**Future Trends for Neath Port Talbot**

**Background Paper**

**Prepared by the Well-being Assessment Sub-Group**

**December 2016**

**Introduction**

This paper is a regularly updated working document that offers an insight into our current understanding of the future trends likely to impact the planning and delivery of services. The trends identified are based on sound evidence and statistics referenced from credible sources of intelligence. However the information presented is not absolute or certain but rather intended to provide a reflection of wider visions of a probable future based on current drivers. Trends have been sourced from a variety of global, national and local contexts and were selected for the relevance of the impact on Neath Port Talbot.

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Section 1: DEMOGRAPHICS

**Key Trends**

* The population of NPT is projected to increase by over 2,500 between 2014-2035
* There will be an increasingly older population
* There is an increasing trend for living alone

**Demographic Projections**

* The estimated population of NPT was 140,490 in 2014; compared to the Welsh population, NPT has fewer young adults between the ages of 20-24 years; this age group makes up around 2.8% of the population of NPT compared to around 3.5% of the all Wales population.**1**



* The population of NPT is projected to increase to 143,063 in 2035.This projected increase takes place in the context of worldwide population increase expected to plateau at about 9 billion by 2050.**2**
* Life expectancy in NPT is currently 77.0 (males) and 81.2 (females) years. The gap in life expectancy in males between the most and least deprived fifth is about 6 years, with an equivalent figure of over 7 years for females. When considering healthy life expectancy the gap is even greater at nearly 17 years for males and over 18 years for females. **3**
* All-cause mortality in people ages <75 years in NPT was estimated to be 482/100,000 between 2012-2014; this is significantly higher than the Welsh average of 376/100,000. **4**
* In NPT the number of children (<16 years of age) is projected to show a modest rise until around 2026, after which the population size will fall slightly to around 23,000 by 2036.**4**
* The number of working aged adults in NPT is predicted to show a steady decline between 2011 and 2036, falling from 89,000 at the 2011 census to 81,100 in 2036.**4**
* The number of people in NPT aged 65 and over is projected to increase from 26,200 at the 2011 census to 38,000 by 2036. This represents an overall increase of nearly 12,000 people or 45% between 2011 and 2036.**4**
* The number of very elderly people (aged 85+ years) is predicted to double, rising from 3,500 at the 2011 census to 7,400 in 2036. Managing older people's health and social care needs effectively will be very important.**4**

**Social Trends**

* Nearly 80% of the Wales projected population increase is expected to be directly or indirectly due to migration**2**; however migration levels in NPT are relatively low. **1**
* Single person households are projected to grow from 29,900 in 2015 to 33,100 in 2035. **1**
* Single parent households are projected to stay approximately stable between 2015 and 2035 at just over 4,000. **5**

**References**

 StatsWales <https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2014-based/populationprojections-by-localauthority-year>

**2** Understanding Wales’ Future (Welsh Government)

<http://wales.gov.uk/docs/caecd/research/120109futureswalesen.pdf>

**3**Measuring Inequalities 2016 (2016) Public Health Wales Observatory

**4**Demography 2016. Public Health Wales Observatory <http://www.wales.nhs.uk/sitesplus/922/page/87039>

**5** Daffodil <http://www.daffodilcymru.org.uk/index.php?pageNo=1039&areaID=1&loc=1>

Section 2: HEALTH AND SOCIAL CARE

**Key Trends**

* Welsh Government’s spending on health could rise by 42-67% by 2024-2025. **6**
* There is projected to be an increase in health problems and physical disabilities related to the increasing age of the population. **7**

**Cost of Health and Social Care**

* Research suggests that by 2024-2025, spending on health alone could rise from 42% of the Welsh Government’s revenue budget to 57% or 67% in their worst case scenario. **6**
* Long-term projections for long-term care spending in the UK, 2016-2017 to 2061-202 are projected to rise from 1.3% of GDP to between 2-2.5%. **8**
* If costs of social care for older adults rises in Wales in line with predictions for England, the real terms cost of services for older people could double from £510 million in 2010-2011 to over £1 billion by 2030. **9**
* Health spend for the ABMU area in 2013-2014 was £937,377,000 **7**
* Cost of social care in the NPT area was £75,383,000

**Health Trends in Wales and Neath Port Talbot**

* Cardiovascular disease, cancer and respiratory disease remain the largest causes of death in the ABMU area. Mortality from cardiovascular disease and cancer has fallen, but for chronic obstructive pulmonary disease it has remained stable. **7**
* By applying the 2014 Welsh Health Survey prevalence rates to the predicted population size in 2035, and assuming no change to the prevalence rates, the following cautious projections can be made:
	+ The number of obese adults in NPT is projected to rise by almost 2,000 (2.7%) to around 72,000 in 2035. **10**
	+ The prevalence of diabetes in adults across NPT is projected to rise by nearly 300 between 2015-2035 to 10,387. **10**
	+ The number of adults in NPT receiving community based services is projected to rise by approximately 1500 (33%) between 2015-2035. **10**
* Healthy life expectancy in NPT has gone up by around 2 years for men between 2005 and 2015 to 62.3 years, and is predicted to rise further to 66 years by 2024; for women remained static between 2005 and 2015 at just over 62 years, and is predicted to remain so until 2024. **11, 12**
* 28% of the NPT population reported that their day-to-day activities are limited a lot or a little by long-term health problems or disability; this is the highest rate in Wales. **12**

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* Smoking rates in NPT have declined from 29% in 2003-2004 to 23% in 2013-2014 and are set to decline further to 17.4% by 2025. **13, 14**
* The proportion of adults eating a healthy diet (5 or more portions of fruit and vegetables a day) is predicted to decline from 27% in 2014 to 13% in 2025. **13**
* Childhood vaccination rates for NPT are above the recommended 95% for all vaccinations given to those under a year old, however by the time they reach the age of 4 years only 85.4% of children are up to date in 2015-2016 **15**

**Effects of an Ageing Population**

* Hospital admissions from falls in those aged 65+ is predicted to increase from 700 in 2015 to around 1,100 in 2035
* The number of people aged 75+ with a limiting long-term illness in NPT is projected to increase from 5,461 in 2015 to 8,947 by 2035 – a 63% increase **10**
* A 50% increase in the number of people ages 65+ in NPT unable to carry out at least one mobility activity on their own is projected by 2035. A 41% increases is anticipated around continence, and a 46% increase in those requiring support to perform household tasks and manage self-care. The largest increases are amongst those aged 80+ **10**
* Projections of demand show a rise of 71% in the number of older people in Wales requiring residential care by 2030. The projections also show a 61% rise in the number requiring some form of community based services by 2030 **6**
* Over 17,000 people aged 65+ years have been predicted to be living alone in the NPT area by 2035, an increase of 33%. **10**
* The number of people aged 75+ receiving a residential care service from NPT social services is estimated to increase from 514 in 2015 to 1,009 by 2035 – an increase of 96%. **10**

**Wellness in the Workforce**

* Approximately 9,500 adults in NPT were in receipt of Disability Living Allowance of Personal Independence Payments in 2015.
* In NPT the projected numbers of working aged adults reporting Limiting Long Term Illness is set to stay approximately stable, dropping slightly from 8850 in 2015 to 8200 in 2035. **10**
* Similarly, the proportion of adults with a mental health problem or learning disability in NPT is predicted to stay approximately stable. **10**

