



Llywodraeth Cymru
Welsh Government

FUTURE WALES

The National Plan 2040

Monitoring & Review Report

March 2026



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1.0 INTRODUCTION

This report evaluates the extent to which **Future Wales: The National Plan 2040 (Future Wales)**¹, the **National Development Framework (NDF)**, has begun to deliver the positive change it aims to achieve and contribute to the Welsh Government's long-term vision for Wales. Published in February 2021, Future Wales is a 20-year strategic plan, and the strategic outcomes it seeks to achieve will take time. Ongoing monitoring and review of its progress towards delivery of its policies and outcomes is important to its success and required by legislation.

The **Future Wales Monitoring and Review**² paper, published alongside Future Wales, sets out how Future Wales is to be monitored. It should be noted that Integrated Sustainability Appraisal (ISA) and Future Wales monitoring are not separate exercises and this is reflected in the approach to Future Wales's review. Monitoring is informed by both qualitative and quantitative evidence from four key sources:

- The National Well-being Indicators
- Policy Related Indicators
- ISA Indicators
- Contextual Evidence

Key social, environmental and economic statistics are evaluated alongside contextual evidence drawn from stakeholder engagement and written reports published since the adoption of Future Wales.

This paper assesses the evidence collected, to reach conclusions regarding progress, whether Future Wales needs to be revised, and to identify matters to consider for its next publication. Key reports considered include **Future Trends Report (2021)**³, **Wellbeing of Wales (2025)**⁴ and **National Survey for Wales (2024-25)**⁵ with details on important monitoring indicators and contextual evidence referenced within the body of the report and in Appendix 1.

The Monitoring Framework set by the **Future Wales Monitoring and Review** paper identifies that this report should be structured around seven key questions:

- Has Future Wales supported Development Plan coverage at all three development plan tiers?
- Has Future Wales supported decarbonisation?
- Has Future Wales supported the delivery of renewable energy?
- Has Future Wales helped meet housing needs in the right places?
- Has Future Wales made places healthier?
- Has Future Wales helped strengthen ecosystems and enhanced biodiversity?
- Has Future Wales supported an economy that delivers prosperity for all?

It is important to note that Future Wales should be read alongside **Planning Policy Wales (PPW)**⁶ and other national policies. Future Wales does not contain statements on all land

¹ [Future Wales - The National Plan 2040](#)

² [Future Wales Monitoring and Review](#)

³ [Future Trends: 2021](#)

⁴ [Wellbeing of Wales 2025](#)

⁵ [National Survey for Wales \(2024-25\)](#)

⁶ [Planning Policy Wales - Edition 12](#)

use planning issues set out in **PPW**. It sets policies on issues of national priority or matters which are distinctly spatial that require national leadership.

Furthermore, it is important to recognise the range of external conditions that have impacted the findings of this report. Since the publication of Future Wales, Wales has continued to feel the impacts of the COVID-19 pandemic, Brexit, the Ukraine war and the cost-of-living crisis. The development industry has also been impacted by critical environmental challenges related to Special Areas of Conservation (SACs) and marine water quality which is explored further in the report.

The social, economic and environmental backdrop has not only affected progress generally, but also the way some statistical evidence is measured in Wales. Therefore, some data sets may be irregular, and a more comprehensive evaluation of Future Wales will be formulated over time.

2.0 Question 1: Has Future Wales supported Development Plan coverage at all three development plan tiers?

2.1 DEVELOPMENT PLAN COVERAGE

Future Wales is the National Development Framework (NDF) for Wales providing a spatial and long-term strategy for growth and to address key national priorities such as decarbonisation, climate resilience, economic prosperity and housing delivery. Together with **PPW**, it forms the framework for planning decisions and directs the production of **Strategic Development Plans (SDP)** and **Local Development Plans (LDP)**.

Full development plan coverage across Wales, with the adoption of **SDPs** and **LDPs**, is vital to enable plan-led decision making. Implementation of Future Wales policies at a regional and local level through **SDPs** and **LDPs** is considered a key measure of progress.

2.2 WELLBEING OF FUTURE GENERATIONS ACT (2015)

The **Wellbeing of Future Generations (WFG) Act (2015)**⁷ is a landmark piece of legislation that requires public bodies in Wales to consider the long-term impact of their decisions. It establishes a legally binding common purpose to improve the social, economic, environmental and cultural well-being of the nation.

Future Wales has been generally well received since its publication, providing a clear ambition and growth agenda for Wales aligned with the goals and objectives of the **WFG Act**. It has also provided a land use framework to support the delivery of wider Welsh Government plans and strategies. The **Government Fit for Future Generations (2022)**⁸ report by the Future Generations Commissioner for Wales, highlighted Future Wales as a good example of a key government plan that stretches beyond considerations of current challenges and thinking and planning for a longer-term future. It also acknowledged its collaboration with other national plans and its integration with the duties set in the **WFG Act 2015**.

The **Future Generations Report (2025)**⁹ again identifies the positive rise in long-term policy commitments from Welsh Government referencing Future Wales as an example of this. It also highlights the importance of a cohesive legislative framework working together effectively and clear policy alignment to tackle national priorities referencing climate risk and nature recovery as examples. The continued monitoring of Future Wales over the plan period and consideration for the balance between statutory and non-statutory plans is key to ensuring progress towards these legislative and national goals.

2.3 PLANNING (WALES) BILLS (2025)

Significant progress has been made since the publishing of Future Wales in relation to the **Planning (Wales) Bill (2025)** and **Planning (Consequential Provisions) (Wales) Bill (2025)**¹⁰. The Bills bring together the principal legislation relating to town and country planning in Wales into a coherent and accessible form. They modernise the structure and language of planning law, making it clearer and more consistent, while preserving its legal

⁷ [Well-being of Future Generations \(Wales\) Act 2015](#)

⁸ [Government Fit For Future Generations \(2022\)](#)

⁹ [Future Generations Report \(2025\)](#)

¹⁰ [Consolidation of planning law | GOV.WALES](#)

effect. They do not seek to reform the planning system but improve legal clarity and usability to support an effective and efficient planning system. The Bills are nearing their final stages in the legislative process having received approval from the Senedd on 10th March 2026. Following a period of intimation, they are expected to received Royal Assent in April 2026 where they will officially become Acts of the Senedd. For the Acts to take effect and become the new legislative framework for planning law in Wales, they must be brought into force together with a suite of subordinate legislation. An implementation plan setting out the steps and timescales to commence the Acts is anticipated to be published this summer.

2.4 STRATEGIC DEVELOPMENT PLANS

Regional planning is central to Future Wales's vision for a three-tiered planning system. Prepared by **Corporate Joint Committees (CJCs)** who were established by the **Local Government and Elections (Wales) Act 2021**¹¹, **SDPs** are plans to focus on regional issues that cross the boundaries of Local Authorities. Future Wales identifies 4 regions, all of which need to deliver an **SDP** and should consider issues including growth areas, housing demand, economic development, transport and green infrastructure. Whilst identifying priorities at a regional level, **SDPs** should support the facilitation of easier and more consistent development management decisions of regional importance when several Local Authorities are situated in close geographical proximity. Regional working also maximises benefits for shared skills of service.

Currently, no **SDPs** have been adopted in any of the four regions. This is due to a combination of resourcing, politics, geography and a shortage of time since Future Wales was published. Progress has however recently been made, with the **Cardiff Capital Region Delivery Agreement**¹² and North Wales Region Delivery Agreements being approved by Welsh Government.

Demonstrating its commitment to **SDPs** and regional working, various recent initiatives have been implemented by Welsh Government to support progress. Acknowledging feedback from **CJCs** and Local Authorities who have raised concerns regarding financial barriers and resource challenges, Welsh Government have approved funding to incentivise SDP delivery. To support with increasing resources, funding has also been approved for Town Planning Bursaries, in addition to funding to support the expansion of the North Wales Shared Planning Service.

2.5 LOCAL DEVELOPMENT PLANS

As of February 2026, 21 Local Authorities and 3 National Parks in Wales have an adopted **LDP**, the latest being Flintshire who adopted its plan in 2023. Turning to revised **LDPs**, Bridgend adopted their **LDP2** in 2024 and Carmarthenshire's **LDP2** is currently at examination stage. Pembrokeshire, Cardiff and Monmouthshire have also recently submitted their **LDP2** for examination. Since the publication of Future Wales all **LDPs** (adopted or in the process of being revised) and Annual Monitoring Reports acknowledge its policies. Future Wales is clearly influencing **LDP** development, driving alignment with its policies and delivery towards its outcomes. See **Appendix 3** for a breakdown of the latest regarding **LDP** development in each Local Planning Authority area.

¹¹ [Local Government and Elections \(Wales\) Act 2021](#)

¹² [Cardiff Capital Region SDP Delivery Agreement \(2025\)](#)

2.6 NEW FEE REGULATIONS (2025)

New planning application fee regulations¹³ were introduced in December 2025. This enables an increase in planning application fees for Local Authorities to reinvest back into their planning services. To support with resource planning, Welsh Government commissioned The Royal Town Planning Institute (RTPI) to undertake a review of the capacity, resource and skills situation across public sector planning services. Published 24th February 2026¹⁴, the report will support the development of a strategy to improve capacity and resilience of planning services to ensure resources are directed to where they will have the most impact.

2.7 COMMUNITY COHESION AND ENGAGEMENT

Stakeholder engagement is a key component of the planning system and was fundamental in the production of Future Wales. The **Future Generations Report 2025**¹⁵ highlights the importance of engaging at the earliest opportunity, transparency and access to information, demonstrating how involvement makes a difference and informing people about the impact their contributions have made. A plan-led system with meaningful engagement enables all to input into the decisions made at all levels of the planning process.

Whilst there have been changes to the survey since 2021, the percentage of people who feel they can influence decisions in their local area in Wales increased from 19% in 2018-19 to 30% in 2021-22, suggesting an improved sense of community and local involvement. Whilst higher figures were observed, the 2024-25 figures have since returned to pre-pandemic levels at 19% in 2024-25¹⁶.

A similar trend can be seen in other national indicators relating to community cohesion, including people's satisfaction with their local area as a place to live¹⁷ and those who feel belonging to the area¹⁸. The national indicator on active global citizenship¹⁹ is broadly consistent with previous years. This relates to people undertaking activities to help with issues such as poverty, human rights, war, refugees or climate change.

Further monitoring is needed in future years to establish if progress is being made in this area and any future revision of Future Wales will need to ensure stakeholder engagement continues to be at the heart of its preparation.

2.8 CULTURE AND THE WELSH LANGUAGE

2.8.1 Cultural Indicators

Future Wales highlights the importance of promoting culture and the positive role it plays in maintaining and enhancing national identity, health, wellbeing and supporting the economy of Wales. This aligns with **(WFG) Act 2015** well-being goals relating to the protection and promotion of a vibrant culture, heritage and Welsh Language²⁰. In 2025, Welsh Government published **Priorities for Culture (2025)**²¹ identifying key priorities for culture and an

¹³ [Planning application fees policy](#)

¹⁴ [Public Sector Planning Resources in Wales Report \(2026\)](#)

¹⁵ [Future Generations Report \(2025\)](#)

¹⁶ [National Indicator 23](#)

¹⁷ [National Indicator 26](#)

¹⁸ [National Indicator 27](#)

¹⁹ [National Indicator 46](#)

²⁰ [Well-being of Future Generations \(Wales\) Act 2015: the essentials](#)

²¹ [Priorities for Culture \(2025\)](#)

expectation that all sectors consider how they can be embedded into strategic and operational planning.

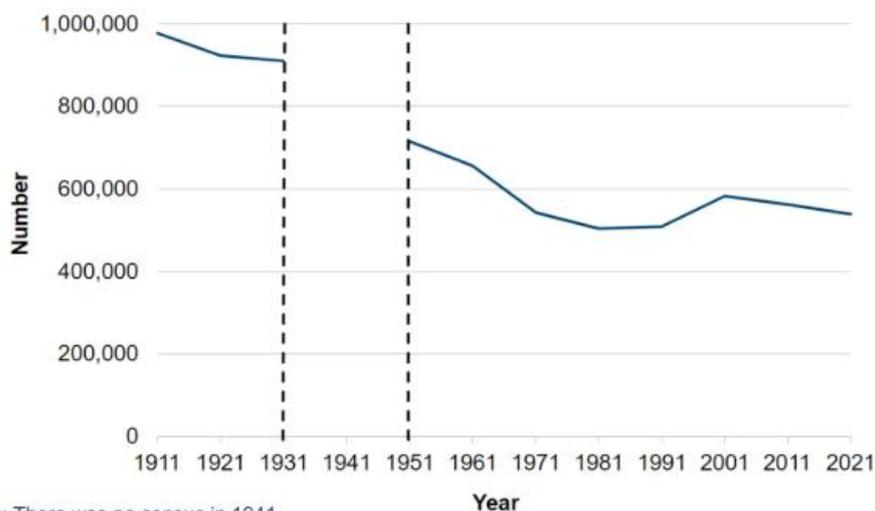
The National Indicator relating to arts, culture and heritage²² remains relatively stable with data from 2022-23 showing 72% of adults participating at least three times a year similar to previous years. The **National Wellbeing Report 2025**²³ does however highlight that children’s participation in the arts has declined and is now at or below levels seen a decade ago. Museum and archive accreditation has improved, and the condition of listed buildings has improved slightly, while scheduled monuments have deteriorated.

2.8.2 Welsh Language Indicators

Future Wales actively supports the Welsh language as an embedded consideration in the spatial strategy of all development plans in the planning system. It highlights Welsh Government’s ambition to reach a million Welsh speakers as well as increasing the percentage of people who speak Welsh daily by 10% by 2050 set by **Cymraeg 2050: A Million Welsh Speakers (2017)**²⁴.

Findings from the **2021 Census**²⁵ shows that since the 2011 Census, the Welsh language has decreased nationally by 1.2 percentage points. The percentage of people aged three years or older able to speak Welsh in 2021 was the lowest recorded in a Census, despite governmental efforts to encourage use of the language.

Graph 1: People aged three years and older able to speak Welsh 1911 to 2021 (Census of Population 1921-2021)



Regional differences can be seen with Gwynedd having the highest percentage of Welsh speakers at 64.4% and the largest increase between 2011 and 2021 seen in Cardiff at 1.1%. The largest decrease was seen in Carmarthenshire, a fall of 4.1%²⁶.

Data from the **National Survey for Wales (2024-25)**²⁷ also shows there has been little change in how often people speak Welsh. The number of people aged 16+ who speak

²² [National Indicator 35](#)

²³ [Wellbeing of Wales \(2025\)](#)

²⁴ [Cymraeg 2050: A million Welsh speakers](#)

²⁵ [Welsh language in Wales \(Census 2021\)](#)

²⁶ [Welsh language in Wales \(Census 2021\)](#)

²⁷ [National Survey for Wales \(2024-25\)](#)

Welsh daily and can speak more than a few words was 11% in 2024/25, remaining steady since Future Wales was published.

2.8.3 Second Home and Short Term Let Policy

A **Programme for Government (2021)**²⁸ commitment was made to take forward actions to limit the number of additional second homes, bringing more homes into common ownership and licence holiday lets. A coordinated suite of measures has been implemented to tackle the issue of second homes and short term lets in Wales and deliver on this government commitment. Second homes are sometimes concentrated in and around Welsh-speaking communities. This can lead to patterns of home occupation that can have a detrimental effect on the vibrancy of the language in these areas. The measures included a land use element, and legislative changes were introduced relating to Use Classes Orders and General Permitted Development rights. Supported by changes to **PPW**, this has given local authorities the ability to control the number of additional second homes and short-term lets in an area through the issuing of an Article 4 Direction. On 1st September 2024, Gwynedd Council became the first planning authority to implement an Article 4 Direction to manage the use of houses as second homes and holiday accommodation. Eryri National Park followed them with their own Article 4 Direction which came into force 1st June 2025.

2.8.4 Strategic Welsh Language Policy

Looking ahead, **Cymraeg 2050: Welsh language strategy action plan 2025 to 2026**²⁹ focusses on education, sustaining Welsh speaking communities, increasing language use and language technology. Key initiatives include the laying of the **Welsh Language and Education (Wales) Act (2025)**³⁰ which sets a clear and robust direction in relation to how Welsh Government intend to improve the attainment of children and young people in terms of Welsh language skills in the education system³¹.

In addition, the Commission for Welsh-speaking Communities, established by the Welsh Government in August 2022, was tasked with making recommendations to strengthen public policy in relation to linguistic sustainability in Welsh-speaking communities. In 2024 it published **Empowering Communities, strengthening the Welsh language (2024)**³² which highlighted the important relationship between town planning and language planning. It identified recommendations relating to strengthening national planning policy and recognising the spatial distribution of Welsh speakers. It also prepared the **Report of the Commission for Welsh Speaking Communities on Town and County Planning (2025)**³³ published in 2025. This provided specific recommendations relating to national guidance on assessing language impact and defining areas of language sensitivity. It also recommended a new statutory designation of areas of higher density linguistic significance to consider the spatial distribution of speakers and more focus on the consideration for the language, informed by evidence, when SDPs are being prepared. On 24th February 2026 Welsh

²⁸ [The Co-Operation Agreement \(2021\)](#)

²⁹ [Cymraeg 2050: Welsh language strategy action plan 2025 to 2026](#)

³⁰ [Welsh Language and Education \(Wales\) Act 2025](#)

³¹ [Cymraeg 2050: Welsh language strategy action plan 2025 to 2026](#)

³² [Empowering communities, strengthening the Welsh language \(2024\)](#)

³³ [The Report of the Commission for Welsh-speaking Communities on Town and Country Planning \(2025\)](#)

Government published its response to the recommendations made in the report³⁴. Further consideration may be given to the role of Future Wales in this context.

2.9 SUMMARY OF CONCLUSIONS

Future Wales establishes a long-term spatial strategy to address national priorities and provides a framework for coordinated sustainable development aligned with the **WFG Act 2015**. While the national tier of the development plan is firmly in place, full coverage across all levels, especially the regional tier, is taking time to implement. Nevertheless, Future Wales remains vital for SDP delivery, offering the necessary regional context, outcomes, and policy basis for their preparation.

Although no SDPs have been adopted to date, there are encouraging signs. Delivery Agreements are progressing, and the recent adoption of **Regional Transport Plans**³⁵ across all four regions demonstrates that regional-level coordination is achievable. To address known barriers, the Welsh Government is implementing financial and resource-led initiatives to support SDP delivery and wider planning function responsibilities which need time to mature. It is essential that Local Authorities maintain this collaborative momentum to realise the benefits of a more connected Wales and Future Wales continues to provide the necessary framework. Future Wales also continues to play a pivotal role in guiding development and decision-making, including where SDPs or up-to-date LDP are not yet in place.

In conjunction with PPW, Future Wales provides a robust mechanism for promoting the Welsh language and culture, supporting the objectives of **WFG Act 2015**. The planning system plays an important role in ensuring that cultural and linguistic considerations are reflected in decisions on land-use and development. While current indicators reflect a mixed picture of progress, it is too early in the 20-year plan period to fully evaluate its long-term impact. Maintaining focus and alignment with wider language and cultural policies will be key to progress over the plan period.

³⁴ [Written Statement: Welsh Government's Response to the Commission for Welsh-speaking Communities report on Town and Country Planning \(24 February 2026\) | GOV.WALES](#)

³⁵ [Regional transport plans: improving travel in your area](#)

3.0 Question 2: Has Future Wales supported Decarbonisation?

The **Environment (Wales) Act 2016**³⁶ sets the framework for the Welsh Government to address climate change. It sets an ambitious target to reach net zero greenhouse gas emissions by 2050, with any residual emissions balanced by removing carbon dioxide from the atmosphere. Interim carbon budgets are set for 2030 and 2040 shaping the trajectory towards the net zero target.

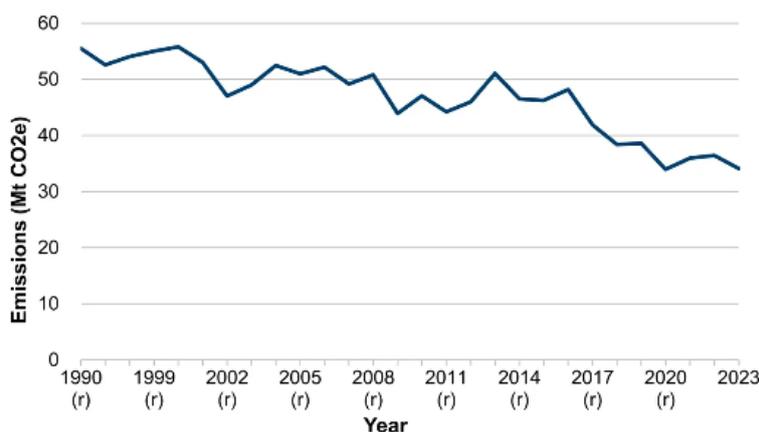
Future Wales recognises the key role the planning system plays in tackling the climate emergency through decarbonisation, promoting low carbon travel and sustainable management of natural resources. A consideration for the review report is the direct and indirect role Future Wales has played in meeting these targets.

3.1 GREENHOUSE GAS EMISSIONS

Prosperity for all: A low carbon Wales³⁷ set the strategy for meeting Wales's first carbon budget (2016-20) at an average of 23% reduction against the base year, 1990. In 2022, it was confirmed that the interim target was exceeded influenced significantly by the impact the global pandemic had on 2020 emissions.

The **Net Zero Wales Carbon Budget 2 (2021-25)**³⁸ set a target of an average reduction of at least 37%. It recognised the challenge and urgency of climate change and set the strategy for achieving the target set. So far, Wales is on track, with emissions decreasing by 38% between 2023 (the most recent year for which we have official data) and the base year, 1990³⁹. The **Wellbeing of Wales Report (2025)**⁴⁰ reports that in 2023, it was estimated that emissions released into the atmosphere directly from within Wales (known as territorial emissions) totalled 34.1 million tonnes of carbon dioxide equivalent (MtCO₂e). This represents a decrease of 6% since 2022. The decrease from 2022 to 2023 continues a recent trend of more significant reductions, with an overall decline of 29% between 2016 and 2023.

