

10. Rural SWOT Report

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Llywodraeth Cymru
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ARUP

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1 Introduction

1.1 Study Context

Following the consultation on the National Development Framework (NDF) Preferred Option in the summer of 2018¹, the Welsh Government are now in the process of developing the Draft NDF with consultation planned for July 2019.

As set out in the Preferred Option, it is proposed the NDF will include both national and regional policies across the defined regions. The three regions will cover North, Mid and South West and South East Wales as shown in Figure 1.

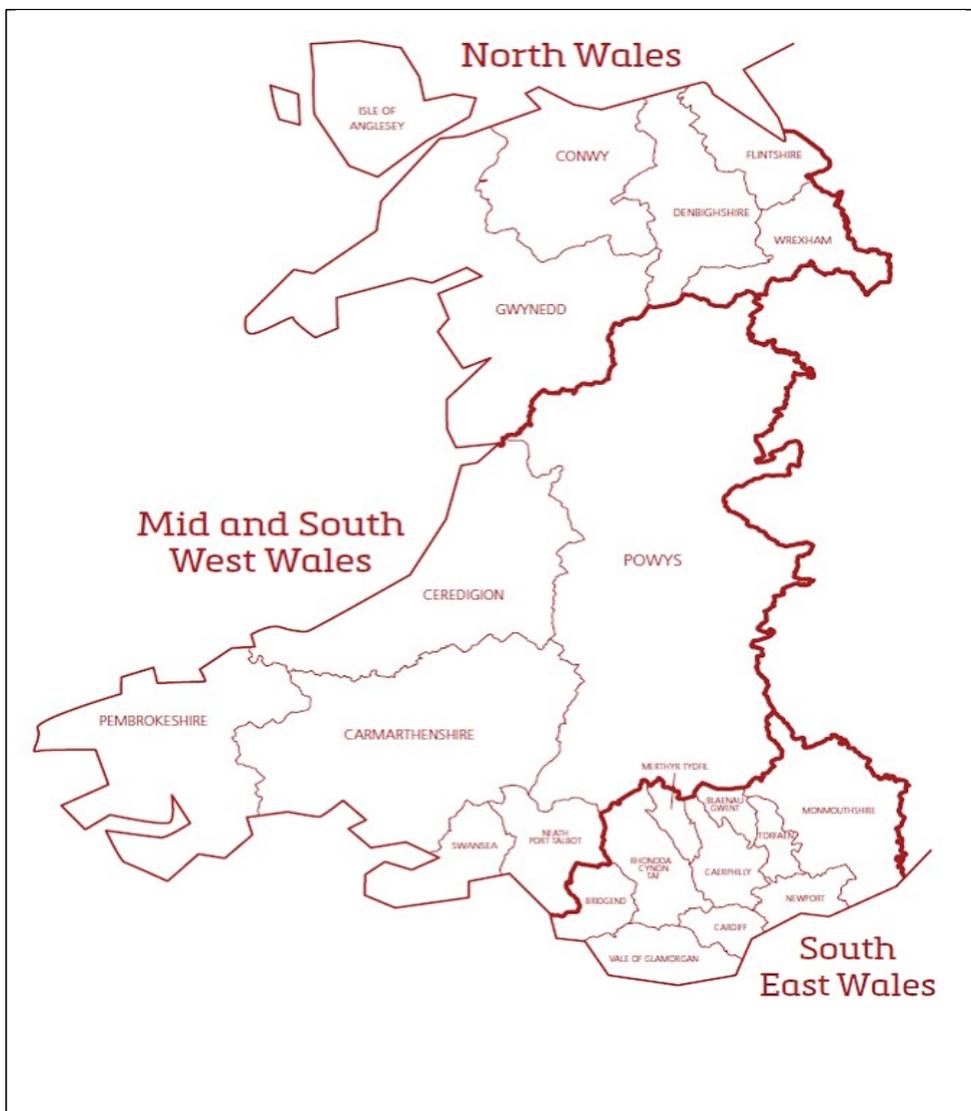


Figure 1 NDF Regions

¹ <https://beta.gov.wales/national-development-framework-issues-options-and-preferred-option>

This reflects the regions identified by the Welsh Government's Economic Action Plan. Chief Regional Officers have been appointed for each region and have commenced work to develop the Welsh Government's approach to improving regional working and delivery. The Planning Act facilitates this approach and provides a legal framework for the preparation of Strategic Development Plans (SDPs) on a regional basis.

From a regional perspective the NDF's role includes supporting the delivery of the Welsh Government's regional policies and better strategic planning / collaboration between Wales' Local Planning Authorities (LPAs).

The programme for the NDF is illustrated in Figure 2 below with consultation on the Draft NDF planned for July to September 2019 and Assembly consideration of the Draft between April and June 2020.

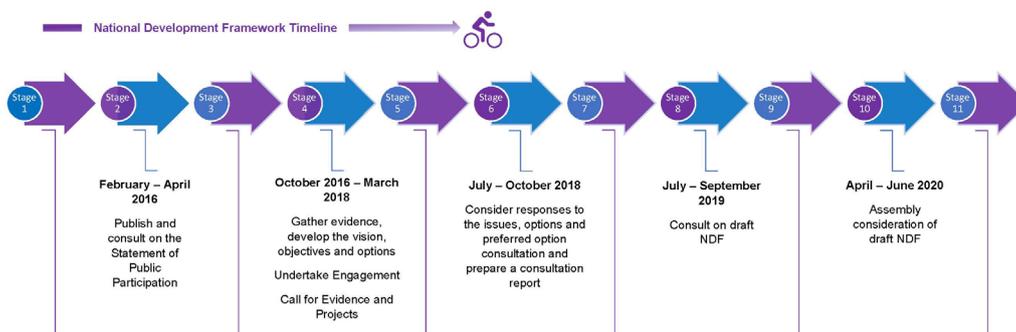


Figure 2 NDF Timeline

1.2 Approach

The objectives for this Regions and Rural Areas Research Study are:

- To develop an evidence base for each NDF region that supports NDF policy development and using this, to identify the issues and spatial areas NDF policies should focus on;
- To identify broad rural areas and develop an evidence base that supports NDF policy development and using this, to identify the issues and spatial areas NDF policies should focus on; and
- To involve stakeholders in a and b.

To help achieve the study objectives, Ove Arup & Partners (Arup) who were commissioned to undertake this Study, produced a suite of reports that address the requirements for the study.

These are summarised in Table 1 below:

Table 1 Study Approach and Reports

Output	Reports	Contents
Study Overview	1. Study Overview	a) NDF context, purpose of study and reports, Arup's involvement
Data and Definitions Report	2. Data and Definitions Report	b) Introduction including context, purpose of study and reports, and structure c) Data collection including approach, method, cooperation, findings, stakeholder feedback, how data has been utilised in the research with tables and maps. d) Defining 'Major' –including employment sites, retail/commercial sites, generating stations and transport schemes e) Defining and mapping key settlements f) Adjoining English regions g) Defining Rural Areas h) Consideration of the Well-being of Future Generations Act i) Summary of Study
Workshop Reports	3. Regional Workshop Report – North Wales 4. Regional Workshop Report – Mid & South West Wales 5. Regional Workshop Report – South East Wales 6. Rural Workshop Report – North Wales 7. Rural Workshop Report – Mid & South West Wales 8. Rural Workshop Report – South East Wales	j) Approach to stakeholder involvement k) Workshop arrangements and attendees l) Results of activities m) Summary of stakeholder feedback
SWOT² Reports	9. Regional SWOT Report 10. Rural SWOT Report	n) Approach to SWOT o) Stakeholder feedback p) Data validation q) SWOT analysis r) Role of the NDF in supporting and addressing the SWOTs, considering interrelationships and ways of working s) Summary of what the NDF should do to support / address SWOTs in regions and rural areas

² Strengths, Weaknesses, Opportunities and Threats (SWOT)

As a suite of documents, the Data and Definitions Report should be read alongside the associated Workshop and SWOT Reports for a comprehensive understanding of the results and findings of the research.

All outputs that comprise the suite of reports for the study provide context, purpose and cross reference to each other as appropriate.

In particular, the Data and Definitions Report clearly explains the approach to the study and reporting, providing an overview of the outputs together as required.

The study reports have been published on the National Development Framework website by the Welsh Government separately and alongside each other³.

1.3 This Report

Through stakeholder engagement and data gathering, the study helped to establish an evidence base of the strengths, weaknesses, opportunities and threats (SWOT) within each region (and common to those regions), as well as rural areas.