**Carers**

* In NPT, approximately 20,150 adults provide unpaid care for an hour or more a week; 6,800 adults provide 50 hours or more of unpaid care a week. **10**
* 4,076 adults aged 16-64 provide 19 or more hours of unpaid care a week; this is set to drop slightly to 3,755 by 2035. **10**
* 2,060 adults aged 65+ years provide 50 or more hours of unpaid care per week; this is set to rise to 3,550 by 2035. **10**
* Approximately 50 children currently provide this level of unpaid care and this is set to remain approximately stable. **10**
* The number of children in the care of social services in NPT is the 135 per 10,000 children aged under 18; this has risen sharply from 88 per 10,000 in 2006. **16**

**References**

**6** Wales Public Services 2025 <http://www.walespublicservices2025.org.uk/papers>

**7** Joint Strategic Needs Assessment (2015) Western Bay

**8** Kings Fund Spending on Health and Social Care over the Next 50 Years, 2013 (p.40) <http://www.kingsfund.org.uk/sites/files/kf/field/field_publication_file/Spending%20on%20health%20...%2050%20years%20low%20res%20for%20web.pdf>

**9** Future Pressures on Welsh Public Services (2013) <http://www.walespublicservices2025.org.uk/2013/09/26/new-report-by-mark-jeffs-wales-public-services-2025/>

**10** Daffodil <http://www.daffodilcymru.org.uk/index.php?&PHPSESSID=hiagi2itbtfjoufr8qp5l71sp6&areaID=20&np=1>

**11** Measuring Inequalities 2016 (2016) Public Health Wales Observatory

**12** 2011 Census: A snapshot of key health, employment and qualification indicators (2013) Public Health Wales Observatory

[http://nww2.nphs.wales.nhs.uk:8080/PubHObservatoryProjDocs.nsf/($All)/AAAA4A637399274480257B3C004C739A/$File/2011%20Census%20Profile%20ABMU\_v2a.pdf?OpenElement](http://nww2.nphs.wales.nhs.uk:8080/PubHObservatoryProjDocs.nsf/%28%24All%29/AAAA4A637399274480257B3C004C739A/%24File/2011%20Census%20Profile%20ABMU_v2a.pdf?OpenElement)

**3** Welsh Health Survey lifestyle trends (2015) Public Health Wales Observatory

**4** WBFG Projections Tool (2016) Public Health Wales Observatory

**5** COVER report 2015/16 [http://nww2.nphs.wales.nhs.uk:8080/CommunitySurveillanceDocs.nsf/3dc04669c9e1eaa880257062003b246b/59f98cb09086438780257fc0004c5041/$FILE/COVER20152016\_v1.pdf](http://nww2.nphs.wales.nhs.uk:8080/CommunitySurveillanceDocs.nsf/3dc04669c9e1eaa880257062003b246b/59f98cb09086438780257fc0004c5041/%24FILE/COVER20152016_v1.pdf)

**6** Stats Wales <https://statswales.gov.wales/Catalogue/Health-and-Social-Care/Social-Services/Childrens-Services/Children-Looked-After/childrenlookedafterat31marchper10000population-localauthority-year>

Section 3: POVERTY AND DEPRIVATION

**Key Trends**

* More than £1bn will be taken out of the Welsh economy when current welfare reforms come to fruition17
* The estimated financial loss arising from welfare reform in terms of loss per working age adult per annum across the 42 wards in Neath Port Talbot ranges from £410 p.a. to £940 p.a. **17**
* Digital inclusion is a fast growing trend

 **Welfare Reform**

* When the current welfare reforms come to full fruition they will take more than £1bn a year out of the Welsh economy – equivalent to £550 a year per adult of working age. Substantially more than the GB average (£470)**17**
* Welfare reform is likely to have a significant impact on Neath Port Talbots’ residents.
* Out of the 40 wards in the welsh valleys facing the greatest financial loss per adult of working age, three wards within Neath Port Talbot are within the top 10 of wards worse affected**17**
* Projections to 2020, show a likely increase in the number of children in poverty
* Economic austerity and cuts to benefit entitlement will continue to affect residents
* Funding changes for anti-poverty programmes and European Funding creates uncertainty in terms of the support provided to communities.
* Digital Inclusion is a fast growing trend.
* Employment initiatives need to ensure they are co-ordinated and seamless in order for the correct support to be available to those who are fit for work. An Engagement Providers Group (EPG) is currently co-ordinating employment initiatives.
* Far reaching welfare reform will have significant impact on Neath Port Talbot’s individuals and communities. The estimated financial loss arising from welfare reform in terms of loss per working age adult per annum across the 42 wards in Neath Port Talbot ranges from £410 p.a. to £940 p.a. **17**
* Evidence suggests that each £1 of income lost could impact the wider economy due to a multiplier effect estimated at somewhere in the range of £1 - £1.50 **18**
* Wales Public Services 2025 estimates the impact on Wales of Welfare Reform may remove £1 billion from the Welsh economy **19**
* Cuts to benefits and more stringent entitlement rules may push people out of unemployment and into crime activities. There is also some evidence that the timing and frequency of welfare payments can impact on crime levels. **18**
* A major study of universal credit relevant clients undertaken by Citizens Advice in 2013 found two thirds of participants (66%) were unable to get online to manage a claim at the initial assessment stage. Demand to increase skills will increase as services increasingly become digital by default. **20**

**Household Consumption Trends**

* The 2010-2020 Food Strategy for Wales acknowledges the World Bank’s forecast that the world’s increasing population will lead to an increase in demand on food supply resulting in higher input and output commodity prices. **21**
* Even relatively benign unwinding of today’s emergency interest rate position allied with anticipated growth in household incomes has the potential to roughly double the number of households facing some form of repayment problem by 2018. **22**
* The Centre for Economics and Business Research forecast annual food bill increases of £350 between now and 2019. **23**
* Demand for energy is predicted to be 53% higher in 2030 than in 2004. **24**
* Demand for gas is set to increase by 60% globally. **24**

**Poverty**

* The Child Poverty Act 2010, makes the target to eradicate child poverty by 2020 a legal requirement. **25** Recent projections however show there are set to be 700,000 more children in relative poverty (both before and after housing costs) by 2020 than there were in 2010. **26**
* Pensioner poverty is reducing with the growing issue of working-age poverty and resurgence in child poverty being the key concern in the coming years. **27** Joseph Rowntree Foundation research suggests that over 217,000 people lacked but wanted work in 2012 and suggest that jobs will be scarce in Wales for a long time. **28**
* The forecast across Europe is that poverty and deprivation will rise from 120 million to 145 million by 2020. **24**
* It is estimated that 19% of adults in Wales are still not online and there are worries that they’re missing out on opportunities to save money, look for work, find information, learn new skills and access important services. **29**
* Over the period 2011 to 2016, unemployment in Neath Port Talbot has decreased from 10.1% in 2011 to 6.4% in 2016. In comparison; the Welsh average has decreased from 8.5% in 2011 to 5% in 2016. **30**

**References**

**17** Sheffield Hallam University Centre for Regional Economic and Social Research, The Impact of Welfare Reform on the Valleys, Christine Beatty and Steve Fothergill <https://www4.shu.ac.uk/research/cresr/sites/shu.ac.uk/files/welsh-valleys-report-2014.pdf>