*Graph 2: Emissions of greenhouse gases within Wales (1990 – 2023)*⁴¹



³⁶ [Environment \(Wales\) Act 2016](#)

³⁷ [Prosperity for All: A Low Carbon Wales \(2019\)](#)

³⁸ [Second All Wales Low Carbon Delivery Plan \(2021-2025\)](#)

³⁹ [Progress in reducing emissions - 2025 report to Parliament - Climate Change Committee](#)

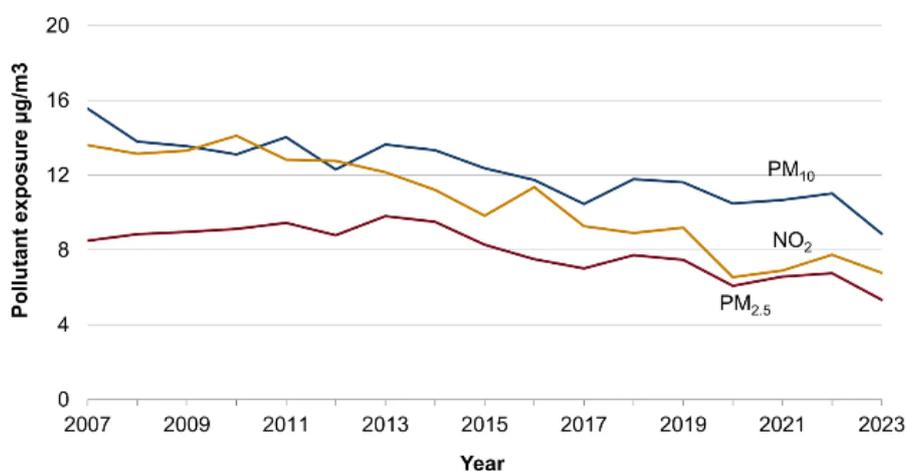
⁴⁰ [Wellbeing of Wales \(2025\)](#)

⁴¹ [National Indicator 41](#)

Whilst latest figures are only available to 2020, there has also been a continued decline in emissions linked to goods and services consumed by Welsh households since 2001⁴². Emissions fell from 40.0 MtCO₂e in 2001 to 25.0 MtCO₂e in 2020. Progress against this indicator will develop over time with the availability of new data and continued monitoring of Future Wales progress.

In addition, the national indicator on nitrogen dioxide (NO₂) shows that overall, the average concentration levels to which people are exposed have been declining over the past decade. The **Wellbeing of Wales Report (2025)**⁴³ highlights that after a period of relative stability between 2017 and 2019 (at around 9 µg/m³), the average concentration decreased to 7 µg/m³ in 2020 and 2021, rising slightly to 8 µg/m³ in 2022 before returning to 7 µg/m³ in 2023. Average concentrations to which people are exposed of particulate matter (PM₁₀ and PM_{2.5}) also decreased since 2021.

Graph 3: Levels of Nitrogen Dioxide (NO₂) pollution in the air⁴⁴



Welsh Government’s recent discussion paper, **Enabling the People of Wales to Deliver and Benefit from the Net Zero Transition in 2026-30 and beyond**⁴⁵ is designed to inform and stimulate discussion about the next stages of Wales’s route to net zero. The feedback from the associated engagement will inform **Carbon Budget 3 (2026–2030)** which is scheduled to be published in 2026⁴⁶. The paper highlights that most of the decarbonisation seen in Wales to date has been delivered by the power and industrial sectors. With opportunities in these sectors largely taken, or planned, more significant reductions are needed in other sectors including transport, buildings, land use and agriculture. This is reinforced by the Climate Change Committee’s **Wales’ Fourth Carbon Budget Report**⁴⁷ which suggests that cost-effective, near term, net zero consistent pathways in the next ten years will increasingly be delivered in areas which intersect with daily life for the majority of people in Wales. While Future Wales continues to provide a planning framework to maintain

⁴² [National Indicator 42](#)

⁴³ [Wellbeing of Wales 2025 | GOV.WALES](#)

⁴⁴ [National Indicator 4](#)

⁴⁵ [Enabling the People of Wales to Deliver and Benefit from the Net Zero Transition in 2026-2030 and beyond \(2025\)](#)

⁴⁶ [Climate change targets and carbon budgets | GOV.WALES](#)

⁴⁷ [Wales' Fourth Carbon Budget - Climate Change Committee \(2025\)](#)

progress and support in reaching the targets set, continued monitoring and alignment with wider decarbonisation priorities and policy will be key.

3.2 SUSTAINABLE LIVING

3.2.1 Energy Use & Waste

Future Wales and PPW encourages sustainability, the efficient use of resources and supports the principles of a circular economy which contribute towards meeting decarbonisation targets.

The **National Survey for Wales April 2024-March 2025**⁴⁸ reports that 73% of participants minimised their energy use at home similar to 2022-23 levels and an increase compared with 62% in 2021-2022⁴⁹.

Furthermore, despite recent deceleration, there has been a decrease in the amount of residual waste produced per person since 2014⁵⁰. 209kg of waste was produced per person in 2014, compared to 177kg in 2020. In 2021 and 2022 figures increased during the Covid pandemic, albeit data for 2024 shows a reduction to 168kg⁵¹.

3.2.2 Energy Efficiency Housing Stock

The planning system supports new developments that have high energy performance, supporting decarbonisation targets and tackling the caused of the climate emergency. The National indicator on percentage of dwellings with adequate energy performance has not been updated since 2017-18⁵². An analysis of home **Energy Performance Certificate (EPC)** data however by Welsh Government reports a general improvement in energy efficiency of homes assessed between 2015 and 2024. In 2015, 34.4% of homes achieved an **Energy Efficiency Rating (EER)** of A, B or C, compared to 54.1% in 2024⁵³.

ONS figures for 2024 also reports that new dwellings in Wales are on average more energy efficient than existing dwellings. Median **EPC** scores range from 61 to 72 for existing dwellings with median **EPC** score for new dwellings ranging between 79 and 84 for all tenures⁵⁴. Social rented homes had the highest median energy efficiency score of different tenure types, compared with private rented homes and owner-occupied homes. This highlights Welsh Government's efforts to support energy efficient homes for lower income households.

Air source heat pumps (ASHP) are expected to become one of the main sources of domestic heating technology as Wales seeks to transition away from fossil fuels to low carbon and net zero alternatives. ASHPs will help to build Wales's energy resilience and security and provide more efficient heating for consumers. In 2025, to help promote the deployment of ASHPs in homes across Wales and help meet low carbon objectives, Permitted Development Rights (PDR) relating to air source heat pumps were reviewed and consulted upon⁵⁵. The review concluded that proposed changes to PDRs to increase flexibility in siting ASHPs would have potential benefits in encouraging the adoption of low-carbon

⁴⁸ [National Survey for Wales headline results: April 2024 to March 2025 \[HTML\] | GOV.WALES](#)

⁴⁹ [National Survey for Wales headline results: April 2022 to March 2023 \[HTML\] | GOV.WALES](#)

⁵⁰ [National Indicator 15](#)

⁵¹ [Wellbeing of Wales \(2025\)](#)

⁵² [National Indicator 33](#)

⁵³ [Analysis of Home Energy Performance Certificate \(2025\)](#)

⁵⁴ [ONS Energy Efficient of Housing in England and Wales \(2024\)](#)

⁵⁵ [Changes to Permitted Development Rights Consultation Document \(2025\)](#)

technologies in households across Wales. Welsh Government is therefore minded to proceed with the ASHP proposals in its first phase of PDR implementation subject to the considerations set out in the summary report⁵⁶.

3.3 TRANSPORTATION

3.3.1 Transport Strategy

The **Llwybr Newydd: The Wales Transport Strategy (2021)**⁵⁷ is a 20-year strategy for shaping the transport system in Wales. It sets Wales on a trajectory for decarbonising its transport system, giving priority to meeting the demand for travel by walking, cycling and public transport ahead of private motor vehicles in line with the Sustainable Transport Hierarchy. Future Wales alongside **PPW** supports integration between land use and transport planning and the use of the Sustainable Transport Hierarchy when planning new development.

In 2023, the **National Transport Delivery Plan (2022-27)**⁵⁸ was published setting out how the priorities and ambitions set by **Llwybr Newydd** will be delivered. The **Plan** highlights key initiatives to deliver on several objectives including sustainability, accessibility and economic growth. These initiatives include the production of **Regional Transport Plans**, investment in key infrastructure projects and transitioning to more sustainable transport modes.

Regional Transport Plans⁵⁹ have recently been delivered by **Corporate Joint Committees** and adopted by all 4 regions. A complete strategic programme for transport in Wales at a regional level will help demonstrate how spatial planning is significant to connecting Wales sustainably and pave the way for more regional working. In March 2025, Welsh Government also introduced landmark legislation to transform bus travel in Wales. The **Bus Services (Wales) Bill**⁶⁰ puts buses back under public control, giving Government the tools to design a more efficient, reliable and integrated network that puts the needs of communities first, while supporting Wales's decarbonisation goals⁶¹.

Success in achieving a modal shift from private cars to sustainable transport and active travel is key to the achieving of decarbonisation targets. The Climate Change Committee reported in May 2025⁶² that the transition to electrified transport and the expansion of electric vehicle charging points also has a significant part to play. In 2025 proposed changes to Permitted Development Rights (PDR) relating to EV chargers were consulted upon and a commitment made to progressing with changes to PDRs as part of the second phase of implementation to ensure they are delivered effectively and in line with policy priorities.

3.3.2 Modes of Travel

There has been little change to the proportions of Welsh residents that usually use each mode of travel over the last decade. In 2023⁶³, 81% of commuters in Wales used a car as their usual method of travel to work. There was also a lower proportion of respondents within

⁵⁶ [Changes to permitted development rights: summary of responses](#)

⁵⁷ [Llwybr Newydd A New Wales Transport Strategy 2021: full strategy](#)

⁵⁸ [National Transport Delivery Plan 2022 to 2027](#)

⁵⁹ [Regional Transport Plans](#)

⁶⁰ [Bus Services \(Wales\) Bill: Overview](#)

⁶¹ [Welsh Government Annual Report 2023-2024](#)

⁶² [Wales' Fourth Carbon Budget - Climate Change Committee](#)

⁶³ [Wellbeing of Wales \(2025\)](#)

the **National Survey for Wales (2024-25)**⁶⁴ at 33% that had avoided or cut down travel by car compared with 40% in 2022-23.

The **Rail Station Usage in Wales Bulletin (2022-23)**⁶⁵ records that rail station usage increased by 31.9% to 38.3 million from 29.0 million in the previous year (2021-22). While overall rail station usage levels increased compared to 2021-22, they have not yet returned to levels seen before the COVID-19 pandemic where 50.4 million entry and exits were recorded during 2019-20.

3.3.3 Home Working

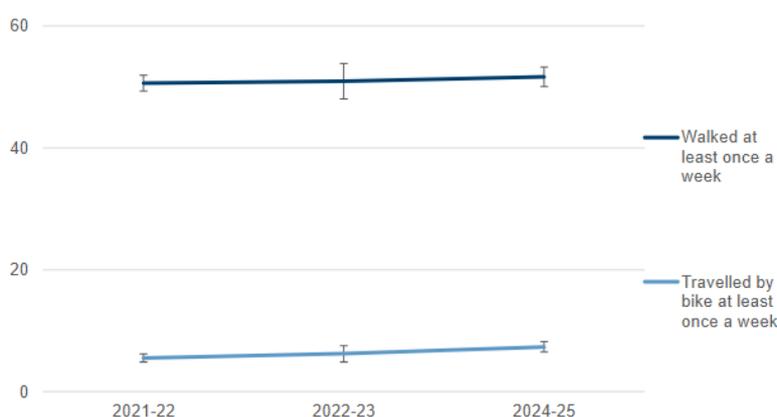
The **Future Trends Report (2021)**⁶⁶ highlights that the COVID-19 pandemic accelerated the trend towards remote and home working and is likely to have lasting implications for travel patterns. The 2021 Census data revealed that 25.6% of people mainly worked from home⁶⁷. The **National Survey for Wales (2024-25)**⁶⁸ reports that 42% of respondents said they work remotely for some or all of their working hours, compared with 34% in 2022-23.

3.3.4 Active Travel

In 2024, Welsh Government published the **Active Travel Delivery Plan (2024-27)**⁶⁹ which aims to increase modal shift by making active travel easier to access, more attractive to use, and more inclusive. The plan includes a holistic, place-based approach, the enhancement of the Transport for Wales Active Travel Hub and the establishment of pathfinder schemes to develop collaborative delivery models and strategies.

Despite strong legislative and policy commitments to active travel, recent figures show little change in Wales. **National Survey for Wales (2024-25)**⁷⁰ reports that 52% of respondents walked for at least 10 minutes or more to get somewhere at least once a week, a similar proportion to 2021-22 and 2022-23. In 2024-25, 7% of people travelled by bike at least once a week, a similar proportion to 2022-23, but higher than the 5% recorded in 2021-22.

Graph 4: Proportion of people who walked or travelled by bike, 2021-22 to 2024-25⁷¹



⁶⁴ [National Survey for Wales headline results: April 2024 to March 2025](#)

⁶⁵ [Rail station usage in Wales \(2022-23\)](#)

⁶⁶ [Future Trends Report Wales \(2021\)](#)

⁶⁷ [Travel to work, England and Wales - Office for National Statistics](#)

⁶⁸ [National Survey for Wales \(2024-25\)](#)

⁶⁹ [Active travel delivery plan 2024 to 2027](#)

⁷⁰ [National Survey for Wales \(2024-25\)](#)

⁷¹ [National Survey for Wales headline results: April 2024 to March 2025 \[HTML\] | GOV.WALES](#)

3.4 SUMMARY OF CONCLUSIONS

Future Wales recognises the crucial, cross-cutting role that planning plays in promoting low carbon development and sustainable resource management, placing a strong emphasis on decarbonisation and responding to the threats of climate change.

Progress in reducing overall territorial greenhouse gas emissions has been notable, with Wales successfully exceeding its first carbon budget and remaining on track for the second. There are also positive signs in relation to sustainable behaviours and improvements in energy efficient homes. An increase has also been seen in renewable energy delivery which is explored further in Section 4.0.

However, meeting the third and fourth carbon budgets (2026-2030 and 2031-2035), requires a step change in ambition and delivery. This step change will also be required to realise the many economic, social and environmental benefits of pursuing a net zero emissions economy. Most of the emissions reductions seen to date have been in the industrial and power sectors. There is likely to be an increase in focus on progress in key areas, such as travel, housing, agriculture and land-use, and where Welsh citizens will be asked to make different choices, such as the type of car they own or how they heat their homes.

Despite strong legislative and policy commitments to sustainable and active travel, there has been no significant change in the proportion of journeys made by walking, cycling, or public transport, and private car use remains persistently high.

Initiatives outlined in **Llwybr Newydd**, implementation of Regional Transport Plans, investment in rail infrastructure, and landmark bus reform legislation, are key initiatives designed to drive this necessary shift and reduce transport-related emissions. Whilst there are several factors contributing to this shift, the planning system has a crucial role in locating development in sustainable locations and providing safe, attractive environments where people can access facilities and services by walking and cycling. Exploring opportunities within Future Wales to expand placemaking criteria to include the implementation of public transport standards, to ensure train stations and bus stops are accessible and inclusive to all communities in a safe, attractive environment could be an aspect to consider further.

Future Wales reflects the strong legislative and policy framework for tackling the climate emergency through decarbonisation and promoting sustainable management of natural resources. It provides the necessary scope and ambition to guide spatial planning decisions relating to decarbonisation supported by **PPW**. Increased ambition and delivery, allied to continued monitoring of the direction of wider decarbonisation policies will however be key to ensure Future Wales continues to contribute towards national net zero targets.

4.0 Question 3: Has Future Wales supported the delivery of renewable energy?

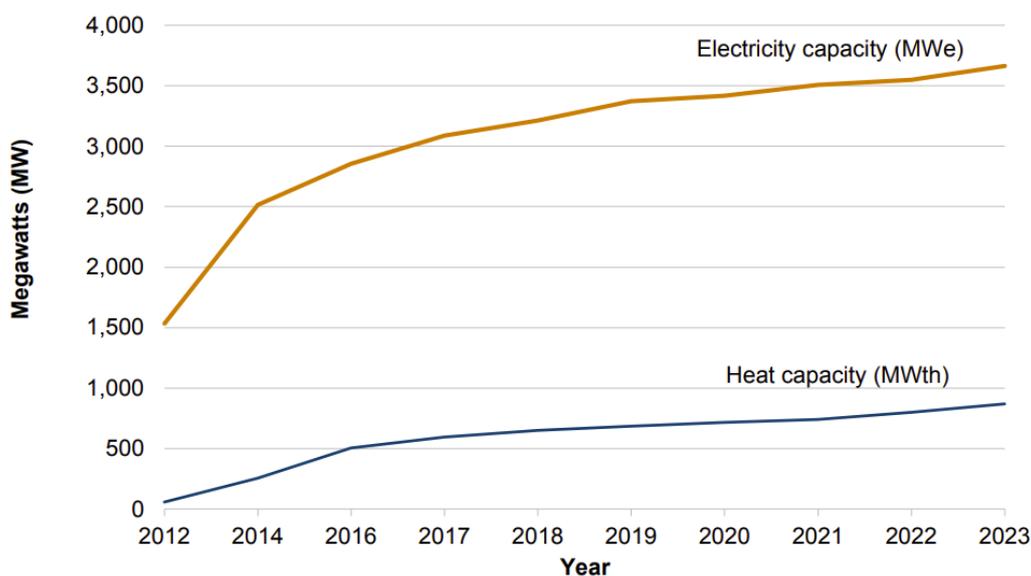
The Welsh Government has set a target for renewable electricity generation to be equivalent to 70% of electricity consumption by 2030 and 100% by 2035. In 2023, the local ownership target for renewable energy was increased to 1.5 GW by 2035⁷².

Future Wales has a positive renewable energy framework, supporting Welsh Government's aims with Policies 17 and 18 providing criteria-based policies for the determination of renewable and low carbon application. Pre-assessed areas are also identified where there is a presumption in favour of large-scale wind energy development. Considering the role Future Wales has played in supporting the delivery of renewable energy projects is a key measure of progress.

4.1 ENERGY GENERATION

On March 3, 2025, the Welsh Government published the **Energy Generation in Wales 2023 (2025)**⁷³ report offering a comprehensive review of energy generation and consumption across Wales. It confirms that progress is being made towards Wales's energy targets with the report highlighting that renewable electricity generation in Wales was estimated at equivalent to 53% of its electricity consumption, including losses. In 2023 there was a total of 3,663 MW of renewable electricity capacity in Wales.

Graph 5: Renewable Energy Generation Capacity, 2012 to 2023⁷⁴



In 2023, 109 MW of new renewable electricity capacity was installed demonstrating a significant rise from 38 MW in 2022 and the second-highest annual increase since 2019. Renewable heat energy equipment installed in Wales reached 869 MW in 2023, bringing the total installed heat and electrical capacity to 4,532 MW⁷⁵.

⁷² [Energy Use in Wales Report \(Third Edition\)](#)

⁷³ [Energy Use in Wales 2023](#)

⁷⁴ [Wellbeing of Wales 2025 | GOV.WALES](#)

⁷⁵ [National Indicator 12](#)

In 2023, all 22 Welsh local authority areas saw an increase in their total renewable energy capacity compared to the previous year⁷⁶. Over half of the local authorities saw a 5% or greater increase in renewable energy capacity, with three achieving a 10% or greater increase. This progress marks an improvement from the previous two years during which only three local authorities experienced a renewable capacity increase exceeding 5%. As with the previous year, Swansea saw the largest growth in renewable energy capacity, increasing its percentage of installed capacity by 14%. Powys saw the largest value increase in installed capacity, with an additional 23 MW installed in 2023.

4.2 DEVELOPMENT MANAGEMENT

4.2.1 Development of National Significance (DNS)

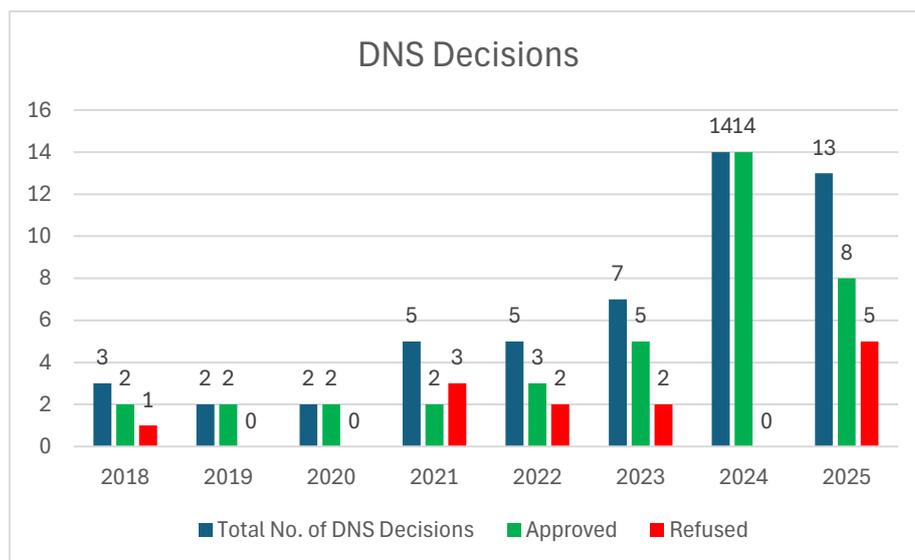
Proposals for large-scale energy development are classed as **Developments of National Significance (DNS)** and are determined by the Welsh Ministers. Proposals below the **DNS** threshold are determined by local planning authorities. As set out in legislation, **DNS** applications must be determined in accordance with Future Wales including:

- All on-shore wind generation of 10 or more megawatts.
- Other energy generation sites with generating power between 10 and 350 megawatts.

