

Newport Childcare Sufficiency Assessment



Name of Local Authority: Newport City Council

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Acknowledgements

This report examines statistical information relating to private, public, and voluntary childcare and play providers within Newport City boundaries. However, it is acknowledged that the childcare and play sector is a complex one and can't only be explained through quantitative data alone. Without the engagement of the early years, childcare and play workforce, the detailed exploration of sufficiency of childcare would not have been achievable. Newport City Council would also like to acknowledge the resilience of the sector during the COVID-19 pandemic in the face of unprecedented challenges. Those challenges were met by the sector who continued to care for our children and young people throughout the pandemic with quality provision and continuity of care, particularly for those children who were our most vulnerable or who were children of key workers.

1. Executive Summary

The approach taken in conducting this assessment has been based on meeting the requirements of the statutory guidance document Childcare Statutory Guidance (2016) and the circular letter WGC 003 2021/WG21-28 “Childcare Statutory Guidance (2016): Securing Sufficient Childcare and Child Sufficiency Assessments” issued on March 15th, 2021.

The Childcare Act 2006 makes it clear in legislation the importance of the role Local Authorities should play in the provision of local childcare. It reinforces the need for local authorities to continue to work in partnership with the maintained, independent, private, voluntary, and community sectors to shape and secure children’s services and focuses in particular upon the provision of:-

- Sufficient, sustainable and flexible childcare that is responsive to parents’ needs; and
- Information, advice and assistance relating to childcare to parents, prospective parents and those with parental responsibility for a child

It is the responsibility of the local authority to secure ‘as far as is reasonably practical, sufficient childcare to meet the requirements of parents in their area who require childcare in order to work or to undertake training or education or to prepare for work.’

This means we need to work to ensure there are enough childcare places available to meet the demands of parents and carers in Newport. The Early Years Development and Childcare Partnership (EYDCP), which is made up of statutory, private and voluntary childcare related organisations, is working towards identifying the gaps in childcare provision in the area, and are consulting with parents, employers, childcare providers and children on this matter. What parents and carers tell us is important and will have a direct effect on the service we will provide in the future.

In line with the CSA statutory guidance, the Local Authority has taken the following steps to complete the assessment:

Mapping of the current provision of childcare, taking into account:

- ✓ the type of registration and the services provided
- ✓ the age range catered for
- ✓ the times of operation
- ✓ the language of provision
- ✓ the location
- ✓ fee levels
- ✓ ability to provide inclusive provision

- ✓ any additional services/facilities provided.
- ✓ Mapping of current attendance patterns, along with the level of vacancies or children waiting for an immediate place
- ✓ A parental survey
- ✓ Engagement of key stakeholders to access knowledge and intelligence regarding current and future demand
- ✓ Use of strategic planning documents and data regarding current and future population; demographic and socio-economic trends, to identify likely future demand
- ✓ Identifying the level and type of unmet current and future demand, calculated by analysing the gap between current provision (type, capacity, location) and the current and predicted future demand

The CSA has not only informed the Action plan for the next 5 year period, but it has also informed several of the 'matters' within the Play Sufficiency Assessment conducted within the same period as this report and has been referenced throughout.

Headline Findings

Overall, the quality and availability of childcare in Newport is good and sufficient to meet the needs of most families. Whilst COVID-19 did cause extreme challenge for the sector, there has been only one full day care close as a direct result of the pandemic and that resulted in a loss. However, there are some gaps in the provision that have been identified and will be addressed in the action plan.

As noted in the body of the assessment, there are concerns about the accuracy of some of the data drawn from the SASS responses. Consequently, in many cases the initial findings are to be interpreted with caution and as a result, it is intended that the Action Plan will seek to further investigate those findings to ensure future developments are appropriate and needed.

Currently there are:

- 3780 childcare places registered in Newport
- 4304 children accessing childcare across Newport.
- 982 attend full time
- 3121 attend part time
- 201 attends on an ad hoc basis

Unfilled places are the number of places available within the service for specific times / sessions and days in a number of combinations. It is difficult to show a true number of unfilled places as there are a large number of factors to understand that are often complex and change on a daily basis. The SASS asked for unfilled places by 'type of care' and the tables below show the collective total of unfilled places and collective total of children on waiting lists of all 'types of care'.

Unfilled Places

Childminders	Full Day	Sessional	Out of school	Open Access
547	3773	347	1119	0

Services with children on waiting lists are shown below.

Waiting List

Childminders	Full Day	Sessional	Out of school	Open Access
44	263	26	0	0

*Note: Data on waiting lists may be unreliable as it does not account for duplication of children who may be on more than one waiting list or may have taken up a place in another childcare setting and not informed the service.

The data implies that unfilled places far outweigh the numbers on waiting lists, therefore it can be assumed that staff may be an influencing factor on why childcare settings can't currently utilise their full capacity (see point **f** below).

a) Location of childcare

Newport covers a geographical area of just over 73.5 square miles. It is made up of 21 Electoral Wards and again divided into 4 geographical hubs: North, East, West and Central. The Childcare Sufficiency Assessment analysis reflects the supply of childcare data by Ward.

Overall, there is a good distribution of CIW registered childcare across the majority of Newport. Beechwood and Victoria have the least amount of provision available with Beechwood only having 3 services available and Victoria only 1. There are 3 wards with 0 full day care services within them: Alway, Beechwood and Shaftesbury. Pillgwenlly ward has 0 out of school provision currently registered with CIW, however it does have an unregistered Kids Club.