**18** Analysing the impact of UK Government Welfare Reforms in Wales [httP://wales.gov.uk/docs/dcells/publications/120228welfareformen.pdf](http://wales.gov.uk/docs/dcells/publications/120228welfareformen.pdf)

**19**Future pressures on Welsh Public Services Summary Report <http://www.walespublicservies2025.org.uk/wp-content/uploads/2013/09/Mark-jeffs-wps2025-summary-report1.pdf>

**20** One day at a time, Citizens Advice Bureau <http://www.citizensadvice.org.uk/index/policy/policy_publications/cr_wales/one_day_at_a_time.htm>

**21 Food for** Wales, Food From Wales 2010-2020 Food Strategy, Welsh Government 2010 <http://www.physicalactivityandnutritionwales.org.uk/documents/740/food%20strategy%202010-2020-eng.pdf>

**22** Hangover Cure: Dealing with Household Debt Overcare, July 2014, Resolution Foundation <http://www.resolutionfoundation.org/media/media/downloads/hangover_cure_dealing_with_the_household_debt_overhang_as_interest_rates_rise_1.pdf>.

**23** The Wales we want factsheet – poverty and deprivation <http://thewaleswewant.co.uk/sites/default/files/resources/poverty%20and%20deprivation%20factsheet.pdf>

**24** Generation 2050 – WLGA <http://www.wlga.gov.uk/sustainable-development-publications/generation-2050-better-long-term-decision-making-l-a-resource-for-local-government>

**25**<http://www.ifs.org.uk/publications/5711>

**26**<http://cpag.org.uk/sites/default/files/programme_for_government_2015_2020_CPAG.pdf>

**27**<http://www.ifs.org.uk/comms/r81.pdf>

**28**<http://www.jrf.org.uk/publications/monitoring-poverty-wales-2013>

**29** ONS (2016) Annual Population Survey

**30** Official Digital Exclusion figures sourced from National Survey of Wales 2014/15

Section 4: HOUSING

**Key Trends**

* Demand for energy is predicted to be 53% higher in 2030 than in 2004
* Demand for gas is set to increase by 60% globally
* There is a requirement for social housing
* There is a need for adapted/adaptable accommodation
* The dominant form of housing tenure continues to be owner-occupation
* The private rented sector has grown significantly in the past decade and can be expected to grow further in response to demand and supply factors.
* Welfare reform continues to impact on housing demand
* One-bed properties for the prevention and relief of homelessness are becoming increasingly difficult to secure.
* There is a need for additional Gypsy and Traveller Pitches
* Regeneration funding mainly aimed at making homes more energy efficient and bringing families out of fuel poverty.

**Housing Demand Requirements**

The Local Housing Strategy identifies the need for additional housing and identifies a requirement for affordable housing across areas of Neath Port Talbot. The market requirement is more heavily focussed on 3 bed properties; while a range of dwelling sizes are required in the social rented sector. It is noted that the impact of welfare reform may see the need for smaller social dwelling rise.

Projecting Housing Requirements: Size mix of housing requirements to 2026

|  |  |
| --- | --- |
| Housing Size | Number of Dwellings Required |
| **Market Housing** | **Affordable Housing** | **TOTAL** |
| **Intermediate** | **Social** |
| **Net Requirement 2010-2026** |  |  |  |  |
| 1 bedroom | 500 | -   | 900 | **1,400** |
| 2 bedrooms | 1,400 | -   | 1,100 | **2,500** |
| 3 bedrooms | 2,600 | -   | 1,000 | **3,600** |
| 4+ bedrooms | 500 | -   | 100 | **600** |
| **Total** | **5,000** | **-** | **3,100** | **8,000** |

The map below shows the housing requirements for subareas of Neath Port Talbot to 2026.

* The LDP will need to provide for about 8000 new dwellings by 2026 within NPT. There is a need for greater variety of size and tenure mix improvements are needed to meet housing standards and energy efficiency targets.
* The number of households in Wales will grow significantly, particularly single person households. Single person households are projected to grow by 18.2% from 18,295 in 2011 to 21,629 in 2036.
* Housing construction is not keeping pace with demand, which is expected to contribute to house price inflation in the long term.
* By 2020, the Welsh Quality Standard requires all Social Landlords to improve their housing stock to an acceptable level.
* In order to meet 2050 carbon reduction we need to retrofit one building every minute for the next 40 years across the UK.

**Housing Standards**

* Inadequate housing causes or contributes to many preventable diseases and injuries, including respiratory nervous system and cardiovascular diseases and cancer31. Poor housing is estimated to cost the NHS at least £600 million a year. 31A
* Cold homes; In England and Wales trends in excess winter deaths have decreased by about 30 percent since 2008-2009, where they were 36,450 deaths attributable to all causes. In 2010/11 there were 25,700 excess winter deaths. The majority of these occurred among those aged 75 and over.
* From estimates of the Excess Winter Mortality Index (EWM Index) by the office for National Statistics, circulatory diseases caused 37% of excess winter deaths in 2009-2010. Respiratory diseases came in second and accounted for 32%. Other diseases attributable to excess winter mortality are dementia and Alzheimer’s disease, injury and poisoning **31B**
* Cold homes are one contributor to this, and increase the risk of cardiovascular, respiratory and rheumatoid diseases as well as hypothermia and poorer mental health. Older, retired people are particularly at risk. **31B**
* Our local housing strategy has a vison that **Housing in Neath Port Talbot will be appropriate, affordable, of good quality, in sustainable communities, offering people choice and support if they need it. 31C**
* The Welsh Government has set a target for all social landlords to improve their housing stock to meet the Welsh Housing Quality Standard by 2020.
* Housing (Wales) Act 2014 requires all Private Rented Housing landlords to register and agents and self-managing landlords to obtain a license.
* Welsh Government, Welsh Local Government Association and Community Housing Cymru have a Housing Supply Delivery pact, underlining the importance of partnership working in delivering 20,000 affordable homes (across Wales) by 2021
* Housing (Wales) Act 2014 places homelessness prevention at the centre of Local Authority duties and in fulfilment of this duty the Local Authority needs the support of housing providers and other partners.
* Across Wales 140,000 properties (12%) are at risk of flooding which is likely to increase with rising sea levels by 2040.56
* The Welsh Governments ARBED funding is aimed at attracting additional Energy Company Obligation (ECO) funding from energy providers to raise properties out of fuel poverty and sever poverty by making the homes more energy efficient
* In order to deliver the 7,800 new dwellings required to meet the economic-led growth strategy, the LDP has made provision for the development of 8,760 additional dwellings in the period 2011-2026.

