enthusiastic attendees and it has been a great pleasure to meet so many members and discuss their experiences. The standard of the presentations has been high and feedback has been positive – so look out for the advance notices of next year's events.

It was a particular pleasure for me to attend the North Wales conference, focussing on planning for sustainable communities and to hear about the range of work focussed on supporting communities and the Welsh Language, including the work in Gwynedd and Eryri on article 4 directions, linked to the 2022 use class changes, and the work of the Commission for Welsh-speaking Communities directed towards strengthening the Welsh Language and the planning input to that work.

I should mention that following on from this event, the first RTPI Cymru event in 2025 returns to the Quay Hotel in Deganwy for a half-day conference on Friday 21st February on the subject of the Supplementary Report from the Commission for Welsh-speaking Communities.

A particular highlight of the year, for me, was involvement in the judging and presentation of the annual RTPI Cymru Wales Planning Awards, recognising the quality of the outcomes of different spheres of planning activity as well as individuals and teams. It was a pleasure to present the Awards to the winners at the evening event in Morgan Arcade prior to the annual Wales Planning Conference. Next year will be the 25th year of RTPI Cymru, so I would ask everyone to think hard about identifying worthy projects, plans and planners and make it a bumper year for entries to celebrate the value of planning in Wales.

Another pleasure was welcoming Lindsey Richards, this year's RTPI President, on her two-day visit to Wales. In addition to several meetings with groups of planners, Lindsey also visited Cardiff University's Sbarc/Spark building, one of this year's RTPI Cymru Planning Award winners and, after a tour of the building, met planning students and staff from the University to share experiences of entry routes to planning and the diversity of work enjoyed by planners. It was quite surprising to learn of the variety of routes into planning, both through post-secondary education academic qualifications and later through career changes.

Mentioning the variety of routes into planning was a reminder of the work currently being carried out by the Institute, under the heading "Education for Everyone", which is a detailed review of the existing entry model into planning as a profession with the intention to broaden access pathways. This work is due to report early in 2025 and will then look at routes to RTPI membership and an implementation phase. Also watch out for the Institute's new Strategic Plan, due to be launched in 2025 following a period of consultation on a draft this year, which RTPI Cymru Executive Committee submitted comments on.

Lindsey also met the Cardiff Capital Region team, who have accommodation in the Sbarc/Spark building and the following day attended the Autumn Briefing event in Cardiff, where she welcomed the group of new RTPI Members and presented the RTPI Cymru annual Awards for Academic Excellence to the winning first-year students from the Cardiff University courses as well as hearing presentations from two more of the RTPI Cymru Award winners on digital place planning and solar farm development and associated nature conservation work.

One way or another, digital planning has had a high profile this year. Following on from previous year's findings from the surveys of members and the Big Conversation and 2023 Building Capacity research, RTPI Cymru has this year commissioned research from Cardiff University into the potential of digital planning to ease resource pressures and improve planning outcomes. We have also developed links with the Centre for Digital Public Services and the Public Map Platform project.

Digital Planning was also then the subject of the second Professor Tony Hall lecture, held in the University's Glamorgan Building in Cardiff in November which featured Dr Ruth Potts from Cardiff University and Nikki Webber, Digital Planning Team Lead at the City of London Corporation. Victoria Hills, the RTPI Chief Executive, also attended and related her meeting with Professor Tony Hall in which he explained his wish to make a bequest to fund this annual lecture series. A really interesting and worthwhile evening and I would urge members to watch out for next year's (free) event and attend if possible or join online if not.

Having been involved in RTPI activity for many years, prior to and since the formation of RTPI Cymru, I've seen at first hand the evolution of resources available to support members in Wales as well as the technological advances which enable the Institute to deliver services more directly to members. Being involved as a member of the Executive Committee and the Policy and Research Forum over the years, but most particularly as this year's Chair, has also given me a close-up view of the huge amount of work carried out by the RTPI Cymru team and I'd like to record my thanks to them all.

I've acknowledged Mark's full-on start to his leadership of RTPI Cymru already, so thanks also to - Rhian Brimble, our Policy Officer, for all the work involved in organising the Forum, coordinating and drafting the responses to consultations, shaping policy positions and evidence and leading ongoing research projects; Doreine Chantepie, our Member Services Officer, for all the work involved ensuring that everything runs smoothly at meetings and events, face-to-face and online, and for all the RTPI Cymru administration and issuing the regular flow of information to members; and, finally, to our Planning Assistants (Sion Mainwaring (to early July) and Georgina Nee (from early July onwards)) enabling RTPI Cymru to carry out discrete research and data analysis, such as investigating, in conjunction with POSW, the level and types of fees and charges made by LPAs across Wales.

I'm also aware of and very grateful for the contributions and support many members have given to RTPI

Cymru activity during the year – for example, supporting a presence at the National Eisteddfod, in conjunction with Planning Aid Wales - and also those who have served on the Executive Committee, the Policy and Research Forum, or as representatives of RTPI Cymru on RTPI groups nationally (our General Assembly and Nations and Regions Panel reps).

A final note on RTPI Cymru's special interest groups and thanks to those who support them. The Young Planners Group continues to flourish with a much appreciated and enjoyed programme of events and, in its first full year, the Consultants' Forum has met quarterly, meeting and exchanging views with representatives from Welsh Government and other organisations. The NAPE network for those involved in enforcement is supported by RTPI centrally but has a flourishing Welsh community which came together at another successful annual RTPI Cymru Enforcement Conference in November.

I know there is more I could mention from this very hectic year but I have to finish and so I'd simply like to wish everyone working in and associated with planning in Wales a successful 2025 and, since 2025 is RTPI Cymru's 25th year, offer my best wishes to next year's Chair, Aneurin Môn Parry, for another successful year's activity for RTPI Cymru, supporting planning and planners in Wales.

## Audit Wales Review of Affordable Housing

### A Planning System that Delivers

It feels like barely a day has passed since the General Election where there hasn't been a headline about the planning system in England, but there's plenty happening in Wales too. This article looks at three key things since the Summer: the Wales Audit report into affordable housing delivery, the Welsh Government fees consultation launched in November, and the draft budget announced last week.

### Audit Wales report on Affordable Housing

On 9<sup>th</sup> September, Audit Wales published its [report on the delivery of affordable housing in Wales](#). Central to the report is monitoring progress against the Welsh Government's target to deliver 20,000 low carbon social rent homes within its current term (i.e. 2021-2026).

The Welsh Government exceeded its previous target of delivering 20,000 affordable homes during its 2016-2021 term. However, the end of term count of 23,061 homes included 187 shared equity homes and 8,875 Help to Buy homes, both of which are excluded from the new target. Indeed, Help to Buy (Wales) homes do not meet the Welsh Government's own strict definition of what constitutes affordable housing as set out in [Technical Advice Note 2 Planning and Affordable Housing](#).

Although the Welsh Government's current Programme for Government includes a target to 'build 20,000 new low carbon social homes for rent' between 2021 and 2026, in June 2021, the then Minister for Climate Change made it clear that the Welsh Government would count some homes that do not meet that definition.

The current target includes social housing delivered by social landlords (the 11 Local Authorities that have retained their housing stock, or the 31 Registered Social Landlords in Wales) and affordable homes on private developments secured through Section 106 agreements. However, the Welsh Government also counts acquisitions of existing properties and long-term leases on privately owned properties that Local Authorities secure through the Leasing Scheme Wales. Consequently, not all of the 20,000 homes will be additional homes: some may be existing housing stock that has become social homes for rent.

Moreover, the Welsh Government counts some homes that are not low carbon. In addition to the acquisition or long-term lease of existing homes referred to above, privately funded affordable homes, such as those provided via S.106 agreements, must meet only the WDQR minimum space standards. Only Welsh Government funded new builds must meet the low carbon standards set out in the 2021 Welsh Development Quality Requirements (WDQR), including non-fossil-fuel heating systems, very low carbon emissions and gigabit-ready broadband.

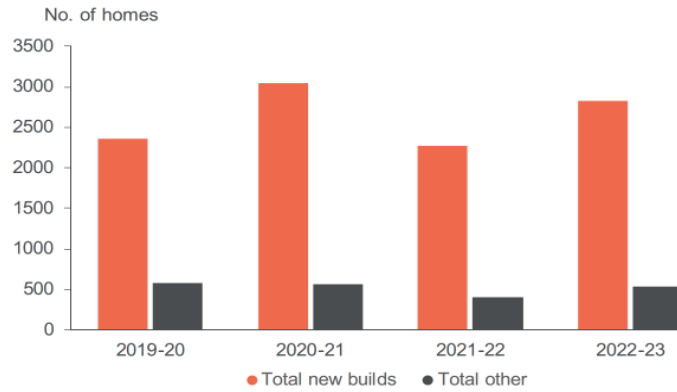
Notwithstanding any debate about the extent to which the precise wording of the 20,000 home target is being adhered to, all of the homes will undeniably provide an urgently needed solution to the housing crisis facing Councils throughout Wales, providing a better solution than B&Bs or hostels for people who are homeless or



at risk of homelessness or in general housing need.

With a challenging target emphasising new builds, the Welsh Government needed to increase the construction of affordable homes. However, the data shows that construction has fallen since 2020/21, when there were 3,045 new build affordable homes. The reduction was particularly sharp in 2021/22 (2,278 new builds), recovering significantly in 2022/23 (2,829 new builds).

### Affordable homes delivered 2019/20 to 2022/23



Source: Welsh Government annual affordable housing statistical releases

Audit Wales recognises that this reduction in delivery coincides with the introduction of sustainable drainage (SUDS) requirements, the phosphate issue affecting five Special Area of Conservation (SAC) rivers in Wales, land supply issues linked to the age of many adopted LDPs, and capacity in the planning system.

The report finds that although the Welsh Government’s pipeline suggests 19,913 homes will be delivered by the end of its current term in 2026, significant additional investment of between £580m and £740m is required to achieve this. Without this additional funding, Audit Wales estimates that between 15,860 and 16,670 homes will be delivered against the target. Interestingly, this figure is roughly comparable to the total achieved in the previous term if Help to Buy homes had been excluded.