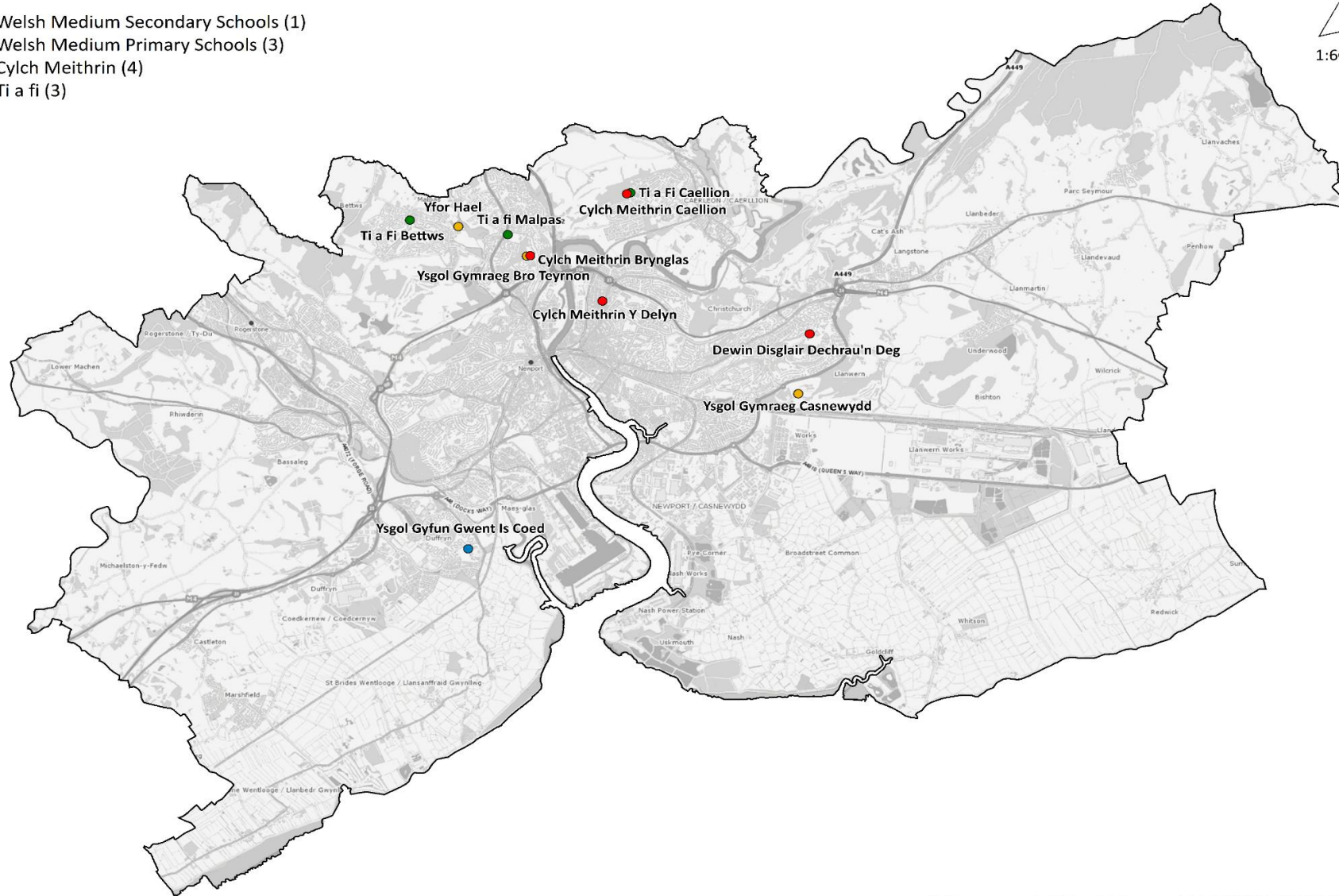
Registration type	Allt Yr Yn	Alway.	Beechwood	Bettws	Caerleon	Gaer	Graig	Langstone	Llanwern	Lliswerry	Malpas	Marshfield	Pillgwenlly	Ringland	Rogerstone	Shaftesbury	St Julians	Stow Hill	Tredeggar Park	Victoria
Full Day Care Total	2	0	0	1	3	2	1	2	2	3	1	4	1	2	2	0	5	4	2	1
FDC inc Breakfast Club	1	0	0	0	2	0	0	1	2	3	1	2	0	1	0	0	3	4	0	0
FDC Inc After School Club	1	0	0	0	1	2	0	1	2	3	1	2	0	1	0	0	3	4	0	0
FDC Inc Holiday Club	1	0	0	1	2	1	0	1	2	3	1	3	0	0	1	0	4	3	1	0
Independently Registered Out of School	0	0	1	2	0	1	0	0	0	2	1	1	0	2	0	0	1	0	1	0
Before School	0	0	1	0	0	0	0	0	0	0	1	1	0	0	0	0	1	0	1	0
After School	0	0	1	1	0	0	0	0	0	2	1	1	0	0	0	0	1	0	1	0
Holiday	0	0	0	1	0	1	0	0	0	0	1	0	0	1	0	0	1	0	1	0
Sessional (Term Time Only)	0	3	0	2	0	1	0	1	0	1	1	0	1	2	0	2	0	0	1	0
Sessional AM	0	3	0	2	0	1	0	1	0	1	1	0	1	2	0	2	0	0	1	0
Sessional PM	0	2	0	2	0	1	0	0	0	1	1	0	1	2	0	0	0	0	0	0
Childminder	8	3	0	1	1	4	9	1	0	3	3	5	0	3	13	2	2	1	2	0
Open Access Play (Holidays)	0	0	0	1	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0
	13	11	3	14	9	14	10	8	8	22	14	19	5	17	16	6	21	16	9	1
	Allt Yr Yn	Alway.	Beechwood	Bettws	Caerleon	Gaer	Graig	Langstone	Llanwern	Lliswerry	Malpas	Marshfield	Pillgwenlly	Ringland	Rogerstone	Shaftesbury	St Julians	Stow Hill	Tredeggar Park	Victoria

Location of Welsh Medium Services

According to the parental demand survey, Availability and distance of travel appear to be the largest issues facing use of Welsh Medium childcare in the future. Below is a map illustrating the current distribution of Welsh Medium services.

Welsh Provision Locations

- Welsh Medium Secondary Schools (1)
- Welsh Medium Primary Schools (3)
- Cylch Meithrin (4)
- Ti a fi (3)



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The map shows that the majority of Welsh Services available are clustered towards the North and Central hub areas. Demand for Welsh Medium services in Newport is varied across the city.

b) types of childcare available;

From the data received through the SASS in relation to waiting list and vacancies it appears that there is sufficient provision of childminders, full day nursery, sessional and out of hours across the city. However, as stated previously the data is not consistent and therefore any assessment made on this data alone, must be tempered by the results of consultation and local knowledge. Post Covid-19, data may also look different to when it was collated, and this will be reflected in the action plan.

Provider Type	Registered Provision	Registered Places
Childminders registered	71	590
Full Day Care	41	2050
Sessional	15	371
Out of School	17	632
Open Access	3	137

According to the parental demand survey, consideration of Welsh Language childcare has shown an encouraging increase. Whilst 90.73% said that they did not access welsh medium childcare currently, of those who answered No, 7.24% indicated that they *would* like to access childcare through the medium of Welsh, and 20.91% indicated that they *may* like to access Welsh Medium childcare. Availability and distance of travel appear to be the largest issues facing use of Welsh Medium childcare in the future.