**Sustainability**

* A strategic housing response is needed to provide, inter alia more social housing, adapted housing solutions and housing to meet changing and evolving needs, including independent living and other affordable housing solutions.
* In NPT people are supported longer in their own homes.
* Changes in legislation have increased the number of suitable properties required to discharge the council’s statutory homelessness duties by over 80%.
* We can expect to the following
* Population aged 65+ in 2016 = 28,700, projected to increase to 37,680 by 2035 (+31.3%
* Living alone (aged 16+) in 2016 = 30,014, predicted to increase to 33,054 by 2035 (+10.1%)
* Living alone (aged 65+) in 2016 = 13,004, predicted to increase to 17,064 by 2035 (+31.2%)
* Limiting long term illness (LLTI):
	+ Age 18+ = 18,989 in 2016, increasing to 22,036 by 2035 (16+%)
	+ Age 65+ = 10,104 in 2016, increasing to 13,826 by 2035 (+36.8%)
	+ Total population aged 18+ predicted to have a learning disability (baseline) = 2,637 in 2016, rising to 2,696 in 2035 (+2.2%)

**References**

**31** – World Health Organisation Regional Office for Europe (2012) Report. Environmental Health Inequalities in Europe

**31A** – Building Research Establishment and the Chartered Institute of Environmental Health (2010). Good housing leads to good health.

**31B** – Office for National Statistics (2010). Statistical bulletin. Excess winter Mortality in England and Wales, 2010/11 (provisional) and 2009-2010 (final)

**31C** - <https://www.npt.gov.uk/pdf/NPTCBC_Local_Housing_Strategy_2015.pdf>

Section 5: EDUCATION, EMPLOYMENT AND SKILLS

**Key Trends**

* There is expected to be a 28.6% increase in the numbers of children and young people displaying challenging behaviour by 2030.**33**
* The population of Neath Port Talbot (aged 16-64) is expected to decrease by 5.7% by 2030.**34**
* Occupations in greatest decline include skilled metal, electrical and electronic trades, process plants and machine operatives, protective service occupations and textiles and printing trades (foot note needed - Education and Skills Trends).

**Schools**

* In NPT, by 2030, there are expected to be 0.5% less people aged under 18 than there were in 2015. This should be compared to projections for Wales, where the child population is expected to grow by 2.4% in the same period.**32**
* In NPT, there is predicted to be a slight 0.36% increase in the number of primary aged pupils between 2016 and 2022. There is predicted to be a 13% increase in secondary aged pupils.
* An increase in school age children across Wales by 2025 indicates although there are often surplus places particularly at urban schools in the short term. In the longer term, there is likely to be a significant shortage of school places.**32**
* Current policy scenarios show that spending on education is due to rise to 20% from 16.5% by 2024-25 as a proportion of Welsh Government’s devolved revenue budget. **32**
* The percentage of age 11 pupils in Year 6 Welsh Medium Education is projected to slightly rise from 16.76% in 2013 to 16.80% in 2022
* There will be an increase in numbers of children and young people with a learning disability of 19.3% by 2030.**33**
* There is expected to be a 28.6% increase in the numbers of children and young people displaying challenging behaviour by 2030.**33**

**Employment & Skills**

* The population of Neath Port Talbot (aged 16-64) is expected to decrease by 5.7% by 2030. **34**
* The population of over those aged 65 and over is expected to increase by 24.8% by 2030. **35**
* With the aging population expanding, there is greater strain on specific employment areas, e.g. the Health Sector. **34**
* Employment levels across the sectors are expected to rise by 3.2% by 2030 **34**
* The qualification profile of people employed in Wales has improved and is projected to continue to improve by 2020. Skills supply is rising with 40% of employed people at Level 4 or above by 2020 (foot note needed - Education and Skills Trends).
* Occupations in greatest decline include skilled metal, electrical and electronic trades, process plants and machine operatives, protective service occupations and textiles and printing trades (foot note needed - Education and Skills Trends).
* There is very little provision for agricultural and animal care skill development which fails to address projected growth in and around the Swansea area, emerging food security issues and the WG prioritisation of the Food and Farming sector (foot note needed - Education and Skills Trends).
* The sector Skills Council has identified that there is a future demand for Welsh language written and oral skills particularly in customer facing roles (foot note needed - Education and Skills Trends).
* Administration accounting and finance is not currently offered widely at 16-18 and administration, management and directorial occupations are forecast to increase by 2030 (foot note needed - Education and Skills Trends).
* The low-carbon transition will require a combination of skills across different sectors and it is vital that these are available – for example, with 80% of employees in the energy sector due to retire within the next 10-15 years a pipeline of sufficiently skilled workers will be necessary

**The Sectors listed below are experiencing the greatest levels of growth (up until 2030)**

* The Health sector is expected to see the largest increase in employment @ 2.1.2% **33**
* Feedback from employers in the Health Sector within NPT indicates that applicants require a driving licence and access to their own vehicle. This is a requirement that applicants often cannot meet. **36**
* There is a growing demand for caring and personal service occupations including care assistants.

In this sector, qualifications are considered to be valuable and relevant. **36**

* Supply of staff is challenging due to the time required to develop qualifications, e.g. the time to progress through level 2, level 3 and level 4 qualifications, often whilst employed. **36**

The skills that applicants require are transferable skills such as: **36**

* Numeracy skills (within elementary and professional level occupations)
* Literacy skills (within elementary and professional level occupations)
* Customer service skills
* Management and leadership skills
* Digital Literacy skills, e.g. productivity (Technology skills)
* Change management skills and the ability to work collaboratively, e.g. multi-agency working.

The Real Estate Sector will experience the largest growth in terms of GVA @ 215.2%.The issues for the sector are: **36**

* There are significant barriers to training (lack of time, financial constraints, staff reluctance, high staff turnover and language barriers);
* It is characterised by an ageing workforce - implications for use of technology;
* There is a need to attract more young people to the profession by developing/delivering qualifications (especially for services to buildings and the landscapes sub-sector).

The skills that applicants requireare transferable skills such as: **36**

* Written communication skills (especially report writing skills);
* Digital Literacy skills, e.g. using a website and social media (Technology skills);
* English for speakers of other languages (ESOL);
* Management and leadership skills;
* Change management skills;
* Technical skills;
* Energy management skills and knowledge (Greens skills);
* Policy and legislation knowledge.

The Service Sector is expected to create the most job opportunities during 2017 and beyond**36.** There are expected to be:

* Increasing jobs in the retail sector;
* Increasing jobs in the hospitality sector;
* Increasing jobs in the call centre sector.

The skills that applicants requireare**36**

* Confidence
* Communication skills
* Presentable appearance
* Ability to work as a team
* Innovation
* Flexibility
* Ability to absorb instructions.

The Construction Sector is expected to create job opportunities during 2017 and beyond**36.**

Specifically there is a skills shortage above ground level, i.e.:

* Skilled occupations;
* Corporate managers;
* Applicants qualified up to level 4+.

As many construction workers are self-employed there is also a need for the following skill development36:

* Basic business skills;
* Entrepreneurship skills.

The Tourism Sectoris projected to demonstrate a range of employment growth across**36:**

* Recreational services;
* Food and beverage services;
* Arts services;
* Accommodation services.

The skills that applicants require are. 36

* Management and leadership skills.

The Business Support Services Sector is pan-sector, which means that they are required and used in all industries. 36

The skills that applicants require are 36:

* Communication skills ;
* Numeracy skills;
* Digital Literacy skills;
* Creativity and problem solving skills;
* Team working skills;
* Time management skills;
* Customer service skills;
* Management and leadership skills.