It is worth noting that, in some cases, developers provide ‘commuted sum’ payments to provide off-site affordable housing. Audit Wales calculates that, as at March 2023, £23m of such funding was being held in Local Authority reserves. Releasing this funding can form an important part of the solution.

**20,000** – the number of new low carbon social homes for rent targeted between April 2021 and March 2026.

**Between 8,859 and 9,197** – the number of homes that count towards the target delivered by March 2024, based on Welsh Government estimates.

**19,913** – the number of homes that count towards the target delivered or in the pipeline for potential delivery by March 2026.

**£1.27 billion** – Welsh Government spending between 2021-22 and 2023-24 on schemes that contribute to the target (excluding some loan support), of which:

- £1.10 billion covers the core schemes that directly fund the construction or acquisition of affordable homes; and
- £166.5 million covers schemes that indirectly support the delivery of the target.

**£730 million** – the notional capital budget for schemes that directly fund the construction or acquisition of affordable homes through 2024-25 and 2025-26 (with £380 million agreed for 2024-25 and a notional £350 million for 2025-26).

**£580 million to £740 million** – our estimate of the amount that could be needed on top of existing budget assumptions to deliver all homes in the pipeline<sup>1</sup>.

**15,860 to 16,670** – our estimate of the number of homes that could be delivered by March 2026 without the additional funding<sup>2</sup>.

Source: Audit Wales report on Affordable Housing, September 2024

The report makes seven recommendations, two of which are of particular relevance to planners:

**R4 The Welsh Government should review the approach to housing needs assessment, including assessing why national estimates appear to have significantly underestimated the scale of existing need and how that can be rectified;**

It is vital that new Local Development Plans help address Wales' housing crisis. Simply replicating past build rates or following population projections will not result in the step change that is required. Housebuilders have contributed a significant proportion of new affordable homes over the last decade via S.106 agreements, and while not perfect, their contribution needs to be supplemented by, rather than replaced by, additional measures, including the growing contribution made by RSLs themselves. In addition to addressing homelessness and critical housing need, many Local Authorities will be considering the role of housing growth in attracting and retaining our young people, countering our otherwise ageing population profile to ensure our communities remain economically and socially sustainable.

**R7 In line with its commitments in response to previous Auditor General and Public Accounts Committee recommendations, the Welsh Government should work with local government partners to develop sustainable solutions to the capacity and delivery constraints in local government planning services, including options for developing the planning profession and greater regional working.**

RTPI Cymru welcomes the recognition of the resource challenges facing Local Planning Authorities, having been campaigning on this topic for several years. Previous [Audit Wales Office research](#) showed that between 2009 and 2021, Local Planning Authority budgets reduced by 50% in real terms. In January 2023, our survey of RTPI members in Wales called [The Big Conversation/Yr Sgwrs Fawr](#) found that 61% of all respondents reported being overstretched at least several times a week. This figure was 74% when looking only at responses from Council planning officers. Our UK-wide membership survey in 2023 identified the six main challenges facing the profession, all of which come back to resources.

**6 challenges facing the profession,  
according to RTPI members**



Member Value Project, 2023

The Audit Wales report on affordable housing helpfully provides another example of how a properly resourced planning service supports delivery of priority outcomes.

The RTPI is working with partners on a number of measures to help address this issue, including exploring apprenticeships and bursaries and raising awareness of planning as a career option in schools and universities, to grow the profession. Thought also needs to be given to how we can focus the resources we do have on what really matters. Recent research commissioned by RTPI Cymru explores ways of [building capacity through collaboration and change](#).

## Resourcing the planning system

In November, the Welsh Government launched a consultation on increases to planning application fees with the objective of achieving cost recovery in coming years. The [consultation](#), which closes on 17<sup>th</sup> January 2025, includes a number of broader proposed changes, such as doubling the fee for retrospective applications and introducing a fee for lodging an appeal. Underlying these proposals is an expectation that higher fees are accompanied by an improved planning service: additional income is re-invested in the planning service to increase capacity and improve service delivery. This reinvestment to improve planning services is absolutely central to delivering the outcomes and achieving the change that motivates us as planners.

RTPI Cymru will be hosting a small virtual roundtable discussion on 9<sup>th</sup> January 2025 to explore the views of our members from different sectors, to help inform our response. To book a place, please fill in [this online form](#).

## Draft Welsh Government budget 2025-26

In December, the Welsh Government published its draft budget for 2025-26, which has four key priorities:

1. A healthier Wales
2. Jobs and green growth
3. Opportunity for every family (which includes more social homes for rent) and
4. Connecting communities (which includes public transport improvements and road repairs)

. Highlights include:

- An additional £3.7m to help accelerate planning decisions and support a programme of digital transformation of planning services
- An additional £5m for NRW to help deliver infrastructure consents quickly and to provide the necessary input into land use and marine planning decisions
- £57m for Help to Buy Wales
- An additional £81m capital funding for Social Housing Grant and Transitional Accommodation Capital Programmes to help social housing providers deliver homes at pace
- An additional £21m for the Housing Support Grant to fund vital homelessness and housing support services
- £70m resource and £51m capital funding to improve rail and bus services and repair roads.

Following scrutiny by Yr Senedd, the final budget will be published on 25<sup>th</sup> February 2025.

*Mark Hand is the Director for RTPI Cymru, RTPI Northern Ireland and Planning Aid England*

## Keep up to date with RTPI Cymru

RTPI Cymru's X account is now closed, but you can follow [Mark Hand](#) and [Dorine Chantepie](#) on LinkedIn to find out the latest on RTPI activities.

Keep also an eye out for our regular e-bulletins!



UK Residential - November 2024



## Welsh Housing Market and Supply Update



### Activity improves and prices rise, but development remains challenging

**House prices and sales activity in Wales have risen in 2024.** An improved macroeconomic outlook has caused mortgage rates to fall to their lowest in two years, improving confidence and increasing demand in the sales market. As rates fall further, capacity for price growth will open up gradually, and sales activity should increase further.

**Planning consents remain at historically low levels,** falling below the number of completions. This will lead to falling completions in the coming months. The CMA has blamed the planning system, and a lack of clarity and consistency from Local Planning Authorities (LPAs), for the weak numbers. **Prices set to rise as improvement in demand continues** We expect house prices in Wales to outperform the UK average over the next five years at 25.2%. Supply and demand in Wales are both strong, suggesting near-term growth will be moderate. But affordability in Wales is less stretched than elsewhere, so as mortgage rates fall over the next few years and affordability improves, prices will grow more strongly.

**House prices in Wales rose by 2.5% in the year to Q3 2024,** according to Nationwide, leaving prices 3.1% below their late-2022 peak. Demand reached its highest level since 2021 in August, according to the RICS. Lower mortgage rates have improved confidence and have begun to improve affordability, although rates remain high in a recent historic context.

**Market activity has also increased in 2024,** as stronger demand has been met by increases in supply. In the five months since April, transactions have exceeded their 2023 level by 10%. But they remain below the 2017-19 average level by some way, falling 15% short since April. The pipeline of sales agreed has remained positive, but has fallen since the early part of the year. A continuation of the positive trends seen this year will rely on mortgage rates continuing to fall.

**Annual price growth has varied across Wales.** The Land Registry price index is lagged but is showing price growth in most local authorities during the year to June, led by the Isle of Anglesey (6.7%) and Merthyr Tydfil (6.3%). The largest falls were in South East Wales, including Blaenau Gwent, Newport and Bridgend.

**Rental growth for new lets has fallen to 5.6% in the year to August,** the lowest for more than three years, according to Zoopla. Worsening affordability means rents are beginning to reach a ceiling, with tenants not

being able to bid rents upwards any further. Growth is slowing as a result. Rental supply in Wales is low, with the number of listings available per branch in September 32% below the 2018-19 average, according to Savills analysis of portal data. Supply is likely to remain constrained, as UK Government proposals to mandate landlords upgrade their properties to an EPC C by 2030 may push landlords to leave the sector. But capacity for further rental growth is limited by affordability, so rental growth is still likely to moderate further from its current rate.

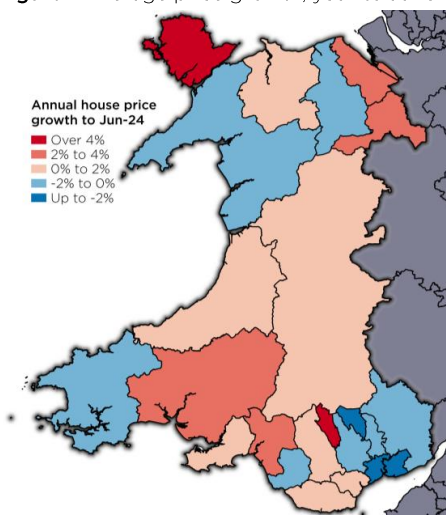
**Consents at historic lows, with completions set to fall** New homes completions have been flat since the middle of 2023 on an annualised basis, according to EPC data, and remain 4% below the 2017-19 average. But starts have fallen away after increasing through 2023, with by far the lowest number of quarterly starts on record in Q1 2024 (exc. the pandemic), according to StatsWales.

**And planning consents remain at historically low levels,** with annualised numbers of consents at their lowest since 2012 excluding the pandemic. They have now fallen 41% since their 2022 peak, according to the HBF. The shrinking pipeline of new homes will lead to declining completions in the coming months.

**Affordable housing delivery is under significant pressure in Wales.** The Government has identified a pipeline of 19,913 homes for delivery by March 2026, against a target of 20,000. Build cost inflation in housing of 24% since the last Senedd election in May 2021 (BCIS) means that an additional £580m - £740m could be needed on top of existing budget assumptions to deliver these homes, according to Audit Wales. The new Minister for Delivery has pledged to “do what is necessary” to meet the target, and former Senedd minister Lee Waters has been drafted in to assess planning applications as they come forward. The latest data is provisional and somewhat lagged, but suggests affordable delivery fell short of need by 12% in 2023/24, and fell by 7% compared to 2022/23.