Two separate SWOT Reports have been prepared as follows:

1. Regional SWOT Report; and
2. Rural SWOT Report.

This Rural SWOT Report outlines the relevant results of stakeholder engagement, data verification and presents the SWOT and analysis around appropriate policy intervention areas and spatial scales (e.g. national, regional, local or community planning) focusing on rural areas. It draws together a range of data and information for each of the three regions related to rural planning issues, presenting this in both tabular form and spatially.

This report considers what the NDF can do to support and address the SWOT pertinent to rural areas. Importantly, as well as supporting the development of the Draft NDF, the outcomes of this research will also be used to support the development of SDPs, LDPs and joint-LDPs.

This Regional SWOT Report is presented in the following sections:

- Section 2 provides a high-level summary of the SWOT discussions across the three NDF Regions;
- Section 3 provides a SWOT analysis and considers issues pertinent to the emerging NDF; and
- Section 4 provides recommendations for the NDF in light of the SWOT analysis.

Appendix A presents an extended table of the SWOT issues raised within workshop discussions, to include those considered to be outside the NDF's remit.

³ <https://gov.wales/topics/planning/national-development-framework-for-wales/?lang=en>

2 Approach to SWOT

2.1 Overview

This section of the Report considers the results of the stakeholder workshops (see Workshop Report for full results), and identifies the Strengths, Weaknesses, Opportunities and Threats for the rural areas within the three Welsh Regions.

Section 3 provides a high-level summary of the Rural SWOTs and includes a wide range of issues spanning all scales and policy areas.

As required by the commission, these issues have been sifted in order to provide a focus for the NDF and those policy areas considered to be appropriate for consideration within the NDF are identified as such in the SWOT results below. The criteria that have informed this sifting process include:

- a) Whether the issue / policy area is a planning consideration;
- b) Whether there is a spatial planning / policy intervention (e.g. is not a matter of funding / financial viability only);
- c) Whether the issue / policy area is best considered at the regional / national scale (also taking into account the results of the stakeholder workshop contributions on this topic); and
- d) Whether an initiative or process already exists that would address the issue (e.g. planning obligations).

Where an issue is more of a strategic matter rather than a rural focuses point, this has been considered as part of the separate Regional SWOT Report, which should be read alongside this report.

To provide a consistent approach to classification, Strengths and Weaknesses apply to the current (baseline) position, whilst Opportunities and Threats apply to the future perspectives.

For each of the topics that are considered to be strengths or weaknesses (i.e. current issues), comments have been made as to where strengths or weaknesses are addressed, supported or delivered outside of planning.

To avoid unnecessary duplication and given the future perspective of opportunities and threats, similar commentary is not considered to be relevant and so has not been provided.

2.2 Data Validation

In addition to the SWOT analysis compiled through workshop events, this section of the report also considers how this analysis compares to the data collected as part of the wider commission⁴.

The commentary in the tables in Section 3 therefore identifies where data either contradicts or compliments the trends / views emerging from the SWOT. This is not specific or in detail, but the data collated can be found in the Study Report.

Where strengths, weaknesses, opportunities or threats associated with particular topics have not been specifically raised by stakeholders in one or more of the three regions, but where data exists to help clarify a position, a comment has been provided.

2.3 Ways of working

A key point raised during stakeholder discussions was the need for the NDF to reflect and drive the ways of working as advocated in the Well-being of Future Generations (Wales) Act 2015. Key issues for the NDF to take into account include:

Long term

The NDF should present a vision for rural areas in Wales, thinking long term. Priorities for growth, investment and strategic decision making around rural industries, related sectors and future changes (e.g. diversification of rural economies and agriculture) need to be clearly set out.

The NDF should articulate how policy interventions will ultimately impact on Wales and its rural areas. This will help address current needs and challenges in a way that safeguards the ability to meet long-term needs.

Prevent

The NDF should provide a clear direction as to the policy interventions that are needed to prevent current problems and those anticipated in the future from happening or getting worse.

For example, the NDF should be clear as to the direction of travel for policy making around the identification of strategic areas for renewable energy related development, related to spatial planning and policy development around associated themes including transport and decarbonisation.

⁴ Data beyond the scope of the commission has not been collected to inform this validation process.

Involve

The NDF should encourage involvement from stakeholders at an early stage in policy and project development, to help make sure that the planning system reflects the [sometimes different] needs of the population across Wales, its regions and rural communities.

Collaborate

The NDF should encourage collaboration between key stakeholders (private and public sector), decision makers and delivery bodies at an early stage to help achieve the long-term policy objectives of the Welsh Government and its partners.

This is important to helping address many of the non-planning barriers and needs, such as funding, viability and deliverability.

This will also support the ability to create innovation and best practice sharing across sectors (e.g. funding and delivery models).

Integration

The NDF should make sure that policy areas are considered as a whole, acknowledging the importance of cross sector working and the interrelated nature of planning.

3 SWOT Results

This section outlines the results of the rural SWOT.

3.1.1 Summary of key issues

Table 2 provides a summary of the key rural issues raised that are applicable to all three NDF regions, including issues raised in the context of stakeholder discussions.

The Workshop Reports provide a full account of stakeholder feedback from the events held in each region.

A breakdown of rural issues specific to the North Wales, Mid & South West Wales and South East Wales regions are thus contained within the respective Rural Workshop Reports for each region. The Study Report – Data and Definitions considers all stakeholder engagement undertaken as part of the research, as well as data collected and its associated analysis.

While these key issues may in some cases span SWOT categories (i.e. an opportunity may also be seen as a threat), they have been classified as a strength, weakness, opportunity or threat for the purposes of presentational clarity.

Table 2 Summary of Key Issues

Strengths	
<ul style="list-style-type: none"> • Community resilience / responsiveness and proactiveness of rural communities. • Cultural heritage • Young farmers / similar groups • Welsh language / culture • Sustainable use / management of resources • Access to natural environment • Tourism • Marine / costal environment • Ports • Community supported agriculture • Digital based SMEs 	<ul style="list-style-type: none"> • Digital infrastructure • Agriculture • Artisan skills • Film and TV industry • Income from green tourism • Topography / landscape • Hydro / tidal energy • Early retirements / asset to community • Lifestyle / well-being • International appeal • Sense of community • Brecon as a growth area • Universities • Well-connected / accessible rural areas • Proximity to populous areas

Weaknesses	
<ul style="list-style-type: none"> • Housing isolated from facilities • Housing delivery not meeting need • Lack of / access to affordable housing • Reliance of a few national house builders • Commuter hubs now communities • Tourism benefits vs impacts • Domination / prominence of tourism • Tourism focussed on car travel • Over-reliance on car • Distance to work • Employment opportunities • Low wage employment • Welsh language not sufficiently protected • EV infrastructure lacking in rural areas • Grid connectivity • Depopulation – especially young • Land viability • Rent / buy house • Transport expensive • Need for long distance travel • Rail infrastructure / routing • Bus passes stop at border • In-migration / purchase of homes / second homes 	<ul style="list-style-type: none"> • Out-migration – working age / young • Rural infrastructure • Market forces failing • Big agriculture • Agriculture no longer labour intensive • Big farms swallow financial support • Listed buildings expensive to run • Septic tank regulations • Less community focussed planning • Seasonality – tourism and agriculture • Economy focussed on agriculture and small industry • Healthcare • Mental health / social isolation • Pattern of travel to school – impact on health • Critical mass to maintain viability of settlements • Large land mass • Ageing population • Land values • Increasing house / property prices • Uncertainty over future of farming and impact on land management • Water pollution • Traveller communities in rural areas

Opportunities	
<ul style="list-style-type: none"> • Community champions / officers • Continued protection of agricultural communities • Local house builders / self-build • More types of affordable housing • Services and amenities related to well-being • Transport for long distance travel / P&R • EV charging infrastructure • Decentralised energy generation / community energy • Offshore renewables • Balance renewables against landscape • Major event to showcase region • Housing co-op • Planning as language enabler • Need to focus on places not ‘rural’ 	<ul style="list-style-type: none"> • Water management at a strategic level • Management of super farms • Food – source and distribution • Construction industry • Automation and upskilling • Waste circular economy • Skills / education in traditional crafts • Sustainable homes through PD • Private water supplies • SuDS • Re-use of existing buildings • Support for re-use of listed buildings • Policy framework for rural life • NDF articulating environmental opportunities • SMEs promoting high quality jobs • Countryside vs highlands