The supply of Welsh Medium childcare has increased since 2017, with 3 CIW registered Cylch Meithrin and 1 out of school club. Since the SASS data was collated, we have seen a 4th Cylch Meithrin open in Caerleon which is fantastic news for the city. Newport City Council remains committed to the development of Welsh Medium services and acknowledges the importance of Early Years services in creating demand and encouraging uptake of Welsh provision.

We have seen a decline in Childminder registrations combined with deregistration of existing childminders both locally in Newport and Nationally across Wales. In 2017 when the last CSA was undertaken, Newport had 90 registered childminders offering 701 childcare places, at the time of the SASS, Newport had 71 childminders offering 590 childcare places. When consideration of the flexibility of care provided by childminders includes providing care for school aged children, it is therefore understandable that out of school childcare is most in demand currently in the context of the equivalent loss of 111 childcare places over the last 5 years (see c. age of children for whom childcare is available).

There is a good variety of supervised play provision in Newport delivered by some of the following partners, Newport Wetlands, Tredegar House, Flying Start, FIS, Newport Play Team, Duffryn Community Link, Newport Live, Serennu, Community Development, Youth Service and Families First. Parks have created a new bike scheme in Tredegar park. These are adapted bikes for various disabilities. It is run by Newport Live and its free to all Newport residents to hire. Newport has a good disability sports provision which runs throughout the year. SHEP was delivered in school venues supported by Education, Flying Start, Play development, Newport Live and Community Development. This was targeted in areas of deprivation with high levels of free school meals. There are plans to enhance Welsh language provisions. These activities could be developed further with additional resources and funding.

(c) age of children for whom childcare is available.

From the data, there appears to be a good range of childcare available for children aged 0 – 8 years of age. Generally, Childminders have the broadest range of ages that they look after, offering full time, part time and out of school care. Childminders are also the most likely provider type to provide care for those over 8 years of age, closely followed by Out of School Care.

Full day care services offer the most childcare places to 2, 3 and 4 year olds. They provide the highest number of childcare places across the city for this age group.

Some settings currently have children aged between 12 and 17 years, these are mostly childminders. Often, children of this age who require care are children with Additional Learning Needs or physical / medical needs. Being placed in registered childcare helps parents to feel secure in their choice of care as a result of quality assurance and inspection of services to reassure them. It also allows them to continue to use childcare benefits. Whilst this age range has the fewest children attending of this age in Newport, it appears from the parental demand survey that childcare for this age range is not in high demand.

Childcare Services for 2 year olds

In a recent joint statement by the Welsh Government and Plaid Cymru to extend free childcare for 2 year olds (details yet to be published), it was considered helpful to look at data specifically related to that of 2 year olds in the context of both childcare data available and population data available.

There is a relatively good spread of childcare services for 2 year olds across the city. All Wards except for Beechwood have childcare services within them that can cater for 2 year olds.

Currently there are 1216 2 year olds on the books of childcare services in Newport. They are broken down as follows:

<i>Children aged 2 on the books (sessional care)</i>	<i>FS Provision only Children aged 2 on the books</i>	<i>Children aged 2 on the books (full day care)</i>	<i>Children aged 2 on the books (childminders)</i>
207	186	764	59

A comparison of 2 year old population and those currently accessing childcare is illustrated below.

	Children who turn 2 between 13/05/2020 13/05/2021	Total 2 year olds currently in childcare
Allt-Yr-Yn	85	64
Alway	127	7
Beechwood	84	0
Bettws	96	128
Caerleon	60	30
Gaer	70	52
Graig	43	35
Langstone	41	44
Liswerry	194	94
Llanwern	67	33
Malpas	88	17
Marshfield	41	152
Pill	153	75
Ringland	84	62
Rogerstone	128	46
St Julians	108	39
Shaftsbury	54	105
Stow Hill	58	91
Tredegar Park	66	99
Victoria	136	43
TOTAL	1783	1216

The data indicates that there may be more children aged 2 (31%) that could require childcare than are currently attending childcare services. Further investigation of whether the 31% are eligible for the extended funded childcare will be required once more detail is obtained.

(d) affordability of childcare;

Overall, the cost of childcare has not risen significantly from 2017 to present. In fact, if the data is to be believed, the average cost per week of childcare remains at approximately £153 per week excluding additional charges which is the same as reported in 2017.

- The average cost of childcare per day in Newport is £23.93 across all age ranges and service types.
- The average cost of childcare per day in Newport for children under school age is £38.98.

The average cost of childcare per week in Newport is illustrated below:

Age	Childminders	Sessional	Full Day Care	Out of School
Under 1	0.00	0.00	213.16	0.00
1 Years	144.00	0.00	212.59	0.00
2 Years	126.00	54.40	212.59	0.00
3 Years	190.00	59.40	197.08	0.00
4 Years	237.00	59.40	212.59	110.00
5 - 7 years	126.25	0.00	175.00	117.50
8 - 11 years	68.15	0.00	0.00	117.50
12 - 14 years	0.00	0.00	0.00	125.00
15 - 17 years	0.00	0.00	0.00	125.00

From the parental demand survey, 23% of the 619 respondents stated they spend between £100 and £199 per week on childcare. The majority of respondents (25.4%) earn more than £1000 per week as a household. The median weekly pay for full time workers in Wales was £611 in April 2021 and therefore can be assumed that 23% of the respondents represented those slightly above the national average household income, whilst 30.9% fell on or just below the national average (14.9% £581 - £750 and 16% £750 - £999).

The majority of respondents to the parental survey either strongly or tend to agree with the statement 'Childcare is too expensive' (85.8%). Whilst the cost of living has risen over recent years, the actual average cost of childcare in Newport has remained relatively stable. Affordability as a concept is one that is personal to the circumstances of the individual, therefore it is always challenging to understand what affordable childcare would look like in reality. Most clients of employability programs reference 'can't afford childcare' or 'after paying for childcare there would be nothing left' as their main reason for not working. This has not changed since the previous CSA in 2017.

(e) times at which childcare is available.

The vast majority of childcare in Newport occurs between the hours of 8am and 6pm. There are varying patterns of open and close times between service types with the most variation appearing in childminding services as quite often they accommodate those parents with more fluctuating work patterns.

From the parental survey, responses linked to time and availability centred around 'The childcare available is not flexible enough for my needs' (13.82%)

And 'Childcare times are unsuitable' (10.14%) which is a relatively low rate of response. However, when asked about parental satisfaction, 'Extended Opening hours' in the morning (24.24%) and evening (24.24%), and 'more flexibility (ad hoc care)' (24.24%) were indicated as the second most common reason for being unsatisfied with their childcare. Whilst we can see that there may be a disparity between current atypical hours and demand, the response rate for the parental survey is not representative of the whole population, therefore caution should be used when interpreting the demand for extended hours.