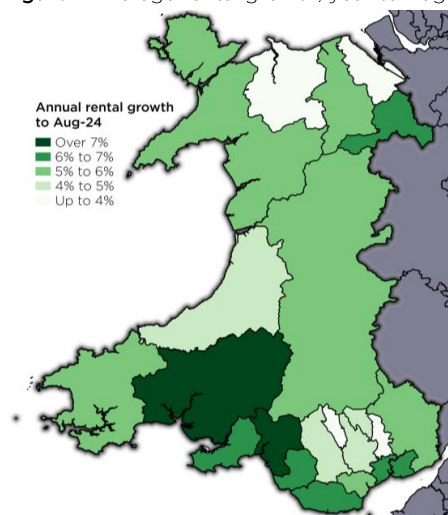
**The Help to Buy Scheme has seen increased use,** supporting more sales in Q2 2024 than any point since Q4 2021, but remains at just 31% of its 2017-19 level. The extended scheme is set to end in March 2025, meaning new homes will lose their competitive advantage in Wales. This will make development viability and new homes sales more challenging.

Figure 1 Average price growth, year to June 2024



Source HM Land Registry, 6 month smoothed\*

Figure 2 Average rental growth, year to August 2024



Source Zoopla Rental Index - powered by Hometrack

## Welsh Housing Market and Supply Update

**Demand and supply in the sales market have both improved markedly in 2024.** Most surveyors have reported rising demand and supply in the six months to September, with average net balances of +20 and +32 respectively.

Demand had been firmly negative for a prolonged period from March 2022, as the rising cost of debt limited buyer appetite. But an improved macroeconomic outlook and an associated drop in mortgage rates has allowed demand to recover. Supply has also risen, which suggests this is unlikely to fuel significant price growth, but may lead to higher levels of activity.

**House prices rose by 2.5% in the year to September 2024 in Wales,** according to Nationwide. Prices are now -3.1% lower than their Q3 2022 peak. Price growth was very strong in the first quarter of the year, growing by 1.1%, but has moderated since then.

Surveyors have reported price falls in most months of 2024, but reported growth in September, with a net balance of +2, according to the RICS survey.

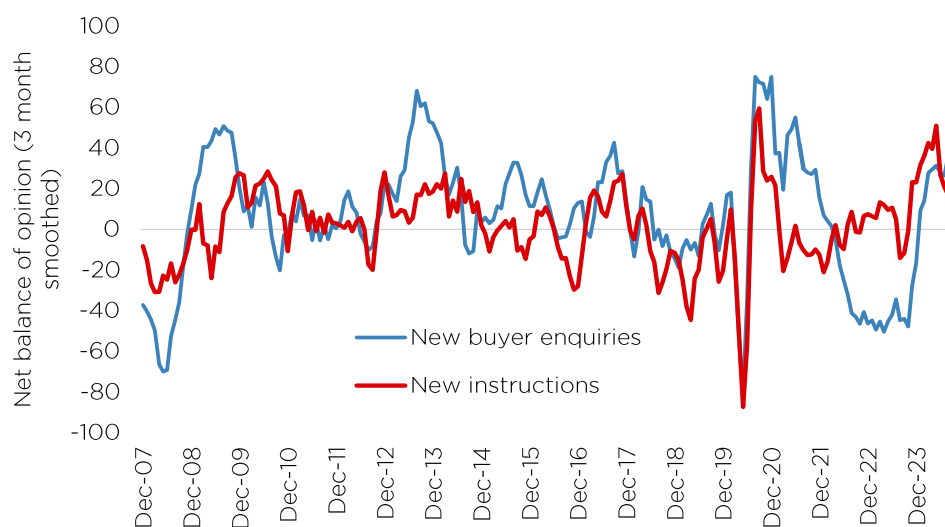
Surveyors' expectations for the next three months remain negative, with a relatively significant majority expecting price falls. With both demand and supply rising, this suggests that price growth is not guaranteed in the coming months.

**Market activity has increased in 2024,** as rising demand and supply have created a slightly more liquid market.

In the five months since April, transactions have exceeded their 2023 level by 10%. But they remain -15% below the 2017-19 average over this period.

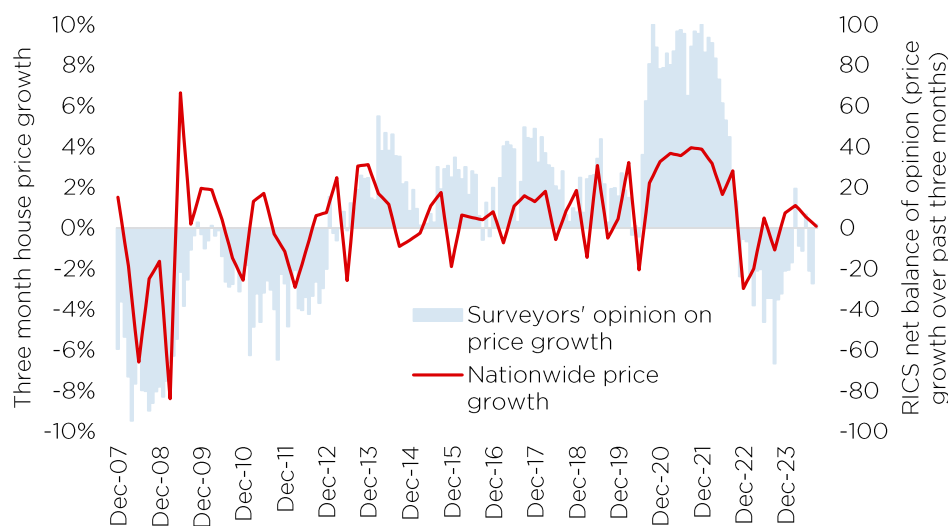
Transaction volumes are likely to continue improving gradually as mortgage rates fall. While sales agreed remain positive, they have fallen since the early part of 2024, suggesting activity is unlikely to reach pre-pandemic levels in the near term.

**Figure 3** Demand and supply have improved markedly as mortgage rates have eased



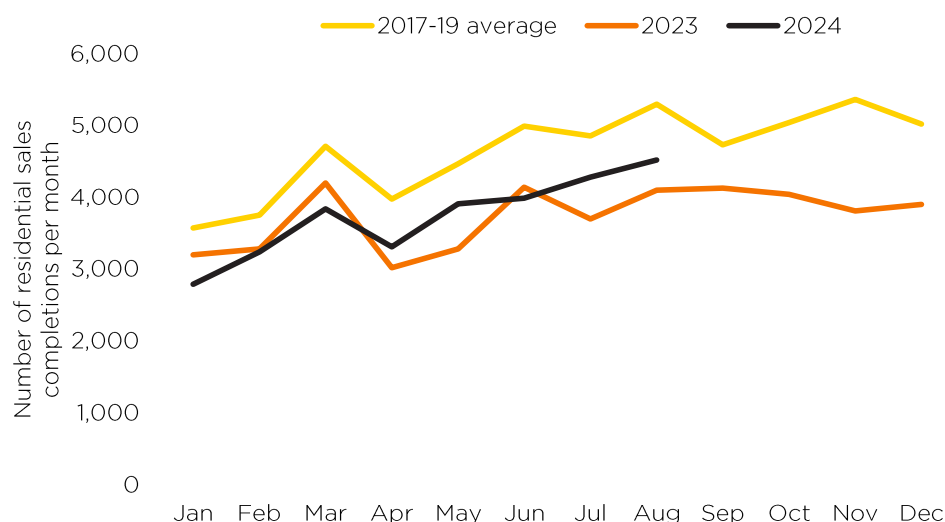
Source RICS (seasonally adjusted)

**Figure 4** House prices rose in the last year, although surveyors expect further falls



Source RICS (seasonally adjusted), Nationwide (seasonally adjusted)

**Figure 5** Transaction activity has improved in recent months



Source Welsh Revenue Authority, HMRC

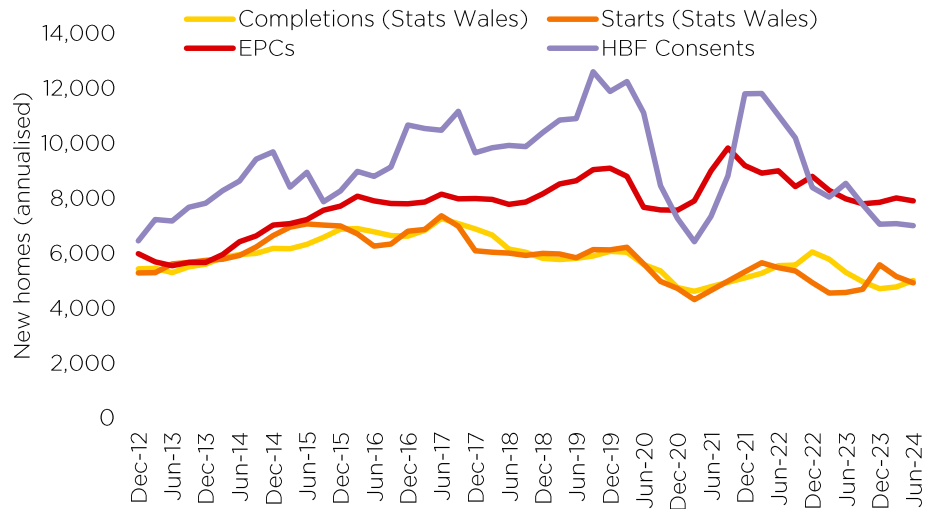
## Welsh Housing Market and Supply Update

**Completions have been broadly flat over the last year, according to new build EPC data, while consents have continued to fall sharply, further threatening the future delivery of new homes.**

Starts have fallen back in the last six months, following a record quarterly low in Q1 2024, according to StatsWales.

Annualised planning consents have fallen by -18% in the last year and by -41% since their 2022 peak to their lowest level since 2012 (excluding the pandemic), according to the HBF. Consents have fallen below completions in 2024, meaning new homes delivery is likely to fall in the future.