Opportunities	
<ul style="list-style-type: none"> • Place planning to sustain communities • Policy for Welsh speaking areas • NDF opportunity to invest • Green tourism / diversification of offer • Tourism tax • Rural jobs • Careers / education and brokering qualifications • Post Brexit review of land • Energy island • Sea walls to protect critical infrastructure • Fishing and use in Wales 	<ul style="list-style-type: none"> • Social innovation /entrepreneurship • Resource of early retired community • Improving digital (5G) • Location of futuristic services • Working from home • Modernisation of schools • Growth deal • Retail/commercial town centres • Regional universities • Reservoirs as attractions • WBFGA

Threats	
<ul style="list-style-type: none"> • Community willingness / time • Rural areas turning into commuting villages • Threat to language and culture (from growth) • Lack of service / housing – outward migration • Transport investment • Electricity network limitations (e.g. increased demand from EV) and funding • Fuel prices and impact on rural community • Ageing population – isolation • Reliance on car • Regional differences • Skills • Retention of people / outmigration of young • Fishing quotas • Relationship between NDF and land management post Brexit • More constraints to address when developing in rural areas – barrier • Land banking (landowners not bringing forward sites for development) • Water quality / environment and intensification of farming • Funding cuts barrier to intervention • Flood risk • Employment opportunities and equality 	<ul style="list-style-type: none"> • Retaining skills and promoting careers • Idyllic / simplistic view of rural areas is a barrier to development • Social care for the elderly • 16+ access to schools • Brexit (including influence of Irish ports and connection with Europe) • Need for protection – seen as development infill opportunities • Communities that are stagnant / stuck in the past • Agriculture and relationship with Brexit • Challenge of financing infrastructure • Movement of services / population to South East Wales • Aspirations for children in rural areas • Reliability of digital networks • Protection of non-designated areas • Air pollution / carbon impact of farming • Loss of sheep farming / impact on upland vegetation • Rural areas being forgotten / side-lined

3.1.2 SWOT issues and the NDF

Key issues that are considered to be pertinent to the role of the NDF are set out in Table 3 to Table 6 below. Each issue references the NDF region within which it was raised, alongside where the data collected validates or contradicts the specific issue. A summary comment is also made about how the issue ought to be addressed and/or delivered outside the remit of spatial planning.

An extended summary and deeper analysis of these issues with respect to the role of the NDF is contained within Section 3.2; this includes details of including of the spatial scale, policy focus, infrastructure requirements for each issue raised.

Appendix A presents an extended table of the SWOT issues raised within workshop discussions, to include those considered to be outside the remit of the NDF.

Table 3 SWOT Issues and the NDF - Strengths

Strength	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Cultural heritage assets in rural areas		Y	Y	Data shows that there is also a significant number of designated heritage assets in North Wales.	Y	Protection and promotion, resource management and maintenance.
Rural areas important to Welsh language and/or culture	Y	Y	Y	Data shows the use of Welsh language is most prominent in the North Wales and Mid & South West Wales regions.	Y	Government policy and programmes (e.g. Welsh language targets and initiatives).
Sustainable use and management of natural resources	Y	Y		Data suggests that the natural environment is a strong asset to all regions.	Y	Maintenance and management.
Access to the natural environment / green spaces	Y		Y	Further study may help to clarify or support this across other regions.	Y	Maintenance and management.
Tourism		Y		Data shows tourism is also an important sector in North and South East Wales.	Y	National and local promotion and funding.
Marine environment / coastal areas		Y	Y	Further study may help to clarify or support this across other regions.	Y	Management plans and conservation.
Ports (e.g. Holyhead)	Y			Data shows that there is important port infrastructure in all regions	Y	Sector-specific programmes and strategies (e.g. trade and skills).
Digital infrastructure	Y			Further study may help to clarify or support this across other regions.	Y	Sector-specific programmes and strategies (e.g. broadband and skills).
Agriculture		Y		Further study may help to clarify or support this across other regions.	Y	Funding (e.g. EU), land management and sector specific programmes.
Brecon as a growth area		Y		Further study may help to clarify or support this across other regions.	Y	Land availability and viability, market forces.
Well-connected and accessible rural areas (by road network)			Y	Data shows that Wales is most well-connected by road.	Y	Government policy (e.g. sustainable transport hierarchy) and operation / maintenance.

Table 4 SWOT Issues and the NDF - Weaknesses

Weakness	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Housing delivery not meeting needs of the community – estimates not accurate	Y	Y		Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. targets), land availability and market interest / forces.
Over-reliance on the car		Y		Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. sustainable transport hierarchy) and funding in alternative modes.
Employment opportunities		Y	Y	Further study may help to clarify or support this across other regions.	Y	Fiscal incentives and market drivers, sector-specific programmes and strategies (e.g. skills).
Welsh language not sufficiently protected	Y			Data shows the use of Welsh language is most prominent in the North Wales and Mid & South West Wales regions.	Y	Government policy and programmes (e.g. Welsh language targets and initiatives).
EV infrastructure lacking in rural areas	Y	Y		Further study may help to clarify or support this across other regions.	Y	Market forces and lack of government strategy on the provision of infrastructure.
Grid connectivity		Y		Further study may help to clarify or support this across other regions.	Y	Market processes (e.g. demand led system) and age of infrastructure.
Rural infrastructure	Y			Further study may help to clarify or support this across other regions.	Y	Government policy and funding.

Table 5 SWOT Issues and the NDF - Opportunities

Opportunities	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Services and amenities related to well-being	Y			Further study may help to clarify or support this across other regions.	Y
EV charging infrastructure	Y	Y		Further study may help to clarify or support this across other regions.	Y
Decentralised energy generation model / community energy schemes	Y	Y		Further study may help to clarify or support this across other regions.	Y
Offshore renewables		Y		Further study may help to clarify or support this across other regions.	Y
Balance renewables against landscape		Y		Further study may help to clarify or support this across other regions.	Y
Need to focus on places not 'rural'	Y			Further study may help to clarify or support this across other regions.	Y
Policy for Welsh speaking areas	Y			Data suggests that the use of the Welsh language is still most prevalent in the North Wales and Mid & South West Wales regions.	Y
Post Brexit review of land use	Y			Further study may help to clarify or support this across other regions.	Y
Energy island	Y			Further study may help to clarify or support this across other regions.	Y
Sea walls to protect critical infrastructure			Y	Further study may help to clarify or support this across other regions.	Y
Water management (catchment areas) at a strategic level			Y	Further study may help to clarify or support this across other regions.	Y
Policy framework should understand rural life and be flexible	Y		Y	Further study may help to clarify or support this across other regions.	Y
NDF articulating environmental opportunities	Y			Further study may help to clarify or support this across other regions.	Y
Improving digital accessibility and 5G		Y	Y	Further study may help to clarify or support this across other regions.	Y
Growth deal		Y		Further study may help to clarify or support this across other regions.	Y
Retail / commercial town centres		Y		Data shows there are key retail and commercial centres across Wales.	Y
Regional universities / satellite campuses		Y		Data shows that there is also University infrastructure in North Wales and South East Wales.	Y
Balance of sustainable development (economy, social, culture and environment) with the Well-being of Future Generations Act	Y		Y	Further study may help to clarify or support this across other regions.	Y

Table 6 - SWOT Issues and the NDF Threats

Threats	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Regional differences	Y			Further study may help to clarify or support this across other regions.	Y
Relationship between NDF and land management post Brexit	Y			Further study may help to clarify or support this across other regions.	Y
Flood risk	Y			Further study may help to clarify or support this across other regions.	Y
Employment opportunities and equality		Y		Further study may help to clarify or support this across other regions.	Y
Brexit (including influence of Irish ports and connection with Europe)		Y		Further study may help to clarify or support this across other regions.	Y
Need for protection – seen as development infill opportunities		Y	Y	Further study may help to clarify or support this across other regions.	Y
Agriculture and relationship with Brexit		Y	Y	Further study may help to clarify or support this across other regions.	Y
Protection of non-designated areas		Y		Further study may help to clarify or support this across other regions.	Y
Rural areas being forgotten / side-lined			Y	Further study may help to clarify or support this across other regions.	Y

4 Role of the NDF

4.1 Approach

Many issues spanning different policy areas have been identified as either strengths, weaknesses, opportunities or threats across the three Welsh regions. To help focus on what the NDF can do to help address, support or consider those issues of most relevance, groups of issues have been grouped in themes.

Those themes are analysed in Table 7.

Firstly, each theme is considered with a summary of its strengths, weaknesses, opportunities or threats across the three Welsh regions.

Then each theme considers the appropriate spatial area / scale, policy focus, infrastructure requirements and links to other policy areas / objectives.

The analysis considers each theme and what the NDF could do to maximise / promote its strengths and opportunities and reduce / address its weaknesses and threats.

This has involved both distilling stakeholder views and applying the authors' professional judgement from experience of the Welsh and other planning systems.