**References**

**32** daffodilcymru.org.uk

**33** Future Pressures on Welsh Public Services (2013) <http://www.walespublicservices2025.org.uk/2013/09/26/new-report-by-mark-jeffs-wales-public-services-2025/>

**34**<https://statswales.gov.wales/Catalogue/Population-and-Migration/Population/Projections/Local-Authority/2011-Based/PopulationProjections-By-LocalAuthority-Year>

**35**<http://www.rlp.org.uk/wp-content/uploads/NPT_LMI.pdf>

**36** Port Talbot JCP

Section 6: INFRASTRUCTURE AND ENERGY

**Key Trends**

* The U.K government will fund the upgrade of the Swansea-London mainline by 2018, and will pay almost half an estimated £500 to electrify the Valley lines. **37**
* Wales has a set target for an 80% greenhouse gas emission by 2050.
* The UK Government will fund the upgrade of the Swansea-London train line by 2018

**Projections in Neath Port Talbot 38**

* Analysis suggests that the projected employment levels in Neath Port Talbot were 54,300 in 2013. Over a seventeen year period to 2030, employment levels are expected to increase by 1,800 up to a total of 56,100 at a county level
* Sectors with the greatest increase in projected employment to 2030 are:
* Health, Real estate, Construction, Food & Beverage Services and Business Support Services.

**Energy 39**

* Increasing use of social media – both for work and social purposes this has the potential to change the demand for transport as people become connected via internet services and less often face to face.
* Increasing use of downloaded entertainment media. This trend could reduce travel demand (with a reduction in carbon emissions) and reduce social Isolation for those living in rural communities.
* The Environment (Wales) Bill will re-affirm the target for an 80% greenhouse gas emission reduction by 2050 and introduce interim targets from 2016-2050.
* From 2016, Welsh Ministers will set Carbon Budgets on the total amount of emissions that can be entitled in Wales. The first two carbon budgets for the periods of 2016-2020 and 2021-2025 will be set before the end of 2018.
* Global energy demand projected to increase by 45% between 2007 and 2030 and could double between now and 2050. Energy prices are projected to rise and become more volatile.
* The Welsh Government has set a target of Energy/Fuel prices which are predicted to continue to rise by 2040.
* GDP, growth and productivity will decline if new and cost-effective non-oil energy sources are not found fast to protect future growth and prosperity.
* £330bn of investment is needed in UK energy infrastructure by 2030.
* 14% of electricity was generated from renewable sources in 2013, a 300% increase from 10 years ago. There will be an increasing intent to utilise NPT’s natural resources to generate renewable energy. NPT have fully embraced and supported the implementation and installation of wind technology throughout the Authority and have the intent of increasing the uptake of hydro/tidal and solar power etc.
* NPTCBC are investigating how to implement and deliver distributed energy generation clusters, which will involve the investment and development of a renewable energy clusters centred around local industry and the surrounding community. Energy clusters will act as an economic development catalyst as well as promoting and supporting other economic development activities in localities and areas that have proved historically difficult to regenerate.

**Transport**

* The UK government will fund the upgrade of the Swansea-London mainline by 2018, and will pay almost half an estimated £500m to electrify the Valley lines.
* The occupations projected to increase the most in terms of employment by 2030 are caring personal service occupations, teaching and educational professionals and corporate managers and directors, business and associate public service administrators and administrative occupations. Occupations in greatest decline include skilled metal, electrical and electronic trades, process plants and machine operatives, protective service occupations and textiles and printing trades.
* The high incidence of small and medium sized enterprises (SMEs) and self-employed individuals in the County suggest basic business and management skills training which support entrepreneurship should be encouraged.

**Infrastructure 40**

* By 2035 the UK population is estimated to be 71-75 million – an increase of at least eight million from the current figure.
* Not only will there be more of us but we’ll be a little older as well – over the next 25 years the number of people aged 65 and over is expected to rise by 65%, to 16.4 million.
* A study based on 274 global cities of all sizes suggests that if current trends for urban expansion continue, urban energy use will increase threefold by 2050 compared to 2005.

**References**

**37**<https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/409774-1230-internet-of-things-review.pdf>

**38**<http://www.rlp.org.uk/wp-content/uploads/NPT_LMI.pdf>

**39**<https://www.npt.gov.uk/pdf/Joint_LTP_300115.pdf>

**40**<http://d3cez36w5wymxj.cloudfront.net/migrated/The%20future%20of%20transport%20overview.pdf>

Section 7: NATURAL RESOURCES AND ENVIRONMENT

**Key Trends**

* Demand for natural resources (food, water, energy) is likely to substantially increase.
* Welsh Government have set a target of zero waste for Wales by 2050 Swansea’s Water Resource Zone, Tywi Gower is predicted to be in surplus by 2040.
* Air quality will continue to be an issue for health unless action is taken to address it.
* Biodiversity will continue to decline, having impacts on food production and the health of our ecosystems unless action is taken to address it.
* Less predictable weather and extreme weather events are likely to become more common.
* There is an increasing conflict of interest for our environment – agriculture, industry, communities, housing, energy, construction and tourism.

**Air Quality**

* Targets for nitrogen dioxide, particulate matter, nickel and polycyclic aromatic hydrocarbons are being breached in Wales, posing a threat to human health and the natural environment.
* The decline in heavy industry along aside regulation has resulted in a reduction in emissions of some pollutants such as particulate matter (PM). Other sources that are subject to less or no regulatory control such as transport, agriculture and domestic heating have become more of a concern.
* PM and nitrogen dioxide concentrations in urban areas and adjacent to major roads are an issue for health.
* Peak ground level ozone concentrations have declined over the past 30 years. Over the same period, background concentrations have been steadily increasing across northern Europe by approximately 0.2ppb annually, leading to damage to some plant species.
* Ammonia remains an issue, both as a local air pollutant and as a contributor to the formation of secondary particulate matter. Concentrations of secondary particulate matter have risen in Wales in recent years, largely due to changes in agricultural practice.
* 90% of semi-natural nitrogen sensitive Welsh habitats are subject to nitrogen deposition in excess of critical load limits. Put another way, the majority of semi-natural nitrogen sensitive habitats are receiving nitrogen from the surrounding environment at a level beyond that which it can cope with.
* Since controls on air pollution were introduced in the 1980’s there has been a significant recovery in surface water quality from the effects of acidification.

**Animals, Plants and Other Organisms**

* The abundance of species is predicted to decline by 9-17% by 2050 with a loss of over a million species globally. **41I**
* 56 per cent of the species have declined over recent decades. More than one in ten of all the species assessed are under threat of disappearing from our shores altogether.(State of Nature Report 2016 RSPB)
* Trends of extent and population for terrestrial, freshwater and marine species vary enormously; with some species increasing and some decreasing. For instance, both increases and decreases can be seen in birds, bats and many pollinator species (e.g. bees, butterflies) whilst for many species we do not have sufficient data on which to base any conclusions.
* There has been a marked reduction in the abundance of salmon in recent years, particularly in the southern regions of the species’ range which is linked to increased mortality at sea. Although stocks in many of our industrial rivers have improved in the last 30 years, most stocks in Wales are severely challenged.
* All species are directly affected by changes in habitat quantity and quality. These changes are directly related to changes in the intensity of management regimes. Fragmentation and eutrophication create particular problems for many species.
* The Climate Change Risk Assessment Evidence Report 2017 (CCRA17) has identified risks to species and habitats due to their inability to respond to changing climatic conditions. There may also be opportunities from new species colonisations.
* Climate change is predicted to affect the amount and distribution of rainfall; this has an impact on flows and water levels, drought and flood events; by 2050 river flows in winter may rise by 10-15% but in the summer and early autumn could reduce by over 50% and as much as 80% in some places.
* Droughts and flood events may become more common.
* By 2025 it is likely that groundwater recharge will decrease, resulting in decreased dry weather river flows and a general lowering of groundwater levels. This may have impacts on base-flow to rivers and wetlands in dry periods and affects small domestic and agricultural water supplies.
* The CCRA17 Evidence Report has identified risks to aquifers and habitats from salt water intrusion.
* Climate change effects include changes to tidal levels due to sea-level rise and increased storminess leading to increases in wave energy posing risks to infrastructure.
* Hydrological processes provide an important resource for wave, tidal stream and tidal range renewable energy.
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**Soils**