**Figure 6** Consents continue to hit historic lows, as completions remain steady for now



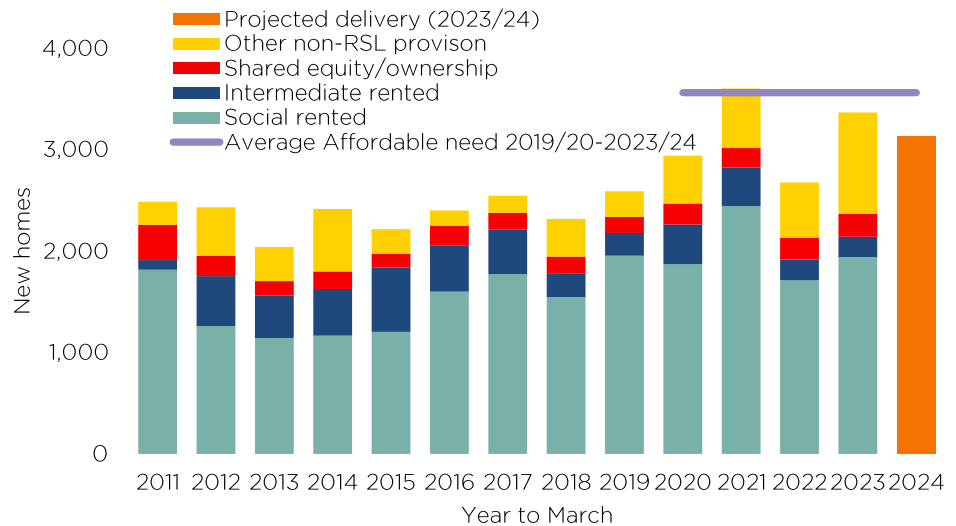
Source StatsWales, DLUHC Table NBI and HBF

**The Welsh Government may need an additional £580 - £740m to reach its target of delivering 20,000 affordable homes by March 2026,** according to Audit Wales.

Build cost inflation has exceeded all assumptions, meaning grant funding has delivered fewer homes than expected since April 2021. The Government has pledged to meet its target regardless, and may require significant additional funding and resource to do this.

Provisional data, albeit lagged, suggests that affordable housing delivery fell by -7% in 2023/24 compared to the previous year. This left total delivery -12% short of affordable housing need.

**Figure 7** Affordable delivery may miss targets without further Government support



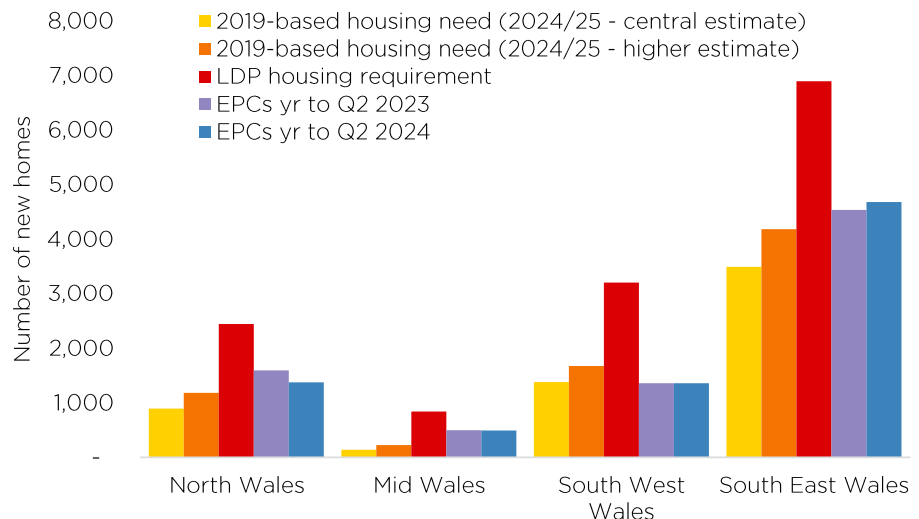
Source StatsWales

**Housing delivery exceeded Welsh Government housing need in three Welsh regions in the year to Q2 2024,** but fell short in the South West. Alternative targets laid out in LDPs were missed in all regions.

Total delivery exceeded the central estimate of need by 34%, and the higher estimate by 9%, according to EPC data. These need figures use household projections from 2018, which may not reflect current housing need in Wales.

Local Development Plans set more ambitious targets than the Welsh Government targets, which were not met in any region. The Labour administration's targets for affordable housing are also unlikely to be met by March 2026 without significant state intervention.

**Figure 8** Housing need met in all regions except South West Wales



Source StatsWales, LDPs and MHCLG Table NBI

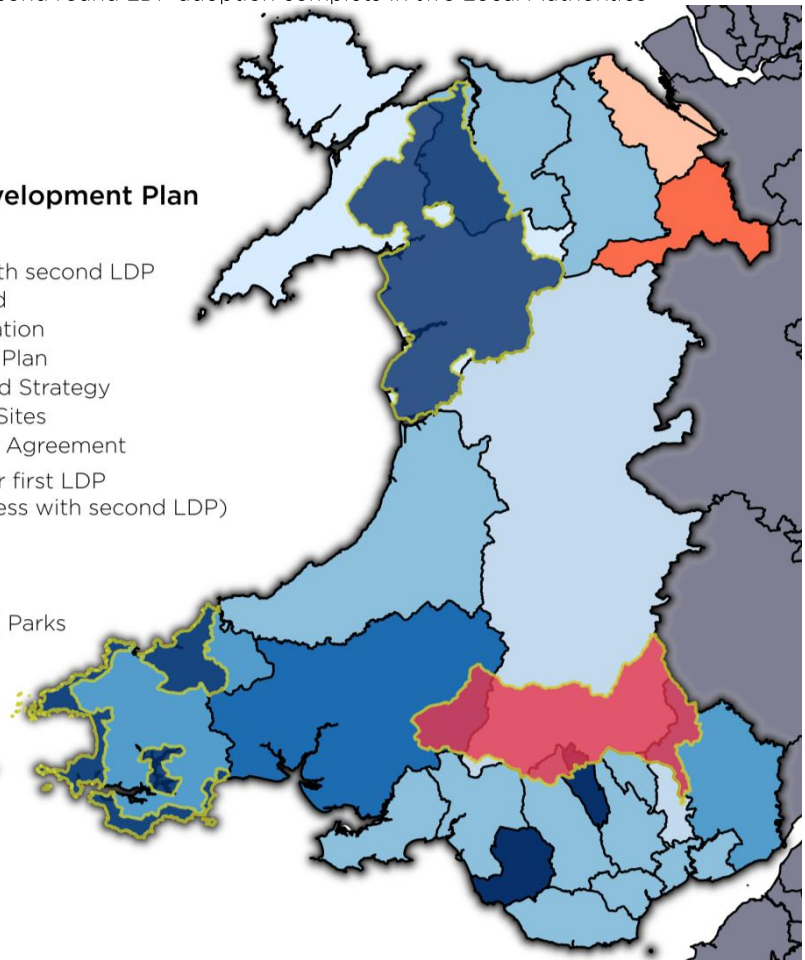
Figure 9: Second round LDP adoption complete in two Local Authorities

Most Local Planning Authorities (LPA) in Wales have begun the process of adopting a second Local Development Plan (LDP). All LPAs have now adopted a first LDP, Wrexham being the last LPA to do so in December 2023.

Monmouthshire is the first in a number of LPAs in South East Wales to commence consultation on their Deposit LDP with other LPAs consulting on Deposit LDPs in the next six to 12 months. This includes the cities of Cardiff and Newport. It will be interesting to see how Newport, along with Caerphilly, and Rhondda Cynon Taff progress their LDPs in light of responses from Welsh Government at Preferred Strategy stage raising non-conformity.

### Local Development Plan Progress

- Progress with second LDP
- Adopted
  - Examination
  - Deposit Plan
  - Preferred Strategy
  - Call for Sites
  - Delivery Agreement
- End date for first LDP (if no progress with second LDP)
- 2022
  - 2028
  - 2030
- National Parks



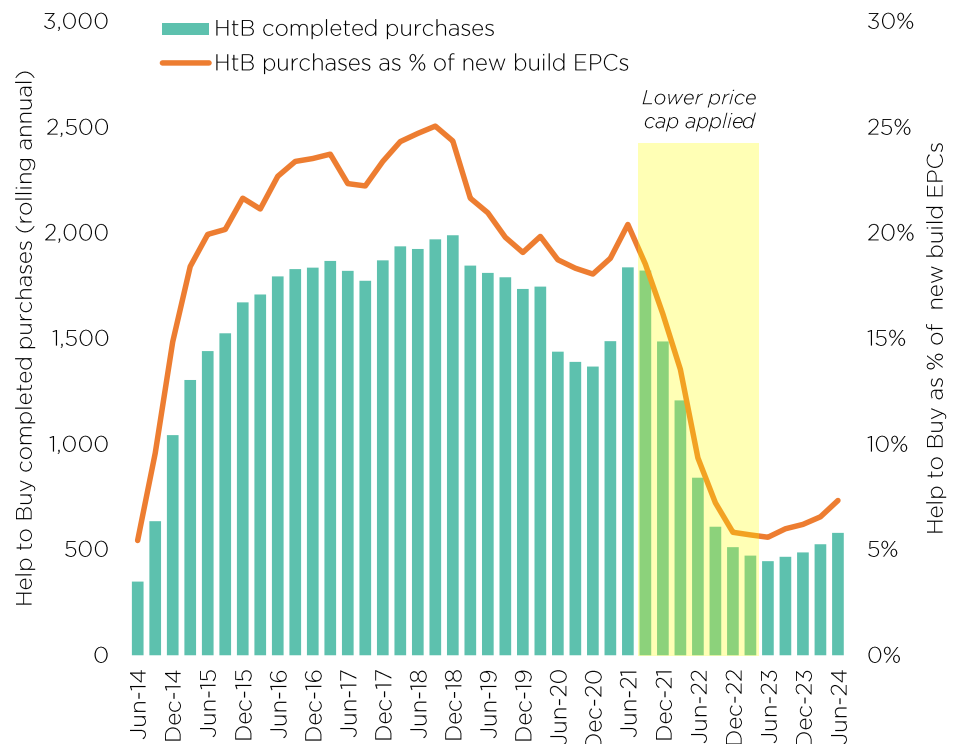
Source LDPs

Use of Help to Buy in Wales has begun to rise in the last year. 7.3% of new build purchases in the year to June were made through the scheme, compared to 5.6% a year earlier, but down from 25% at its peak.

The scheme enables buyers to take on more debt and purchase more expensive homes than they would otherwise be able to afford. Use of the scheme may continue to rise in the coming months as mortgage rates fall. But the scheme is set to end in March 2025, so new homes in Wales will lose their competitive advantage.