It should be acknowledged that whilst particular themes and issues have been sourced to stakeholder feedback pertinent to particular regions, some of the points can be considered to be Wales wide. That is drawn out as part of the recommendations made in section 4 of this report.

As aforementioned, there are also wider themes that impact on rural areas but are not necessarily rural specific themes (e.g. minerals and waste). These are considered as part of the 'Regional SWOT Report', which sits alongside this 'Rural SWOT Report'. Readers may wish to consider both alongside each other for a complete overview of the strengths, weaknesses, opportunities and threats in the rural areas and the three Welsh regions.

For rural areas in particular, the evidence presented in the SWOT results shows that many of the themes involve issues that should be addressed / delivered outside of planning and are thus beyond the scope of 'what the NDF could do'. That being said, there are still clear opportunities for the planning system to help support rural areas across Wales and this Section serves to explain how.

It is important to acknowledge that this section is a factual and succinct account of the SWOT analysis, its results and Arup's view on the role of the NDF is supporting or addressing the key issues raised across Wales and within each region relating to rural areas as appropriate.

4.2 Interrelationships

As set out above, each theme considers links to other policy areas / objectives.

It is clear that many of the strengths, weaknesses, opportunities and threats raised by stakeholders and identified through data collection and analysis – are pertinent to both rural areas and the wider regions in Wales. This indicates that there is limited variation between the issues and policy areas that people consider to be important at a general level when compared to rural specific matters.

This could partly be explained by Wales having large extents of rural or peripheral areas. This could also be partly explained by stakeholders involved in the study not considering the planning system to be a specific barrier to development in Wales or its rural areas, but there being a range of wider issues that interface with planning and development that may not be best addressed / delivered through the planning system. However, it is important that the NDF and planning continues to support development in rural areas and further complements / enables opportunities for positive outcomes in rural areas in the future.

A key consideration for the NDF and policy development in rural areas should be the interrelated nature of both general and more rural specific policy areas. Whilst there may be limited evidence supporting the need for rural specific planning policies, it is clear that the NDF has the capacity and capability to make a positive impact in rural areas through a range of directions and/or interventions. For example, by defining rural areas and supporting the diversification of agricultural land in those areas to meet the needs of the present and future generations, the NDF would:

- a) Support the diversification of the rural economy;
- b) Help support community cohesion by preventing the loss of the farming community or young / working age people from rural areas;
- c) Outline and recognise an element of change with environmental impacts e.g. ecological and/or landscape effects resulting from development;
- d) Consider the need for associated transport, digital and community infrastructure in rural areas to support diversification of agricultural land; and
- e) Direct SPDs to refine suitable areas for changes of use / development.

This serves to demonstrate where policy support in a single area must take into account the interrelated policy impacts (e.g. impacts on other policy areas) as well as the wider benefits and effects (e.g. diversification in agricultural sector and impact on the natural environment).

Table 7 identifies where the NDF should consider these potential interferences and relationships where appropriate, such as the need for growth areas and housing issues needing to consider transport, digital infrastructure, employment and retail / commercial areas to help ensure policy development is integrated in its approach, for example when considering growth, housing and rural communities.