* Topsoil carbon concentrations are generally stable and there is ongoing recovery from soil acidification, it remains above the optimum levels in many (44%) agricultural fields. There has been little or no decline in elevated levels of soil contaminants from industry and transport. Although a significant decline in soil phosphorus levels has been seen for Improved Land. Soil invertebrate (mesofauna) numbers indicate no overall trend.
* The CCRA17 Evidence Report has identified risks to soils from increased seasonal aridity and wetness. Climate change related risks are threatening the many services that soils provide, notably those that relate to soil biota, soil organic matter, and soil erosion and compaction.

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**Food and Agriculture**

* The value of pollination as a contribution to the UK crop market in 2007 was £430 million and the cost of hand pollination, were we to lose this valuable service, has been estimated at £1.8 billion per year in the UK. Pollinators are declining populations e.g. honeybees showed a 23% decline in Wales between 1985 and 2005.**41G**
* By 2025 it is likely that groundwater recharge will decrease, resulting in decreased dry weather river flows and a general lowering of groundwater levels. This may have impacts on base-flow to rivers and wetlands in dry periods and affects small domestic and agricultural water supplies.
* There is an increasing conflict of interest for our environment – agriculture, industry, communities, housing, energy, construction, tourism.**41A**
* Britain is likely to become less self-sufficient in food production in the future, current production currently stands at 60% of the food it consumes but has been falling year on year.**41B**
* It is estimated that by 2050 developing countries’ net imports of cereals will more than double from 135 million metric tonnes in 2008/09 to 300 million in 205098, increasing competition for food globally and driving the price of grains up.**41C**

**Waste**

* There will be growth pressures on waste services. After education and social care, waste is the largest area of local authority spending.**41D**
* Waste sent to landfill in Wales continued to decrease. This has reduced by 2% (37,000 tonnes) between 2011 and 2012 and by 51% since 2001.There is only 10 years of landfill capacity left in south west Wales.**41E**
* Welsh Government have set a target of zero waste for Wales by 2050 (65% reduction on *total waste*), and have an intermediary target of 70% reduction in municipal waste by 2025.**41F**



**Pollution**

* Health impacts from air pollution will increase worldwide, with the number of premature deaths due to urban ozone exposure set to increase by 300% in Europe by 2030.
* Central UK Government has stated that almost every new car and van needs to be zero-emission at the tailpipe by 2040.

**Water**

* Water demand is forecast to reduce from now to 2040 due to reduced leakage and water efficiency improvements amongst customers. Swansea’s Water Resource Zone, Tywi Gower is predicted to be in surplus in 2040.**41H**
* The projections show that total water demand for food and drink manufacturing only decreases under the sustainable behaviour scenario (28%). In contrast total water demand was found to increase under the uncontrolled demand (70%)
.
1. What role do services have in building the capacity of eco-system services to take on this function?
2. How well understood is the role that natural resources make to wellbeing?
3. What are the key threats and opportunities in relation to these benefits being sustained in the future and what role can the PSB play in protecting and increasing these benefits?

**References**

**41A** Wales we want – <http://www.thewaleswewant.co.uk/sites/default/files/resources/environment%20factsheet.pdf>

**41B** – BBSRC Food Security – <http://www.bbsrc.ac.uk/research/topical/food/food-index.aspx>

**41C** – Future of Food and Farming Report – <https://www.gov.uk/government/publications/future-of-food-and-farming>

**41D** - Future pressure on welsh public services 2025 – [www.walespublicservices2025.org.uk/wp-content/uploads/2013/09/mark-jeffs-wps2025-summary-report1.pdf](http://www.walespublicservices2025.org.uk/wp-content/uploads/2013/09/mark-jeffs-wps2025-summary-report1.pdf)

**41E** - Wales Waste Data 2012 – <http://naturalresourceswales.gov.uk/content/docs/pdfs/our-work/policy-advice-and-guidance/87161/wales-waste-data-2012.pdf?lang=en>

**41F** – Towards Zero Waste – <http://wales.gov.uk/topics/environmentcountryside/epq/waste_recycling/publication/towardszero/?lang=en>

**41G** – Consultation on Action Plan for Pollinators – <http://www.senedd.assemblywales.org/documents/s17661/consultation%20on%20the%20draft%20action%20plan%20for%20pollinators%20in%20wales.pdf>

**41H** – Welsh Water – Water Resources Management Plan 2014 – <http://www.dwrcymru.co.uk/~/media/files/environment/2013/water%20resources%20page/wrmp%202014%20summary%20report%20Final%20English%20v2%20%20%20with%20cover%202.ashx>

**41I** – Biodiversity Scenarios: Projections of 21st Century Change in Biodiversity and Associated Ecosystem Services – <http://www.cbd.int/doc/publications/cbd-ts-50-en.pdf>

Section 8: CLIMATE CHANGE ADAPTATION

**Key Trends**

* Summer temperatures are likely to increase in Wales between 1.2°C-4.1°C by 2050.
* There is an increased likelihood of extreme weather events.
* Risks include extreme temperatures, flooding, storms, gales and droughts.

**Changes in Temperature**

Changes in daily mean temperatures in Wales by the 2050’s:

 Summer – between 1.2°C and 4.1°C

 Winter - between 1.1°C and 3.1°C

 Impacts:

* Hot weather related deaths and illnesses
* Overheating of buildings
* Environmental impacts – soil, biodiversity, ecosystems and landscapes
* Increased extreme weather events including flooding.
* Introduction of non-native pests and diseases

**Changes in Precipitation**

Changes in mean precipitation in Wales by the 2050’s suggest that there will not be a significant increase in overall annual precipitation however there will be a change in the distribution across the seasons:

 Winter precipitation - 2% to 30% increase

 Summer precipitation - 36% decrease to 6% increase

 Impacts:

* Low river flows and water availability
* Flooding and sea surge
* Agricultural production (crop and animal)
* Soil conditions
* Biodiversity and ecosystems and landscapes
* Economic services i.e. tourism
* Effects on native biodiversity and species viability

**.**

**Changes in Weather Events**

There is an increased likelihood of extreme weather events for example:

* An increased risk of extreme wet seasons and severe flooding - increased 2 fold
* An increased risk of extreme hot summers – increased 2 fold.
* An increased risk of exceptionally warm months 60 times more likely than 50 years ago
* A reduced risk of extreme cold weather in winter – half as likely
* An increase in sea temperatures by the 2050s – UKCP09 climate projections state that there will be an increase in temperature in the Irish Sea between 0.6°C and 2.3°C in the winter and 0.3°C and 2.9°C in the summer under the Medium emissions scenario.
* Increasing sea level rise – by a rate of 1 millimetre, this is a long established pattern±.
* Increase in the frequency of violent storms and gales.