Local Authority officers who regularly engage with the sector have worked with providers to become more flexible with their opening times. Flexibility of service times largely depends on planning permission, premises overheads, insurance cover and staffing costs versus demand to make it viable for the business to accommodate. The main reason for childcare services provided to the Local Authority anecdotally through network meetings has been that there is not enough consistent demand for services before 8am or after 6pm to cover the costs of running the extended hours.

(f) Childcare and Play workforce

Arguably, development of future workforce is the key headline finding to be included in the action plan for the next five year period. Workforce challenges have faced the childcare and play sector for several years. Additionally, the pressure that COVID-19 has placed upon the sector has been complex, making recruitment and managing staffing levels very difficult. Whilst this data has been extracted from the SASS for the period 7th June-4th July 2021, workforce issues are ongoing with a critical factor being staff sickness due to COVID isolation and lack of suitably qualified staff within the sector to fill vacancies.

The response to the SASS represents 90.3% of the total childcare and play sector for CIW registered services. There are currently 837 members of staff within those services, with the majority of workforce currently working within the Full Day Care sector.

The number of staff that left the service in the last 12 months totals 131, the number of vacant posts totals 74. It can be assumed that there is a vacancy rate within the childcare and play sector of 56.48%. The data also shows that the number of current vacancies does not always meet the additional staff actually required over the next 24 months (difference of 43% more than the current number of vacancies).

Vacant post rates by provider type are as follows:

Full Day Care	32.3%
Sessional Day Care	14.2%
Out of School	61.9%
Open Access Play	75%

Whilst the data shows that there is further capacity within childcare places available for children on the waiting list, and even future demand, the challenges around recruitment and retention are preventing those places from being utilised. More work needs to be done locally and nationally to encourage more people into the sector, and more needs to be done to recognise the childcare and play workforce in terms of pay and professionalism of qualifications. This issue has been escalated to Welsh Government level and Newport is represented on the relevant workforce strategy groups.

Proposed Key Actions

1. Work closely with the public and umbrella organisations to understand the actual demand for extended hours in the context of having to pay for the service should it be provided.
2. Work with the sector to understand the challenges in providing extended opening hours.
3. Improve the preschool provision available through the medium of Welsh.
4. Encourage meaningful play opportunities through the medium of Welsh.
5. Increase the provisions during school holidays to help working parents to access full day care and include Welsh Medium Provision.
6. Monitor progress of 2 year old childcare entitlement, working with the sector to realise Welsh Governments ambitious proposals.
7. Develop an implementation plan for expansion of funded 2 year old childcare places
8. Promote the nanny approval scheme to allow parents to access flexible childcare and be able to access the childcare part of working tax credits. This could help support parents working non typical hours.
9. Marketing strategy for digital inclusion and promoting the Family Information Service within communities.
10. Improve the information available from employers to parents relating to financial assistance and flexibility of childcare through Family Information Service.
11. Manage public and corporate expectations surrounding childcare affordability, flexibility and accessibility and attempt to balance affordability with sustainability by working with key partners such as CWLWM and EYDCP.
12. More work needs to be done locally and nationally to encourage more people into the sector, and more needs to be done to recognise the childcare and play workforce in terms of pay and professionalism of qualifications. This issue has been elevated up to Welsh Government level and Newport is represented on the relevant workforce strategy groups.
13. Develop a workforce strategy for Early Years to be running alongside the CSA action plan
14. Work with Careers and Colleges to encourage more students to take Childcare and Play qualifications and work with employability programmes to promote childcare and play as a viable option for a career path

2. Introduction

The approach taken in conducting this assessment has been based on meeting the requirements of the statutory guidance document Childcare Statutory Guidance (2016) and the circular letter WGC 003 2021/WG21-28 “Childcare Statutory Guidance (2016): Securing Sufficient Childcare and Child Sufficiency Assessments” issued on March 15th, 2021.

The Childcare Act 2006 makes it clear in legislation the importance of the role Local Authorities should play in the provision of local childcare. It reinforces the need for local authorities to continue to work in partnership with the maintained, independent, private, voluntary, and community sectors to shape and secure children’s services and focuses in particular upon the provision of:-

- Sufficient, sustainable and flexible childcare that is responsive to parents’ needs; and
- Information, advice and assistance relating to childcare to parents, prospective parents and those with parental responsibility for a child

It is the responsibility of the local authority to secure ‘as far as is reasonably practical, sufficient childcare to meet the requirements of parents in their area who require childcare in order to work or to undertake training or education or to prepare for work.’

This means we need to work to ensure there are enough childcare places available to meet the demands of parents and carers in Newport. The Early Years Development and Childcare Partnership (EYDCP), which is made up of statutory, private and voluntary childcare related organisations, is working towards identifying the gaps in childcare provision in the area, and are consulting with parents, employers, childcare providers and children on this matter. What parents and carers tell us is important and will have a direct effect on the service we will provide in the future.

The Childcare Act 2006

The Childcare Act underpins the Assembly Government’s current early years and childcare plan “Building a Brighter Future”, and enshrines in law:

- Parents Legitimate expectation of accessible high quality childcare for children and their families; and
- Local Authorities’ responsibility for providing information to parents and prospective parents to support them in their parenting role.

The Childcare Act achieves these aims through statutory duties that build on Local Authorities’ existing responsibilities. In Wales, this:

- Places a duty on Local Authorities to take the lead role in facilitating the childcare market to ensure it meets the needs of working parents; in particular, those on low incomes, those with disabled children, or those who wish their child to attend Welsh medium provision.

- Ensure people have access to the full range of information they need as a parent.

Section 22 of the Childcare Act

This Consultation exercise has derived from section 22 of the Childcare Act. The intention of section 22 is to place a duty on Local Authorities in Wales to secure, as far as is reasonably practicable, sufficient childcare to meet the requirements of parents in their area who require childcare in order to work or to undertake training or education or to prepare for work. Local Authorities have a duty to support and shape the development of childcare provision within the local area to make it flexible, sustainable and responsive to the needs of the local community; thereby ensuring that parents are able to access childcare locally meets their needs and allows them to make a real choice about work.

When determining if the provision of childcare is sufficient the local authority must have regard to the needs of parents in their area for:

- The provision of childcare in respect of which the childcare element of working tax credit or universal credit is payable
- The provision of childcare in respect of which employer supported childcare or tax free childcare is payable
- The provision of childcare for children who have special educational needs or require specialist care due to disability
- The provision of childcare involving the use of the Welsh Language
- The provision of childcare which enable them to access their foundation phase early education entitlement
- The provision of childcare which enable them to access their entitlement for free childcare places

This assessment is a necessary first step towards securing sufficient provision, enabling Local Authorities to identify Gaps and establish plans to meet the needs of parents so that they can fulfil their childcare sufficiency duty under Section 22.