Table 7 Analysis and Results

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
Growth Areas / Housing	<p>The need for new housing that meets the needs of rural communities, including different types / tenures was raised as a weakness and an opportunity. In particular this was raised as an issue in North and Mid & South West Wales.</p> <p>The need for more accurate growth estimates was also raised as a concern alongside the availability and deliverability of land in rural areas.</p> <p>The opportunity of Growth Deals and key centres for growth in rural areas (e.g. Brecon) was discussed.</p>	<p>Regional – reflecting the differing markets and requirements across communities.</p>	<p>Identifying areas for growth (housing and services) in rural areas, responding to local context.</p> <p>Consider the provision of retail / commercial services in rural areas.</p>	<p>Sites / land – ensuring there is sufficient and appropriate land and infrastructure to facilitate growth and housing delivery.</p>	<p>Housing Transport Digital Employment Retail / Commercial</p>	<p>The NDF could recognise the varying context of rural areas and respond through identification of rural growth areas across the regions to reflect the regional needs for housing.</p> <p>In particular, sustainable growth areas could prioritise development where they are well-connected / served by or will be supported by planned infrastructure investment/provision.</p> <p>PPW provides the appropriate national level planning policy. However, the NDF and/or SDPs could identify areas or sites for support, future development / growth. They may wish to prioritise certain forms of housing in rural areas or make high-level ‘zones’ or allocations where communities run across administrative boundaries.</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
Tourism	<p>Tourism is recognised as a strength in the Mid & South West Wales Region with specific opportunities in relation to maximising the opportunities that the natural and historic environment offers.</p> <p>Data also shows that tourism is an important sector in the other NDF Regions.</p> <p>The focus on car travel to facilitate or service the sector was raised as a concern / weakness within rural areas.</p>	<p>Regional – reflecting the differing tourism offer across Wales.</p>	<p>Facilitating and supporting year-round tourism activities and ensuring a balance between the economic benefits and impacts on the environment.</p> <p>Supporting tourism developments with sustainable transport connectivity.</p>	<p>Transport Accommodation</p>	<p>Transport – access and connectivity Digital infrastructure – connectivity</p>	<p>The NDF could direct SDPs to identify broad tourism areas to be supported. For North Wales this could focus on natural environmental assets and, along with Mid & South West Wales, be a means of supporting of creating agricultural diversification and/or transition with the overarching objective of supporting sustainable development. South East Wales is likely to retain its current destination tourism focus.</p> <p>It is not envisaged that sites need to be identified within the NDF and PPW provides the appropriate national level planning policy. However, tourism could be one sector of the economy that the NDF could usefully provide high-level steer on.</p> <p>The NDF and/or SDPs could identify areas or sites for support, future development / growth. They may wish to prioritise certain forms of tourism in rural areas or make high-level ‘zones’ or allocations where tourism interests run across administrative boundaries. This might include trying to ‘spread’ or otherwise emphasise the tourism benefits of national parks or coastal stretches.</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
Welsh Language	<p>All regions consider rural areas to be important in relation to the Welsh language and culture.</p> <p>Within North Wales it was considered that the Welsh language is not sufficiently protected and that there should be specific policies for Welsh speaking areas.</p>	<p>National – aligned to the setting of targets across Wales.</p> <p>Regional – appreciating the variation in use of the Welsh language across Wales.</p>	<p>Supporting areas which positively contribute to the protection and enhancement of Welsh language and culture.</p>	N/A	<p>Housing</p> <p>Employment / rural economy</p> <p>Agriculture</p>	<p>This is a policy area that forms a thread throughout government policy. Planning also has an important role to play.</p> <p>The NDF could identify broad areas where the Welsh language is prevalent, in order to help promote and protect the language / culture moving forward. This would give a ‘hook’ for SDP and LDP policy-making.</p> <p>As the context and needs of the Welsh Language and the communities embracing it varies from authority to authority (and in some cases from settlement to settlement) lower tiers of policy making are better placed to co-ordinate efforts.</p> <p>Otherwise not a spatial planning theme and covered in PPW (strategic and spatial choices, active and social places, distinctive and natural places). PPW does not ‘allocate’ <i>Enabling the Welsh Language to thrive</i> within the ‘Productive & Enterprising’ wellbeing goal; it may be that in the North Wales and Mid & South West Wales regions this area could be given further consideration to explore the creation of an economic impetus around the Welsh Language, especially in rural or peripheral areas.</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
<p>Digital Infrastructure</p>	<p>Digital connectivity is considered a strength in North Wales.</p> <p>Improving digital accessibility and 5G technology is considered to be an opportunity, in particular for Mid, West and South East Wales – possibly reflecting the shared opportunity in those areas associated with home working and reducing the need to travel.</p>	<p>National and regional – reflecting the variations in access and connections within and between the regions and beyond.</p>	<p>Rolling out digital infrastructure and technologies to support rural areas and better connect their communities and areas of employment.</p>	<p>Broadband Telecoms</p>	<p>Housing Employment Transport</p>	<p>The NDF and SDPs could identify areas of weakness, need and opportunity to support improvements in digital connectivity in rural areas. Setting out priority areas across Wales needs to be balanced with supporting rural areas to help ensure equal opportunities are provided. Identifying areas where there are often isolated communities for example will provide a different approach to the traditional approach to prioritising provision (e.g. by utility providers on a customer reach basis).</p> <p>Strategic Development Plans could identify key regional projects based on the NDF framework, to help ensure a diverse and competitive position is maintained between rural and urban areas, the three regions and compared to the UK - and to ensure balance between (for example) population and/or employment growth and energy provision.</p> <p>The NDF should consider where other infrastructure projects (e.g. roads or electricity lines) also provide an opportunity to install upgraded digital communications infrastructure.</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
<p>Skills and Employment</p>	<p>The opportunity of the Growth Deal in Mid Wales could help contribute to the rural economy and job creation.</p> <p>The role / future of regional Universities / Satellite campuses is considered to be important to developing skills and employment opportunities in rural areas.</p> <p>Whilst ports are considered to be a strength, the threat of Brexit and disruption to access to markets in Europe may favour Irish ports.</p> <p>Tourism is considered to be a key sector for employment in rural areas, particularly in Mid & South West Wales.</p>	<p>Regional – reflecting the support mechanisms and sector foci at the regional level and potential opportunities in regional centres.</p>	<p>Supporting the opportunity for skills development, education and employment in rural areas.</p>	<p>Ports Education facilities and services Tourism accommodation / attractions</p>	<p>Transport and Ports Growth Deal Tourism Education</p>	<p>The NDF could direct SDPs to identify broad sectors to be supported. For rural areas this could focus on natural environmental assets and be a means of supporting / creating agricultural diversification and/or transition with the overarching objective of supporting sustainable development. Wales is likely to maintain its current destination tourism focus and to help address seasonal employment, the NDF and SDPs could seek to strengthen physical links between education facilities including universities, acknowledging their key strengths and connections to areas of employment.</p> <p>Planning has the opportunity to influence the location of new employment sites and encourage regeneration. It thus sits alongside broader government focus on employment. The NDF could identify existing and future strategic sites of national significance (in an attempt to provide clarity and certainty over (reuse), as well as outlining high-level spatial improvements needed (such as network improvements or soft infrastructure) to encourage growth and investment. In turn, Strategic Development Plans could champion the delivery of those national sites and also establish a sub-national set of priority sites and / or key sectors or associated investor opportunities (avoiding conflicts where identified).</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
Connectivity / Accessibility	<p>Access and connectivity to the natural environment and green spaces was considered to be a strength.</p> <p>It is also recognised that rural areas are generally well connected by road, in particular in South East Wales.</p> <p>Ports were also raised as a key strength in terms of wider accessibility / connectivity.</p> <p>However, there was an acknowledgement that in many rural areas residents and visitors have an over-reliance on the car and there is a lack of electric vehicle charging infrastructure.</p> <p>Electric vehicles are seen as an opportunity to limit the impact of car usage but the infrastructure to enable this is critical to success.</p>	<p>National and regional – reflecting the key connections within and between the regions and beyond.</p>	<p>Identifying and facilitating key connections providing suitable accessibility to support development and the movement of people and goods.</p> <p>In particular, electric vehicle infrastructure is seen as a key opportunity and threat to rural areas.</p>	<p>Transport – ensuring connectivity and accessibility.</p>	<p>Housing Employment Tourism Commercial and retail</p>	<p>The NDF could identify key routes and support the roll out of electric vehicle infrastructure, ensuring that rural areas don't miss out and investment is equal.</p> <p>Transport, and the investment in related infrastructure is one of the major 'levers' that government can operate to help influence places. Planning must both guide and react to maximise benefits and ensure complementarity as part of a shared vision.</p> <p>The NDF can also try to support a national view on the balance of effort between physical and virtual connectivity and the prioritisation of both need and opportunity. It may even develop high-level zones for such priorities.</p> <p>Strategic Development Plans could identify key regional routes and projects. These would reflect any zonal or spatial focus in the NDF. In reality, this could be a combination of top-down and bottom-up forces to try and shape the core needs for regions, such as sustainable and viable public (rural) transport for North Wales and Mid & South West Wales, encouraging modal shift, reducing the need to travel and supporting the sustainable transport hierarchy in PPW10.</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
Energy	<p>The sustainable use and management of natural resources (including renewable energy) is seen as a strength across all regions. In particular, the Energy Island was raised as an opportunity for North Wales. The opportunity for decentralised energy systems was raised in North and Mid & South West Wales.</p> <p>However, the impact of renewables on the landscape was seen as a threat.</p> <p>Grid connectivity is a weakness, particularly in the Mid & South West Wales Region, limiting development potential.</p> <p>Offshore renewables were specifically raised as an opportunity in Mid & South West Wales.</p>	<p>National and regional – in order to identify key constraints around Grid capacity and support future delivery of infrastructure within rural areas.</p> <p>Regional and Local – to identify opportunities for a decentralised approach to energy management within rural areas.</p>	<p>Supporting the decarbonisation agenda and the need to provide sources of energy to support development and sustainable communities / businesses.</p>	<p>Grid connections</p> <p>Transport – ensuring connectivity and accessibility.</p> <p>Community resilience.</p>	<p>Carbon and climate change</p> <p>Transport</p>	<p>Stakeholders repeatedly cited TAN8 (renewable energy, and its identification of strategic areas for wind energy) as an example of how national policy can provide spatial certainty with granularity around energy types. The NDF should explore whether this approach could be extended and where it could support rural areas, taking into account potential areas for diversification / new use of agricultural land or where community owned schemes could support life in rural areas.</p> <p>Energy developments can be contentious, much like infrastructure or development generally, and the NDF and SDP can together provide a national debate on ‘what goes where’. In doing so, it will be important to consider how LDPs and communities engage in this process.</p> <p>Strategic Development Plans could identify key regional projects based on the NDF framework, to help ensure a diverse and competitive position is maintained and to ensure balance between (for example) population and/or employment growth and energy provision.</p> <p>Furthermore, the NDF should provide policy position on which to lobby electricity network operators (e.g. National Grid / DNOs) in planning to meet future demand and help to meet Welsh based targets for renewables as an example.</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
Agriculture	<p>Agriculture is considered to be a strength across all regions.</p> <p>The future of agriculture in relation to Brexit was raised as a threat in Mid & South West Wales and South East Wales, however this will be important across all regions.</p> <p>In particular land management that has occurred through European funding programmes is uncertain post Brexit. The agreement could also impact on access to markets / exports and the viability of certain types of agriculture.</p>	Regional – reflecting different agricultural industries, skills, needs and quality of land / resources	Supporting the agricultural sector and diversification, in particular post Brexit.	N/A	Economy	<p>Agriculture is a key sector for Wales and is considered a strength across Wales. However, the challenges faced vary. Planning provides multiple support points to agriculture, the main ones referred to by stakeholders were the range of permitted development rights and the interplay between agricultural land and the workers needed to manage and support it.</p> <p>The NDF could identify where agricultural industry is prevalent and where consideration needs to be given to supporting the sector and / or its diversification. This could include the key elements of the agricultural sector most likely to be affected by the Brexit process.</p> <p>The SDPs can then take these broad areas and, as part of their own evidence gathering and analysis, determine what regional and sub-regional actions may be required. The SDPs will have to face some ‘tough questions’ around economic growth as agriculture is increasingly land-intensive but labour-extensive.</p>

Themes	Summary	Spatial Area / Scale	Policy Focus	Infrastructure	Links to Other Policy Areas / Objectives	Role of the NDF
<p>Marine Environment and Coastal Areas</p>	<p>The marine environment and coastal areas are seen as a strength. This was raised specifically within Mid & South West Wales and South East Wales.</p> <p>Water management and catchment areas should be considered at the national level alongside coastal processes. This is in the context of requiring investment to protect critical infrastructure given flood risk (inland and coastal) is viewed as a threat.</p>	<p>National and Regional</p>	<p>Recognising the importance of protecting the marine and coastal environment whilst also ensuring the protection of key assets from climate change and associated flood risk.</p>	<p>Flood defence infrastructure</p>	<p>National Marine Plan Shoreline Management Plans Tourism</p>	<p>The NDF could identify the main areas and assets at risk along with strategic opportunities to support the aspirations of the Marine Plan and Shoreline Management Plans at the National level. The NDF could be a catalyst for a ‘do it once, do it well’ partnership with NRW to build a national picture of environmental information.</p> <p>In this way, the NDF could identify protected and high value areas, complementing the planning policy at the national level as directed by PPW. It could also identify key areas for marine energy and include consideration of these schemes to lobby network providers.</p> <p>SDPs could consider the natural environment at the regional scale and make more of a ‘joined up’ picture between the natural environment, sustainable growth, economic opportunities (such as eco-tourism) and the role of the natural environment in health and climate change topics.</p>

5 Summary

An analysis of the identified strengths, weaknesses, opportunities and threats considered across Wales helps identify what the NDF could do to protect, facilitate and enhance development in rural areas.