Impacts:

* Flooding and sea surges - Coastal erosion, flooding related deaths and illnesses.
* Increase in droughts - Low river flows and water availability, agricultural production (crop and animal), Soil conditions, Biodiversity and ecosystems and landscapes, Economic services i.e. tourism.
* Increase in exceptionally warm months - Agricultural production (crop and animal), Soil conditions, Biodiversity and ecosystems and landscapes, introduction of non-native pests and diseases
* Increasing sea temperatures – changes / damage to aquaculture production (flora and fauna) biodiversity and ecosystems, economic services i.e. tourism.
* Increasing sea levels – Sea surges, coastal erosion, coastal flooding related deaths and incidents.
* Increase in the frequency of violent storms and gales - Coastal erosion, damage to ecosystems and landscapes, death or incidents from falling trees and debris

Section 9: ECONOMY AND EMPLOYMENT

**Key Trends**

* The LDP will need to make provision for a projected increase of 3,850 new jobs over the period 2011-2026.
* The main growth sector is likely to be in health and social care.

**Local Trends**

* The LDP will provide for the projected 3,850 new jobs over the period 2011-2026. **41** This represents an increase in jobs of 7.7%. **44**
* In Neath Port Talbot, the economic activity rate has increased from 68.9% in 2011 to 71.3% in 2016. Whilst the rate has increased, it is lower than the Welsh average of 75.2% (2016). **45**
* Over the period 2011 to 2016, unemployment in Neath Port Talbot has decreased from 10.1% in 2011 to 6.4% in 2016. In comparison; the Welsh average has decreased from 8.5% in 2011 to 5% in 2016. **46**
* In 2016 the average gross weekly earnings were £558 in Neath Port Talbot, marginally higher than the welsh average of £546. **47**
* Total GVA in Neath Port Talbot is projected to increase consistently from 2013-2030; the total increase of the 17 year period is expected to be £690.2 million. **48**

**National Trends**

* The Gross Value Added of the UK economy has increased steadily, from £1,192,787m in 2004 to £1,618,346m in 2014. In Wales, it has increased from £40,096m to £54,336m in the same period. **49**
* The population of the UK is aging. Between 2001 and 2015, the number of people aged 65+ in the UK increased from 9.73 million to 11.61 million. In Neath Port Talbot, this age cohort also increased from 24,636 in 2001 to 28,446 in 2015. **50**
* The ratio of the working age population to pensionable age population is projected to decrease, from 3.14 in 2010 to 2.61 in 2035. 51

 **Economy**

* In Neath Port Talbot, historically, the economy has been heavily influenced by steel production and other industrial activities.
* In 2010, the Neath Port Talbot share of knowledge economy employment was 6%, considerably less than the average of the whole of Wales at 12%. **52**
* A number of new developments, including the Swansea University Science and Innovation Campus on Fabian Way, development of the TWI Research and Development Centre at Harbourside and the redevelopment of Baglan Bay could help to stimulate spin off activity in the local area. **52**
* To support the local economy, there has been major investment in new infrastructure, including the PDR and Baglan Energy Park Link Bridge.

**Employment**

The following table indicates the potential change in jobs in Neath Port Talbot over the period 2010-2026: **52**

|  |  |  |
| --- | --- | --- |
| EE (adj+) | Total | Change 2010-2026 |
| 2010 | 2026 | No.  | % |
| Industrial jobs | 9,280 | 9,245 | -35 | -0.4% |
| Warehousing jobs | 5,832 | 6,414 | 583 | 10.0% |
| Office jobs | 9,960 | 10,640 | 680 | 6.8% |
| B-space jobs | 25,072 | 26,299 | 1,228 | 4.9% |
| Non B-space jobs | 25,065 | 27,684 | 2,619 | 10.4% |
| All jobs | 50,137 | 53,983 | 3,847 | 7.7% |

**To summarise key trends:**

* A decrease in traditional manufacturing jobs is projected, however, at a lower rate than previous trends;
* B Space jobs are jobs within the planning employment use class order, such as business, general industrial or storage and distribution. The increase in this sector is projected to be 4.9% over the period.
* Non B-Space jobs include jobs not within the traditional B classes, such as retail, education and health. Over half of the all new jobs are projected to be from service-led sectors, in particular there is projected to be an increase of 1,150 jobs in health and social care, representative mainly of growth in hospitals and residential care institutions to reflect the aging population;
* Also within non-B Space jobs, there is projected to be an increase of 500 jobs to reflect the expansion of the mining and utilities sectors with the energy sector expansion at Baglan Bay and proposed investment for a ‘super’ mine at Margam. **52**

Over the period 2011-2026, economic and job growth is projected to increase, with gains in ‘Professional Services’, ‘Administrative and Supportive Services’, ‘Education’ and ‘Health’. The largest increase in sectors are:

* Transport Equipment +54.8%
* Utilities +49.3%
* Professional Services +31%
* Real Estate +25.0%
* Computing and Information Services +22.7%
* Residential Care and Social Work +21.5% **52**

**Decreasing Sectors**

There are projected to be decreases in the following sectors over the period 2011-2026:

* Chemicals -84.6%
* Civil Engineering -74.6%
* Wood and Paper -49.1%
* Computer and Electronic Products – 46.7%
* Machinery and Equipment – 44.8%
* Food, Drink and Tobacco -42.9% **50**

**References**

**43**Neath Port Talbot Local Development Plan, Adopted January 2016

**44** PBA (2012) Economic Assessment & Employment Land Provision for Swansea and Neath Port Talbot

**45** ONS (2016) Labour Force Survey / Annual Population Survey

**46** ONS (2016) Annual Population Survey

**47** ONS (2016) Annual Survey of Hours and Earnings

**48** Regional Learning Partnership (2015) Labour Market & Curriculum Overview for Neath Port Talbot

**49** ONS (2014) Regional Gross Value Added (Income Approach) 1997 to 2014

**50** Welsh Government (2016) Mid-year Population Estimates

**51** House of Commons (2012) Population ageing: statistics

**52** PBA (2012) Economic Assessment & Employment Land Provision for Swansea and Neath Port Talbot

Section 10: COMMUNITY SAFETY

**Key Trends**

* Cyber-crime is likely to become more prevalent given the reliance on the internet.
* Recorded crime has been falling although anti-social behaviour has been increasing.
* Alcohol and drug use levels are increasing.