Since the publication of Future Wales, changes have been introduced within the planning system to support the consenting and delivery of renewable energy projects⁷⁷. This has included enabling delegation of decisions for small scale projects (up to 50MW) to PEDW Inspectors and boosting resources across the planning and consenting system.

The number of **DNS** applications determined has increased in recent years, and average determination time reduced. In 2025 13 applications were determined with a reduction in average time taken by 6 weeks. Alaw Mon Solar Farm (160MW), Alwen Forest Wind Farm (60MW) and Twyn Hywel Energy Park (92MW) approved in recent years are some of the largest and are set to contribute significant renewable energy capacity in the coming years.

Graph 6: DNS Applications Determined (Source; PEDW)



⁷⁶ [Energy Use in Wales 2023](#)

⁷⁷ [Written Statement: Speeding up planning \(20 January 2026\) | GOV.WALES](#)

4.2.2 Pre-Assessed Areas⁷⁸

Future Wales identifies Pre-Assessed Areas (PAA) for wind development where the Welsh Government has already modelled the likely impact on the landscape and has found them to be capable of accommodating development in an acceptable way. The Welsh Government undertook an assessment to identify these areas to provide certainty, where in principle, developments can be acceptable. There is a presumption in favour of large-scale wind energy development in these areas, subject to specific criteria detailed in Policy 17 and 18 of Future Wales.

Proposals have come forward within the PAA boundaries, however some applications have been promoted by developers outside these areas. See below table which provides a high-level overview of the number of planning applications and scoping opinions since the publishing of Future Wales proposing wind development within and outside the pre-assessed areas. Whilst the policy framework allows for this, subject to the criteria set, further consideration is needed on why more proposals are not being promoted within the Pre-Assessed Areas. Also, whether there are opportunities to further develop the spatial focus the Pre-Assessed Areas seek to provide. This could help further address the spatial complexity of projects and provide further assessment of where they can be developed using latest information. This could be through building on the strategic planning currently being prepared by NESO at a UK level and discussed in section 4.4. To provide greater certainty to developers and decision makers, spatially directing low carbon projects could also potentially be expanded to cover other energy technologies.

Table 1: Planning applications and scoping opinions issued compared with the pre-assessed boundaries

Status	Within Pre-assessed Area	Outside Pre-assessed Area	Total
Approved	7	2	9
Submitted	3	2	5
Scoping Opinion Issued	10	13	23
Total	20	17	37

4.2.3 Infrastructure Wales Act 2024

The new **Infrastructure (Wales) Act 2024**⁷⁹ provides a streamlined process for consenting Significant Infrastructure Projects (SIP) in Wales. It took effect from 15th December 2025, replacing DNS and other existing consenting regimes demonstrating the Government's commitment to the effective and efficient determination of large-scale infrastructure using a modern consenting process. Further consideration could also be given to the expanding of Future Wales policies to provide further spatial direction and criteria to support developers and decision makers through the new SIP regime.

⁷⁸ [Policy 17 – Pre-assessed areas for wind energy | DataMapWales](#)

⁷⁹ [Infrastructure \(Wales\) Act 2024](#)

4.2.4 Environmental Considerations

Whilst the delivery of low carbon infrastructure is essential for meeting decarbonisation targets, it must be balanced with the protection and the strengthening of the natural environment. There have been situations that have arisen with decision making requiring careful consideration of the impacts of proposals for renewable energy development on sensitive environments including peatland and best most versatile (BMV) land.

Future Wales and PPW provides a framework for decision makers when balancing these competing priorities. Future Wales Policy 17 emphasises that decision makers must give significant weight to the need to meet Wales' international commitments and target to generate 70% of consumed electricity by renewable means by 2030 in order to combat the climate emergency subject to certain criteria. It also states that proposals should demonstrate that they will not have an unacceptable adverse impact on the environment and should describe the net benefits the scheme will bring in terms of social, economic, environmental and cultural improvements to local communities.

Policy 18 sets criteria including that there are no unacceptable adverse impacts on national statutory designated sites for nature conservation (and the features for which they have been designated), protected habitats and species. PPW Chapter 6 includes more recent policy on designated sites and those containing protected species and habitats which are irreplaceable and states that development in such locations is unacceptable as a matter of principle. Such sites form the heart of resilient ecological networks and their role and the ecosystem services they provide must be protected, maintained and enhanced and safeguarded from development. Further consideration may be given to the role of Future Wales in this context.

4.3 LOCAL ENERGY

Welsh Government's previous local ownership target for renewable energy of 1 GW by 2030 has almost been reached. At 0.9 GW of installed capacity, Wales is also 60% of the way towards its new target of 1.5 GW by 2035. **Energy Generation in Wales 2023 (2025)**⁸⁰ reports that twice as many locally owned renewable energy projects were installed in 2023 compared to 2022, primarily due to the accelerating uptake of domestic solar PV. In 2023, 79 MW of locally owned capacity was commissioned, including 78 MW of electrical capacity from solar PV and 1 MW of heat capacity, comprising 0.8 MW from biomass and c. 0.1 MW from solar thermal. Nearly two-thirds of all locally owned capacity comes from electricity generation sources, such as solar PV and onshore wind. Wales is now estimated to have more than 89,500 locally owned renewable electricity and heat projects, 90% of which are classified as domestic. These domestic projects are typically small-scale rooftop solar PV and biomass systems, so only account for 37% of all locally owned capacity.

The Welsh Government's **Ynni Cymru**⁸¹ programme demonstrates a strong commitment to continue the fostering of locally owned renewable energy and accelerating the deployment of Smart Local Energy Systems (SLES) across the nation. The initiative, established in 2023, aims to ensure that the economic and social benefits of energy generation are retained within Welsh communities, thereby facilitating a just transition to net zero. This commitment was explicitly underlined in autumn 2024 with the launch of a £10 million capital grant fund for public and community sector organisations, as well as SMEs, developing SLES projects. This funding directly supports projects that integrate various energy assets like

⁸⁰ [Energy Use in Wales 2023](#)

⁸¹ [Ynni Cymru | GOV.WALES](#)

solar panels, battery storage, and heat pumps to improve efficiency, cut energy costs (with some residents saving up to 50% on bills), and enhance local energy resilience across Wales.

In addition, **Local Area Energy Plans** (LAEPs) look at the scale of change needed to deliver on climate targets within Local Authority areas. The plans are tailored to the unique characteristics and needs of each local area, ensuring that energy solutions are both effective and sustainable. There are adopted LAEPs now in place across all areas of Wales.

4.4 EMERGING POLICY CONSIDERATIONS

The **Energy Act (2023)**⁸² paved the way for the creation of the National Energy System Operator (NESO). It operates independently as a not-for-profit model, licensed and regulated by the **Office of Gas and Electricity (OFGEM)**. Its key role is to provide expert and impartial advice on the energy system across England, Scotland and Wales. This includes guiding what infrastructure and sources of electricity are required to securely accelerate the transition away from fossil fuels into new energy technologies including renewables.

4.4.1 Strategic Spatial Energy Plan (SSEP)

NESO has responsibility for producing a **SSEP** setting a long-term view of the energy sources needed to reach net zero targets. The **SSEP** will assess and map the optimal locations for electricity and hydrogen energy generation. It will also identify capacity within the zones and timings for delivery having assessed economic, technical and environmental factors.

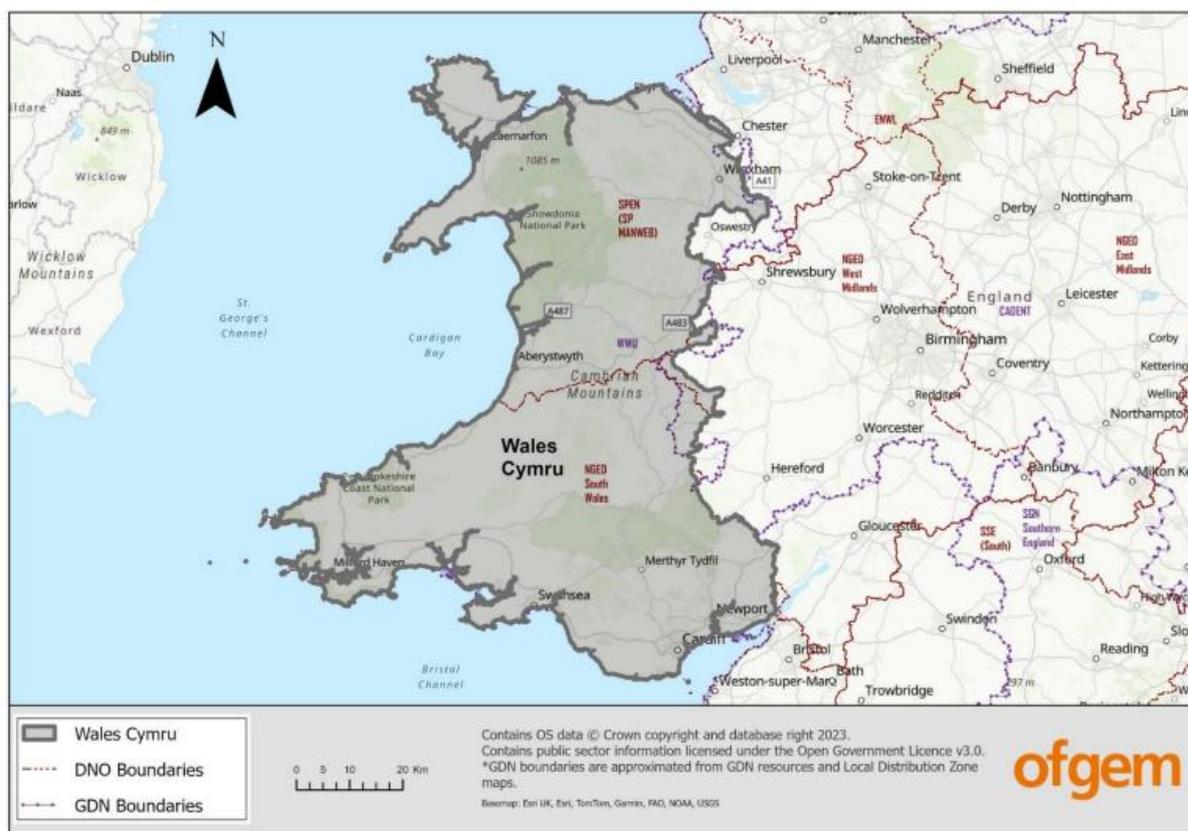
Pathway scenarios will be produced, designed to achieve UK net zero by 2050 and establish a secure energy system in Great Britain. Once all the information on the pathway options is evaluated, they will be shared with Welsh and Scottish Ministers for their views. The Secretary of State for Energy Security and Net Zero will choose a pathway to be used for the draft **SSEP** consultation which is currently programmed for after Summer 2026. The final **SSEP** is expected to be published Autumn 2027.

4.4.2 Regional Energy Strategic Plans (RESP)

The **SSEP** works with and supports other important energy transition programmes, including the **RESP**. **NESO** will produce Plans across 11 **RESP** areas setting spatially modelled pathways of future supply and demand for the regions. **RESPs** will be informed by the development of the **SSEP** and they are currently programmed to be produced by the end of 2028. The below Map shows the boundaries of the 2 **RESP** areas identified for Wales.

⁸² [Energy Act 2023](#)

Map 1: Wales RESP Boundary⁸³



4.4.3 Centralised Strategic Network Plan (CSNP)

The **CSNP** serves as a network blueprint for the country, mapping demand and optimal locations for onshore and offshore transmission infrastructure to support a decarbonised energy grid. This will be informed by the output of the **SSEP** and **RESPs**.

4.4.4 Hydrogen and Carbon Capture and Storage

In June 2023, the Climate Change Committee (CCC) published its progress report on reducing emissions in Wales⁸⁴. The CCC’s report made 58 recommendations for the Welsh Government, including a recommendation to assess the potential for large-scale hydrogen production in Wales, and to coordinate with the UK Government on how Wales can best contribute to UK-wide hydrogen plans. The CCC also considers Carbon Capture and Storage (CCS) to have a significant role in decarbonising many parts of the economy including industry, energy supply and transport.

Recognising the strategic importance of these technologies, in 2025 Welsh Government consulted upon and published preferred policies. Monitoring progress in this area will be important to ensure Future Wales and other national planning policy documents provide the framework and guidance to support decision making for such technologies.

4.5 GRID INFRASTRUCTURE

Fundamental to achieving key energy and decarbonisation targets is the ability to connect, transfer and distribute renewable energy via the energy grid efficiently and in a timely

⁸³ [Decision on the Regional Energy Strategic Plan Policy Framework](#)

⁸⁴ [Climate Change Committee: Reducing Emissions in Wales Progress Report \(2023\)](#)

manner. The **Future Energy Grids For Wales – Insight Report (2023)**⁸⁵ and the NICW's report **Preparing for Renewable Energy 2050 (2023)**⁸⁶ highlights the need for a strategic review of the distribution of transmission grid in Wales to facilitate renewable energy generation, storage and distribution. The **Future Generation Report (2025)**⁸⁷ also highlights major challenges in ensuring the transmission and distribution system is fit to serve our communities' and businesses needs for the future. It emphasises not only the technical and environmental challenge but also the social and cost challenges regarding the growing calls for the undergrounding of infrastructure where possible.

In 2024, the Welsh Government established the **Independent Advisory Group on Future Electricity Grid for Wales** tasked with developing principles for new electricity infrastructure, considering costs, environmental impact, community views and technical needs to meet net zero targets. The resulting **Report**⁸⁸ was published in January 2026, with a recommendation that Welsh Government should review its policy in relation to grid infrastructure. Owing to its spatial nature Future Wales has the potential to support the deployment of grid infrastructure and continued monitoring of the national direction in this area will be important.

4.6 SUMMARY OF CONCLUSIONS

Progress is clearly being made towards net zero targets, with increases in renewable energy installation and generation from both large scale and community-based projects. Future Wales and specifically Policies 17 and 18 have supported decision making and the consenting of large-scale renewable energy projects. Decisions in recent years through the DNS process have increased significantly, providing a pipeline of projects for delivery.

Whilst progress is being made, the delivery of schemes and associated grid connections will need to accelerate as electricity consumption is expected to double by 2050. As energy technology advances, the capacity of energy schemes is expected to increase, as will their complexity and variety. NESO's strategic plans will also provide UK level direction for energy projects, and the SIP regime replacing the DNS process looks to deliver an effective consenting process to support national infrastructure priorities. Consequently, Future Wales will need to adapt to continue to provide the spatial direction and framework for decision making.

A key challenge to the delivery of renewable energy initiatives is ensuring a financially viable grid connection with the ability to transfer and distribute efficiently across the country. Owing to its spatial context Future Wales has the potential to spatially map and support the deployment of both new national grid connections and its adaptation to facilitate renewable energy generation.

Finally, whilst clear progress has been made in increasing renewable energy generation, balancing with the protection and strengthening of the natural environment will continue to be a key area of focus. Further consideration should be given through a future review as to whether additional clarity can be provided for decision makers when balancing competing national priorities, to simplify decision making and speed up the overall consenting process.

⁸⁵ [Future Energy Grids for Wales: Insights report \(2023\)](#)

⁸⁶ [Preparing Wales for a Renewable Energy 2050 \(2023\)](#)

⁸⁷ [Future-Generations-Report-2025.pdf](#)

⁸⁸ [Independent Advisory Group on Future Electricity Grid for Wales \(2026\)](#)

5.0 Question 4: Has Future Wales helped meet housing needs in the right places?

Future Wales contains spatial direction and policies for shaping the growth of places to ensure key services and facilities are delivered in the most accessible locations, well served by public transport and co-ordinated with the delivery of homes and jobs. Assessing the delivery of new homes across Wales and how Future Wales is shaping sustainable places with facilities and services that are accessible to all is a key measure of progress.

5.1 HOUSING

Future Wales provides an estimate of additional housing need in Wales over the Plan period to 2039. The estimates comprise two elements; the backlog of unmet need and newly arising need and are presented by region and tenure mix (affordable and open market). It is important to note that the estimates are not targets and do not form a dwelling requirement for Wales. The estimates do however provide part of the evidence and context on which housing policy and requirements can be based. Data limitations of the estimates should also be noted. Based on past trends continuing and assumptions materialising, and to illustrate the uncertainty associated with estimate of housing need, a range of estimates were produced. There will also be variation within the regions themselves.

The central estimate suggests a need for 110,000 homes over the 20-year plan period with 7,400 homes required annually during the first 5 years (2019-24). The housing needs estimates also indicate that the provision of affordable homes should become a key focus for housing delivery. It represents an average of approximately 3,500 (48%) affordable homes and 3,900 (52%) market homes per year over the five-year period.

The **Minister for Climate Change's Written Statement on Social Housing in Wales June 2021**⁸⁹ also included a commitment to deliver 20,000 new low carbon homes for rent within the social sector during the government term ending in 2026.

5.1.1 Housing Delivery

Several policy related indicators are identified in the Future Wales monitoring framework, to inform an assessment of progress. These relate to the number of new homes provided across Wales and its regions together with the provision of affordable housing. A variety of different data sources exist which may be analysed to measure the housing delivery indicators over the five-year period to date.

StatsWales captures new house building activity (completions and starts). This confirms that in 2024-25, there were 4,631⁹⁰ new homes built in Wales. This follows a general trend of decline in housing completions over the past 10 years. There was also a decline in the number of new homes started, with 3,798 homes between 2024-25 compared to 6,224 between 2019-20⁹¹.

StatsWales data on new house building is provided with the caveat that there is a known undercount in the reporting:

⁸⁹ [Written Statement: Social Housing in Wales \(15 June 2021\) | GOV.WALES](#)

⁹⁰ [New dwellings completed by local authority, tenure, dwelling type and number of bedrooms | StatsWales](#)

⁹¹ [New dwellings started by local authority, tenure and dwelling type | StatsWales](#)

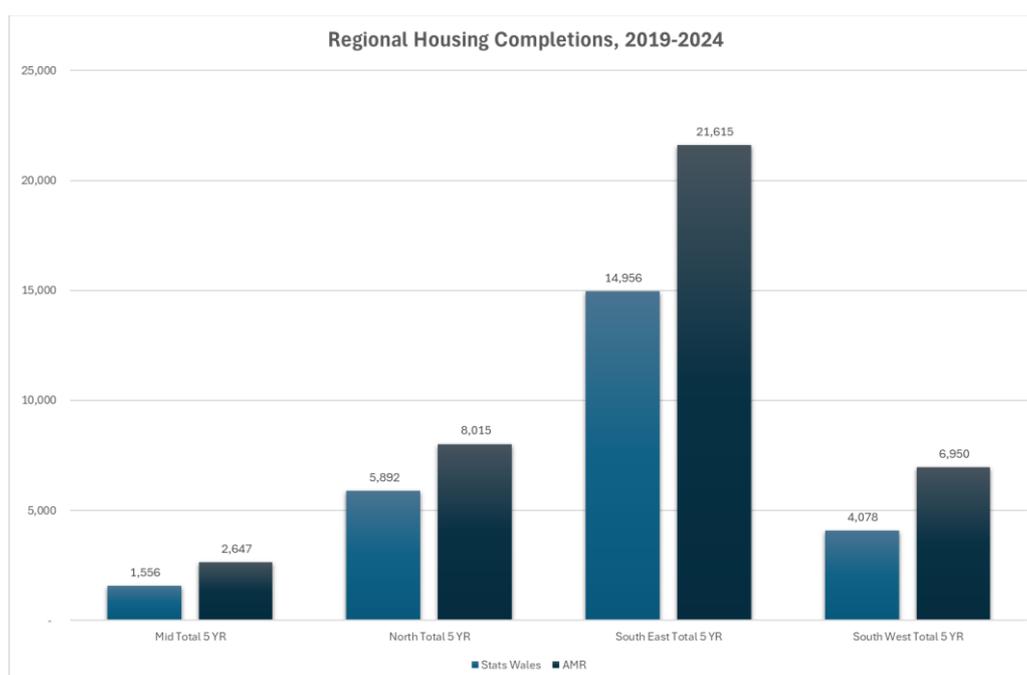
*“In Wales, new house building is undertaken by the private sector, Registered Social Landlords (RSLs) and local authorities. The information presented here is based on the reports of local authority building inspectors and the National House Building Council (NHBC). It **does not include information from private approved inspectors**. The exclusion of this information means that there is currently an undercount in the number of dwellings started though this is estimated to be quite small.”*

StatsWales data can be compared with alternative counts of new dwelling completions. It is reasonable to assume that some discrepancy will exist in year-to-year reporting from different data sources, related to different surveys timings and delays and lag in administrative process. However, any significant undercount owing to omissions should become clearer over the five-year monitoring period.

One alternative set of data are LPA Housing Monitoring Completions data, based on annual surveys of planning consents, used to inform LDP preparation and monitoring. This data has an established use amongst planning having been used historically to inform the Joint Housing Land Availability Study (JHLAS) 5 years land calculations. It is also the data used to inform Annual Monitoring Reports (AMRs) which monitor LDP effectiveness. This data captures new build but also picks up other new dwelling delivery – for example where a change of use results in additional homes or where a sub-division leads to a net increase in dwellings.

AMR completions data from LPAs across Wales indicate that approximately 39,227 homes were delivered between 2019/20 and 2023/24 (i.e. the first five years of available data since Future Wales came into place). Completion figures from AMRs are approximately 48% higher than the new build completions data published on the StatsWales website, as illustrated in the chart below.

Graph 7: Regional Housing Completions (2019-24)



As can be seen, AMR data suggest that the majority of homes delivered was in South-East Wales totalling approximately 21,615. The lowest delivery was seen in Mid Wales totalling 2,647 homes. It should be noted that due to limitations in identifying precise site locations within the Bannau Brycheiniog National Park, some completions which took place in the South East and South West regions will have been attributed to mid-Wales where the majority of completions for this LPA took place.