Table 2 sets out the key issues raised by stakeholders during workshop events across Wales and Table 3, Table 4,

Table 5 and Table 6 consider where those issues are pertinent to each region, where data collected helps verify the stakeholder views, and whether an issue can be supported or addressed through the NDF or if there is a function for an issue to be addressed or delivered outside of the planning system.

Table 7 provides a full analysis of the SWOT and outlines Arup's views of the role of the NDF when taking into account the stakeholder feedback, data validation exercise and analysis.

The final sections of this report below help to outline where and how the NDF might best support policy development across Wales and within each of the three Welsh regions, as well as benefit the planning system now and in the longer term by identifying the issues and spatial areas NDF policies should focus on.

This section summarises a factual and concise account of Arup's views based on the evidence base collected for the NDF.

As is advocated by the Welsh Government, this research has covered all Wales and a wide range of potential policy areas. As such this study and its recommendations are intended to be high-level and will help inform NDF policy development, as well as provide evidence and support policy development for all levels including regional planning and Strategic Development Plans (SDPs) across Wales.

It is important to note that where recommendations relate to the role of the NDF in terms of it directing regional planning through SDPs, there is also another key function to consider in terms of joint LDPs and the need for LPAs to work together in a collaborative approach (as advocated by the Well-being of Future Generations Act as well as the Planning Act.

As explained above, some strategic non-rural planning issues may not be considered here but instead within the Regional SWOT Report, which should read alongside this Rural SWOT Report.

Other thematic areas (those not listed below) are considered to be either not relevant for the NDF, not a spatial planning theme and/or are covered in PPW.

Recommendations are thus made as follows:

- a) What the NDF could identify;
- b) What rural issues and spatial areas the NDF should focus on; and
- c) How the NDF should support rural policy development.

5.1 What the NDF could identify

In some cases, there is not a spatial planning theme to help address an identified strength, weaknesses, opportunity or threat – and instead PPW is the appropriate place to set national planning policy.

It is therefore recommended that the NDF considers the following eleven prospects at a national level for rural areas:

The NDF could identify...

1. ... rural / peripheral growth areas within each of the three Welsh Regions, responding to their varying characteristics and needs;
2. ... areas where tourism is a strength / opportunity and ensure that infrastructure investment aligns;
3. ... broad areas where the Welsh language is prevalent, in order to help promote and protect the language moving forward, considering a variation in policy approach across the regions;
4. ... areas of weakness, need and opportunity to support improvements in digital connectivity in rural areas.
5. ... spatial opportunities to strengthen links between universities, their key strengths and areas of employment – and help ensure infrastructure is available to support strategic skills and employment opportunities.
6. ... key national and regional transport infrastructure and priorities that effect rural areas, in particular taking a strategic approach to electric vehicle infrastructure provision, ensuring that rural areas don't miss out and investment is equal.
7. ... the direction for sustainable development, including the national and regional need for new housing in rural communities and outside of urban areas.
8. ... and support existing and new energy developments alongside supporting the associated infrastructure essential to delivery and future growth in rural areas.
9. ... where agricultural industry is prevalent and where consideration needs to be given to supporting the sector as a key feature of the rural economy.
10. ... the main areas and assets at risk of flooding along with strategic opportunities to support the aspirations of the Marine Plan and Shoreline Management Plans at the National level.
11. ... where a policy area is best addressed at the regional scale, Strategic Development Plans could identify areas or sites for future development / growth as well as strategic projects or initiatives. Strategic Development Plans could also identify key sectors and any specific investor requirements. In particular, SDPs could consider minerals and waste planning at the regional scale.

5.2 What rural issues and spatial areas the NDF should focus on

When considering the more specific themes and spatial areas, it is clear that the NDF needs to acknowledge a wide range of interrelated key issues taking into account regional variations even across rural areas that may share similar characteristics.

Whilst advocating NDF policy development that would address and deliver the above eleven prospects, the NDF should create a framework for decisions at the national and regional scale, as well as direct policy areas for SDPs, joint-LDPs and LPAs to prioritise as part of an integrated planning policy framework.

The issues and spatial areas the NDF should focus on should be considered together, acknowledging the many interrelationships outlined in previous sections of this report. However, for presentational purposes, policy themes are set out in turn below alongside a summarised narrative of what the NDF should focus on within that policy area.

Overall, there is limited need for further / rural specific planning policies beyond what the planning system already offers.

However, there is a clear opportunity for the NDF to help the planning system continue to support development in rural areas and further complement / enable opportunities for positive outcomes in the future.

The NDF should focus on...

a) Housing and new settlements

- In rural areas housing and new settlements should be connected by sustainable forms of transport to community facilities, services and employment.
- Defining growth areas considering necessary infrastructure provision at a national and regional level would support sustainable development.

b) Tourism

- Tourism assets, the natural environment and visitor destinations should be connected to sustainable forms of transport, with easy access by walking, cycling, public transport and then the car.
- Identifying strategic locations for growth and where essential infrastructure is needed at a national and regional level would support sustainable development.

c) Welsh Language

- The Welsh language should be promoted and protected, acknowledging variation across the regions, by identifying priority areas and policies that would support the prevention of loss and offer the opportunity for growth in Welsh language and culture (e.g. well-connected education facilities and employment areas to help retain local young or working age people).

The NDF should focus on...

d) Digital infrastructure

- Digital infrastructure should be prioritised in rural areas so to facilitate home working and reducing the need to travel by car, as well as supporting community cohesion and access to online education.
- Identifying priority areas for digital infrastructure considering national and regional needs would support sustainable development.

e) Employment

- Economic opportunities in rural areas should be better connected with appropriate infrastructure and placemaking, linking communities and education facilities with areas of employment.
- Identifying strategic sites and facilities and linking them to areas for growth and where essential infrastructure is needed at a national and regional level would support sustainable development.

f) Transport

- Transport infrastructure should connect all groups of people, visitors and businesses to key sites, facilities and services, whilst taking a strategic approach to futureproofing the network with electric vehicle infrastructure in rural areas.
- Identifying strategic routes and priority areas for new and innovative infrastructure considering national and regional needs would support sustainable development.

g) Energy

- Energy development should be enabled in an integrated way, considering local communities and community owned models / benefits, electricity grid capacity, accessibility and land and marine based land management.
- Identifying strategic areas considering interfaces with communities and grid infrastructure / capacity could support sustainable development.

h) Agriculture

- Agricultural industry and development should be supported with a flexible approach to planning that will help enable appropriate types and forms of diversification in the future.
- Identifying rural areas where diversification would be appropriate and where essential infrastructure to support diversification is needed at a national and regional level would support sustainable development.

5.3 How the NDF should support rural policy development

Of particular importance to rural and peripheral areas across Wales, land and marine based development should be planned and considered as part of a whole systems approach to planning, considering the needs and likely effects on people, the economy and the environment in an integrated way.

To help achieve the outcomes advocated above, the NDF should support policy development by utilising the five ways of working required by the Well-being of Future Generations (Wales) Act:

The NDF should...

- i. Set a clear vision for rural areas across Wales in the future;
- ii. Prevent problems from occurring or getting worse;
- iii. Be developed to reflect the diversity and variations between the Welsh people;
- iv. Encourage cross sector collaboration and partnership; and
- v. Take into account the interrelated nature of policy themes and the support a whole systems approach to planning in rural areas.

This approach will help set a framework for rural policy development and decision making across Wales and at different spatial levels. These ways of working will help the NDF reflect the key principles of national planning policy around placemaking and will help achieve sustainable development in Wales.

Appendix A

SWOT Results

Strengths

Strength	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Community resilience / projects, people engaged with rural areas and responsiveness and proactiveness of rural communities	Y	Y	Y	Further study may help to clarify or support this across other regions.		Community based / third sector organisations.
Cultural heritage assets in rural areas		Y	Y	Data shows that there is also a significant number of designated heritage assets in North Wales.	Y	Protection and promotion, resource management and maintenance.
Young Farmers Movement / similar groups		Y		Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. trade and skills).
Rural areas important to Welsh language and/or culture	Y	Y	Y	Data shows the use of Welsh language is most prominent in the North Wales and Mid & South West Wales regions.	Y	Government policy and programmes (e.g. Welsh language targets and initiatives).
Sustainable use and management of natural resources	Y	Y		Data suggests that the natural environment is a strong asset to all regions.	Y	Maintenance and management.
Access to the natural environment / green spaces	Y		Y	Further study may help to clarify or support this across other regions.	Y	Maintenance and management.
Tourism		Y		Data shows tourism is also an important sector in North and South East Wales.	Y	National and local promotion and funding.
Marine environment / coastal areas		Y	Y	Further study may help to clarify or support this across other regions.	Y	Management plans and conservation.