Section 26 *Power to require local authority to assess childcare provision*

The Childcare Act 2006 (Local Authority Assessment) (Wales) Regulations 2016, made under section 26 of the 2006 Act, requires local authorities to prepare assessments of the sufficiency of childcare provision (Childcare Sufficiency Assessment) in their area and to keep these under review. A Local authority Childcare Sufficiency Assessment must measure the nature and extent of the need for, and supply of, childcare in the area. Through this analysis, local authorities and their partners will be able to identify gaps in childcare provision where parents' needs are not being met and will allow local authorities to plan how to support the market to address the gaps identified.

The 2016 regulations require local authorities to complete and submit to Welsh Ministers a full assessment of childcare provision every 5 years. The assessment must contain an Action Plan, which is to be kept under continuous review and updated and reported upon via annual progress reports. The Action Plan will be completed in conjunction with local partners to address any gaps in childcare provision. Annual review of performance against the plan will provide a means of ensuring ongoing improvement in the provision of childcare in the local area.

Context

The data used to analyse the supply of registered childcare in Newport was supplied by CIW through the SASS (Self Assessment of Service Statement). As of 2016 all registered providers are required to complete an online assessment which is a snapshot of data taken during the term time and summer holidays. This information includes details of number and types of places used, ages of children, workforce qualifications, opening hours, fees, waiting lists and vacancies. The data provided by CIW came in at a return rate of 90.3%. However, there are inconsistencies within the SASS data which is a limitation of the overall assessment. Therefore, caution should be used when drawing conclusions from the data alone and local knowledge and expertise have been represented within the analysis to maximise the validity of the information provided. Consultation with FIS was also used to gain a better picture in areas where possible.

In order to obtain the views of parents/carers living in Newport the parent/carer a national parent online survey was developed and circulated across Wales in both Welsh and English. To ensure that Newport parents were able to access the survey, it was shared electronically to schools and private providers in order for them to circulate to parents. A social media campaign lead by Newport City Council Communications team in conjunction with Newport Family Information Service went live from October 1st, 2021 until October 24th 2021. It was available to complete electronically on the Newport City website but due to Covid-19 restrictions, many of our community events have been postponed or had been moved to virtual events. Representatives from FIS also circulated them and helped parents complete them at focus groups and forums for single parents, people who are trying to get back into work in partnership with Jobcentre Plus and agencies such as PaCE. Newport City Community Hubs were also a focal point for disseminating the parental survey as they are at the heart of our most hard to reach communities.

Through analysing the data, looking at current demand, supply and potential barriers to families taking up childcare, an assessment can be made which will contribute to the mapping of provision. It allows us to determine as to whether there is sufficient childcare for the families of Newport. However, the numbers of parents consulted with represents [insert stats] of the population with children therefore caution needs to be taken when interpreting the information for use within the CSA Action Plan

A Childcare Sufficiency Assessment (CSA) Action Plan has been drawn up using the above data in conjunction with FIS data held on DEWIS Cymru which will guide the work of the Local Authority's Early Years and Childcare team to manage the local childcare market in partnership with other identified Local Authority departments and external partner organisations including the private and voluntary sectors.

Newport Early Years and Childcare Partnership (EYDCP) have developed a vision 'to work closely with key partners and existing and new childcare providers to deliver quality, sustainable childcare that meets the individual needs of the community'. As a result, the CSA Action Plan has now been formally adopted by the EYDCP and will be used to steer the direction of work and give focus for all key partners who support the sector in Newport. The CSA also informs the Education business plan to direct the future developments of the broader Education agenda.

Partnership Working and Consultation

In completing the CSA a number of partner organisations and agencies were used during consultation with parents, these include: Family Information Service, Early Years Wales, Flying Start, Newport LEA and associated Education Services, GAVO, Regeneration Investment and Housing, One Newport Partnership (NCC), Local Authority Business Support and Economic Development team, Families First, Job Centre Plus, Learning and Libraries, Mudiad Meithrin, and Clybiau Plant Cymru.

A special thanks is given to the Newport Intelligence Hub, who have provided ongoing support with population data and advice and guidance on how to display it within the context of the CSA document.

Newport Family Information Service holds details of childcare provision across the city. Using the local knowledge of FIS along with the SASS data we were able to get a more consistent picture of childcare provisions in Newport. Views were also obtained from relevant stakeholders on their views of the supply, demand and quality of childcare. They were also asked views on the barriers to accessing childcare. For example,

'As a primary user of childcare facilities in the Newport area, in support of our customers. The PaCE project (Parents, Childcare & Employment, a Welsh Government/DWP initiative), has found that both the standard and availability of the childcare sector is very good. This could however, be supplemented with what appears to be a lack of childcare providers offering weekend opportunities.'

The members of Gwent Safeguarding Board were approached for comments and feedback in regarding to childcare in Newport. The response was that they could only comment on the training available to the childcare workforce across Gwent. They stated that they provide a programme of multiagency safeguarding training which is available across the region which is accessible for providers that make up the childcare workforce. The training available attempts to match the training participants with job competency this allows them to match their training requirements with the courses on offer.

All neighbouring Local Authorities, both colleagues dealing with Early Years Education and Family Information Officers, were consulted to establish the demand for childcare outside of Newport. This information is summarised and included within the Cross Border section of this report (section 12).

Other stakeholders that were consulted include schools and other Local Authority departments such as Education, Planning and Healthy Schools. This consultation took the form of emails and face to face discussions. Local employers were also contacted and asked to complete a survey; it provided an insight into barriers that are faced by parents returning to work and the range of childcare services that are required to meet their needs.

Questionnaires were sent out to local businesses and schools. Unfortunately the response was poor from schools and does not give an accurate picture. Through partnership with FIS and Clybiau Plant Cymru consultations with children aged 4-11 years were held at afterschool clubs. The consultation was to gain their views on the provision, reasons why they attend, and any improvements they would like to see.

3. The Childcare Sufficiency Assessment and Local Well Being Needs Assessment

The Public Service Board has produced the 'Local Assessment of Wellbeing' and was first published in April 2019 and subsequently in January 2022. Consultations were held with members of the Public Services Board in order to ensure that we work in partnership and that this assessment was taken in to consideration while completing the CSA. Consultation included working with the Newport Intelligence Hub to establish population data that was as up to date as possible in the absence of current population data at ward level. 2011 census data is referenced but publication of the 2021 census data will not be available at the time of writing this report. Future refresh documents will reflect on the 2021 Census data to ensure that any gaps identified within this analysis has drawn on more accurate data sources.