Take-up fell sharply between May 2021 and March 2023, as the scheme was limited to first-time buyers and had a reduced price cap of £250,000. It was then extended and will now end in March 2025. The scheme now applies to all buyers and has a price cap of £300,000, equal to the cap which was in place between 2014 and April 2021.

Figure 10 Help to Buy use begins to rise under the new extended scheme



Source StatsWales, MHCLG Table NBI

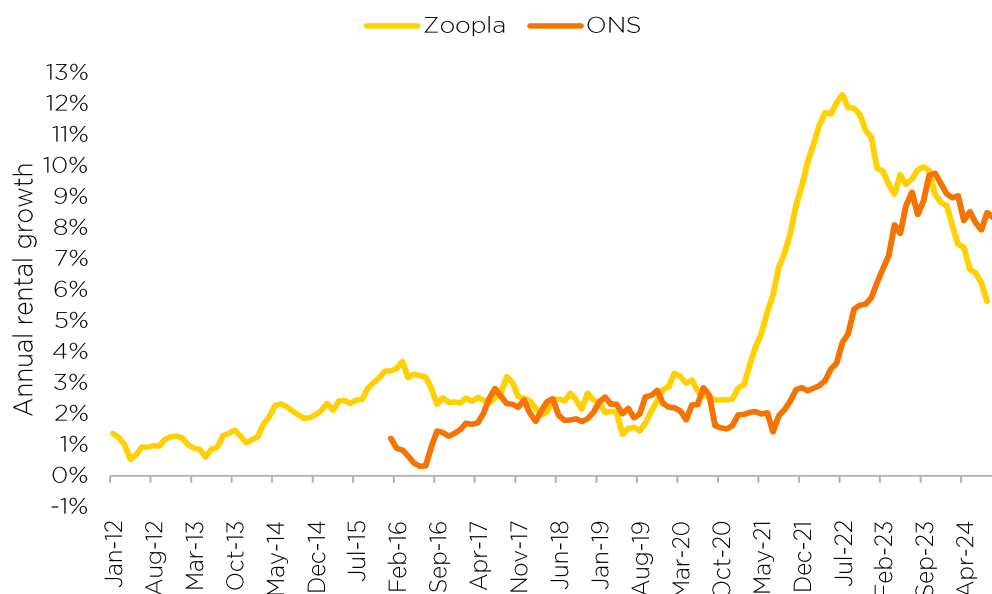
## Welsh Housing Market and Supply Update

Rents on new lets grew by 5.6% in the year to August, according to Zoopla, with affordability pressure beginning to restrict growth in the rental market.

Rental growth for all tenancies (including renewals and existing leases) was 8.3% in the year to September, according to the ONS, suggesting the strong recent growth in new tenancies is now filtering through to the wider market.

The supply of available rental listings per branch in Wales was 32% below the 2018-19 average in September, according to Savills analysis of portal data. Proposals to mandate landlords upgrade their properties to an EPC C by 2030 may keep supply low in the future. But with capacity for further rental growth limited by affordability, rental growth is still likely to moderate looking forwards.

Figure 11 Rental growth begins to slow as affordability bites in the rental market



Source ONS, Zoopla Rental Index - powered by Hometrack

Table 1 Recent house price and rental growth

	Nationwide (house prices) (to Sep-24)			Savills (house prices) (to Jun-24)			Zoopla (rents) (to Aug-24)		
	m/m	q/q	y/y	m/m	q/q	y/y	m/m	q/q	y/y
UK	0.7%	0.7%	2.5%	0.2%	-0.2%	-0.7%	0.5%	1.6%	4.8%
Wales	-	0.1%	2.5%	0.2%	0.3%	0.1%	0.4%	1.7%	5.6%

Source Savills using HM Land Registry and Registers of Scotland, 6 month smoothed\*. Nationwide quarterly data (seasonally adjusted), Zoopla Rental Index - powered by Hometrack

Table 2 House price forecasts - first published November 2024

	2025	2026	2027	2028	2029	5yrs to 2029
UK	4.0%	5.5%	5.0%	4.0%	3.0%	23.4%
Wales	3.5%	5.5%	6.0%	4.5%	3.5%	25.2%

Source Savills

Table 3 Rental growth forecasts - first published November 2024

	2025	2026	2027	2028	2029	5yrs to 2029
UK	4.0%	3.5%	3.0%	3.0%	3.0%	17.6%

Source Savills

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\*Savills index is an unadjusted repeat sales index based on HM Land Registry and Registers of Scotland price paid data. Note that Savills national index (labelled UK) is for Great Britain, not including Northern Ireland.

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## Plugging the gap – a new policy approach to enhance housing delivery

With only [4,771 housing completions](#) in 2023/24—the lowest\* since record-keeping began in 1974—urgent action is needed to address the systemic barriers impeding progress to the delivery of new homes in Wales.

The housing crisis in the UK has reached alarming levels, particularly in Wales, where a recent [Audit Wales report](#) highlights the slow delivery and rising costs of delivering affordable homes.

Within the last 20-years, housing delivery in Wales was at its peak in the early 2000s where on average 8,558 dwellings were completed per annum. Completions fell following the 2008 financial crash to a low of 5,451 dwellings in 2012/13 before slowly recovering to 6,900 in 2015/16. As a result of the pandemic, the number of completions dropped significantly during 2020/21 to 4,616 before rising to 5,785 in 2022/23.



The Future Wales estimate of need of 7,400 dwellings per annum in the first five years of the Plan has never been met. This is even more concerning when taking into account that the need identified in Future Wales is based on past build rates and demographic trends. Some would argue that Future Wales fails to leverage the full potential of planning policy to deliver change by, for example, tackling Wales' rapidly ageing demographic profile.

To better understand some of the barriers to housing delivery the Competition and Markets Authority (CMA) published a [paper](#) on housebuilding in the UK in February 2024. A specific summary was provided in relation to Wales. It stated that it would like to see a housebuilding market that delivers:

- a More homes overall, and particularly in the areas of highest demand, in turn reducing pressure on affordability;
- b Consistently better outcomes on new build quality, with consumers having an effective route to redress; and,
- c Reduced detriment to consumers arising from the private management of amenities on new build estates.

The CMA report made specific recommendations in terms of reforming the planning system. Some of these include:

- a Option 2.1: More objective and effective use of targets to ensure housing need is met.
- b Option 2.2: Effective monitoring and enforcement of local development plans to encourage housebuilders to bring forward successful planning applications and build new houses.
- c Option 2.3: Streamlining the planning system to significantly increase the ability of housebuilders to begin work on new projects sooner and bring forward marginal projects which may have previously not been viable due to the costs of taking them forward. Potential easy gains here could include limiting the use of pre commencement conditions and utilising standardised s106 agreements.

\*With the exception of 2020/21 that was impacted by the covid-19 pandemic where construction sites were shut down.

There are other important recommendations such as the need to reduce delay of statutory consultee responses, improve capacity within local planning authorities, simplifying the outline planning process and incentivising the delivery of small sites.

The Labour Government in England seem to have taken on board the CMA's recommendations and, within weeks of taking power, it had proposed a challenging housing target for England of 370,000 new homes per annum and to revoke previous changes that eased the requirement on local planning authorities in respect of the need to demonstrate a five-year supply of housing. If successful, this would double the national annual level of housing output delivered in recent years. Deputy Prime Minister Angela Rayner sees this as a way of not only getting homes delivered but to drive growth and create jobs. A brief general response to the CMA report has been provided by Jayne Bryant MS and we look forward to seeing the full response in due course.

Lichfields would welcome a detailed assessment of housing needs across Wales. Whilst there has been analysis of affordable housing needs, the assessments of wider market needs are primarily based on demographic trends which take no account of factors such as concealed households or policy ambition.

As a result, Lichfields is concerned that housing requirements in emerging RLDPs are underestimating actual housing needs, particularly as past build rates are being used as a benchmark of what is considered deliverable. At a time of acknowledged crisis in housing provision, RLDPs are in danger of simply rolling forward past patterns of historic under delivery which cannot be seen as aspirational policy in the context of achieving the well-being goals. A stock-based approach to assessing housing requirements is, in our view, more likely to trigger the necessary step-change in housing delivery.

Welsh Government has recently announced a 'deep dive' into the barriers of delivering affordable housing at pace and also a [consultation](#) on promoting a resilient and high performing planning service. This indicates a recognition that there are delivery issues, as highlighted by the CMA and Audit Wales in their recent reports. However, we consider that these issues go beyond just affordable housing delivery and are primarily rooted in procedural and political challenges in producing ambitious and timely LDPs.

### **Delivering LDP Targets**

The Welsh Government prioritises a plan-led system, in the same way as the rest of the UK. However, this long-held cornerstone of our planning system only works where development plans are updated regularly and without delay. LDPs identify the land required to deliver new homes and need regular review to replenish those sites that have either been built out or that have failed to come forward for reasons such as viability. Of course, local plans can also become out of date in England, but the new Government has acted to ensure that there are policies and mechanisms in place to allow alternative sustainable sites to come forward outside of the Plan process to deliver a continuing supply of new homes.

In Wales, every LPA should currently review its LDPs no longer than four years from the date of adoption (PCPA 2004 (Section 69 (1)) and LDP Regulation 41 (1)). Delays in LDP preparation have been widespread across Wales, with only seven out of 25 plans being less than five years old. Of the remaining 18 LDPs, 11 are time expired and therefore fail to offer a robust basis for forward planning and associated investment decisions.

In the absence of either up-to-date LDPs or alternative policy sanctions there is no incentive in Wales to ensure that LPAs are delivering the required amount of housing, and little incentive for elected Members to vote to adopt a controversial new LDP. Neither is there the flexibility to bring forward sustainable housing sites quickly to resolve critical housing shortages. The latest Welsh Government consultation on a resilient planning system seeks views on extending the LDP review period from four to six years. We believe that an implication of this change would be to make the need for the monitoring of land supply and reacting to any identified shortages, even more crucial.