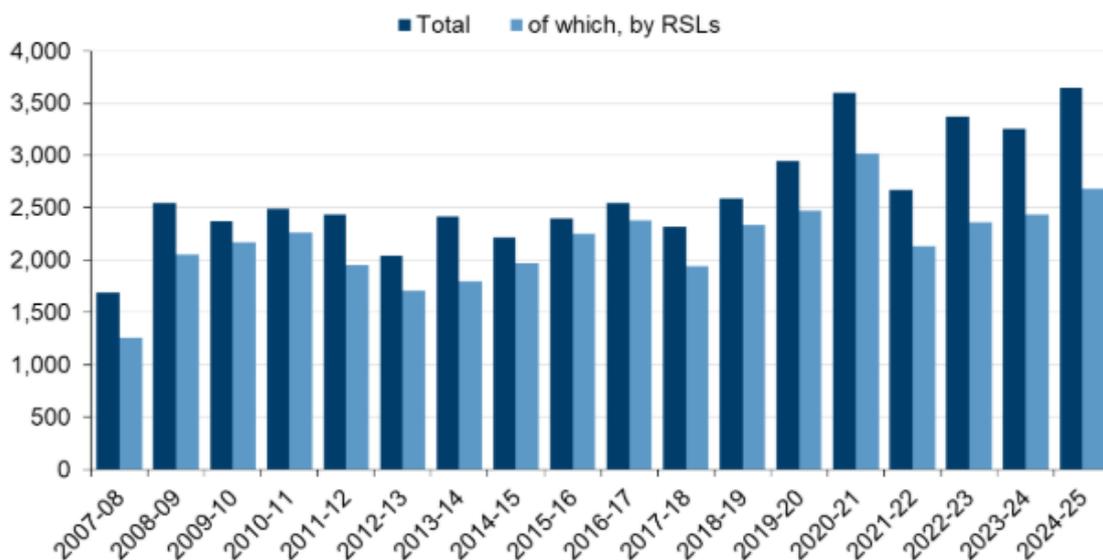
It is important to note that in its first stage of review, the impact that Future Wales has had in delivering homes is too early to assess. Furthermore, **National House Building Council (NHBC)'s Annual Reports since 2021**⁹² highlight the challenging economic conditions since the Covid 19 pandemic that have hindered progress in market housing delivery across the United Kingdom. The NHBC reports that this is mainly due to the poor health of the UK economy, with high interest rates and persisting inflationary pressures significantly contributing to a deceleration in house building activity. In addition, there have been critical environmental challenges related to Special Areas of Conservation (SACs) and marine water quality in parts of Wales impacting the delivery of new homes and explored further in Section 7.4.

Welsh Government in February 2026 published a new set of national estimates of additional housing need⁹³ updating those from 2019 that were used to inform Future Wales. Any future revision of Future Wales would need to account for these latest figures. It should be noted however that as with the previous estimates of need the latest release should not be used as housing targets.

5.1.2 Affordable Housing

Turning to affordable housing, recent years has seen an increase in delivery when compared to historical rates. 3,643 were delivered in 2024-25, the highest since records began in 2007⁹⁴. This compared to 2,942 in 2019-20 and 2,218 in 2014-15.

Graph 8: Additional Affordable Housing Provision 2007-2025⁹⁵



⁹² [National House Building Council \(NHBC\)'s Annual Reports](#)

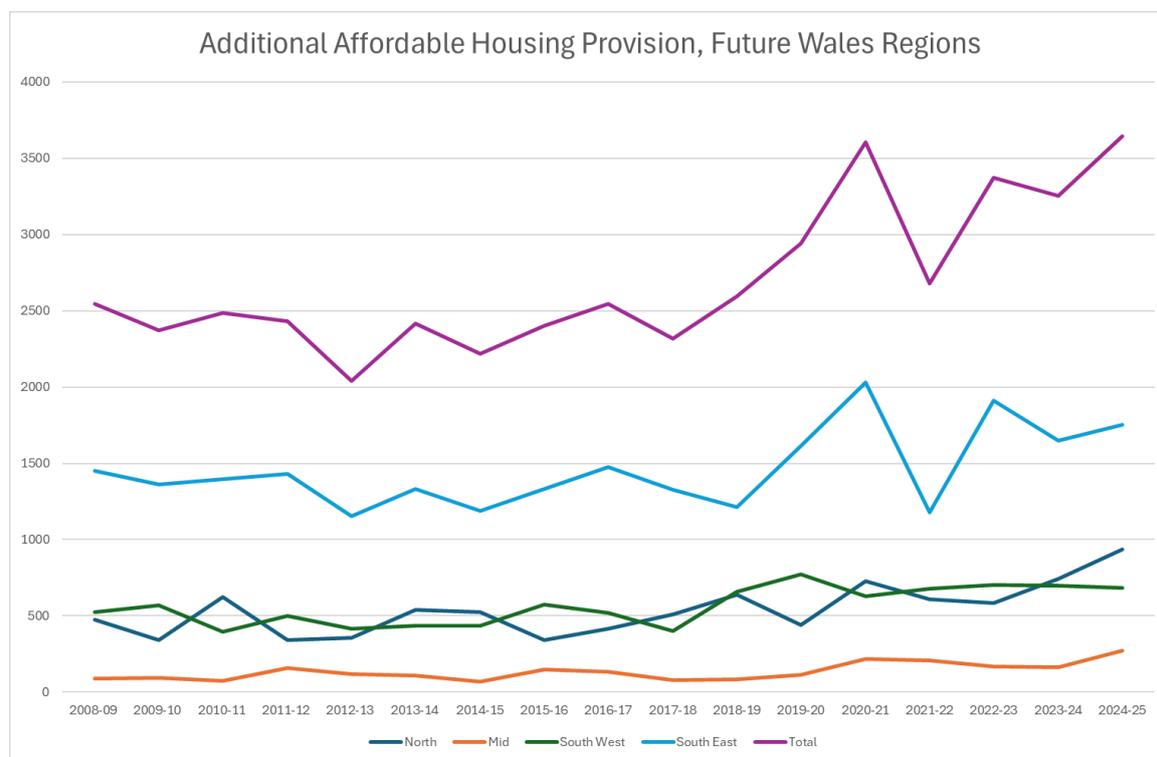
⁹³ [Estimates of additional housing need: 2025-based](#)

⁹⁴ [Affordable Housing Provision: 2024-25](#)

⁹⁵ [Affordable Housing Provision: 2024-25](#)

Regional delivery shows a similar trend with the highest delivery rate seen in South East and the lowest in Mid Wales.

Graph 9: Regional Affordable Housing Provision (2008-2025)⁹⁶



In November 2025, the **Cabinet Secretary for Housing and Local Government’s Written Statement on Affordable Housing Provision**⁹⁷ provided an update on progress towards the 20,000 social housing targets. It confirmed that by May 2026, 18,652 low-carbon homes for rent within the social sector is forecast to have been delivered. This comprises both new build, acquisitions and bringing empty homes back into affordable use. Whilst not quite reaching the target before the end of the Senedd Term, a further 1,652 are expected to be delivered by the end of 2026 bringing the total to 20,304. Future Wales Policy 7 continues to have a key role in influencing the ongoing delivery of this ambition.

In 2024 a new Affordable Housing Taskforce was convened to report on the short-term challenges to unblocking sites in the 20k manifesto commitment and making system changes to streamline the delivery of more homes for social rent. In May 2025, the report was published highlighting certain recommendations for the planning system relating to introducing efficiencies, prioritising applications for new affordable homes and streamlining the planning application and LDP process⁹⁸.

5.2 HOMELESSNESS

At the beginning of the Covid-19 pandemic in 2020, Welsh Government adopted a ‘no one left out’ approach to ensuring everyone had access to a safe place to live. This means that anyone who is street homeless or at risk of being street homeless is now recognised in legislation as being in ‘priority need’ for housing support and emergency accommodation.

⁹⁶ [Affordable Housing Provision: 2024-25](#)

⁹⁷ [Written Statement: Affordable housing provision \(13 November 2025\) | GOV.WALES](#)

⁹⁸ [Affordable Housing Taskforce: report and recommendations \[HTML\] | GOV.WALES](#)

Statutory homelessness statistics provide summary information on local housing authorities' activities under the homelessness legislation, introduced in the **Housing (Wales) Act 2014**. The statistics cover the prevention and relief of homelessness as well as information on the number of homeless households in temporary accommodation. Collections about statutory homelessness capture data on the number of households, not individuals. From the statutory homeless data⁹⁹, the number of households successfully prevented from becoming homeless has declined in recent years, with the lowest rate recorded in 2024-25 at 33 per every 10,000 households, compared to 49 in 2019-20.

Latest statutory homelessness data¹⁰⁰ however outlines that homelessness is successfully prevented in the majority of cases (during 2024-25 homelessness was successfully prevented in 57% of cases via section 66). Section 66 of the Housing (Wales) Act 2014 is the duty on local housing authorities to help prevent an applicant from becoming homeless. In its broadest terms, 'homelessness prevention' is where a local authority takes positive action to provide housing assistance to someone who the authority considers is threatened with homelessness within 56 days. Prevention work can also be undertaken before meeting the statutory definition but would not then be recorded against Section 66 prevention outcomes. Homelessness is an urgent challenge for Wales, the rest of the UK and the world. In Wales, Welsh Government are actively addressing homelessness through increased investment in prevention and housing supply, investing almost £220m in homelessness prevention and housing support this year alone.

Turning to rough sleeping, Welsh Government continues to invest in assertive outreach and wrap around support services, which are essential not only for helping people move into accommodation but also for enabling them to keep it. A monthly homelessness data collection¹⁰¹ was introduced at the start of the pandemic, to allow for more timely access to data on temporary accommodation provision and the number of people sleeping rough.

Whilst not comparable with data pre-2020¹⁰², the monthly data published on StatsWales¹⁰³ shows that the numbers of rough sleepers fluctuated through the year with reduction between October 2024 and October 2025 from 173 to 157. Caution is advised when making comparisons to monthly data, as there may be a seasonal impact on homelessness or other reasons for fluctuations.

In 2023, the **Ending Homelessness Action Plan (EHAP)** was updated. The **Ending Homelessness Outcomes Framework (EHOF)** was developed to provide a clear strategic direction for preventing and ending homelessness in Wales, building on the key actions in the Action plan. The framework was published in January 2024. The EHOF baseline report, the first report published against the outcomes framework, was subsequently published in July 2024. The **EHOF 2025 Update Report**¹⁰⁴, the second report published against the framework, was published in October 2025.

A key action included the introduction of the **Homelessness and Social Housing Allocation (Wales) Bill**. This is currently at stage 3 of the legislative process and expected to receive Royal Assent in March 2026. The Bill sets out a range of amendments to transform the homelessness system in Wales, including a stronger emphasis on prevention to achieve our long-term ambition to end homelessness.

⁹⁹ [Homelessness statistics | GOV.WALES](#)

¹⁰⁰ [Homelessness: April 2024 to March 2025 | GOV.WALES](#)

¹⁰¹ [Homelessness accommodation provision and rough sleeping | GOV.WALES](#)

¹⁰² [National rough sleeper count \(discontinued from November 2019\) | GOV.WALES](#)

¹⁰³ [Homelessness accommodation provision and rough sleeping | GOV.WALES](#)

¹⁰⁴ [Ending Homelessness Outcomes Framework: 2025 Update Report | GOV.WALES](#)

Future Wales should continue to pursue affordable housing as national planning policy and monitoring to ensure continued alignment with wider homelessness legislation and policies.

5.3 SUSTAINABLE COMMUNITIES

5.3.1 Placemaking

Future Wales shapes sustainable places and emphasises the importance of active travel, mixed uses and green infrastructure within neighbourhoods to encourage vibrant, cohesive and diverse communities alongside housing developments. PPW highlights that to achieve sustainable development, design must go beyond aesthetics and include the social, economic, environmental, cultural aspects of the development, including how space is used, how buildings and the public realm support this use, as well as its construction, operation, management, and its relationship with the surrounding area. Community safety is a key component of good design with crime prevention and fear of crime social considerations to which regard should be given in the preparation of development plans and taking planning decisions.

In 2024-25, The **National Wellbeing Report 2025**¹⁰⁵ confirmed that 78% of people said they were satisfied with their ability to access facilities and services, a reduction from 86% in 2022 and 80% in 2019-20. 58% agreed they belonged to their local area and community compared to 52% in 2018-19 and 84% were satisfied with their local area as a place to live which has been relatively consistent since 2017. However, 68% of people said they felt safe at home and walking in their local area, compared to 71% in 2019-20.

The Welsh Government and the **Design Commission for Wales** in collaboration with the Placemaking Wales Partnership have developed the **Placemaking Wales Charter**¹⁰⁶. The charter outlines six placemaking principles that cover the range of considerations that contribute to establishing and maintaining good places. Signatories commit to supporting placemaking through planning, design and management of new and existing places. This includes promoting active travel and public transport and public spaces that are well defined, welcoming, safe and inclusive. As of December 2025, 173 organisations have signed up to the Charter, including 12 Local Authorities and 3 National Parks.

5.3.2 Flooding

Latest flood risk assessments by NRW highlights that a significant number of homes in Wales are at risk of flooding from seas, rivers and surface water, with some properties at risk from more than one type of flooding. The latest **Wellbeing of Wales Report (2025)**¹⁰⁷ notes that 1 in 7 (275,000) residential and non-residential properties are at either low, medium or high risk of flooding. In terms of the national indicator on flooding, nearly 49,000 properties in Wales were at high or medium risk of flooding from rivers and over 80,000 properties at high or medium risk of tidal flooding. **SoNaRR 2025**¹⁰⁸ highlights that the risk of flooding is likely to increase due to climate change and population growth, with almost 353,000 properties predicted to be at risk of flooding by 2120.

The national strategic approach to managing flood risk through the planning and development process is firmly established within a clear policy framework, primarily outlined

¹⁰⁵ [Wellbeing of Wales \(2025\)](#)

¹⁰⁶ [Placemaking Wales Charter](#)

¹⁰⁷ [Wellbeing of Wales \(2025\)](#)

¹⁰⁸ [Natural Resources Wales / SoNaRR 2025](#)

in Future Wales Policy 8 and **PPW**. A core principle of this approach is that an understanding of flood risk should be a critical factor in strategic decision making within SDPs and LDPs, particularly when determining suitable locations for new growth and essential infrastructure.

Notably, **Technical Advice Note 15 (TAN 15)**¹⁰⁹ was updated in March 2025 which providing guidance on balancing new development proposals with the inherent risks associated with flooding. This revised guidance places an increased emphasis on the roles of SDPs and LDPs in not only assessing the level of risk but also in proactively identifying and incorporating appropriate flood mitigation measures. Furthermore, the updated policy provides Local Planning Authorities with more flexibility to make informed decisions that effectively consider unique local evidence and circumstances.

5.4 SUMMARY OF CONCLUSIONS

Future Wales sets a strong and ambitious foundation for delivering sustainable growth and meeting housing needs across Wales. Whilst it continues to provide the spatial direction, housing delivery has been shaped by a challenging economic backdrop. The combined impacts of the UK's departure from the EU, the COVID-19 pandemic, the war in Ukraine, high inflation, and constraints arising from river and marine water quality requirements have collectively created challenges for the construction industry.

While the total delivery of new homes has been impacted by the above factors, affordable housing delivery has strengthened in recent years with 2024-25 recording the highest annual figure since 2007. Progress towards the Government's 20,000 social housing commitment is notable and expected to be fully realised by November 2026. Sustained affordable housing delivery and alignment of planning policy with wider housing support and homelessness measures is key to progress.

In relation to placemaking, Future Wales and PPW promote the creation of sustainable, well-connected neighbourhoods that support active travel, safety and access to services. National wellbeing indicators show a mixed picture of progress relating to the public's perception of their local area. Whilst there are broader societal and economic conditions influencing these outcomes there is a growing number of organisations signing the Placemaking Wales Charter reflecting a strong commitment to high quality placemaking principles. Flood risk remains a significant challenge with the recently updated TAN15 reinforcing the integration of flood risk into strategic and local plan making to ensure growth is guided to the best locations.

Overall, while Future Wales and PPW is providing a spatial and policy framework to support housing delivery, external factors have played a major role in shaping outcomes to date. As highlighted under section 2.4, the delivery of SDPs for each region is also taking time with initiatives to encourage progress needing time to embed. Continued emphasis on regional planning, affordable housing delivery, practical implementation of placemaking principles and monitoring housing delivery will be fundamental to meeting long term housing needs in the right places.

¹⁰⁹ [Technical Advice Note 15: Development, flooding and coastal erosion \(2025\)](#)

6.0 Question 5: Has Future Wales made places healthier?

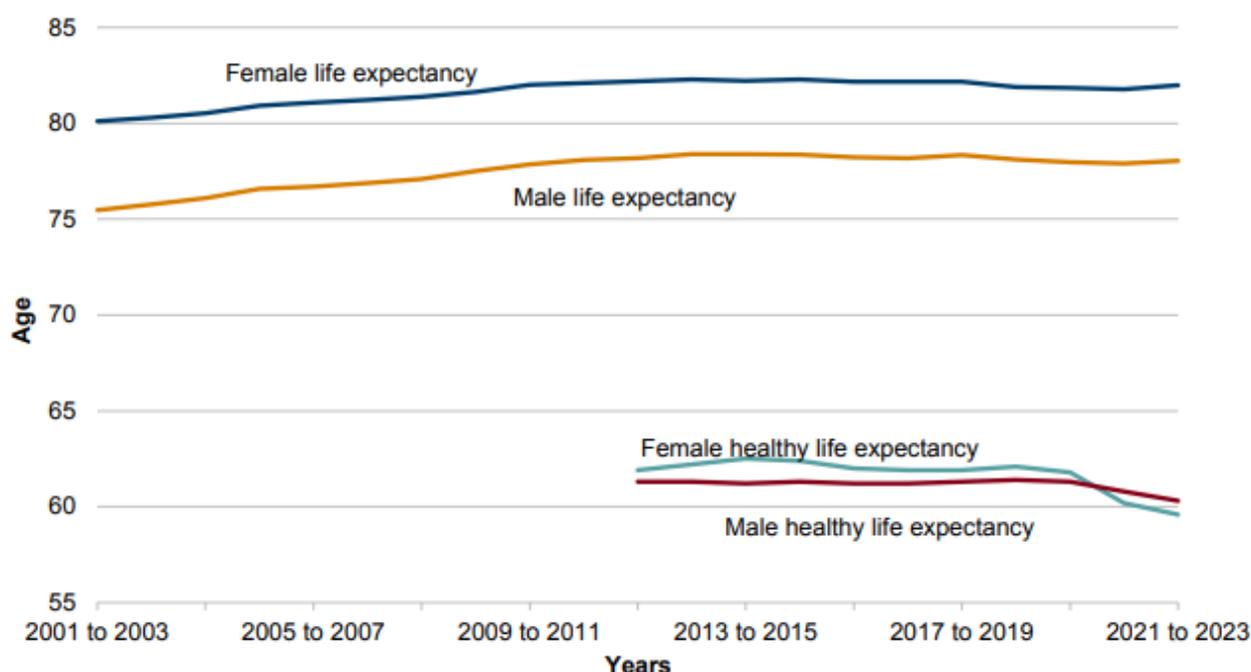
Future Wales sets the spatial framework for planning decisions relating to the built and natural environment. Planning shapes the places where people live and influence the opportunities they have and the choices they can make. It impacts key areas that affect health including air quality, access to open space, opportunities for active travel, delivery of housing needs and access to facilities and services. Monitoring improvements in health and addressing issues that affect healthy environments and decision making is a key measure of progress.

6.1 PLACES PLANNED FOR HEALTHY PEOPLE

6.1.1 Life Expectancy

Mixed progress has been achieved towards a healthier Wales with the Covid-19 pandemic significantly affecting trends. Life expectancy has remained stable in recent years, at 78.1 years for men and 82 years for women for 2023¹¹⁰. While the **Future Trends 2021 Report**¹¹¹ states life expectancy is set to increase, expectations for healthy life expectancy is expected to stagnate. ONS figures for 2021-23 relating to healthy life expectancy confirms a downward trend since 2019-21.

Graph 10: Life Expectancy and healthy life expectancy in years at birth¹¹²



COVID-19 has highlighted major inequalities in health in Wales, with people living in deprived areas spending far less years in good health. **Future Generations Report (2025)**¹¹³ references Public Health Wales highlighting of the cumulative impact of Brexit, the COVID-19 pandemic, and climate, referred to as the Triple Challenge, on health, well-being, and equity. These factors have exacerbated existing inequalities, particularly for those in

¹¹⁰ [Life expectancy for local areas of Great Britain - Office for National Statistics](#)

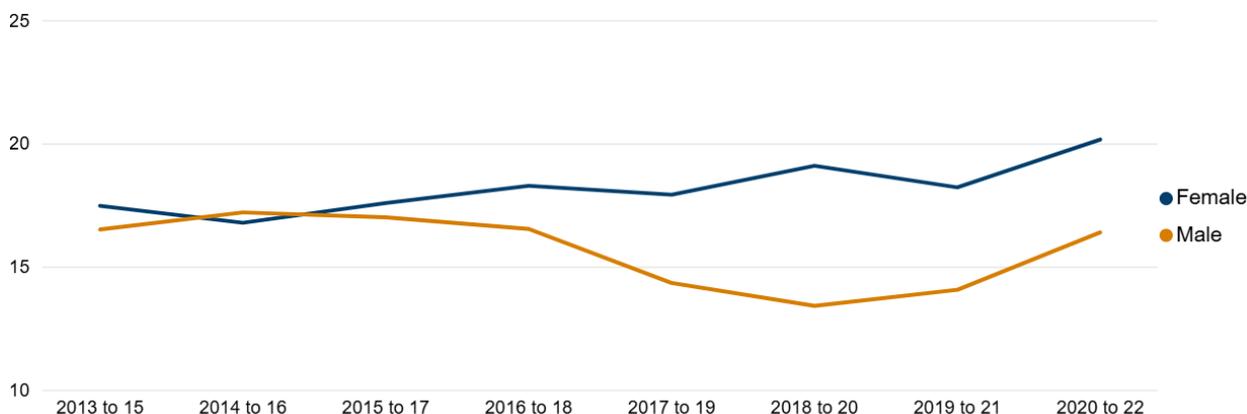
¹¹¹ [future-trends-report-wales-2021-narrative-summary.pdf](#)

¹¹² [National Indicator 2](#)

¹¹³ [Future-Generations-Report-2025.pdf](#)

economically deprived communities and marginalised groups. This is highlighted in ONS figures over the past 10 years where the gap in healthy life expectancy has increased when comparing between most and least deprived areas.