The Local Assessment of Wellbeing contains 20 community assessments that comprise the whole area. For the purpose of continuity, the demographic data for Newport has been sourced from and in partnership with Newport City Council Wellbeing Assessment 2019 as the current NCC Wellbeing Assessment was not available at the time of writing the report. All relevant parts of the Wellbeing Assessment have been utilised for the purpose of this report. As the timing of the CSA is just outside of the scope of using the 2021 Census data and Wellbeing Assessment, Newport Intelligence Hub have been integral in pertaining the most relevant data captures for the purpose of illustrating the population in Newport.

The consultation process for the Assessment of Wellbeing has already taken place and feedback from residents and has been collated. From approximately 1700 responses only one response mentioned childcare.

“More Childcare reasonably priced”

Section 4

Population Data

4. Population

Introduction

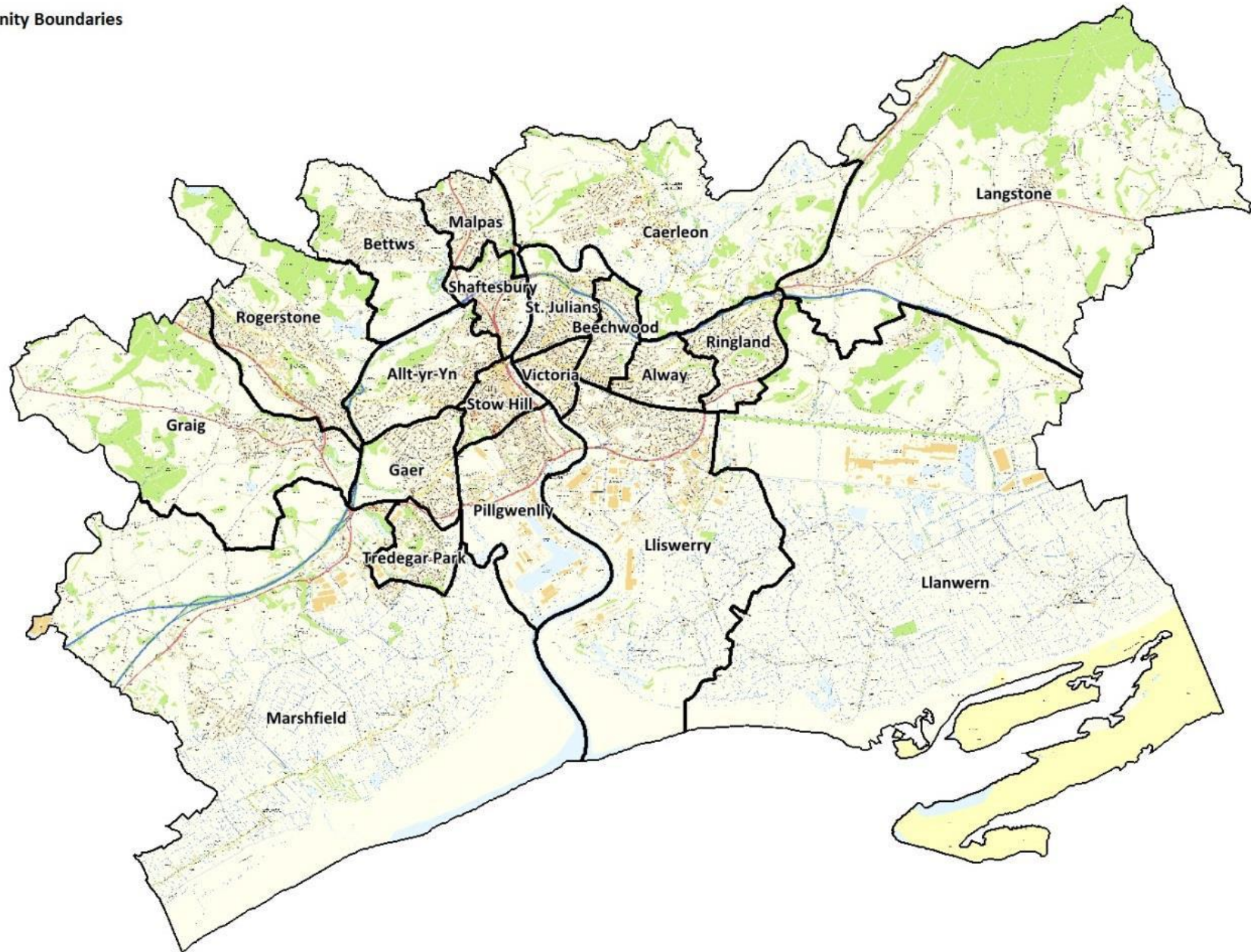
Newport forms the gateway between Wales and England and is the economic motor for the South East Wales region. Despite the tough economic climate facing the city and the UK as a whole, it continues to undergo some of the most far-reaching changes seen in the locality during the last 100 years and heralds the newest and perhaps most exciting chapter in the city's history. Those who know the city well will recognise it as a multi-cultural community with its own unique atmosphere where traditional industries exist alongside new electronics and financial service sectors.

Newport covers a geographical area of just over 73.5 square miles. It is a vibrant, forward-thinking city steeped in a rich heritage, natural areas, biodiversity and landscape. Protection of this environment as well as our urban centres will make Newport a more attractive place.

Data used for the population section of the document has been challenging to collate. Census data for 2021 was not available at the time of the SASS, and as a result the data available from the Newport City Council Intelligence Hub, Local Wellbeing Assessment (2021) and mid-year estimates formed the majority of the data illustrated within. The Childcare Sufficiency Assessment looks at Newport City as a whole and of the individual twenty communities comprising Newport.