In 2018, at a time when housing delivery in Monmouthshire had been below the LDP targets, working collaboratively with the Council, Lichfields obtained outline planning permission for 115 dwellings on a site in Llanfoist, Abergavenny outside the settlement boundary. The proposal included 35% affordable housing (above the policy target) and the permission was subject to a condition requiring submission of an application for the approval of Reserved Matters within 12 months. The purpose of this was to expedite the delivery of houses on the site. Despite the contractor going into administration mid-development, the site is approaching completion, delivering 69 market homes and 37 affordable homes. The LDP became time expired in 2021 and the replacement LDP is unlikely to be in place until 2026 at the earliest. However, due to the Welsh

Government's removal of TAN1 and the five-year housing land supply test, valuable sustainable developments (with increased affordable housing and accelerated delivery timescales) such as the site in Llanfoist are no longer able to come forward to plug the gaps whilst LDPs are being updated or are not delivering.

It is understood that Welsh Government is working with LPAs to try to improve up-to-date LDP coverage across Wales. However, we consider that a new policy mechanism is also required to ensure the planning process is more responsive to supply shortages. This is something Welsh Government could address in the short term through a new policy requirement to ensure housing delivery is reflecting LDP housing trajectories.

Lichfields propose that such a mechanism could monitor delivery against LDP anticipated annual build rate (AABR) and allow for short-term sustainable housing land releases ahead of LDP review where urgent land shortages are evident. This would make the planning system in Wales more resilient and support the social and economic objectives set out in Future Wales and PPW as well as assisting the Welsh Government in meeting its 20,000 affordable homes target.

A new policy mechanism for addressing housing shortfalls against agreed trajectories would not only address this need but would also encourage LPAs to ensure that up-to-date LDPs are in place. If LPAs have up-to-date LDPs they are more likely to be delivering against trajectories and retain control over where new housing is located.

Any new policy statement allowing for short-term releases would still need to ensure that housing sites reflect key government planning principles including:

- a Sustainable location with good active travel links;
- b Affordable housing in line with policy requirements;
- c Accordance with place making principles; and,
- d Achievement of net biodiversity benefit requirements.

## **20,000 new low carbon affordable homes**

The Welsh Government's housing planning policy is overwhelmingly focused on affordable housing delivery. Increased open market house building would, in Lichfields' view, enhance affordable housing delivery by ensuring the private sector deliver considerable numbers of affordable homes through Section 106 agreements. It would also provide valuable housing for the skilled workforce that Welsh Government are trying to grow in Wales.

The consequence is that whilst the proportion of affordable housing delivery may at first glance be increasing, this is only as part of diminishing overall output.

Welsh Government has a target of delivering 20,000 new low carbon homes for rent between 2021 and 2026. Welsh Government Affordable Housing Provision data records a net increase of 6,045 affordable homes between 2021 and 2023. This figure, however, includes acquisition of existing stock. Based on Stats Wales Housing Completion data the actual number of new build affordable dwellings was 3,825. Of these 1,738 (45%) were delivered via Section 106 agreements from private enterprise schemes. Welsh Government has recently launched a 'deep dive' to understand why affordable housing delivery is falling [short of the 20,000 target](#). In Lichfields' view the CMA report has already identified many of the key issues that require addressing.

Whilst investment in affordable housing schemes is to be commended, this is happening at significant cost to Welsh Government budgets, and it is unclear how sustainable this is in the medium term. There is a private house building sector that accepts affordable housing delivery forms part of the policy environment in Wales and is willing to play its part in addressing the shortfalls. We believe that a policy focus on increased private sector output would be a more cost-effective way to increase affordable housing delivery and reflect the concerns raised in the Audit Wales report.

The current low levels of house building are undermining achievement of the seven well-being goals. The planning system has a real opportunity to address these matters and make use of the house-building sector as a vehicle to significantly boost the Welsh economy. Rachel Reeves has repeatedly referred to the importance of

increased house building to achieving economic growth in England; this is surely something that we should also be also be aspiring to in Wales.

Whilst there are issues in the development management process that require addressing (primarily additional resources and expertise), the real blockage in housing delivery lies in the procedural and political challenges of the plan-making process and lack of any policy mechanism to allow for appropriate sites to come forward in the short term where there is evidence that housing trajectories are not being met. We believe that these are issues that warrant urgent attention and action.



*Lichfields works across all housing tenures from private housing builders to RSLs to council partnership operators. We have advised public and private sector clients on assessments of housing supply and demand as well as the economic and social value that is derived from delivering new homes.*

## Section 106 Planning Contributions

Recent research by the Home Builders Federation (HBF) on [unspent planning contributions in England and Wales](#) estimates that over £6bn from Section 106 agreements and almost £2bn raised through the Community Infrastructure Levy (CIL) is being held by Local Authorities in England and Wales, rather than being spent on infrastructure improvements.

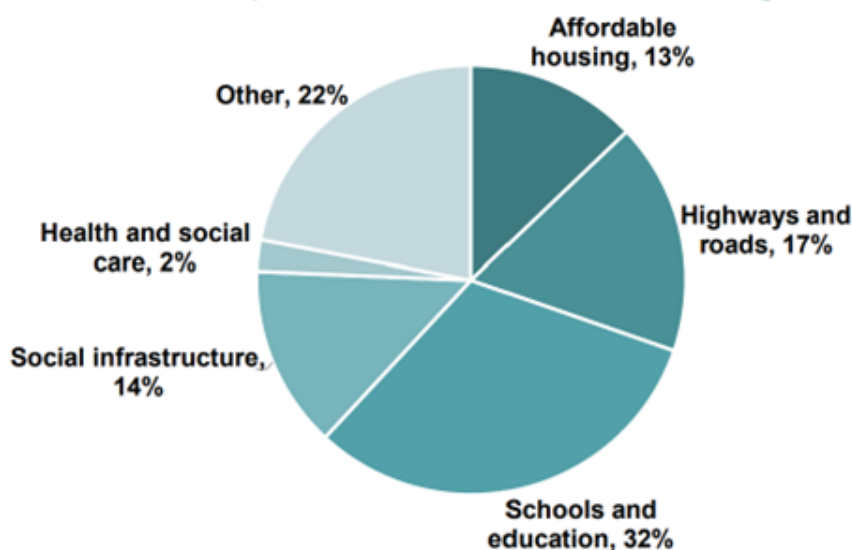
Developer contributions to infrastructure can be secured in one of two ways:

- Section 106 agreements are negotiated between developers and Local Authorities and specify contributions that developers will make to mitigate the impact of a specific development;
- Community Infrastructure Levy (CIL) is a charge which can be levied by Local Authorities on new development. Rather than being negotiated (like Section 106 agreements), CIL is a compulsory levy set out in a charging schedule that must be published on the Local Authority's website.

The HBF's research is based on Freedom of Information (FOI) responses from 208 (61%) Local Authorities, who had total unspent S.106 contributions amounting to £3.9bn. This average of £18.7m per Local Authority was then extrapolated up to provide an estimation of £6.3bn for all Local Authorities in England and Wales.

Contributions were broadly allocated as below:

**Allocations of unspent Section 106 contributions in England and Wales**



Source: HBF

Of the twenty respondents with the highest level of unspent S.106 contributions, 11 are County Councils, five are London Boroughs and four are Unitary Councils. None are in Wales.

However, when looking at the estimated £817m unspent in Affordable Housing contributions across England and Wales, Cardiff Council is in the top ten of those who responded.

Of those who replied to the FoI, the ten councils with the largest amount of unspent Affordable Housing contributions were:

	<b>Council</b>	<b>Amount held unspent</b>
<b>1</b>	Cardiff Council	£33.4m
<b>2</b>	Newport City Council	£11.2m
<b>3</b>	Swansea Council	£8.1m
<b>4</b>	Pembrokeshire County Council	£7.1m
<b>5</b>	Monmouthshire County Council	£6m

Source: HBF

### **Why is this important?**

Given current discussions about Local Government financial sustainability and the spiralling costs of temporary accommodation for people at risk of homelessness, the suggestion that Councils in England and Wales are holding an estimated £817m of unspent contributions towards affordable housing is bound to create unwelcome headlines.

Moreover, the most commonly-cited objection from local communities to urgently needed new homes relates to pressure on infrastructure: school places, getting a GP appointment, lack of public transport, with a clear perception that new development makes no contribution to infrastructure needs. If Councils are believed to be banking monies that should be spent on infrastructure, this will undermine confidence in governance and democracy.

Unfortunately, the HBF report equates the unspent estimated £1.1bn in highway improvement monies to repairing an estimated 12.6 million potholes. Those closely involved in planning will know that S.106 developer contributions are to provide increased infrastructure capacity and cannot lawfully be used to undertake normal repairs such as filling potholes.

### **Three takeaways**

#### **1) What don't we know?**

In Wales, six of the 22 Councils did not reply to the Freedom of Information request. This presumably means that six Councils in Wales do not have accurate records readily to hand to quantify what S.106 planning contributions have been secured, what they are for, and whether or not they have been spent. It is important contributions are being carefully monitored.

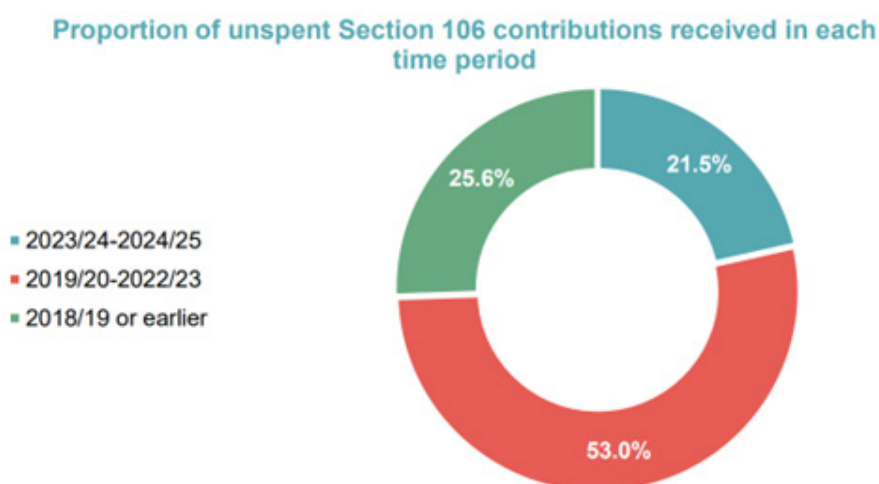
A full data set for Wales will also avoid potentially inaccurate data extrapolation, and will give stakeholders confidence.