Graph 11: Gap in Healthy Life Expectancy in years at birth between the most and least deprived areas¹¹⁴



6.1.2 Well-being

In financial year 2024 to 2025, the average mental wellbeing score among adults was 48.4 on the Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS)¹¹⁵, similar to recent years. Loneliness also has remained the same over recent years, with 13% of people in Wales found to be lonely in 2022-23¹¹⁶ the same as in 2021-22 and 2020-21 and lower than 2019-20. The most recent results (2022 to 2023) from the **National Survey for Wales** suggested that younger adults (aged 16 to 44) were more likely to feel lonely than those aged 65 and above¹¹⁷.

6.2 PLACES PLANNED FOR HEALTHY ENVIRONMENTS

6.2.1 Air Quality

Closure of polluting industries and progress in the renewable energy sector has helped reduce greenhouse gas emissions in Wales. The positive reduction in nitrogen dioxide levels over the past decade is also covered further in Section 3.1.

6.2.2 Placemaking

Future Wales and **PPW** advocates the adoption of a placemaking approach to plan making, planning policy and decision making. Placemaking is a holistic approach to the planning and design of development and spaces, focused on positive outcomes. It draws upon an area's potential to create high quality development and public spaces that promote people's prosperity, health, happiness, and well-being in the widest sense. Healthy places are designed to foster active lifestyles, social interaction and access to nature which is essential for overall health.

As detailed in 5.3.1, there is mixed progress when assessing national indicators relating to access to facilities, satisfaction with their local area and safety. Commitment by public bodies

¹¹⁴ [National Indicator 2](#)

¹¹⁵ [Wellbeing of Wales \(2025\)](#)

¹¹⁶ [National Indicator 30](#)

¹¹⁷ [Wellbeing of Wales 2025 | GOV.WALES](#)

to adopting placemaking principles through planning, design and management of new and existing places has however increased.

6.2.3 Healthy Lifestyles

The **National Survey for Wales** was adapted due to the pandemic, as such it is not possible to directly compare results for healthy lifestyle behaviours for adults from prior to financial year 2020 to 2021¹¹⁸. Prior to the COVID-19 pandemic, between 2016 to 2017 and 2019 to 2020 the percentage of adults with two or more healthy behaviours deteriorated. The trend since 2020 to 2021 appears to have improved slightly but is not comparable with previous years.

In 2024-25 93.6%¹¹⁹ of adults reported following two or more healthy lifestyle behaviours, such as not smoking, drinking within guidelines, eating fruit and vegetables, being physically active, and maintaining a healthy weight.

Regular sports participation fell in financial year 2024 to 2025, with 35% of adults taking part in sport three or more times a week. But over the long term the percentage of adults regularly taking part in sport has been increasing. Sports participation amongst children had increased previously but has now fallen back to similar levels seen in 2013¹²⁰.

As detailed in Section 3.3.4, despite strong legislative and policy commitments to active travel, recent figures show little change in Wales.

6.2.4 Green Infrastructure, Trees & Resilient Ecosystems

Strengthening ecosystems, biodiversity and green infrastructure is important in creating healthier places owing to the natural environment's role in human health and well-being. The planning system contributes to this by protecting nature, managing existing green spaces and creating new green infrastructure, which ensures new developments provide better access to safe, inclusive, diverse, and enriching natural areas for people. **PPW 12** has made significant strides in planning for these spaces, a direction supported by Future Wales Policy 9. The ongoing relationship between Future Wales and PPW is vital for this effort and explored further under Section 7.0.

6.3 SUMMARY OF CONCLUSIONS

Future Wales and other national planning policies aim to provide a strong framework for creating healthier, more sustainable communities. The planning system has an important role in shaping the social, economic, environmental and cultural factors which determine health. The way places work and operate can have an impact on the choices people make in their everyday lives. Determinants of health are however influenced by many different factors and can lie beyond the direct influence of the planning system.

The evidence collected identifies a mixed picture in terms of health outcomes. While life expectancy has remained stable, there is a downward trend in healthy life expectancy, a trajectory exacerbated by the long-term impacts of the COVID-19 pandemic. These trends underscore a widening gap in health outcomes, as inequality persists across Wales. Specifically, residents in Wales's most deprived areas continue to spend fewer years in good

¹¹⁸ [Wellbeing of Wales \(2025\)](#)

¹¹⁹ [National Indicator 3](#)

¹²⁰ [Wellbeing of Wales \(2025\)](#)

health compared to those in the least deprived areas, with the healthy life expectancy gap between these groups continuing to increase.

Trends relating to mental well-being and loneliness have remained relatively stable. Levels of regular sports participation have fluctuated, and despite strong policy commitments to active travel there has been limited behavioural change in travel patterns. This reinforces the need for continued focus on delivering environments that make active travel and healthy lifestyle choices more convenient and attractive.

Overall, while the planning system cannot address all determinants of health, Future Wales and PPW sets the policy direction for creating healthier environments. The early evidence indicates that implementation of placemaking principles, prioritisation of active travel, protection and enhancement of green infrastructure, and alignment with wider public health objectives will be critical to achieving long term improvements in health and wellbeing across Wales.

7.0 Question 6: Has Future Wales helped strengthen ecosystems and enhanced biodiversity?

The **Natural Resources Policy**¹²¹ in Wales is guided by the **Environment (Wales) Act 2016** which establishes a framework for the sustainable management of natural resources, including addressing the climate emergency and reversing biodiversity decline. It aims to ensure that natural resources are managed in a way that benefits both the environment and the people of Wales, emphasising the importance of an ecosystems approach which integrates environmental, social and economic consideration in decision making. The **Natural Resources Policy** informed and helped shape Future Wales. The relationship is two way, with Future Wales taking the strategic direction and providing a means of delivery and a framework for maximising the potential outcomes. Assessing improvement in ecosystems resilience and reversing the decline of biodiversity is considered a key measure of progress.

7.1 Nature Emergency

In June 2021 the Senedd declared a 'nature emergency'¹²² in recognition of human induced declines in biodiversity. The **Kunming-Montreal Global Biodiversity Framework**¹²³ was adopted at COP15 (Convention of the Parties), in December 2022. It replaced the Convention on Biological Diversity's Strategic Plan for Biodiversity 2011-2020 and the Aichi targets and includes four goals and 23 targets to achieve by 2030. The Global Biodiversity Framework addresses various issues to halt and reverse biodiversity loss, including targets to protect ecosystems (targets 2 and 3) and species (targets 4, 5 and 6); tackle pollution (target 7); and respect the rights of indigenous peoples and local communities (Goal C and included in 7 targets).

Target 3, also referred to as '30x30', is a key aspect of the COP15 agreement, which aims to protect: "...at least 30% of terrestrial, inland, water, and of coastal areas, especially areas of particular importance for biodiversity and ecosystem functions and services...".

As a response to the 30x30 commitment and ahead of COP15, the Welsh Government launched a **Biodiversity Deep Dive**¹²⁴, which concluded in October 2022. A group of experts and practitioners identified key themes and recommendations for actions to support the 30x30 target¹²⁵. The **Deep Dive** included a commitment to develop primary legislation to establish an environmental governance body and set up statutory biodiversity targets¹²⁶.

The **Environment (Principles, Governance and Biodiversity Targets) (Wales) Bill** introduced in September 2025, aims to:

- Embed environmental principles into law to underpin future policy decision-making (Part 1);
- Establish an environmental governance body (the Office of Environmental Governance Wales – OEGW) which would hold public authorities to account on environmental law (Part 2); and

¹²¹ [Natural Resources Policy \(2017\)](#)

¹²² [Plenary 30/06/2021 - Welsh Parliament](#)

¹²³ [Kunming-Montreal Global Biodiversity Framework](#)

¹²⁴ [Biodiversity Deep Dive \(2022\)](#)

¹²⁵ [Biodiversity Deep Dive: Recommendations](#)

¹²⁶ [Biodiversity Research Briefing \(2023\)](#)

- Introduce a statutory framework for legally binding biodiversity targets (Part 3)¹²⁷

Ongoing monitoring and any future review of Future Wales would need to consider and embrace the implications of the Bill when it receives Royal Assent.

7.2 ENHANCING BIODIVERSITY

The planning system has a key role to play in helping to reverse the decline in biodiversity and increase the resilience of ecosystems, at various scales, by ensuring appropriate mechanisms are in place to both protect against loss and to secure enhancement. Future Wales recognise the importance of reversing the decline in biodiversity and assisting nature recovery, and **PPW** sets out a range of policies to maintain and enhance biodiversity, promote the resilience of ecosystems, including securing a net benefit for biodiversity using a stepwise approach.

7.2.1 Biodiversity Status

The **Wellbeing of Wales 2025**¹²⁸ report has identified that the latest comprehensive assessment of Welsh natural resources shows that overall, biological diversity is declining. Between 1970-2016, the index of distribution change for section 7 priority species in Wales has declined to 87% of its baseline value in 1970. The publication of **SoNaRR 2025**¹²⁹ found that Wales is not yet meeting the four long-term aims of sustainable management of natural resources and that Wales is one of the most nature depleted countries in the world, with almost 1 out of 5 species at risk of extinction.

7.2.2 Soil

Well managed soil will safeguard food production, support habitats, help manage flood risk and reduce water treatment costs. The national indicator on soil carbon for 2021 to 2023, shows that the concentration of carbon in our topsoil is generally stable, apart from in arable land and broadleaf woodland where a loss of carbon in topsoil has been observed relative to concentrations in 2013 to 2016¹³⁰.

Whilst an initiative that sits outside the planning system, the **National Peatland Action Programme**¹³¹ has restored 3,600ha of peatland. This has helped safeguard 2.2 million tonnes of carbon (based on the scale of restoration activity and the average estimated carbon content of Welsh peat soils).

As detailed in Section 4.2.4, issues have arisen with decision making requiring careful consideration of the impacts of proposals for renewable energy development on sensitive environments including peatland and best most versatile (BMV) land. Future Wales and PPW provides a framework for decision makers when balancing these competing priorities. Further consideration should be given to the role of Future Wales in this context and the opportunities available to expand monitoring to consider the relationship between development proposals and sensitive environments.

¹²⁷ [Environment \(Principles, Governance and Biodiversity Targets\) \(Wales\) Bill: Stage 2 amendments](#)

¹²⁸ [Wellbeing of Wales \(2025\)](#)

¹²⁹ [State of the Natural Resources Report \(2025\)](#)

¹³⁰ [Wellbeing of Wales \(2025\)](#)

¹³¹ [National Peatlands Action Programme 2020-2025](#)

7.2.3 Ecological Footprint

There is also a national milestone relating to global footprint which is for Wales to use only its fair share of the world's resources by 2050. The latest estimates show that while the global footprint per person in Wales reduced by nearly a third between 2004 and 2018, it remains over twice the estimated biocapacity of Wales. If the entire world population lived like the citizens of Wales, humanity would require 2.08 Earths¹³².

As detailed in Section 3.2.1, there has been a decrease in the amount of waste produced per household and emissions of greenhouse gases have reduced in the past decade.

7.2.4 Woodland

The Welsh Government set out its commitment to create a **National Forest for Wales** in Spring 2020. The aim of the National Forest is to restore and maintain existing woodland and connect them with new woodland areas through tree planting. Whilst the planning system doesn't directly contribute towards tree planting, Policy 15 supports the principle of safeguarding proposed locations for the National Forest. Also, the principle of increasing woodland coverage in line with national targets to help build ecosystem resilience, deliver towards climate change and decarbonisation targets and provide places for recreation and wellbeing.

Latest **Forestry Statistics (2025)**¹³³ report that there have been recorded improvements in woodland planting in Wales with figures per annum increasing from 80ha per annum in 2020 to 1,190ha in 2023. The latest figures for 2025 amount to 840ha per annum totalling 313,000ha compared with 310,000 in 2020.

7.2.5 Surface Water and Groundwater Bodies

The percentage of surface waterbodies and groundwater bodies achieving good Water Framework Directive regulations status has increased from 37% in 2015 to 40% in 2024¹³⁴.

7.3 STRENGTHENING ECOSYSTEMS

7.3.1 Resilient Ecological Networks and Green Infrastructure

Future Wales and **PPW** sets the requirement for strategic action to safeguard ecological networks and secure biodiversity enhancements (net benefit). They also seek to maximise the use of green infrastructure and nature-based solutions as part of shaping urban growth, supporting rural communities and responding to the twin challenges of addressing the climate emergency and reversing biodiversity decline.

The update to **PPW** (12th Edition) in 2024, elevated green infrastructure as a crucial component of sustainable, nature positive development. It mandates that all planning applications include a Green Infrastructure Statement demonstrating how biodiversity enhancement, net benefit and multi-functional nature-based solutions are integrated.

7.3.2 Gwent Levels: Supplementary Planning Guidance

Policy 9 of Future Wales designates the Gwent Levels as a National Natural Resource Area (NNRA). In recent years, the Gwent Levels has been a focus of attention concerning the balance between protecting its natural resources and the delivery of nationally significant

¹³² [Wellbeing of Wales \(2025\)](#)

¹³³ [Forestry Statistics 2025 - Forest Research](#)

¹³⁴ [National Indicator 45](#)

renewable energy and economic development projects. In the interest of safeguarding its ecological networks, habitats and biodiversity the Welsh Government is in the process of developing pilot Strategic Planning Guidance (SPG).

In developing the SPG extensive collaboration and engagement across local authority boundaries has taken place to coordinate a strategic policy response to planning challenges within the NNRA. The resulting draft guidance¹³⁵, consulted upon in early 2026, will not only help deliver the requirements of Policy 9, but also serve as an important pilot approach and template for future SPGs covering other NNRAs identified in Future Wales.

7.4 RIVER AND MARINE SPECIAL AREA OF CONSERVATION (SAC)

In January 2021, Natural Resources Wales (NRW) published evidence confirming that over 60% of Special Areas of Conservation (SAC) rivers, including the Wye, Usk, and Teifi, failed stricter water quality targets for phosphorus. This introduced the need to demonstrate nutrient neutrality, proving that new development would not increase phosphate levels in the river system to a level that would create a significant adverse effect¹³⁶. This had an immediate impact on Local Planning Authorities, being unable to grant planning permission for new housing or progress LDPs unless satisfied that the development would have no adverse effect on the integrity of the SAC rivers.

By early 2024, Dŵr Cymru had committed via their Asset Management Plan 6 (2020-25) and 7 (2025-30) capital investment programmes to instal phosphorus-stripping technology and nature-based solutions at certain affected wastewater treatment works (WwTW). Reinforcement works and compliance with new permit limits, has created 'headroom' within the existing sewerage system in some areas. This has allowed some planning authorities to begin determining applications or time delaying occupation of development until such time as reinforcement works at WwTW have been delivered.

Welsh Government commissioned DTA Ecology to prepare guidance on identifying pathways through which development could be facilitated, with particular focus on the delivery of affordable housing. This was published in 2025¹³⁷ along with an Interim Planning Policy Statement¹³⁸. The approach sets out a preference for an integrated approach to mitigation whereby all sectors can play their part in contributing towards the meeting of conservation objectives for SAC rivers in a proportional way. Whilst progress is being made in identifying solutions, this issue has and is continuing to impact the delivery of new homes and other forms of development.

In June 2025, NRW issued updated conservation advice following condition assessments in Marine SACs wholly within Wales. These confirmed that dissolved inorganic nitrogen was contributing to the unfavourable condition of certain marine SACs. This discovery has triggered further nutrient neutrality requirements for development in the Pembrokeshire and Carmarthen Bay and Estuaries SACs, widening the impact on the determination of planning applications and the preparation of LDPs.

The Welsh Government is actively collaborating with Local Planning Authorities (LPAs) and NRW to seek a way forward on the practical application of the existing WG/DTA guidance to the Marine SAC and nitrates issue. This initiative is designed to provide worked examples for

¹³⁵ [Strategic planning guidance: Gwent Levels National Natural Resource Area \(Future Wales Policy 9\)](#)

¹³⁶ [Natural Resources Wales / Advice to planning authorities for planning applications affecting nutrient sensitive Special Areas of Conservation](#)

¹³⁷ [Planning Guidance - Development in SAC Rivers \(2024\)](#)

¹³⁸ [Interim Planning Policy Statement on Development in SAC Rivers \(2025\)](#)

planning officers and provide further reassurance about the pathways which exist to ensure LDPs and development proposals can come forward in compliance with the Habitats Directive and Regulations.

To further support decision making, the Welsh Government has expanded the scope of the **All-Wales Nutrient Budget Calculator**¹³⁹. As of late 2025, the tool has been updated to include provision for nitrogen as well as phosphates, in response to recent marine conservation advice. Additionally, its geographical coverage has been extended to include river catchments and coastal areas not previously mapped, ensuring that developers across all affected regions have access to a standardised, evidence-based method for quantifying and mitigating their nutrient impact.

7.5 LANDMAP

LANDMAP is a complete all-Wales GIS based landscape resource where landscape characteristics, qualities and influences on the landscape are recorded and evaluated into a nationally consistent data set. To maintain the effectiveness and confidence in LANDMAP as the key landscape baseline resource in Wales the mapping and survey information is periodically updated. Landscape monitoring is underway which will inform updates to LANDMAP evidence and the reassessment of the quality and diversity of landscapes and designated landscapes. The output of the monitoring work will feed into future monitoring and any revision of Future Wales.

7.6 NATIONAL PARK DESIGNATION

In its **Programme for Government (2021-2026)**¹⁴⁰, Welsh Government set out its commitment to designate a new National Park for Wales. Welsh Government commissioned NRW to evaluate the case for a new National Park based on the existing Clwydian Range and Dee Valley National Landscape (formerly Area of Outstanding Natural Beauty). NRW evaluated the case undertaking data and evidence gathering, consultation and engagement with local communities and other stakeholders. This has culminated in a Designation Order to create a new National Park. During the statutory Notification Period on the Designation Order, several statutory consultees (i.e. Local Authorities in the proposed new National Park area) have objected. This means Welsh Ministers will need to hold a Public Local Inquiry before a decision is made on whether to confirm the Designation Order. Depending on the outcome of this process there may be spatial implications that would need to be considered as part of any future review of Future Wales.

7.7 SUMMARY OF CONCLUSIONS

Future Wales and Planning Policy Wales (PPW) establish a framework for strengthening ecosystems and enhance biodiversity. To ensure long-term milestones are met, the planning system must continue to communicate the fundamental importance of ecological resilience and provide clarity for decision makers when balancing competing priorities. Any future revision of Future Wales should consider the balance between spatial, non-spatial, and development principal policies to ensure a comprehensive approach.

Whilst wider Welsh Government policies and initiatives have delivered notable successes in peatland restoration and woodland planting, significant challenges remain. The **Wellbeing of Wales (2025)** report and **SoNaRR 2025** confirms that overall biological diversity continues to decline, and the national ecological footprint still exceeds the Earth's biocapacity. Like many

¹³⁹ [Nutrient budget calculator | GOV.WALES](#)

¹⁴⁰ [Welsh Government Programme for Government](#)

developed nations, Wales is consuming resources at an unsustainable rate, and continued focus is needed on resource efficiency and circular economy practices.

Furthermore, while investment and national policy guidance has begun to unlock development in river Special Areas of Conservation (SACs) previously stalled by nutrient neutrality requirements, the pressures and challenges remain. Maintaining momentum is essential to ensure that environmental safeguarding and sustainable development proceed in tandem.

Overall, there is mixed progress at a national level. Sustained action and effective implementation will be essential to halt biodiversity loss and building ecosystem resilience over the plan period.

8.0 Question 7: Has Future Wales supported an economy that delivers prosperity for all?

The planning system has a key role to play in supporting national and regional economies by facilitating the delivery of jobs and infrastructure in the right places. Assessing progress made towards key economic indicators and the delivery of SDPs, LDPs, transport, energy and digital infrastructure are considered key measures of progress.

8.1 ECONOMIC ACTIVITY

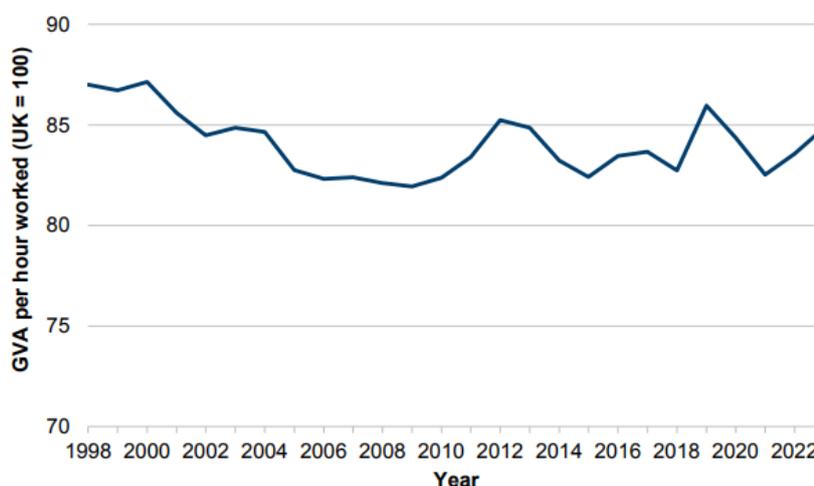
8.1.1 Economic Challenges

At a first review, it is important to note that since the publication of Future Wales, Wales and the rest of the UK has undergone a period of economic uncertainty. **The Wales Economic and Fiscal Report 2025**¹⁴¹ references the significant impact Brexit, the Covid-19 pandemic, high inflation and the cost-of-living crisis has had on the economy. Therefore, despite policies that support economic prosperity in Future Wales, it is arguably too early to assess economic progress.