1	Allt-yr-yn	11	Malpas
2	Always	12	Marshfield
3	Beechwood	13	Pillgwenlly
4	Bettws	14	Ringland
5	Caerleon	15	Rogerstone
6	Gaer	16	Shaftesbury
7	Graig	17	St Julians
8	Langstone	18	Stow Hill
9	Llanwern	19	Tredegar Park
10	Lliswerry	20	Victoria

Community Boundaries

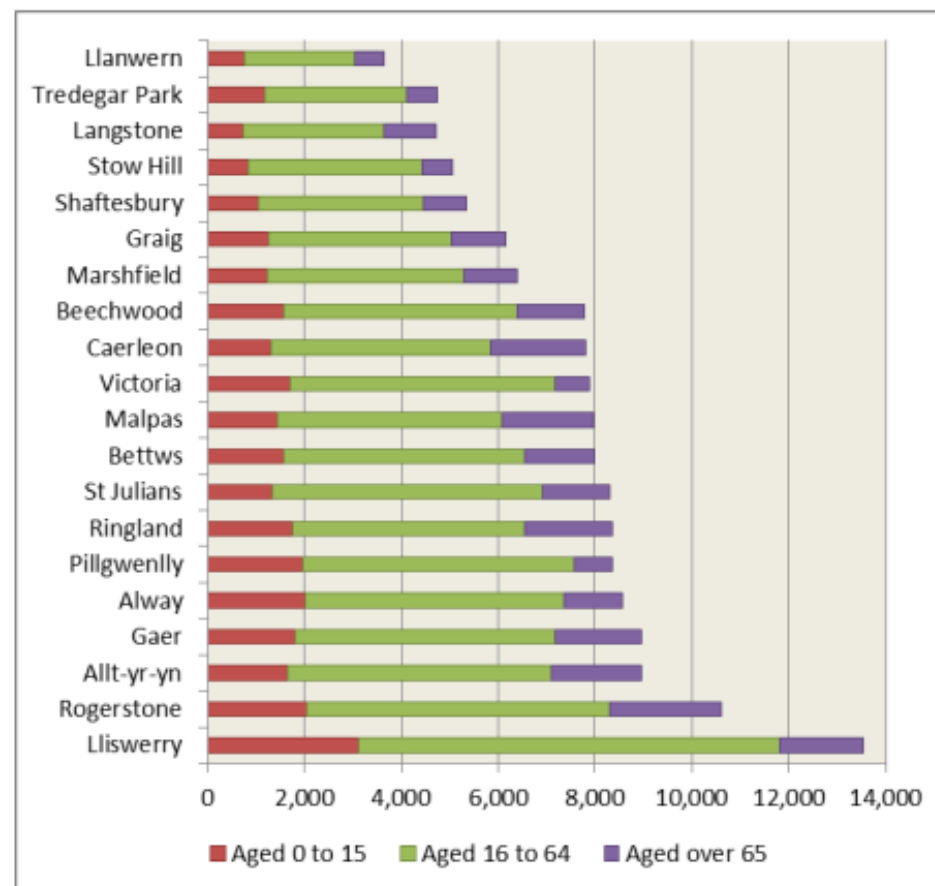


Population figures (current and projections) by ages of children

In accordance with the Social Services and Well-being Act Population Needs Assessment Gwent Region Report Newport City is the third largest urban centre in Wales with a population of 146,841. The city has the second largest number of people from minority ethnic communities of all the Welsh countries (after Cardiff) and has continued to increase since 2009 when the figures estimated at 6.6% of the population.

The population is projected to increase by 4.1% from around 577,100 in 2011 to 601,000 in 2036. The greatest increase in population will be seen in Newport with an estimated 17.3% increase.

[Population Needs Assessment Gwent Region Report May 2017](#)
(newport.gov.uk)