Strength	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Ports (e.g. Holyhead)	Y			Data shows that there is important port infrastructure in all regions	Y	Sector-specific programmes and strategies (e.g. trade and skills).
Community supported agriculture	Y			Further study may help to clarify or support this across other regions.		Community based / third sector organisations, sector-specific programmes and strategies (e.g. trade and skills).
Digital based international SMEs	Y			Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. broadband and skills).
Digital infrastructure	Y			Further study may help to clarify or support this across other regions.	Y	Sector-specific programmes and strategies (e.g. broadband and skills).
Agriculture		Y		Further study may help to clarify or support this across other regions.	Y	Funding (e.g. EU), land management and sector specific programmes.
Artisan skills		Y		Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. skills).
Film and TV industry (media)	Y			Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. skills).
Income from green tourism	Y			Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. trade and skills).
Topography / landscape	Y			Further study may help to clarify or support this across other regions.		Land management
Hydro / tidal energy – free asset	Y			Further study may help to clarify or support this across other regions.		Government policy, strategies and targets.
Early retirement as an asset to community		Y		Further study may help to clarify or support this across other regions.		Community based activities / organisations.

Strength	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Lifestyle, well-being / health		Y		Further study may help to clarify or support this across other regions.		Regional and local funding, programmes and strategies (e.g. well-being and healthy initiatives).
International appeal		Y		Further study may help to clarify or support this across other regions.		Promotion and sector specific programmes.
Sense of community		Y		Further study may help to clarify or support this across other regions.		Regional and local initiatives and events.
Brecon as a growth area		Y		Further study may help to clarify or support this across other regions.	Y	Land availability and viability, market forces.
Universities		Y		Data shows that there is also University infrastructure in North and South East Wales.		Funding, sector-specific programmes and strategies (e.g. skills).
Well-connected and accessible rural areas (by road network)			Y	Data shows that Wales is most well-connected by road.	Y	Government policy (e.g. sustainable transport hierarchy) and operation / maintenance.
Proximity to populous areas			Y	Further study may help to clarify or support this across other regions.		Accessibility to main centres.

Weaknesses

Weakness	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Housing isolated from facilities and services	Y	Y		Data shows that housing delivery in Mid & South West Wales has been highest in Carmarthenshire and Swansea		Government policy (e.g. targets), land availability and market interest.
Housing delivery not meeting needs of the community – estimates not accurate	Y	Y		Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. targets), land availability and market interest / forces.
Lack of access to affordable housing			Y	Further study may help to clarify or support this across other regions.		Fiscal incentives and market drivers.
Reliance on few national house builders			Y	Further study may help to clarify or support this across other regions.		National and regional support for smaller developers (e.g. Housing Innovation Fund).
Commuter hubs over communities		Y		Further study may help to clarify or support this across other regions.		Government policy (e.g. sustainable transport hierarchy)
Tourism benefits vs impacts / capacity	Y	Y	Y	Data shows tourism is also an important sector in Wales.		National and local promotion and funding.
Domination / prominence of tourism		Y		Data shows tourism is also an important sector in Wales.		National and local promotion and funding.
Tourism focussed on car travel	Y			Further study may help to clarify or support this across other regions.		Government policy (e.g. sustainable transport hierarchy), sector-specific programmes and strategies (e.g. target areas), market forces, funding in alternative modes.
Over-reliance on the car		Y		Further study may help to clarify or support this across other regions.	Y	Government policy (e.g. sustainable transport hierarchy) and funding in alternative modes.

Weakness	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Distance to work		Y		Further study may help to clarify or support this across other regions.		Government policy (e.g. sustainable transport hierarchy), market forces.
Employment opportunities		Y	Y	Further study may help to clarify or support this across other regions.	Y	Fiscal incentives and market drivers, sector-specific programmes and strategies (e.g. skills).
Low wage employment		Y		Further study may help to clarify or support this across other regions.		Sector-specific programmes and strategies (e.g. skills and training), market forces.
Welsh language not sufficiently protected	Y			Data shows the use of Welsh language is most prominent in the North Wales and Mid & South West Wales regions.	Y	Government policy and programmes (e.g. Welsh language targets and initiatives).
EV infrastructure lacking in rural areas	Y	Y		Further study may help to clarify or support this across other regions.	Y	Market forces and lack of government strategy on the provision of infrastructure.
Grid connectivity		Y		Further study may help to clarify or support this across other regions.	Y	Market processes (e.g. demand led system) and age of infrastructure.
Depopulation – especially young	Y	Y		Further study may help to clarify or support this across other regions.		Market forces and sector-specific programmes and strategies (e.g. opportunities and incentives for young people).
Land viability	Y			Further study may help to clarify or support this across other regions.		Land availability, management and market drivers.
Rent / buy housing	Y			Further study may help to clarify or support this across other regions.		Social trends, access to finance, market drivers.
Transport is expensive	Y			Further study may help to clarify or support this across other regions.		Market forces, lack of alternatives (e.g. public transport) and access to finance / funding.

Weakness	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Need for long distance travel			Y	Further study may help to clarify or support this across other regions.		Government policy (e.g. sustainable transport hierarchy), market forces.
Rail infrastructure / routing / Public Transport / sustainable transport		Y	Y	Further study may help to clarify or support this across other regions.		Government policy (e.g. sustainable transport hierarchy), market forces, funding in alternative modes.
Bus passes stop at the border		Y		Further study may help to clarify or support this across other regions.		Partnerships and funding arrangements.
In-migration / purchase of homes locally and second homes	Y	Y		Further study may help to clarify or support this across other regions.		Government policy and fiscal arrangements.
Out-migration – working age and young			Y	Further study may help to clarify or support this across other regions.		Market forces and sector-specific programmes and strategies (e.g. opportunities and incentives for young / working people).
Rural infrastructure	Y			Further study may help to clarify or support this across other regions.	Y	Government policy and funding.
Market forces are failing	Y			Further study may help to clarify or support this across other regions.		Government policy, market forces and sector-specific programmes and strategies.
Big agriculture / agri-jobs	Y			Further study may help to clarify or support this across other regions.		Market forces and sector-specific programmes and strategies (e.g. skills and training), fiscal incentives.
Agriculture no longer labour intensive	Y			Further study may help to clarify or support this across other regions.		Government policy, market forces and sector-specific programmes and strategies (e.g. automation).

Weakness	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Big farms swallowing up financial support	Y			Further study may help to clarify or support this across other regions.		Market forces and funding arrangements (e.g., EU).
Listed buildings – expensive to run / maintain	Y			Further study may help to clarify or support this across other regions.		Funding and asset management.
Septic tank registrations – unknown private network (largely)	Y			Further study may help to clarify or support this across other regions.		Government policy, market forces and sector-specific programmes and strategies (e.g. records and administration).
Less community focussed planning	Y			Further study may help to clarify or support this across other regions.		Government policy, market forces and sector-specific programmes and strategies (e.g. self-build support).
Seasonality – tourism and agriculture	Y	Y		Data shows tourism and agriculture are both important sectors across Wales.		National and local promotion and funding, market forces and sector-specific programmes and strategies (e.g. employment and skills).
Economy focussed on agriculture and small industries	Y			Further study may help to clarify or support this across other regions.		Market forces and sector-specific programmes and strategies (e.g. employment and skills).
Healthcare			Y	Further study may help to clarify or support this across other regions.		Health Board strategies and plans and future funding / delivery models.
Mental Health / Social Isolation		Y	Y	Further study may help to clarify or support this across other regions.		Health Board strategies and plans and future funding / delivery models.
Pattern of travel to school – impact on health and well-being		Y		Further study may help to clarify or support this across other regions.		Government policy (e.g. sustainable transport hierarchy), Health Board strategies and plans and future funding / education.

Weakness	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role	Addressed / delivered outside of planning
Critical mass to maintain viability of settlements / services		Y		Further study may help to clarify or support this across other regions.		Land availability, management and market drivers.
Large land mass		Y		Further study may help to clarify or support this across other regions.		Land availability, management and market drivers.
Ageing population		Y	Y	Further study may help to clarify or support this across other regions.		Health Board strategies and plans and future funding, sector-specific programmes and strategies (e.g. access to services).
Land values		Y		Further study may help to clarify or support this across other regions.		Land availability, management and market drivers.
Increasing house / property prices			Y	Further study may help to clarify or support this across other regions.		Land availability, management and market forces.
Uncertainty around future of farming and impact on land management		Y		Further study may help to clarify or support this across other regions.		Government policy, market forces and sector-specific programmes and strategies (e.g. automation), access to funding (e.g. EU).
Water pollution		Y		Further study may help to clarify or support this across other regions.		Resource management, sector-specific programmes and strategies (e.g. initiatives for clean water), access to funding.
Traveller communities in rural areas			Y	Further study may help to clarify or support this across other regions.		Government policy, land availability, market forces, social trends.