8.1.2 Income

As across the UK, growth in the economy and in real incomes in Wales has been slow, reflecting low productivity growth. One measure of productivity, GVA per hour worked, has been relatively stable since 1998 but is lower in Wales than in other UK countries and regions in England. In 2023 it was 84.9% of the UK figure, up from 84.4% in 2020¹⁴².

Graph 12: Welsh gross value added per hour worked, relative to the UK (UK = 100), 1998 to 2023¹⁴³



Gross Value Added (£ per head) in Wales¹⁴⁴ has steadily increased from £20,968 in 2020 to £25,742 in 2024 however this again is below the UK average.

Household income figures provide an indicator of people's prosperity and material wellbeing. The national indicator on income uses the measure gross disposable household income

¹⁴¹ [Wales Economic and Fiscal Report October 2025](#)

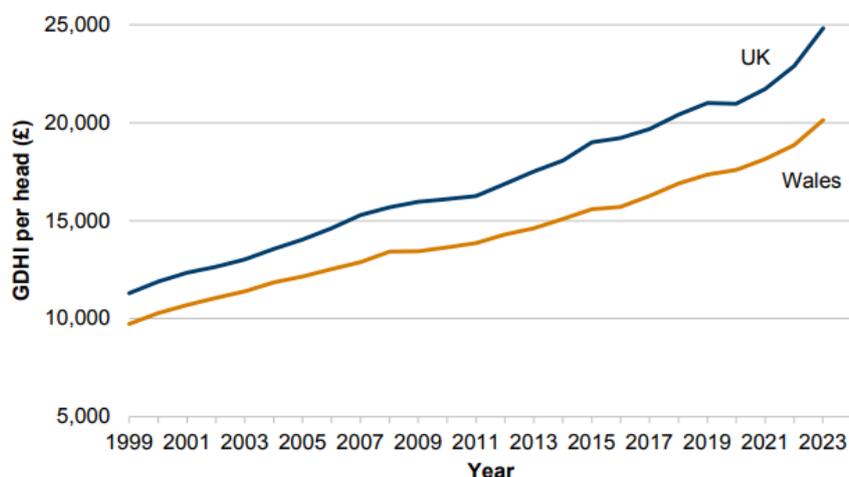
¹⁴² [National Indicator 9](#)

¹⁴³ [Wellbeing of Wales \(2025\)](#)

¹⁴⁴ [Gross value added by area and year | StatsWales](#)

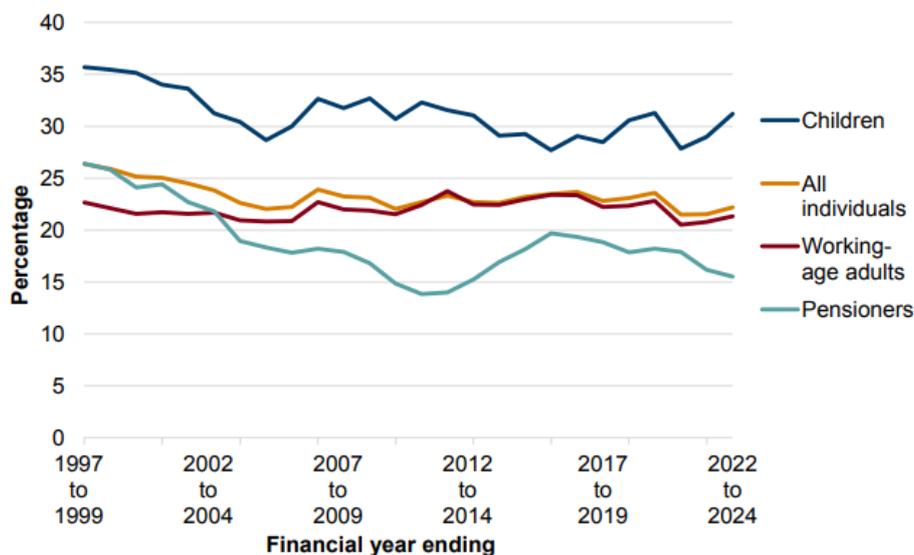
(GDHI). On this measure Wales, according to the data for 2023, has risen by 14% since 2020 albeit remains below the UK average.

Graph 13: Gross disposable household income per head, Wales and UK, 1999 to 2023¹⁴⁵



People living in relative income poverty are those who live in a household where the total household income from all sources is less than 60% of the average UK household income (as given by the median). In 2021-23 and 2022-24, 22% of all people in Wales were living in relative income poverty (after housing costs were paid)¹⁴⁶. Figures for 2022-24 records children as being more likely to be in relative income poverty, at 31% compared to working-age adults (21%) and pensioners (16%).

Graph 14: percentage of each age group in Wales living in relative income poverty (after housing costs), 3-financial-year averages¹⁴⁷



¹⁴⁵ [National Indicator 10](#)

¹⁴⁶ [National Indicator 18](#)

¹⁴⁷ [Wellbeing of Wales \(2025\)](#)

Progress has been recognised in Wales's median gross weekly earnings albeit arguably impacted by rising inflation. Earnings increased from £541.50 in 2020 to £675.6 in 2024¹⁴⁸.

Furthermore, the gender pay gap has generally been narrowing over the last 2 decades and decreased to 1.9% in 2024. Both the ethnicity and disability pay gap are highly volatile which means we are unable to determine whether there has been a significant change since 2015¹⁴⁹.

Material deprivation is a measure of living standards, and a person is defined to be living in material deprivation if they are not able to access a certain number of goods and services. Material deprivation figures for people in 2024-25 were recorded at 11% down from 16% in 2022-23 and 13% in 2019-20¹⁵⁰.

The percentage of people in employment in Wales who earn at least the real Living Wage has shown an overall decrease from the peak of 70.4% in 2013 despite some volatility in the data over this time period¹⁵¹. Also, the proportion of employees whose pay is set by collective bargaining is down from 54.8% in 2020 to 52.8% in 2024¹⁵². Average median total household wealth in Wales also reduced from £275,700 in 2018-20 to £266,900 in 2020-22¹⁵³.

8.1.3 Education and Qualifications

Skills and qualifications are the biggest single influence on people's chance of being in employment and on their incomes. Qualification levels in Wales have been steadily increasing since 2008. In 2024¹⁵⁴, 68.6% of working age adults (aged 18 to 64 years) were reported as having level 3+ qualifications, up from 62.4% in 2020. It should be noted however that these results are not comparable due to changes in the questions in the Annual Population Survey.

The proportion of people aged 16 to 18 in education, employment or training in Wales has increased in the last 2 years following a decrease in 2021. The proportion of people aged 19 to 24 in education, employment or training has remained relatively consistent over the last 5 years, despite fluctuations during this time¹⁵⁵.

8.2 EMPLOYMENT

8.2.1 Employment Rate

The employment rate for people aged 16 to 64 in Wales was 73.4%¹⁵⁶ in the year ending March 2025 whilst the UK rate was 75.4%. Both these rates are roughly stable compared to the previous year. Since the year ending March 2005, the employment rate has increased by 4.0 percentage points in Wales and by 2.9 percentage points in the UK with the gap in the employment rate narrowing from 3.1 percentage points to 2.0 percentage points¹⁵⁷.

¹⁴⁸ [Average \(median\) gross weekly and hourly earnings by Welsh local area, English region, UK country and year \(£\) | StatsWales](#)

¹⁴⁹ [National Indicator 17](#)

¹⁵⁰ [National Indicator 19](#)

¹⁵¹ [National Indicator 16](#)

¹⁵² [National Indicator 20](#)

¹⁵³ [Welsh economy in numbers: interactive dashboard | GOV.WALES](#)

¹⁵⁴ [National Indicator 8](#)

¹⁵⁵ [National Indicator 22](#)

¹⁵⁶ [National Indicator 21](#)

¹⁵⁷ [Wellbeing of Wales \(2025\)](#)

The unemployment rate is also recorded as declining over the past decade however the **Labour market overview: July 2025**¹⁵⁸ recording the rate on a quarterly basis highlights unemployment levels increasing since the 2020 pandemic. Lows of 2.9% in the second quarter of 2019 rose to 4.4% in the first quarter of 2025.

8.2.2 Regional Unemployment

Employment levels in Wales are not equal. The **Future Trends 2021**¹⁵⁹ report sets out how South East Wales has seen steep decreases in unemployment, whereas mid Wales has experienced very little change. Furthermore, since 2001, Cardiff has had the largest proportionate increase of jobs in Wales during this time with a 45.5% rise, in consistence to its population growth over the last two decades. Meanwhile, Blaenau Gwent has seen the greatest proportional decrease in jobs, at -19.1%. Evidently, both national and regional economic inequalities are existing in Wales. This arguably amplifies the need for progress on SDPs, so local authorities can work together to bridge the inequalities present in their region and aid sustainable development.

8.3 ECONOMIC DEVELOPMENT POLICY

Future Wales's spatial strategy provides a guiding framework for where large scale change and nationally important developments will be focused over the next 20 years. The strategy identifies three economically distinctive National Growth Areas. These are Cardiff, Newport and the Valleys, Swansea Bay and Llanelli & Wrexham and Deeside, which support a range of businesses, enterprises and universities. These Areas are internationally and nationally significant places and Future Wales promotes their continued growth and regeneration.

Future Wales also identifies a range of important Regional Growth Areas which, through specific policies in SDPs and LDPs, should retain and enhance the commercial and public service base that make them focal points in their areas.

In establishing these Areas in Future Wales, the Welsh Government has provided a framework for co-ordinated policies, infrastructure delivery and spending by Government, local authorities and stakeholders.

8.3.1 City & Regional Growth Deals

City and regional growth deals are agreements between the UK Government, Welsh Government and Corporate Joint Committees to coordinate investment and policy interventions to drive growth in key areas. Growth deals are in place and whilst progress is mixed, highlighted by the recent Inquiry by the Economy, Trade and Rural Affairs Committee, they are emerging across all four regional areas in Wales.

8.3.2 Investment Zones¹⁶⁰

In 2024, the Welsh and UK governments jointly announced there will be two investment zones in Wales delivered by the Corporate Joint Committee for each region. Cardiff and Newport Travel to Work Areas (TTWAs) will focus on driving innovation and growth across the advanced manufacturing and digital and technology sectors, with focus on the region's semiconductor cluster. The Wrexham and Flintshire TTWA focusses primarily on advanced manufacturing.

¹⁵⁸ [Labour market overview \(July 2025\)](#)

¹⁵⁹ [Future Trends Report \(2021\)](#)

¹⁶⁰ [Investment zone programme | GOV.WALES](#)

8.3.3 Freeports

In May 2022, the Welsh Government reached an agreement with the UK Government to establish a freeport programme in Wales. Following a bidding process, it was announced that two new freeports were to be established, Celtic Freeport covering Milford Haven and Port Talbot and Anglesey Freeport in North Wales¹⁶¹. These are special zones with the benefits of simplified customs procedures, relief on customs duties, tax benefits, and development flexibility. They are designed to promote regeneration and high-quality job creation, become a national hub for global trade and investment across the economy, and foster an innovative environment.

Policy 10 of Future Wales highlights the importance of supporting and protecting Strategic Gateways including ports owing to the essential part they plan to the local, regional, national and international economy.

8.3.4 UK Government Industrial Strategy

In June 2025, the UK Government published the Modern Industrial Strategy¹⁶² providing clarity of ambition and a pathway to increase business investment and grow industries of the future. It crucially gives confidence to investors and helps to shape a future vision which builds upon Wales's strengths. There were also other announcements including a new Strategic Sites Accelerator, a Defence Growth Deal cluster, developing AI Growth Zones and the continued backing of our City and Growth Deals, aimed at helping to attract investment. An Industrial Strategy Zones Action Plan has also been published in collaboration with Welsh Government and encompasses the Investment Zones highlighted in 8.3.2.

8.3.5 Infrastructure Delivery

Infrastructure delivery serves as the arteries of an economy, moving resources, people and information to drive both immediate and long-term prosperity. Welsh Government's **Annual Report 2024-25**¹⁶³ highlights the £800 million investment in rail, with the majority of Transport for Wales journeys now made on new trains, bringing faster, more frequent and more reliable services.

The South Wales Metro is also one of the biggest and most transformative projects ever delivered in Wales, and major strides have been taken towards its completion during the Senedd term. With over £1 billion of investment, more frequent services have been introduced from Caerphilly and Pontypridd to Cardiff and the Vale of Glamorgan, opening up better journey options for commuters and communities. Treherbert, Aberdare and Merthyr lines have been successfully energised, allowing the first-ever electric trains to run on these routes which is part the £800 million investment in new trains.

The Network North Wales plan also lays out a vision for more frequent metro-style services along the North Wales mainline and between Wrexham and Liverpool – helping to better connect communities and grow the economy in the years ahead.

8.3.6 Tourism

Although largely to do with the pandemic, tourism in Wales has decreased in recent years. In 2024, Domestic GB tourism statistics¹⁶⁴ records that residents of Great Britain embarked on

¹⁶¹ [Wales' new freeports unveiled | GOV.WALES](#)

¹⁶² [The UK's Modern Industrial Strategy 2025 - GOV.UK](#)

¹⁶³ [Welsh Government Annual Report 2024-2025](#)

¹⁶⁴ [Domestic GB tourism statistics \(overnight trips in Wales\): 2024](#)

7.61 million overnight trips within Wales, resulting in a total of 22.30 million nights spent and a cumulative expenditure of £2.24 billion. The average duration of these Welsh trips was 2.9 nights, with visitors spending an average of £295 per trip. When compared to the previous year's data from 2023, 2024 saw a 10% decrease in the overall volume of trips taken, yet an 11% increase in total expenditure. Further consideration could be given to the potential for Future Wales to include more detailed policy guidance of tourism and heritage in the interest of helping local authorities drive tourism economies and rebuild one of its key employment sectors. Nationally significant regeneration opportunities could also be incorporated to heighten the importance of restoring national and global tourism in Wales.

8.3.7 Town Centres

The Welsh Government operates a 'town centres first' policy in relation to the location of new retail and commercial centre development. It looks to prioritise town centres for new commercial, retail, health, education and public service facilities to increase footfall and create vibrant, sustainable communities.

Future Wales and PPW provides national planning policy in respect of large scale and out of centre development. In implementing this policy, planning authorities need to adopt a sequential approach to the selection of new sites in their development plan and when determining planning applications for retail and other complementary uses. By adopting a sequential approach, first preference should be to locate new development within a retail and commercial centre defined in the development plan hierarchy of centres. Developers should demonstrate that all potential retail and commercial centre options, and then edge-of-centre options, have been thoroughly assessed using the sequential approach before out-of-centre sites are considered.

8.3.8 Digital Infrastructure

The **Connected Nations UK Report (2025)**¹⁶⁵ confirms significant progress in digital infrastructure in Wales. When compared to previous years, coverage of gigabit-capability, full fibre and superfast broadband has increased year on years since 2019.

In 2021 Welsh Government published the **Digital Strategy for Wales**¹⁶⁶ identifying a series of priority areas under six missions which, when taken together, aim to accelerate the benefits of digital innovation for people, public services and across the business community. Building on the Digital Strategy for Wales, **AI Cymru: Shaping a Smarter, Fairer, More Prosperous Wales**¹⁶⁷ was published in 2025 covering Welsh Government's plan to harnessing the transformative power of Artificial Intelligence to drive economic growth, enhance public services and equip people across Wales with the skills to thrive in an AI-shaped future. It identifies the opportunities to attract investment into Wales linked to the need for more data centres and semiconductors. In doing so highlights opportunities associated with the identification of AI growth zones to create a thriving ecosystem for the development and delivery of AI services and solutions and importance of direct access to energy sources.

¹⁶⁵ [Connected Nations UK Report 2025](#)

¹⁶⁶ [Digital strategy for Wales \(2021\)](#)

¹⁶⁷ [AI Cymru: Shaping a Smarter, Fairer, More Prosperous Wales \[HTML\] | GOV.WALES](#)

8.4 SUMMARY OF CONCLUSIONS

Since its publication, Future Wales has operated within a challenging economic climate shaped by the impacts of Brexit, Covid-19 pandemic, high inflation and cost of living crisis. Whilst the economy is influenced by many different factors that lie beyond the direct influence of the planning system, Future Wales and PPW are important in providing a framework for economic growth.

Economic indicators show mixed trends, GVA per head has grown, gross disposable income and earnings have increased while relative income poverty has remained unchanged since Future Wales was published. Indicators suggest a reduction in both disability, gender and ethnicity pay gaps albeit data is highly volatile. Real living wage earnings and average median total household wealth has however seen a reduction.

Future Wales clearly advocates economic prosperity within its policies, and its spatial strategy provides a guiding framework for growth and investment. There is clearly an extent to which Future Wales can spatially present economic policy, as the complexity and broadness of economic development is better explained methodically in PPW. National and Regional Growth Areas have provided guidance as to where national economic priority should take place which has broadly aligned with key Governmental investment announcements associated with City and Regional Growth Deals, Investment Zones and the recent UK Industrial Strategy. Further consideration could be given however to defining them in more spatial detail to provide more accuracy and certainty and evolve to align with any changes to wider Welsh Government economic plans.

Future Wales has the potential to expand its precision in spatially mapping of areas in need of economic growth and regeneration. Also identifying areas for high growth sectors for example AI growth zones. However, it should be recognised that national policy for economic development should be prioritised in PPW, and Future Wales should continue to support clear spatial priorities for bridging economic inequalities and regenerating areas of economic stagnation.

While Future Wales may not yet have had sufficient time to fully influence economic outcomes, its policy direction aligns with long-term drivers of prosperity and provides a strong basis for continued monitoring and future strategic intervention.

9.0 FINAL CONCLUSIONS

The first 5 years since the publishing of Future Wales marks a pivotal, yet early, juncture in assessing its long-term impact. It has also operated within a challenging context, defined by significant global economic turbulence. Future Wales continues however to provide an essential, strategic framework for decision making and addressing national priorities through the planning system. It aligns with the overarching goals of the WFG Act 2015 and provides the necessary direction for SDPs and LDPs.

Early indications suggest progress in several critical areas at a national level including decarbonisation, air quality, renewable energy and affordable housing delivery. Future Wales alongside other national policies have provided the planning framework to facilitate the progress made.

However, certain high-priority areas, such as the implementation of SDPs, increase in active travel, improved health outcomes, tackling the nature emergency and economic prosperity shows mixed progress. The disparity in outcomes highlights the need for sustained focus and the recognition that some strategic ambitions require time to mature.

Progress in several areas will be critical to the plan's success over the coming years. Specific attention must be paid to the delivery of SDPs and LDPs following the announcement of incentivisation funding and increased planning fees, which are intended to accelerate plan production. The implementation of specialised guidance, such as the Gwent Levels Supplementary Planning Guidance (SPG), the rollout of the Strategic Infrastructure Plan (SIP) regime and the output of NESO's strategic planning work will serve as key areas to monitor and focused consideration of how Future Wales may need to adapt over the plan period. In addition, continued monitoring of wider economic policy and national investment decisions to ensure Future Wales continues to provide the spatial direction and framework for economic growth through the planning system.

Continued monitoring of prospective policy or legislative changes relating to key national priority areas and engagement with the future Government post the May elections will also be critical to ensure the plan remains robust, responsive and fit for purpose over the plan period.

In conclusion, Future Wales remains a national blueprint for navigating Wales's path towards 2040 and its structure remains sound and relevant. While early results are mixed, the strategy retains its currency and capacity to deliver meaningful change. Whilst the assessment hasn't identified the urgent need for amending Future Wales, the following have been highlighted as areas for possible further consideration as part of any future revisions. This will be subject to ongoing stakeholder engagement via the monitoring process, discussions with the next Government and informed by a call for evidence.

- **Regional and local plan coverage:** Monitoring the progress of SDP and LDP coverage.
- **National policies:** Include more development plan policies to broaden coverage, clarity, and alignment across the three-tiered planning system.
- **Decision making policies:** Incorporate additional Development Management policies to establish clear standards and criteria for nationally specific topics.
- **Policy balance:** Review the balance between spatial, non-spatial, and development principal policies to ensure a comprehensive approach.
- **Align update cycles:** Update Future Wales concurrently with PPW to enhance the relationship between the spatial and thematic policy frameworks.

- **Spatial context:** Provide more specific geographical guidance and boundaries to maximise the effectiveness of Future Wales' spatial nature.
- **Energy:** Adapt policies to align with NESO's strategic plans to ensure they are fit for purpose and reflect latest spatial direction of renewable energy generation.
- **Grid Connections:** Develop grid policies and spatial corridors in FW to support the implementation of new grid infrastructure.
- **Monitoring:** Further develop mechanisms for monitoring of progress towards key priorities.
- **Supplementary Planning Guidance:** Consider opportunities to build on the Gwent Levels Supplementary Planning Guidance (SPG) as a tool for supporting Future Wales policy implementation.
- **Economic Growth Areas:** Consider links to existing place based economic policy intervention and potential to identify specific areas in need of economic growth, regeneration and for high growth sectors.

Appendix 1 – Monitoring Indicators

The Monitoring Framework Paper, published alongside Future Wales, sets out how Future Wales is monitored, [Future Wales Monitoring and Review](#). Data for each quantitative indicator identified by the Monitoring Framework has been collected and updated to inform an assessment of progress against the 7 questions. Please see details of sources and caveats associate with the data collected via the individual links.

Question 1: Has Future Wales supported full development plan coverage at all three development plan tiers?