#### **2) Is there good reason for S.106 contributions having not yet been spent?**

Behind every headline and statistic is a story. It is rarely the case that Councils can immediately spend infrastructure contributions as soon as they are received from the developer. In many cases, multiple developments (and therefore multiple contributions) are combined to fund a specific infrastructure improvement such as a new school or road junction improvements or new swimming pool.

Likewise, some projects may require match funding from grants or from the Council's capital reserves, requiring bids to be submitted and/or Council approval. Many projects will then require design, tender and procurement. Some may require seasonal ecology surveys or other consents such as sustainable drainage approval. Others may have stalled due to a lack of capacity or resource to move the project forwards.

The data provided by Councils in England and Wales shows that nearly 75% of contributions were paid within the last five years. Many (but not all) S.106 agreements include a clause requiring contributions to be repaid to the developer, with accrued interest, if it is not spent within a specified time period (typically five years). Attention should therefore be focused on those contributions paid four or more years ago to ensure infrastructure funding is not inadvertently lost. Should there be good reason why extra time is needed to spend a S.106 contribution, the developers may be willing to agree additional time if asked.



### 3) Development funds infrastructure improvements

Although the focus of the HBF's article is on infrastructure contributions being paid by developers and then 'banked' by Local Authorities, the same data can be used to highlight the positive news that developers do contribute significant sums to fund infrastructure improvements to mitigate the impact of their development. Many developers now promote this message on a sign at their show home.

By publicising this positive message (while also ensuring S.106 contributions are properly spent in a timely manner), some of the community concerns about the impacts of urgently needed new development might be resolved, making our role as planners less challenging. Councils and developers can use this data to present the facts to communities and hopefully mitigate some concerns and objections.

*Mark Hand is the Director for RTPI Cymru, RTPI Northern Ireland and Planning Aid England*

## New analysis of access to local amenities in England and Wales

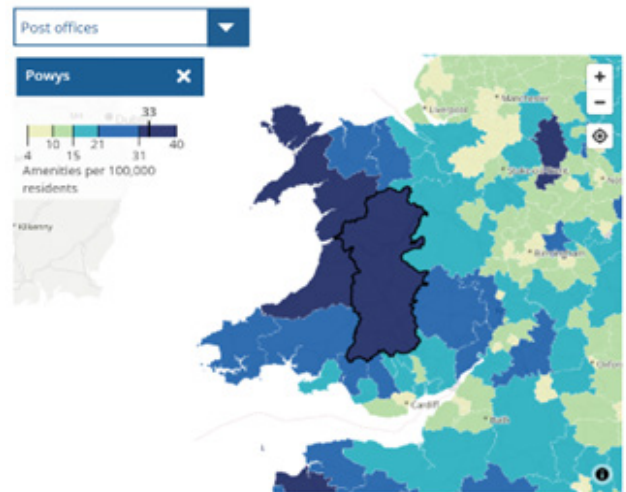
The Office for National Statistics has collaborated with Ordnance Survey Great Britain to publish [Access to local amenities in England and Wales - Office for National Statistics](#). Building from the previous study [Access to sports facilities and other amenities in your local area release](#), this new research provides a valuable analysis of spatial access to amenities including:

- ATM and cashpoints
- community facilities
- dental practices
- GP surgeries
- libraries
- parks and play areas.
- prescribing dispensaries (pharmacies)
- post offices
- pubs
- rail stations
- places of religious worship

The findings are presented through an interactive map where dark blue indicates higher frequencies of amenities per 100,000 residents, categorised by Local Authority area. Users can select which local amenity they wish to view. Perhaps unsurprisingly, there is an urban-rural divide in England and Wales, with rural areas on average less well served by essential services including ATMs (cashpoints), pharmacies, and railway stations.

Although this tool is immensely helpful, its use requires thought. For example, at a glance, Powys scores well for Post Office provision because it has 33 Post Offices per 100,000 population. However, the vast geography and dispersed population of Powys means that a higher number of a specific amenity per 100,000 people does not necessarily equate to service accessibility.

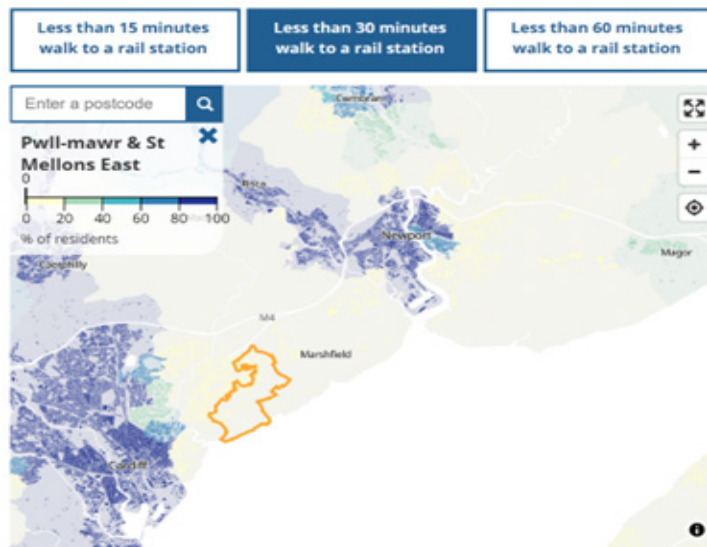
Figure 1: Amenities per 100,000 people, by local authority



Source: Access to local amenities in England and Wales from the Office for National Statistics

Due to the nuances in accessibility, this new publication provides a deeper analysis of two types of amenities: railway stations and libraries, with walking times published to reflect the ease of access. This is valuable data for policymakers and planners.

The graph below displays data for railway stations. The data is categorised into three timeframes: less than 15 minutes' walk, less than 30 minutes' walk and less than 60 minutes' walk. For England, the data is also categorised by how urban or rural a place is using the ONS 2011 rural/urban classification (this classification does not exist for Wales, limiting the ability to analyse and to compare results to England). Each dot is an area, and users can hover over each dot to see the area name. The data better illustrates the accessibility of a place by categorising the walking distances.



Source: Access to local amenities in England and Wales from the Office for National Statistics, Ordnance Survey

Figure 2: Percentage of resident population within certain travel times of their nearest railway station, by local authority and rural-urban classification



Source: Access to local amenities in England and Wales from the Office for National Statistics, Ordnance Survey

The Charter's six principles include:

1. Movement: Aims to prioritise walking cycling and public transport. This supports active travel which requires high access to amenities.
2. Location: Supports the growth and efficiency with positive land use, especially in rural areas.

Insights using this ONS and OSGB tool can support evidence-based policymaking and could be particularly helpful when drafting emerging LDPs and SDPs. The data could also help service providers target investment in amenities. It may help to identify gaps in under-served areas where additional amenities may be required. Furthermore, detailed maps of libraries and train stations may assist in understanding implications of shutting services or the benefits of opening new routes. It is hoped that the tool will be expanded so that all amenities have this level of 'walkability' detail, not just railway stations and libraries.

## Rural and Urban Disparities

Even though Wales does not have an urban and rural (2011) classification, previous research and knowledge highlights pressing issues in rural communities and the disparities of access to amenities in various parts of Wales. The RTPI [Rural Planning in the 2020s](#) research paper highlights that some rural areas are close enough to an urban area to use their amenities while other rural areas are too distant to these amenities: there are varying degrees of rurality in Wales.

As rural communities continue to experience challenges in accessing essential services, these insights can guide strategic interventions to improve community well-being and enhance overall accessibility in Wales. The data can also assist in inclusive planning for all ages. This report indicates areas with higher frequency of older adults having few amenities like stations within comfortable walking distance. The data will provide evidence

Perhaps surprisingly, the two Welsh Local Authorities with just 10% of their population within 15 minutes' walk of a train station were Swansea and Torfaen. The Vale of Glamorgan tops the chart with 50% of its population within 15 minutes' walk of a train station.

Over time, this data supports evidence-based modelling for infrastructure investment. Specifically, 70% of Cardiff's population, 45% of Newport's population and 31% of Monmouthshire's population are within a 30-minute walk. How may the six new stations between Cardiff and Severn Tunnel Junction, as recommended by the Burns Commission, change this data, and significantly improve walkable access to public transport?

## Placemaking and Planning Policy

According to Planning Policy Wales (PPW12), placemaking involves making a "high quality development and public spaces that promote people's prosperity, health, happiness, and well being." The core principles of sustainable development and placemaking include ease of access to services for residents, workers and visitors. The Placemaking Wales Charter, endorsed by key stakeholders explains:

*"The Charter reflects the collective and individual commitment of these organisations to support the development of high-quality places across Wales for the benefit of communities."* – Placemaking Wales Charter



of prioritising amenities to be not just geographically distributed but also tailored to the age profile of the population.

*Georgina Nee is the Planning Policy Assistant at RTPI Cymru.*

## Digital Planning Research in Wales

The prevalence of technology around us, combined with the growth of digital platforms in business and social interactions, has increased expectations of government services such as urban planning to become more effective. In the last decade there has been increasing momentum internationally around using technology to modernise planning systems with a focus on process-based enhancements to improve transparency and the speed of decision-making. Digitalisation has been promoted globally as a solution for many urban and governance problems including, improving the economic and environmental performance of cities, the use of data to aid decision-making, a focus on making local democracy more participatory, and increasing the efficiency of the planning system. Beyond improving the planning system's efficiency, evolving technologies also offer planners numerous opportunities to engage with hard-to-reach communities in new and exciting ways, access more data than ever before, visualise development proposals, and much more.



In 2020 the UK Government published the [Planning for the Future White Paper](#) highlighting a need for planning reform in England, with a focus on digitalizing the planning system as a means to make it 'simpler, clearer and easier to navigate'. Since then, the Department for Levelling Up, Communities and Local Government have announced several digital planning initiatives and funding related to digital planning at the local level in England. Also in 2020, Scotland published the Government's digital strategy for planning, [Transforming Places Together](#) with the aim of developing a digital planning system. More broadly there has been a push outside government to advance a digital planning agenda within the UK. Despite the growing traction around digital planning in many parts of the UK, Wales has been slow to embrace digital transformation. The Centre for Digital Public Services has been working a range of initiatives, such as digital data standards for the public sector and, in partnership with the Welsh Government, Cardiff, Vale of Glamorgan, and Gwynedd councils, has been exploring the needs of planners in relation to digital technology to improve the pre-application phase of the planning process.