**Crime**

* Analysts suggest that greater incidents of internet crime, identity theft and knowledge and information crime will become more prevalent given the reliance on the internet.**53**
* Recorded crime has steadily been falling although perceptions of anti-social behaviour (noisy neighbours, litter, vandalism, graffiti, drug dealing etc.) have been on the rise.**53**
* Prison population in England and Wales is forecasted to increase by 2019.**54**
* Trends, means and patterns of radicalisation are evolving and have broadened across a range of ideologies.**55**

**Safety**

* Road Casualties are reducing.**53**
* Fire incidents and deaths are continuing to decrease.**53**
* Alcohol and drug use levels are not improving. **53**

**References**

**53** – The Wales we want – Community Safety – <http://thewaleswewant.co.uk/content/community-safety-factsheet>

**54** – Prison Population projections 2012 – 2018 England and Wales

* [https://www.gov.uk/government/uploads/system/uploads/attachment\_data/file218323/prison-pop-projections-2012-18.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file218323/prison-pop-projections-2012-18.pdf%2053)

**55** – Preventing radicalisation to terrorism and violent extremism: Strengthening the EU’s response – <http://ec.europa.eu/dgs/home-affairs/e-library/documents/policies/crisis-and-terrorism/radicalisation/docs/communication_on_preventing_radicalisation_and_violence_promoting_extremism_201301_en.pdf>

Section 11: TECHNOLOGY

**Key Trends**

* Technology and innovation could provide long-term catalysts for economic growth.
* Advances in data processing, energy, smart infrastructure, 3D printing and e-Health. By 2020, it is predicted that all UK citizens will have access to superfast broadband.
* Smart/intelligent functionality the increased uptake of householders to implement smart systems in conjunction with the low/zero carbon systems.

**Innovation**

* Materials: New materials and nanotechnologies will help support a range of technologies such as IT processing and 3D printing.
* Tools: will increase our understanding of human behaviour and society providing a greater source of evidence and analysis for underpinning policy and other decision making.
* Sensors: Light, motion and magnetism are becoming increasingly small and increasingly connected, with cheap sensors able to:

- Monitor the quality of drinking water

- Detect structural damage in buildings and vehicles

- Assist in achieving low and zero carbon buildings and homes

- Sense and measure pollution in the environment and help define interventions for the formulation of air quality and improvement plans

- Monitor and enable the optimisation of transportation systems

- Enable the delivery of smart/intelligent grids and buildings

- Assist in the development of healthcare programmes by the recording an analysis of health related data sources and the monitoring of vulnerable parties within the community.

**Internet & Communications Technology**

* Internet connections will move beyond traditional devices. Today, there are 14 billion objects connected to the internet. Industry analyst estimate the number of connected devices or objects (the internet of things) could be anywhere from 20 billion to 100billion by 2020.
* There are increasing trends for wider network availability; improved data management and storage (open-source software/ cloud-based data forcing IT budgets down); and more powerful analytics and application enabling organisation to understand vast quantities of data in near real-time.
* The demand by customers and businesses for a convergence of capabilities (e.g. voice, video, etc.) delivered over the internet is increasing, as business practices and lifestyle change and consumer technology evolves.
* By 2020, it is predicted that:

- All citizens will have access to 30Mbit/s (superfast broadband)

- 50% of all citizens, businesses and public sector organisations will have access to least 100Mbit/s.

- 67% of the UK population are engaged with social networks and this is set to rise more than three quarters by 2020.

**Smart Infrastructure**

* With the move towards decentralised electricity generation, there is the need for intelligent electricity distribution network systems which will require the upgrade of network to enable grid systems to be responsive and modulate to demand and supply accordingly and new instrumentation to support micro-generation.
* With the low increase in the number of localised electrical generation via renewable and low carbon systems the issue of network constraints will become more prevalent.
* There will be an increased need for electric vehicle recharging.
* All household should expect to have a smart meter installed by 2019.

**Energy Security**

* Increase in the construction of carbon neutral homes and the delivery of the concept of homes as power stations.
* Intermittent energy supply is seen as a major future challenge, but also a possible source (or accelerator) of innovation.
* Advances in renewable technologies and storage are expected to increase the localisation of energy generation in the future.
* New energy storage systems will play a role in providing back-up and the balance of generation and distribution systems, particularly those that can decouple power output and storage capacity.
* The SPECIFIC project led by Swansea University is helping to accelerate the deployment of renewable energy in the future. They are developing practical functional coated materials on the metals and glass that can be manufactured by industry in large volumes to produce, store and release energy at point of use.

Section 12: CULTURE AND HERITAGE

**Key Trends**

* In the last decade, Neath Port Talbot has seen a 2.76% decline in the number of Welsh speakers
* Third Sector organisations report a rise in demand for counselling, housing, financial and welfare advice. **58B**
* 391 Listed Buildings of which 45 are at serious risk, with a further 90 identified as needing close monitoring. **59**

**Welsh Language**

* The 2011 Census states that there were 20,698 people aged over 3 able to speak Welsh in Neath Port Talbot, 15.3% of the County’s population. This compares with a Wales average of 19% **57**
* 32.9% of Welsh speakers were aged between 5 and 15 suggesting that in the future the percentage of adult Welsh speakers may rise.
* There has been a 2.76% (2,706) decline in the number of Welsh Speakers over the last decade in Neath Port Talbot.
* Language Sensitive Areas where the proportion of Welsh speakers is 25% or more have also seen a reduction in the percentage of Welsh Speakers. In Cwmllynfell, the area of Neath Port Talbot with the highest concentration in 2001, the percentage fell from 68.23% in 2001 to 58.8% in 2011.

Welsh Language Projections in (Wales) of those aged 3 and over **58**

|  |  |
| --- | --- |
|  | Year |
| 2001 | 2011 | 2021 | 2031 |
| Number able to speak Welsh | 582,000 | 583,000 | 617,000 | 654,000 |
| % able to speak Welsh | 20.8% | 20.0% | 20.0% | 20.3% |

**Society**

* Volunteering has now increased generally despite a small decrease in 2013, and there is a trend away from single resource of payment such as government. **58A**
* In March 2014 a survey of Welsh households estimated that 37 percent of adults in Wales volunteer. **58A**
* Third Sector organisations report a rise in demand for counselling, housing, financial and welfare advice. **58B**

**Heritage**

12% of listed buildings in Neath Port Talbot are considered to be at risk.

Within NPT there are:

* 2 Designated Landscapes of Outstanding Historic Interest;
* 2 Designated Landscapes of Outstanding Historic Interest;
* Six Historic Parks and Gardens;
* Six Conservation Areas;
* 92 Ancient Monuments;

391 Listed Buildings of which 45 are at serious risk, with a further 90 identified as needing close monitoring. **59**

**References**

**57** All data is taken from the Submission LDP welsh Language Topic Paper 2014 [https://www.npt.gov.uk/ldp/CoreDocuments/(3)%20Background%20Topic%20Papers/ldp\_submission\_sd52.pdf](https://www.npt.gov.uk/ldp/CoreDocuments/%283%29%20Background%20Topic%20Papers/ldp_submission_sd52.pdf)

**58** A Statistical Overview of the Welsh Language <http://www.comisiynyddygymraeg.org/English/Publications%20List/A%20statistical%20overview%20of%20the%20Welsh%20language.pdf> (Table 15)

**58A** – Third Sector Statistical Resource 2014, WCVA (p.13) – <http://www.wcva.org.uk/media/1160375/wcva_almanac_2014_web.pdf>

**58B** – One Day at a Time, Citizens Advice Bureau, July 2014 (p.47) <http://www.citizensadvice.org.uk/index/policy/policy_publications/cr_wales/one_day_at_a_time.htm>

**59** All data is taken from the Submission LDP Environment Topic Paper 2014 [https://www.npt.gov.uk/ldp/CoreDocuments/(3)%20Background%20Topic%20Papers/ldp\_submission\_sd47.pdf](https://www.npt.gov.uk/ldp/CoreDocuments/%283%29%20Background%20Topic%20Papers/ldp_submission_sd47.pdf)