NATIONAL INDICATORS															
INDICATOR	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	LATEST DATA	STATISTIC	SOURCE
15. Amount of waste generated that is not recycled, per person (kg)	794					523							2019	523kg	Microsoft Power BI
<i>Residual household waste per person by local authority (kg)</i>	209	195	200	196	187	183	177	186	182	172	168		2023-24	168kg	Microsoft Power BI
23. Percentage of people who feel able to influence decisions affecting their local area (%)	25	21		20		19		26	30				2024-25	19%	Microsoft Power BI
26. Percentage of people satisfied with their local area as a place to live (%)				85		85		87	89				2024-25	84%	Microsoft Power BI
27. Percentage of people agreeing they belong to their area, that people from different backgrounds get on well together, and that people treat each other with respect (%)	62	61		50		52		69	64				2024-25	58%	Microsoft Power BI
35. Percentage of people attending or participating in arts, culture or heritage at least 3 times a year (%)					75		71			72			2022-23	72%	Microsoft Power BI

36. Percentage of people who speak Welsh daily and can speak more than a few words (%)	10	11		11	12	11	10	10	12	11		11	2024-25	11%	Microsoft Power BI	
37. Number of people who can speak Welsh	562,000 / 19% (2011)							538,300 / 18%					2021	538,300 / 18%	Microsoft Power BI	
39. Percentage of museums and archives holding archival/heritage collections meeting UK accreditation standards (%)	Museums			59	59	59			62	62	61	62	2025	62%	Microsoft Power BI	
	Archives			57	86	86			74	93	82	88	2025	88%		
40. Percentage of designated historic environment assets that are in stable or improved condition (%)	Listed buildings		74	75	75	75	75	76	76	77	76	76	2025	76%	Microsoft Power BI	
	Scheduled monuments		65	66	63	62	60	59	59	59	58	58	2025	58%		
46. Active Global Citizenship (%)									11				13	2024-25	13%	Microsoft Power BI

POLICY INDICATORS

INDICATOR	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	LATEST DATA	STATISTIC	SOURCE
Number of regional areas across Wales with up to date and adopted SDPs	N/a	0	0	0	0	0	0	0	0	0	0	0	2025	0	Plans Team
Number of local planning authorities across Wales with up to date and adopted LDPs	10	15	18	22	23	23	23	23	23	25	25	24	2025	24 out of 25	Plans Team
Number of local planning authorities across Wales that have adopted LDP2	N/a	0	0	0	0	1	3	3	3	3	4	4	2025	4 out of 25	Plans Team
Number of persons aged three or over reporting being able to speak Welsh	562,000 / 19% (2011)							538,300 / 18%					2021	538,300 / 18%	Census 2021
Percentage of persons aged three or over reporting being able to speak Welsh in regional areas (%)	11.1 Cardiff (2011)							12.2					2021	12.2% (Cardiff largest increase)	
	43.9 Carmarthen (2011)							39.9					2021	39.9% (Carmarthen largest decrease)	
	65.4 Gwynedd (2011)							64.4					2021	64.4% (Gwynedd largest %)	

ISA INDICATORS

ISA: 5. To contribute towards the future wellbeing of the Welsh language	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	LATEST DATA	STATISTIC	SOURCE
36. Percentage of people who speak Welsh daily and can speak more than a few words (%)	10	11		11	12	11	10	10	12	11		11	2024-25	11%	Microsoft Power BI
37. Number of people who can speak Welsh	562,000 / 19% (2011)							538,300 / 18%					2021	538,300 / 18%	Microsoft Power BI
ISA: 13. To create opportunities for the protection and enhancement of the local distinctiveness of our landscapes, townscapes and seascapes	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	LATEST DATA	STATISTIC	SOURCE
Number of Green Infrastructure Assessments completed by local authorities in Wales						1	2	4	4	7	12	13	2025	13 out of 25	Review of LPA LDP evidence bases
Area of woodland in Wales per annum (by thousand hectares)	306,000	306,000	307,000	308,000	309,000	310,000	310,000	310,000	310,000	311,000	312,000	313,000	2025	313,000Ha	Forestry Statistics 2025 - Forest Research
Area of new woodland planting in Wales per annum (by hectares)	930	100	110	410	200	670	80	290	620	1,190	640	840	2025	840Ha	Time Series - Forest Research
LANDMAP change reporting	No data														
Review of designated landscapes	No data														
ISA: 14. To create opportunities for the protection, conservation and enhancement of the historic environment, historic assets and their settings	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	LATEST DATA	STATISTIC	SOURCE

40. Percentage of designated historic environment assets that are in stable or improved condition (%)	Listed buildings		74	75	75	75	75	76	76	77	76	76	2025	76%	Microsoft Power BI
	Scheduled monuments		65	66	63	62	60	59	59	59	58	58	2025	58%	
LANDMAP Historic Landscape Character Areas conserved	No data														
ISA: 15. To create the opportunities for the protection and promotion of Welsh culture	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	LATEST DATA	STATISTIC	SOURCE
27. Percentage of people agreeing they belong to their area, that people from different backgrounds get on well together, and that people treat each other with respect (%)	62	61		50		52		69	64			58	2024-25	58%	Microsoft Power BI
35. Percentage of people attending or participating in arts, culture or heritage at least 3 times a year (%)					75		71			72			2022-23	72%	Microsoft Power BI

Question 2: Has Future Wales supported decarbonisation?

NATIONAL INDICATORS															
INDICATOR	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)	11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI
41. Emissions of greenhouse gases within Wales (MtCO2e)	46	46	48	42	38	39	34	36	36	34			2023	34MtCO2e	Microsoft Power BI
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)	35	36	31	31	33	31	25						2020	25MtCO2e	Microsoft Power BI

POLICY INDICATORS																
INDICATOR		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Total renewable energy generation capacity (electricity) (MWe)		2,515		2,854	3,087	3,213	3,373	3,417	3,508	3,551	3,663			2023	3,663 MWe	Low Carbon Energy Generation StatsWales
Renewable energy generation compared to Wales current electricity consumption in (%)				43	48	50	51	56	55	59	53			2023	53%	Energy Use in Wales 2023
Usual mode of travel to work by Welsh resident (%)	Car	83	81	80	81	80	80	83	82	79	81			2023	81%	Microsoft Power BI
	Walking	8	9	10	8	9	10	10	9	11	10				10%	
	Bus / Coach	4	5	4	4	5	5	2	4	5	4				4%	
	Rail	2	2	2	4	3	2	2	3	2	3				3%	
	Bike	2	2	3	2	2	2	2	1	2	1				1%	
Total number of railway station entries and exits in Wales per year (million)		49	49	51	52	53	53	50	9	29	38			2022-23	38 million	Rail station usage in Wales. 2022-23

ISA INDICATORS

ISA: 6. To create opportunities within which greenhouse gas emissions can be reduced and limited and encourage energy efficient and sustainable design																	
		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE	
Total renewable energy generation capacity (electricity) (MWe)		2,515		2,854	3,087	3,213	3,373	3,417	3,508	3,551	3,663			2023	3,663 MWe	Low Carbon Energy Generation StatsWales	
Renewable energy generation compared to Wales current electricity consumption in (%)				43	48	50	51	56	55	59	53			2023	53%	Energy Use in Wales 2023	
48. Usual mode of travel to work by Welsh residents (%)	Car	83	81	80	81	80	80	83	82	79	81			2023	81%	Microsoft Power BI	
	Walking	8	9	10	8	9	10	10	9	11	10				10%		
	Bus / Coach	4	5	4	4	5	5	2	4	5	4				4%		
	Rail	2	2	2	4	3	2	2	2	3	2	3					3%
	Bike	2	2	3	2	2	2	2	2	1	2	1					1%
41. Emissions of greenhouse gases within Wales (MtCO2e)		46	46	48	42	38	39	34	36	36	34			2023	34MtCO2e	Microsoft Power BI	
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)		35	36	31	31	33	31	25						2020	25MtCO2e	Microsoft Power BI	

Question 3: Has Future Wales supported the delivery of renewable energy?

NATIONAL INDICATORS															
INDICATOR	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
12. Capacity (in MW) of renewable energy equipment installed	2,770		3,357	3,683	3,864	4,059	4,133	4,249	4,349	4,532			2023	4,532 MW	Microsoft Power BI

POLICY INDICATORS															
INDICATOR	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Total renewable energy generation capacity (electricity) (MWe)	2,515		2,854	3,087	3,213	3,373	3,417	3,508	3,551	3,663			2023	3,663 MWe	Low Carbon Energy Generation StatsWales
Renewable energy generation compared to Wales current electricity consumption in (%)			43	48	50	51	56	55	59	53			2023	53%	Energy Use in Wales 2023
Wind energy generation for NDF Pre-Assessed Areas	No data														

ISA INDICATORS															
ISA: 6. To create opportunities within which greenhouse gas emissions can be reduced and limited and encourage energy efficient and sustainable design	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Total renewable energy generation capacity (electricity) (MWe)	2,515		2,854	3,087	3,213	3,373	3,417	3,508	3,551	3,663			2023	3,663 MWe	Low Carbon Energy Generation StatsWales

Renewable energy generation compared to Wales current electricity consumption in (%)				43	48	50	51	56	55	59	53			2023	53%	Energy Use in Wales 2023
48. Usual mode of travel to work by Welsh residents (%)	Car	83	81	80	81	80	80	83	82	79	81			2023	81% by car	Microsoft Power BI
	Walking	8	9	10	8	9	10	10	9	11	10				10% walking	
	Bus/coach	4	5	4	4	5	5	2	4	5	4				4% bus / coach	
	Rail	2	2	2	4	3	2	2	3	2	3				3% rail	
	Bike	2	2	3	2	2	2	2	2	1	2	1				
41. Emissions of greenhouse gases within Wales (MtCO2e)		46	46	48	42	38	39	34	36	36	34			2023	34MtCO2e	Microsoft Power BI
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)		35	36	31	31	33	31	25						2020	25MtCO2e	Microsoft Power BI
ISA: 8. To create opportunities to encourage the protection and improvement of air quality		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)		11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI
41. Emissions of greenhouse gases within Wales (MtCO2e)		46	46	48	42	38	39	34	36	36	34			2023	34MtCO2e	Microsoft Power BI
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)		35	36	31	31	33	31	25						2020	25MtCO2e	Microsoft Power BI

Question 4: Has Future Wales helped meet housing needs in the right places?

NATIONAL INDICATORS																
INDICATOR		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)		11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI
24. Percentage of people satisfied with their ability to access facilities / services they need (%)						77	80		87 (Q4)	86			78	2024-25	78%	Microsoft Power BI
25. Percentage of people who feel safe at home, walking in local area, and when travelling (%)					69		71		68	66			68	2024-25	68%	Microsoft Power BI
26. Percentage of people satisfied with their local area as a place to live (%)					85		85		87	89			84	2024-25	84%	Microsoft Power BI
27. Percentage of people agreeing they belong to their area, that people from different backgrounds get on well together, and that people treat each other with respect (%)		62	61		50		52		69	64			58	2024-25	58%	Microsoft Power BI
31. Percentage of dwellings which are free from hazards (%)		71				82								2018	82%	Microsoft Power BI
32. Number of properties (homes and businesses) at medium or high risk of flooding from rivers and sea	River						42,000					49,000	49,000	2024-25	49,000	Microsoft Power BI
	Sea						60,000					79,000	80,000	2024-25	80,000	Wellbeing of Wales GOV.WALES
<i>Number of properties at risk from flooding referenced in Flood Risk Management Annual Report (NRW)</i>									245,118	245,118	245,118	272,817	275,000	2024-25	275,000	NRW Flooding reports, evidence and data
33. Percentage of dwellings with adequate energy performance (%)						47%								2017-18	47%	Microsoft Power BI

34. Number of households successfully prevented from becoming homeless per 10,000 households				35	43	45	54	49	35	45	40	37	33	2024-25	33 per 10,000	Microsoft Power BI
Number of rough sleepers in Wales (Oct date) - change in data since 2019				82	141	188	158	176			169	173	157	2025	157	Homelessness accommodation provision and rough sleeping: October 2025 [HTML] GOV.WALES National rough sleeper count (discontinued from November 2019) GOV.WALES
	46. Active Global Citizenship (%)									11			13	2024-25	13%	Microsoft Power BI

POLICY INDICATORS

INDICATOR		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Number of new homes built (COMPLETED) in Wales per annum	ONS	5,843	6,170	6,900	6,833	6,663	5,777	6,037	4,616	5,273	5,785	4,771	4,631	2024-25	4,631	New dwellings completed by local authority, tenure, dwelling type and number of bedrooms StatsWales
	AMR		n/a	8,021	8,429	8,251	8,705	8,589	8,304	7,453	7,848	7,033	n/a	2023-24	7,033	Review of AMRs
Number of new homes built (COMPLETED) in regional areas across Wales per annum (AMR Data)	North Wales		n/a	1,540	1,585	1,836	1,806	1,571	1,770	1,749	1,542	1,383			1,383	Review of AMRs
	Mid Wales		306	499	521	578	356	351	620	602	680	394			394	
	SW Wales		n/a	1,779	1,622	1,445	1,757	1,710	1,541	1,394	1,103	1,202			1,202	
	SE Wales		3,457	4,203	4,701	4,392	4,786	4,957	4,373	3,708	4,523	4,054		2023/24	4,054	
Number of affordable housing units		2,416	2,218	2,400	2,546	2,316	2,592	2,942	3,603	2,676	3,369	3,255	3,643	2024-25	3,643	Affordable housing provision: April 2024 to March 2025

built in Wales per annum																	
Number of affordable housing units built in regional areas across Wales per annum	North Wales	540	523	343	416	508	639	443	726	611	586	743	937	2024-25	937		
	Mid Wales	109	70	148	133	79	85	113	220	209	170	161	271		271		
	SW Wales	434	435	576	522	400	657	772	627	679	701	700	683		683		
	SE Wales	1,333	1,190	1,333	1,475	1,329	1,211	1,614	2,030	1,177	1,912	1,651	1,752		1,752		
24. Percentage of people satisfied with their ability to access facilities / services they need (%)						77	80		87 (Q4)	86			78	2024-25	78%	Microsoft Power BI	
Number of Local Authorities signed up to Design Commission for Wales placemaking charter								0					15	2025	15 out of 25	DCFW Website	
Total number of railway station entries and exits in Wales per year (million)		49	49	51	52	53	53	50	9	29	38			2022-23	38 million	Rail station usage in Wales, 2022-23	
48. Usual mode of travel to work by Welsh residents (%)	Car	83	81	80	81	80	80	83	82	79	81			2023	81%	Microsoft Power BI	
	Walking	8	9	10	8	9	10	10	9	11	10				10%		
	Bus / Coach	4	5	4	4	5	5	2	4	5	4				4%		
	Rail	2	2	2	4	3	2	2	2	3	2	3					3%
	Bike	2	2	3	2	2	2	2	2	1	2	1					1%

ISA INDICATORS

ISA: 6 To create opportunities within which greenhouse gas emissions can be reduced and limited and encourage energy efficient and sustainable design		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Total renewable energy generation capacity (electricity) (MWe)		2,515		2,854	3,087	3,213	3,373	3,417	3,508	3,551	3,663			2023	3,663 MWe	Low Carbon Energy Generation StatsWales
Renewable energy generation compared to Wales current electricity consumption in (%)				43	48	50	51	56	55	59	53			2023	53%	Energy Use in Wales 2023
48. Usual mode of travel to work by Welsh residents (%)	Car	83	81	80	81	80	80	83	82	79	81			2023	81%	Microsoft Power BI
	Walking	8	9	10	8	9	10	10	9	11	10				10%	
	Bus / Coach	4	5	4	4	5	5	2	4	5	4				4%	
	Rail	2	2	2	4	3	2	2	3	2	3				3%	
	Bike	2	2	3	2	2	2	2	2	1	2	1			1%	
41. Emissions of greenhouse gases within		46	46	48	42	38	39	34	36	36	34			2023	34MtCO ₂ e	Microsoft Power BI

Wales (MtCO2e)																
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)		35	36	31	31	33	31	25							25MtCO2e	Microsoft Power BI
ISA: 7. To contribute to the reduction and management of flood risk		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
32. Number of properties at medium or high risk of flooding from rivers and sea	River						42,000					49,000	49,000	2024-25	49,000	Microsoft Power BI
	Sea						60,000					79,000	80,000	2024-25	80,000	Wellbeing of Wales GOV.WALES
<i>Number of properties at risk from flooding referenced in Flood Risk Management Annual Report (NRW)</i>									245,118	245,118	245,118	272,817	275,000	2024-26	275,000	Data taken from - Natural Resources Wales / Flooding reports, evidence and data
ISA: 8. To create opportunities to encourage the protection and improvement of air quality		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)		11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI

41. Emissions of greenhouse gases within Wales (MtCO2e)		46	46	48	42	39	39	34	36	36	34			2023	34MtCO2e	Microsoft Power BI
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)		35	35	31	30	33	31	25						2020	25MtCO2e	Microsoft Power BI
ISA: 10. To create opportunities for the improved connectivity of communities and sustainable access to basic goods, services and amenities for all groups		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
24. Percentage of people satisfied with their ability to access facilities / services they need (%)						77	80	87 (Q4)	86					2024-25	78%	Microsoft Power BI
26. Percentage of people satisfied with their local area as a place to live (%)					85		85	87	8					2024-25	84%	Microsoft Power BI

Total number of railway station entries and exits in Wales per year (million)		49	49	51	52	53	53	50	9	29	38			2022-23	38 million	Rail station usage in Wales, 2022-23
48. Usual mode of travel to work by Welsh residents (%)	Car	83	81	80	81	80	80	83	82	79	81			2023	81%	Microsoft Power BI
	Walking	8	9	10	8	9	10	10	9	11	10				10%	
	Bus / Coach	4	5	4	4	5	5	2	4	5	4				4%	
	Rail	2	2	2	4	3	2	2	3	2	3				3%	
	Bike	2	2	3	2	2	2	2	1	2	1				1%	
ISA: 11 To create opportunities within which an improvement in social cohesion and equality can be achieved		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
23. Percentage of people who feel able to influence decisions affecting their local area (%)		25	21		20		19		26	3			19	2024-25	19%	Microsoft Power BI
25. Percentage of people who feel safe at home, walking in local area, and when travelling (%)					69		71		6	66			68	2024-25	68%	Microsoft Power BI
26. Percentage of people satisfied with their local area					85		85		87	89			84	2024-25	84%	Microsoft Power BI

as a place to live (%)																
27. Percentage of people agreeing they belong to their area, that people from different backgrounds get on well together, and that people treat each other with respect (%)		62	61		50		52		69	64			58	2024-25	58%	Microsoft Power BI
35. Percentage of people attending or participating in arts, culture or heritage at least 3 times a year (%)						75		71					72	2022-23	72%	Microsoft Power BI
46. Active Global Citizenship (%)										11			13	2024-25	13%	Microsoft Power BI
ISA: 12. To create opportunities for the provision of good quality, safe, affordable housing that meets identified needs		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	Source
Number of new homes built (COMPLETED) in Wales per annum	ONS	5,843	6,170	6,900	6,833	6,663	5,777	6,037	4,616	5,273	5,785	4,771	4,631	2024-25	4,631	New dwellings completed by local authority, tenure, dwelling type and number of bedrooms StatsWales

	AMR		n/a	8,021	8,429	8,251	8,705	8,589	8,304	7,453	7,848	7,033	n/a	2023-24	7,033	Review of AMRs
Number of new homes built (COMPLETED) in regional areas across Wales per annum	North Wales		n/a	1,540	1,585	1,836	1,806	1,571	1,770	1,749	1,542	1,383		2023/24	1,383	Review of AMRs
	Mid Wales		306	499	521	578	356	351	620	602	680	394			394	
	SW Wales		n/a	1,779	1,622	1,445	1,757	1,710	1,541	1,394	1,103	1,202			1,202	
	SE Wales		3,457	4,203	4,701	4,392	4,786	4,957	4,373	3,708	4,523	4,054			4,054	
Number of affordable housing units built in Wales per annum	Wales (total)	2,416	2,218	2,400	2,546	2,316	2,592	2,942	3,603	2,676	3,369	3,255	3,643	2024-25	3,643	Affordable housing provision: April 2024 to March 2025
Number of affordable housing units built in regional areas across Wales per annum	North Wales	540	523	343	416	508	639	443	726	611	586	743	937	2024-25	937	
	Mid Wales	109	70	148	133	79	85	113	220	209	170	161	271		271	
	SW Wales	434	435	576	522	400	657	772	627	679	701	700	683		683	
	SE Wales	1,333	1,190	1,333	1,475	1,329	1,211	1,614	2,030	1,177	1,912	1,651	1,752		1,752	
31. Percentage of dwellings which are free from hazards (%)		71				82								2018	82%	Microsoft Power BI
33. Percentage of dwellings with adequate energy performance (%)						47								2017-18	47%	Microsoft Power BI
34. Number of households successfully prevented from becoming homeless per 10,000 households				35	43	45	54	49	35	45	40	37	33	2024-25	33 per 10,000	Microsoft Power BI

Question 5: Has Future Wales made places healthier?