In 2021 a range of experts within the planning and digital technology sectors came together to form a non-profit Task Force for Digital Planning leading to the production of a [Digital Task Force report](#). The digital planning agenda progressed in England in 2023 with the passing of the Levelling Up and Regeneration Act, which amongst other things, established clear powers regarding the processing, provision, and format of data in the planning system. The primary improvement to the English planning system through the Levelling Up and Regeneration Act 2023 is the setting of clear data standards through the provision of powers to local authorities to dictate how planning data must be provided and processed, with the aim of improving the availability, use, accuracy, transparency, and interoperability of planning tools and services.

Despite these various projects and policy initiatives there has been limited research examining the capacity of the UK's planning systems and planners to utilise digital technologies, planners' perspectives on digital planning tools, or exploration of the potential impact of digital tools on improving planning outcomes. Consequently, we have been exploring how prepared planners are for the impending digitalisation of the planning system. Our recent work has explored which technologies planners are using across the UK, how confident planners are using different types of technology, and how technology is changing how we conceptualise planning theory and practice. Our work found that the use of technology in planning practice in the UK is fragmented, with technology use varying substantially across the public and private planning sectors. While our research shows that planners are eager to utilise digital planning tools and not afraid of change, barriers related to access to appropriate training, lack of funding, and their capacity to learn and integrate digital planning tools into their already busy workloads threaten to dampen their enthusiasm and slow the

potential institutionalisation of digital planning tools.

More broadly, a lack of awareness among planners of the potential pitfalls of digital planning highlights the need for targeted digital literacy training for planning professionals to ensure compliance with data privacy and standards, the ethical use of data, legislative requirements, and broader knowledge of the limitations of digital planning tools. While applicable to the entire profession, these issues are particularly critical for public sector planners as custodians of public information and enforcers of policy and legislative regulations. Additionally, the public sector faces wider institutional pressures to manage change alongside the growing and ever-changing expectations of the public and politicians about the effectiveness of planning. It is therefore important that we gain a deeper understanding of the capacity of Local Planning Authorities in Wales to engage with digital planning.

With this in mind, in partnership with RTPI Cymru, we are researching the current capacity of local planning authorities and planners to engage in digital planning in Wales. The work will focus on exploring digital planning and planners' capacity to engage with it with a focus on how digital planning can ease resource pressures in planning and improving planning outcomes. In the coming weeks we will be inviting planners across Wales to participate in an online survey and a series of online focus groups to further explore their experiences of digital planning in Wales, and their capacity to engage with digital planning. We are interested in reaching planners from a wide variety of backgrounds, and levels of experience – whether you're a tech-savvy planner or limited in your use of digital technologies in your work. We look forward to hearing about your experiences of digital technologies and planning through the forthcoming survey and focus groups!

*Dr Brian Webb is a Reader in Spatial Planning, Director of Postgraduate Taught Studies at Cardiff University School of Geography and Planning. Dr Ruth Potts is a Senior Lecturer in Spatial Planning, Director of Undergraduate Studies at Cardiff University School of Geography and Planning.*

## RTPI Cymru Planning for Excellence Awards 2025



Join us in celebrating Planning in 2025!

Entries for the RTPI Awards for Planning Excellence will open on 16th January 2025- so start thinking about that special project/ team which deserved to be recognised.

Follow us on LinkedIn to find out more.

## RTPI Ambassadors

The RTPI Corporate Strategy programme BALANCE: Build A Legacy And New Community Equality is an education project that seeks to 'target intelligently schools of greatest educational need and diversity, including areas of socio-economic deprivation in areas of high planning demand, and attract talented young people who can then serve their communities from a position of strength, signposting accessible routes'. We are seeking to equip Member volunteers ('Ambassadors') with helpful, accessible materials to facilitate engagement with schools and, crucially, reach young people from groups underrepresented in the profession.

### What is an RTPI Ambassador?

Ambassadors are RTPI members who help to raise awareness of town planning, and champion what a great career it is.

They are volunteers who might:

- help promote the profession at university careers fairs or school assemblies.
- help write a case study which is turned into a lesson plan or skills workshop.
- help broker a work experience 'insight day' for a student or class at your place of work.

### You could be an Ambassador

Stepping up to 'give back' to the profession could be a fantastic way to practise your communication skills, and a fun way to make links to community engagement and public consultations you've undertaking in your workplace. If that is the case, and it meets your personal development plan objectives, it could also be counted as CPD.

### Could you volunteer to bring planning into the classroom?

If you are an RTPI member and would like to represent the profession, are willing to adapt and relate planning to interesting and everyday issues, and are confident to talk engagingly about your job to young people then you may find being an RTPI Ambassador rewarding.



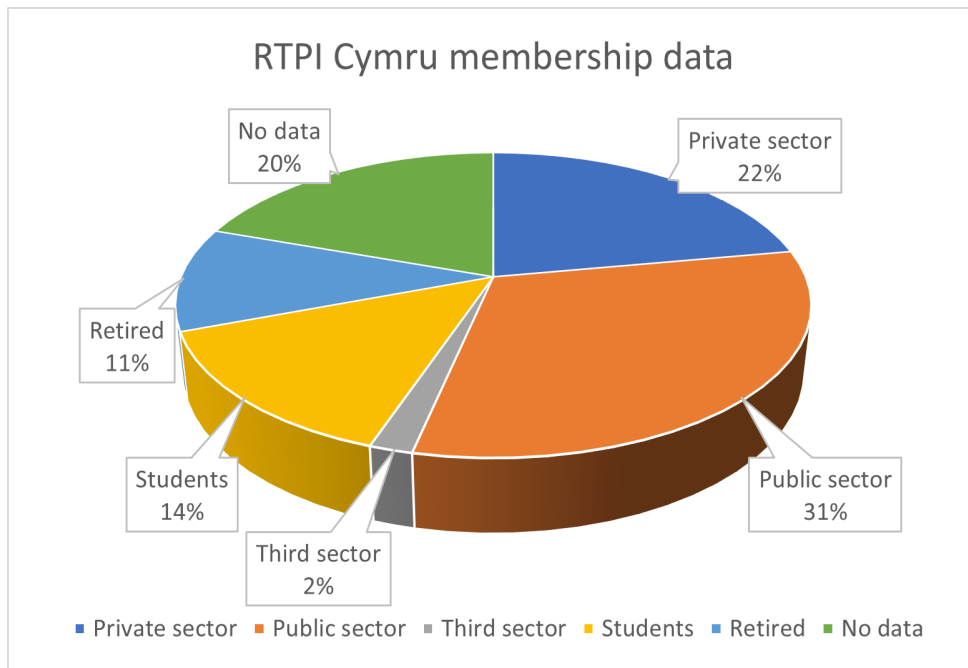
The Institute is urging its members to volunteer as ambassadors and dedicate at least two hours next year to visiting schools and universities.

The Ambassadors Toolkit can be accessed [here](#).

# Updating your details- why it matters

You might have seen the posters at an event, a little plea at the bottom of a page of a past edition of Cynllunio, or a message in one of our e-bulletins asking you to log in to your RTPI account via our website and ensure your details are up to date. Why is this so important?

Having accurate data ensures you remain informed of relevant events and communications from the RTPI, such as membership renewal notices. It also helps us comprehend where our members work and where they live to help us better understand the needs of our members and the shape of the planning profession in Wales. But this is made more difficult if we have gaps in our data, as per chart below:



We aim to do some more deep-dive analysis of our membership data in 2025- and would be grateful if you could take a couple of minutes over the holidays to log in to your RTPI profile and ensure your data is up to date.

**RTPI**  
Royal Town Planning Institute

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## Hello Dorine Chantepie

Track your progress, view your booked events and keep your information up-to-date here

Personal Details | Membership | My Booked Events | My CPD | Member Benefits | Volunteering

### Personal Details

Title: Miss

First Name: Dorine

Last Name: Chantepie

Sign In Email: dorine.chantepie@rtpi.org.uk

Change Sign In Email

Password: [Redacted]

Change Password

Phone (Optional): [Redacted]

Mobile: [Redacted]

Personal Address: [Redacted]

Country: United Kingdom

### Employer Details

Selected Organisation: Royal Town Planning Institute (RTPI) - Wales

Employer Address: Royal Town Planning Institute (RTPI) - Wales, Studio 107 The Creative Quarter, Morgan Arcade, Cardiff, South Glamorgan, CF10 1AF, United Kingdom

Job Title (Optional): Member Services Officer

Contact Phone (Optional): 0202 7529 9468

Primary Phone: [Redacted]

Primary Address: Home

Contact Preference: Any

Please note that your primary address determines what communications you get- so if you live and work cross borders you might receive information on events in England even though you live in Wales, if your primary address is your work address set in England.

We are also exploring the possibility of having an “update your data” pop-up at some of our events too- so that we can get relevant information sent to you as well as having the correct information printed on your name badge for any future event.

If you have any queries and would like to discuss further, let us know by emailing [wales@rtpi.org.uk](mailto:wales@rtpi.org.uk)

*Dorine Chantepie is the Member Services Officer for RTPI Cymru.*

## RTPI Cymru 2025 Events

We have already got some fantastic events lined up for 2025- an important year for RTPI Cymru as we celebrate our 25th anniversary.

- [Report from Commission for Welsh Language Conference](#) Friday 21st February, The Quay Hotel, Deganwy
- [Planning Law Update](#) Friday 28th February Online
- [RTPI Cymru Awards and Summer Party 2025](#) Wednesday 25 June, Cardiff (location TBC)
- [Wales Planning Conference](#) Thursday 26 June, Cardiff (location TBC)
- Professor Tony Hall lecture Tuesday 14th October, Cardiff
- North Wales Conference Thursday 16 October, TBC
- Enforcement Conference Thursday 13th November, Mid Wales

Thank you to our regular sponsors FTB, Savills, POSW and WSP for their ongoing support. We have a range of additional sponsorship opportunities available- more information can be found [here](#)

**The RTPI Cymru team wishes you all a very Happy Festive Season- see you in 2025!**