Opportunities

Opportunities	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Community champions / officers	Y			Further study may help to clarify or support this across other regions.	
Continued protection of agricultural communities	Y			Further study may help to clarify or support this across other regions.	
Local house builders / self-build opportunities	Y		Y	Further study may help to clarify or support this across other regions.	
More and more types of affordable housing			Y	Further study may help to clarify or support this across other regions.	
Services and amenities related to well-being	Y			Further study may help to clarify or support this across other regions.	Y
Transport for long distance travel / park and ride		Y	Y	Further study may help to clarify or support this across other regions.	
EV charging infrastructure	Y	Y		Further study may help to clarify or support this across other regions.	Y
Decentralised energy generation model / community energy schemes	Y	Y		Further study may help to clarify or support this across other regions.	Y
Offshore renewables		Y		Further study may help to clarify or support this across other regions.	Y
Balance renewables against landscape		Y		Further study may help to clarify or support this across other regions.	Y
Major event to showcase region		Y		Further study may help to clarify or support this across other regions.	

Opportunities	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Housing co-op	Y			Further study may help to clarify or support this across other regions.	
Planning as language enabler	Y			Data suggests that the use of the Welsh language is still most prevalent in the North Wales and Mid & South West Wales regions.	
Need to focus on places not 'rural'	Y			Further study may help to clarify or support this across other regions.	Y
Place planning to sustain communities		Y	Y	Further study may help to clarify or support this across other regions.	
Policy for Welsh speaking areas	Y			Data suggests that the use of the Welsh language is still most prevalent in the North Wales and Mid & South West Wales regions.	Y
NDF opportunity to invest	Y			Further study may help to clarify or support this across other regions.	
Green tourism / new / diversification of offer	Y	Y		Further study may help to clarify or support this across other regions.	
Tourism tax		Y		Further study may help to clarify or support this across other regions.	
Rural jobs that people want to do	Y			Further study may help to clarify or support this across other regions.	
Careers / education and brokering qualifications		Y		Further study may help to clarify or support this across other regions.	
Post Brexit review of land use	Y			Further study may help to clarify or support this across other regions.	Y

Opportunities	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Energy island	Y			Further study may help to clarify or support this across other regions.	Y
Sea walls to protect critical infrastructure			Y	Further study may help to clarify or support this across other regions.	Y
Fishing and use in Wales	Y			Further study may help to clarify or support this across other regions.	
Water management (catchment areas) at a strategic level			Y	Further study may help to clarify or support this across other regions.	Y
Management/oversight of super dairies and poultry farms			Y	Further study may help to clarify or support this across other regions.	
Food – source and distribution			Y	Further study may help to clarify or support this across other regions.	
Construction industry	Y			Further study may help to clarify or support this across other regions.	
Automation and upskilling	Y			Further study may help to clarify or support this across other regions.	
Waste – circular economy	Y			Further study may help to clarify or support this across other regions.	
Skills / education in traditional crafts	Y			Further study may help to clarify or support this across other regions.	
Sustainable homes through permitted development	Y			Further study may help to clarify or support this across other regions.	

Opportunities	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Private water supplies	Y			Further study may help to clarify or support this across other regions.	
Use of sustainable drainage	Y			Further study may help to clarify or support this across other regions.	
Re-use of existing buildings	Y			Further study may help to clarify or support this across other regions.	
Flexibility / support for re-use of listed buildings	Y			Further study may help to clarify or support this across other regions.	
Policy framework should understand rural life and be flexible	Y		Y	Further study may help to clarify or support this across other regions.	Y
NDF articulating environmental opportunities	Y			Further study may help to clarify or support this across other regions.	Y
SMEs promoting high quality jobs / as business hubs	Y	Y		Further study may help to clarify or support this across other regions.	
Countryside vs highlands – where is the focus	Y			Further study may help to clarify or support this across other regions.	
Social innovation and entrepreneurship		Y		Further study may help to clarify or support this across other regions.	
Resource of early retired community (55+)		Y		Further study may help to clarify or support this across other regions.	
Improving digital accessibility and 5G		Y	Y	Further study may help to clarify or support this across other regions.	Y

Opportunities	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Location of futuristic services due to space in rural areas		Y		Further study may help to clarify or support this across other regions.	
Working from home / new ways of working		Y	Y	Data indicates working from home is most prevalent in North Wales.	
Modernisation of schools		Y		Further study may help to clarify or support this across other regions.	
Growth deal		Y		Further study may help to clarify or support this across other regions.	Y
Retail / commercial town centres		Y		Data shows there are key retail and commercial centres across Wales.	Y
Regional universities / satellite campuses		Y		Data shows that there is also University infrastructure in North Wales and South East Wales.	Y
Reservoirs as attractions		Y		Further study may help to clarify or support this across other regions.	
Balance of sustainable development (economy, social, culture and environment) with the Well-being of Future Generations Act	Y		Y	Further study may help to clarify or support this across other regions.	Y

Threats

Threats	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Community willingness / time	Y			Further study may help to clarify or support this across other regions.	
Rural areas turning into commuting villages	Y	Y		Further study may help to clarify or support this across other regions.	
Threat to language and culture (from growth)	Y	Y	Y	Data suggests that the use of the Welsh language is still most prevalent in the North Wales and Mid & South West Wales regions.	
Lack of service / housing – outward migration	Y			Further study may help to clarify or support this across other regions.	
Transport investment	Y		Y	Further study may help to clarify or support this across other regions.	
Electricity network limitations (e.g. increased demand from EV) and funding	Y	Y		Further study may help to clarify or support this across other regions.	
Fuel prices and impact on rural community		Y		Further study may help to clarify or support this across other regions.	
Ageing population – isolation	Y			Further study may help to clarify or support this across other regions.	
Reliance on car	Y			Further study may help to clarify or support this across other regions.	
Regional differences	Y			Further study may help to clarify or support this across other regions.	Y

Threats	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Skills	Y			Further study may help to clarify or support this across other regions.	
Retention of people / outmigration of young	Y	Y		Further study may help to clarify or support this across other regions.	
Fishing quotas	Y			Further study may help to clarify or support this across other regions.	
Relationship between NDF and land management post Brexit	Y			Further study may help to clarify or support this across other regions.	Y
More constraints to address when developing in rural areas – barrier	Y			Further study may help to clarify or support this across other regions.	
Land banking (landowners not bringing forward sites for development)			Y	Further study may help to clarify or support this across other regions.	
Water quality / environment and intensification of farming	Y	Y		Further study may help to clarify or support this across other regions.	
Funding cuts barrier to intervention	Y			Further study may help to clarify or support this across other regions.	
Flood risk	Y			Further study may help to clarify or support this across other regions.	Y
Employment opportunities and equality		Y		Further study may help to clarify or support this across other regions.	Y
Retaining skills and promoting careers	Y			Further study may help to clarify or support this across other regions.	

Threats	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Idyllic / simplistic view of rural areas is a barrier to development	Y			Further study may help to clarify or support this across other regions.	
Social care for the elderly		Y		Further study may help to clarify or support this across other regions.	
16+ access to schools		Y		Further study may help to clarify or support this across other regions.	
Brexit (including influence of Irish ports and connection with Europe)		Y		Further study may help to clarify or support this across other regions.	Y
Need for protection – seen as development infill opportunities		Y	Y	Further study may help to clarify or support this across other regions.	Y
Communities that are stagnant / stuck in the past		Y		Further study may help to clarify or support this across other regions.	
Agriculture and relationship with Brexit		Y	Y	Further study may help to clarify or support this across other regions.	Y
Challenge of financing infrastructure		Y		Further study may help to clarify or support this across other regions.	
Movement of services / population to South East Wales		Y		Further study may help to clarify or support this across other regions.	
Aspirations for children in rural areas		Y		Further study may help to clarify or support this across other regions.	
Reliability of digital networks			Y	Further study may help to clarify or support this across other regions.	

Threats	North Wales	Mid & South West Wales	South East Wales	Data Validation	NDF Role
Protection of non-designated areas		Y		Further study may help to clarify or support this across other regions.	Y
Air pollution / carbon impact of farming		Y		Further study may help to clarify or support this across other regions.	
Loss of sheep farming / impact on upland vegetation		Y	Y	Further study may help to clarify or support this across other regions.	
Rural areas being forgotten / side-lined			Y	Further study may help to clarify or support this across other regions.	Y