NATIONAL INDICATOR																
INDICATOR		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
1. Percentage of live single births with a weight of under 2,500g (%)		5.11	5.15	5.35	5.62	5.64	5.94	6.06	5.76	6.09	6.10	6.30		2024	6.30%	Microsoft Power BI
2. Healthy life expectancy at birth (years)	Male	61.56	61.2	61.3	61.2	61.2	61.3	61.4	61.3	60.8	60.3			2021-23	60.3 years	Microsoft Power BI
	Female	62.57	62.5	62.4	62	61.9	61.9	62.1	61.8	60.2	59.6				59.6 years	
Including the gap between the least and most deprived (years)	Male	15.47	16.51	17.2	17	16.53	14.34	13.41	14.06	16.39				2020-22	16.39 years	Microsoft Power BI
	Female	15.78	17.47	16.78	17.58	18.28	17.92	19.09	18.22	20.16				2020-22	20.16 years	
3. Percentage of adults who have two or more healthy lifestyle behaviours (%)					92.87	89.72	90.13	89.86		92.87	92.28		93.64	2024-25	93.64%	Microsoft Power BI
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)		11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI
5. Percentage of children with two or more healthy lifestyle behaviours (%)						87.69		88.02		89.76		90.1		2023-24	90.1%	Microsoft Power BI
18. Percentage of people living in households in income poverty relative to the UK median (%)		23	23	23	24	24	23	23	24	21	22	22		2022-24	22%	Microsoft Power BI
19. Percentage of people living							14	13		11	16		11	2024-25	11%	Microsoft Power BI

in households in material deprivation (%)																
24. Percentage of people satisfied with their ability to access facilities / services they need (%)					77	80		87 (Q4)	86			78	2024-25	78%		Microsoft Power BI
26. Percentage of people satisfied with their local area as a place to live (%)				85%		85%		87%	89%			84%	2024-25	84%		Microsoft Power BI
29. Mean mental wellbeing score for adults					50.85		51.35		48.9	48.2		48.4	2024-25	48.4		Microsoft Power BI
30. Percentage of people who are lonely (%)				17	16		15	13	13	13			2022-23	13%		Microsoft Power BI
38. Percentage of people participating in sporting activities three or more times a week (%)	Adults				32	32	32	32		34	39		35	2024-25	35%	Microsoft Power BI
	Children		48			48				39			2022	39%		
41. Emissions of greenhouse gases within Wales (MtCO2e)		46	46	48	42	38	39	34	36	36	34		2023	34MtCO2e		Microsoft Power BI
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)		35	36	31	31	33	31	25					2020	25MtCO2e		Microsoft Power BI

43. Areas of healthy ecosystems in Wales (Ha)						640,827								2018	640,827Ha	Microsoft Power BI
										11				2024-2025	13%	Microsoft Power BI
48. Usual mode of travel to work by Welsh residents (%)	Car	83	81	80	81	80	80	83	82	79	81			2023	81%	Microsoft Power BI
	Walking	8	9	10	8	9	10	10	9	11	10				10%	
	Bus/coach	4	5	4	4	5	5	2	4	5	4				4%	
	Rail	2	2	2	4	3	2	2	3	2	3				3%	
	Bike	2	2	3	2	2	2	2	1	2	1				1%	

POLICY INDICATORS

INDICATOR		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Male life expectancy as birth in Wales (Years)		78.4	78.4	78.4	78.2	78.2	78.4	78.1	78.0	77.9	78.0			2023	78.0 years	Life expectancy - ONS
Female life expectancy at birth in Wales (Years)		82.3	82.2	82.3	82.2	82.2	82.2	81.9	81.8	81.8	82.0			2023	82.0 years	Life expectancy - ONS
2. Healthy life expectancy at birth (Years)	Male	61.56	61.2	61.3	61.2	61.2	61.3	61.4	61.3	60.8	60.3			2021-23	60.3	Microsoft Power BI
	Female	62.57	62.5	62.4	62	61.9	61.9	62.1	61.8	60.2	59.6				59.6	
Including the gap between the least and most deprived	Male	15.47	16.51	17.2	17	16.53	14.34	13.41	14.06	16.39				2020-22	16.39	Microsoft Power BI
	Female	15.78	17.47	16.78	17.58	18.28	17.92	19.09	18.22	20.16					20.16	
Frequency of active travel by walking and cycling in Wales (%)	Cycle at least once a week				5	6	6	4		6	6			2022-23	6%	Active travel (walking and cycling) GOV.WALES
	Walked at least once a week				61	58	57	60		51	51			2022-23	51%	

ISA INDICATORS

ISA: 2. To contribute to an improvement in physical, mental and social health and well being for all, including contributing towards a reduction in health inequalities across Wales		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Frequency of active travel by walking and cycling in Wales (%)	Cycle at least once a week				5	6	6	4		6	6			2022-23	6%	Active travel (walking and cycling) GOV.WALES
	Walked at least once a week				61	58	57	60		51	51			2022-23	51%	
2. Healthy life expectancy at birth (Years)	Male	61.56	61.2	61.3	61.2	61.2	61.3	61.4	61.3	60.8	60.3			2021-23	60.3 years	Microsoft Power BI
	Female	62.57	62.5	62.4	62	61.9	61.9	62.1	61.8	60.2	59.6				59.6 years	
Including the gap between the least and most deprived (Years)	Male	15.47	16.51	17.2	17	16.53	14.34	13.41	14.06	16.39				2020-22	16.39 years	
	Female	15.78	17.47	16.78	17.58	18.28	17.92	19.09	18.22	20.16					20.16 years	
3. Percentage of adults who have two or more healthy lifestyle behaviours (%)					92.87	89.72	90.13	89.86		92.87	92.28		93.64	2024-25	93.64%	Microsoft Power BI
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)		11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI
5. Percentage of children with two or more healthy lifestyle behaviours (%)						87.69		88.02		89.76			90.1	2023-24	90.1%	Microsoft Power BI
18. Percentage of people living in households in income poverty relative to the UK median (%)		23	23	23	24	24	23	23	24	21	22	22		2022-24	22%	Microsoft Power BI
19. Percentage of people living in households in material deprivation (%)							14	13		11	16		11	2024-25	11%	Microsoft Power BI
24: Percentage of people satisfied with their ability to					77	80		87 (Q4)		86			78	2024-2025	78%	Microsoft Power BI

access facilities / services they need (%)																
26. Percentage of people satisfied with their local area as a place to live (%)					85		85		87	89			84	2024-25	84%	Microsoft Power BI
29. Mean mental well being score for adults					50.85		51.35			48.9	48.2		48.4	2024-25	48.4	Microsoft Power BI
30. Percentage of people who are lonely (%)					17	16		15	13	13	13			2022-23	13%	Microsoft Power BI
38. Percentage of people participating in sporting activities three or more times a week (%)	Adults				32	32	32	32		34	39		35	2024-25	35%	Microsoft Power BI
	Children		48			48				39				2022	39%	
41. Emissions of greenhouse gases within Wales (MtCO2e)		46	46	48	42	38	39	34	36	36	34			2023	34MtCO2e	Microsoft Power BI
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)		35	36	31	31	33	31	25						2020	25MtCO2e	Microsoft Power BI

Question 6: Has Future Wales helped strengthen ecosystems and enhanced biodiversity?

NATIONAL INDICATORS															
INDICATOR	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)	11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI
13. Concentration of carbon and organic matter in soil (gC per Kg)	109		81.8							80.4			2021-23	80.4gC per Kg	Microsoft Power BI
14. The global footprint of wales (gha per person)	4.43				3.93								2018	3.93gha per person	Microsoft Power BI
15. Amount of waste generated that is not recycled, per person (kg)						523							2019	523kg	Microsoft Power BI
<i>Residual household waste per person by local authority (kg)</i>	209	195	200	196	187	183	177	186	182	172	168		2023-24	168kg	Microsoft Power BI
43. Area of healthy ecosystems in Wales (Ha)					640,827								2018	640,827Ha	Microsoft Power BI
44. Status of biological diversity in Wales (% compared to 1970 baseline value)					87								1970-2018	87% of base value	Microsoft Power BI
45. Percentage of surface water bodies, and groundwater bodies, achieving good or high overall status (%)		37							40		40		2024	40%	Microsoft Power BI
46. Active Global Citizenship (%)									11			13	2024-25	13%	Microsoft Power BI

POLICY INDICATORS															
INDICATOR	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Number of Green Infrastructure Assessments completed by local authorities in Wales						1	2	4	4	7	12	13	2025	13 out of 25	Review of LPA LDP evidence bases
Area of woodland in Wales per annum (by thousand hectares)	306,000	306,000	307,000	308,000	309,000	310,000	310,000	310,000	310,000	311,000	312,000	313,000	2025	313,000Ha	Forestry Statistics 2025 - Forest Research
Area of new woodland planting in	930	100	110	410	200	670	80	290	620	1,190	640	840	2025	840Ha	Time Series -

Wales per annum (by hectares)																Forest Research
ISA INDICATORS																
ISA: 8. To create opportunities to encourage the protection and improvement of air quality	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE	
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)	11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI	
41. Emissions of greenhouse gases within Wales (MtCO2e)	46	46	48	42	38	39	34	36	36	34			2023	34MtCO2e	Microsoft Power BI	
42. Emissions of greenhouse gases attributed to the consumption of global goods and services in Wales (MtCO2e)	35	36	31	31	33	31	25						2020	25MtCO2e	Microsoft Power BI	
ISA: 9. To create opportunities to protect and enhance the quality and quantity of water features and resources	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE	
45. Percentage of surface water bodies, and groundwater bodies, achieving good or high overall status (%)		37							40		40		2024	40%	Microsoft Power BI	
Number of new developments taking places despite an adequate capacity in water supply to cater for the development secured	No data															

ISA: 16. To create opportunities for the conservation and enhancement of biodiversity and geodiversity	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Number of Green Infrastructure Assessments completed by local authorities in Wales						1	2	4	4	7	12	13	2025	13 out of 25	Review of LPA LDP evidence bases
Area of woodland in Wales per annum (by thousand hectares)	306,000	306,000	307,000	308,000	309,000	310,000	310,000	310,000	310,000	311,000	312,000	313,000	2025	313,000	Forestry Statistics 2025 - Forest Research
Area of new woodland planting in Wales per annum (by hectares)	930	100	110	410	200	670	80	290	620	1,190	640	840	2025	840	Time Series - Forest Research
4. Levels of nitrogen dioxide (No2) pollution in the air (ug/m3)	11	10	11	9	9	9	7	7	8	7			2023	7ug/m3	Microsoft Power BI
13. Concentration of carbon and organic matter in soil (gC per Kg)	109		81.8							80.4			2021-2023	80.40gC per Kg	Microsoft Power BI
14. The global footprint of wales (gha per person)	4.43				3.93								2018	3.93gha per person	Microsoft Power BI
43. Area of healthy ecosystems in Wales (Ha)					640,827								2018	640,827Ha	Microsoft Power BI
44. Status of biological diversity in Wales (% compared to 1970 baseline value)					87								1970-2016	87% of base value	Microsoft Power BI
45. Percentage of surface water bodies, and groundwater bodies, achieving good or high overall status (%)		37							40		40		2024	40%	Microsoft Power BI

ISA: 17. To create opportunities for the sustainable management and use of natural resources, taking into account their benefits and intrinsic value	2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
15. Amount of waste generated that is not recycled, per person (kg)	794					523							2019	523kg	Microsoft Power BI
<i>Residual household waste per person by local authority (kg)</i>	209	195	200	196	187	183	177	186	182	172	168		2023-24	168kg	Microsoft Power BI

Question 7: Has Future Wales supported an economy that delivers prosperity for all?

NATIONAL INDICATORS																
INDICATOR		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
8. Percentage of adults with qualifications at the different levels of the National Qualifications Framework	The percentage of working age adults in Wales reported as having level 3+ qualifications (%)	56.6	56.6	57.9	58.3	59.1	59.4	62.4	62.3	66.8	67.4	68.6		2024	68.60%	Microsoft Power BI
9. Gross Value Added (GVA) per hour worked index UK=100 (%)		83	82	83	84	83	86	84	83	84	85			2023	85	Microsoft Power BI
10. Gross Disposable Household Income per head in Wales (£)		15,086	15,585	15,711	16,268	16,893	17,356	17,598	18,150	18,858	20,140			2023	£20,140 per head	Microsoft Power BI
11. Percentage of businesses which are innovation-active (%)		51		47		34		44		31				2020-22	31%	Microsoft Power BI
16. Percentage of people in employment in Wales who earns at least the real Living Wage (%)		68.70	67.30	65.40	67.10	67.20	66.30	69.80	69.40	67.70	63.50	67.40		2024	67.40%	Microsoft Power BI
17. Pay difference for gender, ethnicity and (£)	Gender	£1.03	£0.92	£1.02	£0.82	£0.94	£0.86	£0.71	£0.63	£0.86	£0.82	£0.32		2024	0.32	Microsoft Power BI
	Ethnicity	£1.11	£1.23	£0.75	-£0.07	£0.82	£0.16	£0.62	£0.90	£2.18	£1.93	£0.54		2024	0.54	
	Disability	£0.75	£1.27	£0.74	£0.85	£1.11	£1.76	£1.57	£1.48	£1.26	£1.75	£1.18		2024	£1.18	
18. Percentage of people living in households in income poverty relative to the UK median (%)		23	23	23	24	24	23	23	24	21	22	22		2022-24	22%	Microsoft Power BI

19. Percentage of people living in households in material deprivation (%)							14	13		11	16		11	2024-25	11%	Microsoft Power BI
20. Proportion of employees who's pay is set by collective bargaining (%)		56.4	51.3	54.6	51.1	51.7	48.6	54.8	57.1	52.7	52.1	52.8		2024	52.8%	Microsoft Power BI
21. Percentage of people in employment (%)					71.5	72.8	73.1	73.6	72.2	73.6	73.0	73.5	73.4	2024-25	73.4%	Microsoft Power BI
22. Percentage of people in education, employment or training (%)		82.8	83.9	84.3	86.8	86	85.6	85.8	84	86.1	86.4			2023	86.4%	Microsoft Power BI
32. Number of properties at medium or high risk of flooding from rivers and sea	Rivers						42,000					49,000	49,000	2024-25	49,000	Microsoft Power BI
	Seas						60,000					79,000	80,000	2024-25	80,000	Wellbeing of Wales GOV.WALES
<i>Number of properties at risk from flooding referenced in Flood Risk Management Annual Report (NRW)</i>									245,118	245,118	245,118	272,817	275,000	2024-25	275,000	NRW Flooding reports, evidence and data
46. Active Global Citizenship (%)										11			13	2024-25	13%	Microsoft Power BI
50. Status of digital inclusion														No data	No data	Microsoft Power BI

POLICY INDICATORS																
POLICY RELATED INDICATOR		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATISTIC	SOURCE
Unemployment rate in Wales (year end 31st March) (%)		7.6	6.9	5.6	4.5	4.9	4.6	3.9	4.1	3.9	3.3	3.6	3.6	2025	3.60%	Annual Population Survey: summary

																	y of economic activity StatsWales
Gross Value Added (GVA) in Wales per head per year (£)		18,518	19,103	19,831	20,491	£1,222	22,129	20,968	22,008	23,934	25,742			2023	£25,742		Gross value added by Welsh local authority and year StatsWales
Average (median) gross weekly earnings (£)		473.90	478.60	493.70	498.30	509.00	534.80	541.50	563.70	599.70	636.30	675.60		2024	£675.60		Average (median) gross weekly and hourly earnings (£) StatsWales
Average (median) total household wealth (£)		211,900		223,800		253,200		275,700		266,900				2020-22	£266,900		Link
Workplace employment (person)		1,394,600	1,403,800	1,409,800	1,424,200	1,452,100	1,444,100							2019	1,444,100		Workplace employment
Workplace employment for regional areas across Wales (person)	North Wales	304,800	312,200	305,900	309,500	318,400	315,500							2019	315,500		
	Mid Wales	100,800	101,600	97,500	97,500	96,800	96,100							2019	96,100		
	South West Wales	312,400	307,600	322,700	312,700	311,400	318,900							2019	318,900		
	South East Wales	676,600	682,400	683,700	704,600	725,500	713,600							2019	713,600		
Residential broadband coverage at a fixed location Wales (%)	Gigabit-capability							19	36	52	64	74	81	2025	81%		Connected Nations UK
	Full fibre						12	19	27	40	55	68	78		78%		
	Superfast						93	94	94	95	96	96	97		97%		

	Unable to get decent							3.0	1.2	1.0	1.0	0.5	0.5	0.4		0.4%	Report 2025
Domestic GB Tourism overnight trips to Wales annually (million)											8.7	8.4	7.6		2024	7.6 million	2024 Link
Domestic GB Tourism day visits to Wales annually (million)											62	60.9	53.3		2024	53.3 million	2024 Link
Total Visitor Spend (£ billion)											£4.30	£4.58	£4.78		2024	£4.78 billion	2024 Link

ISA INDICATORS																
ISA: 1. To encourage and support improvements in educational attainment for all age groups and all sectors of society to help to improve opportunities for life		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATIS TIC	SOURCE
22. Percentage of people in education, employment or training (%)		82.8	83.9	84.3	86.8	86	85.6	85.8	84	86.1	86.4			2023	86.4%	Microsoft Power BI
ISA: 3. To create opportunities for an increase in employment across the country and promote economic inclusion		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATIS TIC	SOURCE
19. Percentage of people living in households in material deprivation (%)							14	13		11	16		11	2024-25	11%	Microsoft Power BI
20. Proportion of employees who's pay is set by collective bargaining (%)		56.4	51.3	54.6	51.1	51.7	48.6	54.8	57.1	52.7	52.1	52.8		2024	52.8%	Microsoft Power BI
21. Percentage of people in employment (%)					71.5	72.8	73.1	73.6	72.2	73.6	73.0	73.5	73.4	2024-25	73.4%	Microsoft Power BI
ISA: 4. To create opportunities for sustainable economic growth, diversity and business competitiveness		2014 prior	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	DATE	STATIS TIC	SOURCE
Unemployment rate in Wales per annum (year end 31st March) (%)		7.6	6.9	5.6	4.5	4.9	4.6	3.9	4.1	3.9	3.3	3.6	3.6	2025	3.60%	Annual Population Survey: summary of economic

																activity StatsWales
Gross Value Added (GVA) in Wales per head per year (£)		18,518	19,103	19,831	20,491	21,222	22,129	20,968	22,008	23,934	25,742			2023	£25,742	Link
Average (median) gross weekly earnings (£)		473.90	478.60	493.70	498.30	509.00	534.80	541.50	563.70	599.70	636.30	674.50		2024	£674.50	Average (median) gross weekly and hourly earnings (£) StatsWales
Average (median) total household wealth (£)		211,900		223,800		253,200		275,700		266,900				2020-2022	£266,900	Link
Workplace employment (person)		1,394,600	1,403,800	1,409,800	1,424,200	1,452,100	1,444,100							2019	1,444,100	Workplace employment
Workplace employment for regional areas across Wales (person)	North Wales	304,800	312,200	305,900	309,500	318,400	315,500							2019	315,500	
	Mid Wales	100,800	101,600	97,500	97,500	96,800	96,100							2019	96,100	
	South West Wales	312,400	307,600	322,700	312,700	311,400	318,900							2019	318,900	
	South East Wales	676,600	682,400	683,700	704,600	725,500	713,600							2019	713,600	
Residential broadband coverage at a fixed location Wales (%)	Gigabit-capability							19	36	52	64	74	81	2025	74%	Connected Nations UK Report 2025
	Full fibre						12	19	27	40	55	68	78		68%	
	Superfast						93	94	94	95	96	96	97		96%	
	Unable to get decent						3.0	1.2	1.0	1.0	0.5	0.5	0.4		0.5%	
Domestic GB Tourism overnight trips to Wales annually (million)										8.7	8.4	7.6		2024	7.6 million	2024 Link
Domestic GB Tourism day visits to Wales annually (million)										62	60.9	53.3		2024	53.3 million	2024 Link
Total Visitor Spend (£ billion)										£4.30	£4.58	£4.78		2024	£4.78 billion	2024 Link

APPENDIX 2: Local Development Plan (LDP) Progress October 2025

	Authority	Adopted Plan Period	Adoption Date	Status of Replacement Plan
1	Pembrokeshire Coast	2006-2031	LDP2 Adopted September 2020	Delivery Agreement for LDP3 (2025-2040) approved by WG October 2025.
2	Caerphilly	2006-2021	LDP Adopted November 2010	LDP2 Pre-Deposit Consultation took place January 2025
3	Rhondda Cynon Taf	2006-2021	LDP Adopted March 2011	LDP2 preparation began April 2022
4	Merthyr Tydfil	2016-2031	LDP2 Adopted January 2020	LDP3 review not formally commenced
5	Snowdonia	2016-2031	LDP2 Adopted March 2019	Delivery Agreement for LDP3 (2026-2041) approved by WG September 2025
6	Blaenau Gwent	2006-2021	LDP Adopted November 2012	LDP2 revised Delivery Agreement July 2024.
7	Pembrokeshire	2006-2021	LDP Adopted February 2013	LDP2 submitted to WG for examination July 2025
8	Ceredigion	2007-2022	LDP Adopted April 2013	LDP2 on hold due to phosphates
9	Denbighshire	2006-2021	LDP Adopted June 2013	LDP2 Preferred Strategy consultation was in July-August 2019
10	Bridgend	2018-2033	LDP2 Adopted March 2024	LDP2 adopted March 2024
11	Conwy	2007-2022	LDP Adopted October 2013	LDP2 Deposit Plan expected for consultation December 2025
12	Torfaen	2006-2021	LDP Adopted December 2013	LDP2 Preferred Strategy consultation is due in Oct 2025
13	Bannau Brycheiniog	2007-2022	LDP Adopted December 2013	LDP2 Delivery Agreement consultation June 2025
14	Monmouthshire	2011-2021	LDP Adopted March 2014	LDP2 submitted for Examination 2025
15	Carmarthenshire	2006-2021	LDP Adopted December 2014	LDP2 Examination Oct-Nov 2024. Inspector issued letter instructing requirement to find additional housing sites.
16	Newport	2011-2026	LDP Adopted January 2015	LDP2 Preferred Strategy consultation was in October-November 2023

17	Neath Port Talbot	2011-2026	LDP Adopted January 2016	LDP2 Preferred Strategy consultation December 2024-February 2025
18	Cardiff	2006-2026	LDP Adopted January 2016	LDP2 submitted for Examination 2025
19	Vale of Glamorgan	2011-2026	LDP Adopted June 2017	LDP2 Deposit consultation Jan-Mar 2026
20	Anglesey	2011-2026	Joint LDP Adopted July 2017	LDP2 Candidate Sites consultation closed August 2025
21	Gwynedd	2011-2026	Joint LDP Adopted July 2017	LDP2 Candidate Sites consultation closed April 2025
22	Powys	2011-2026	LDP Adopted April 2018	LDP2 Preferred Strategy consultation took place August-October 2024
23	Swansea	2010-2025	LDP Adopted February 2019	Preferred Strategy consultation took place February-April 2025
24	Flintshire	2015-2030	LDP Adopted January 2023	Plan review not triggered
25	Wrexham	2013-2028	N/a	Adopted LDP quashed by High Court in May 2025