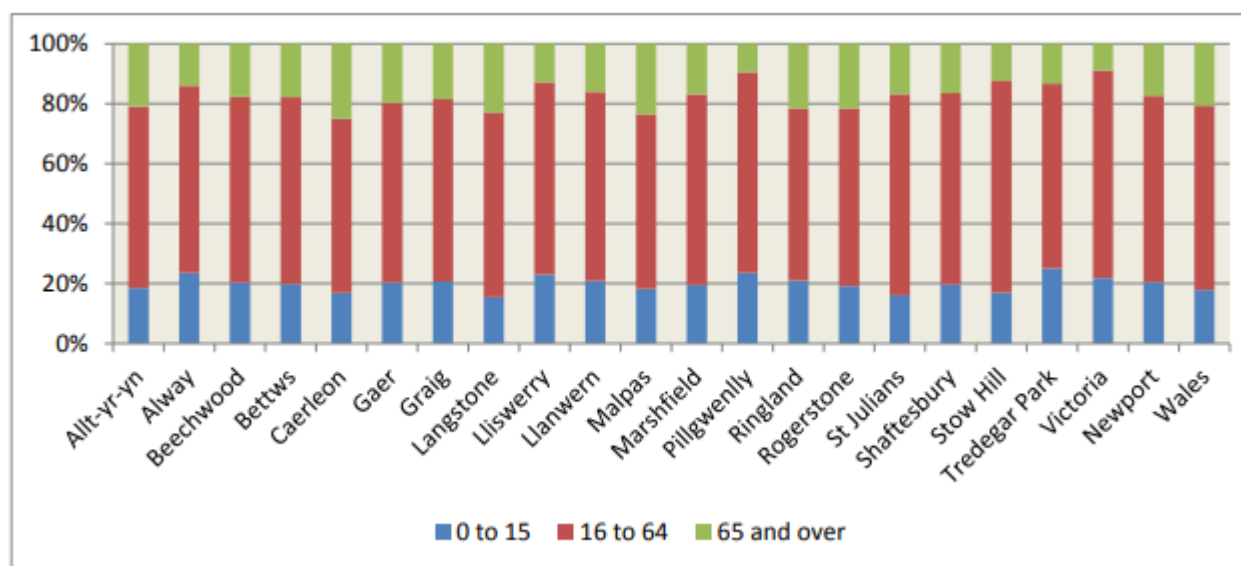


Newport Community Well-being Profile 2019 – Population

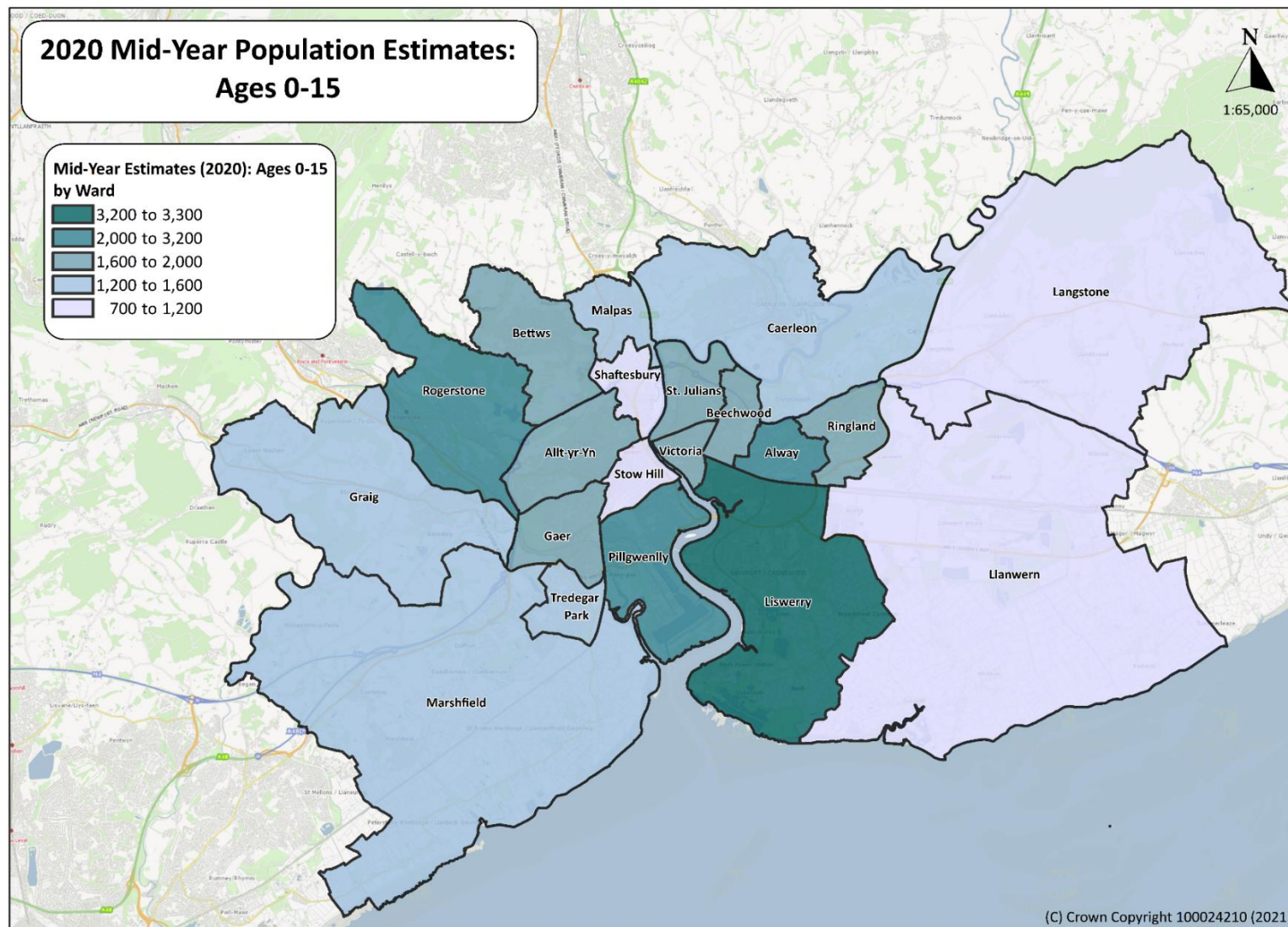
The age structure of the population in Newport is different to the Wales average with a higher percentage of people under the age of 15 and a lower percentage over the age of 65. The percentage of the population aged 0 - 15 years over the five-year period between 2011 and 2015 has remained relatively consistent and according to the Mid-Year Population estimates for Newport 2020 we have 23% of people aged 0-15 year, with an average of 20.5 between 2011 and 2020. This is above the Wales average which was estimated at 17.9%. The populations for each ward vary across Newport.

Based on the information research conducted to form the Community Wellbeing Profile 2019 for Newport; Tredegar Park has the highest percentage of under 16-year-olds at 25.07% and Langstone has the lowest percentage at 15.48%. Stow Hill has the highest percentage of people aged 16 to 64 at 70.68% compared with Ringland which is the lowest at 57.41%. The highest percentage of people aged over 65 can be found in Caerleon with 25.06% of the population. The lowest is in Victoria at 8.96%.

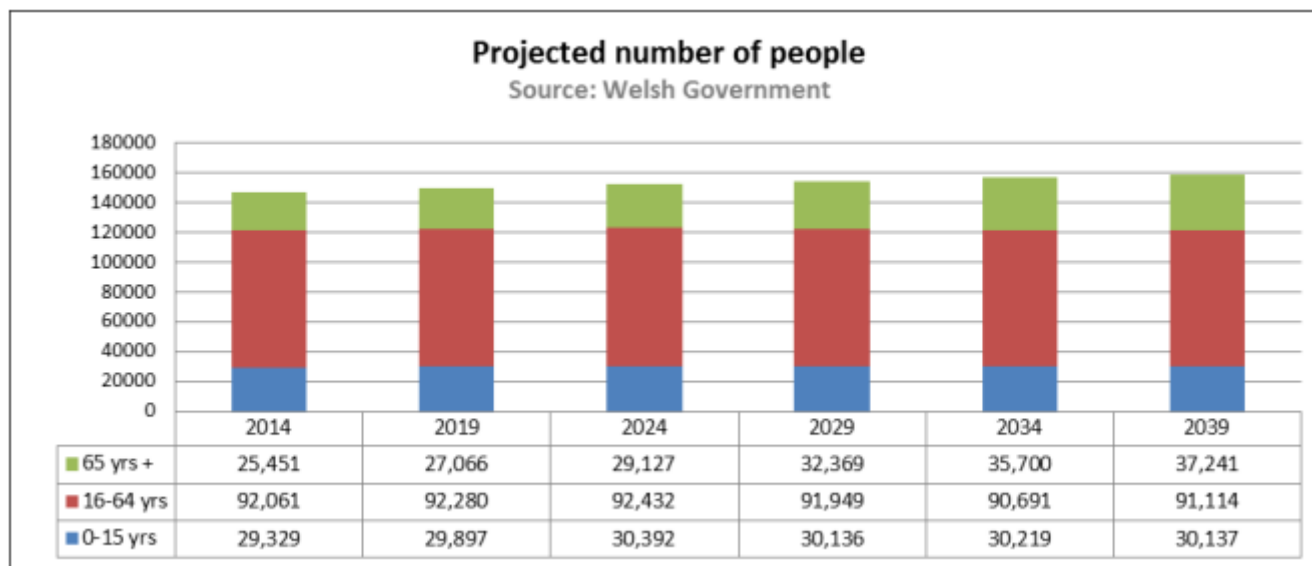
[Community Wellbeing Profile 2019 - Newport Population](#)



The highest population is in Lliswerry at 13,539 and the lowest in Llanwern at 3,637.



In 2014, population levels were projected to 2039. The population in Newport over the period 2014 to 2039 from those figures project that the population will increase by 7.9% to 158,492 people by 2039. These figures are showing a slower increase than the population estimates data. 2018 estimates show the population as 153,302, which is already above the population projection for 2026 of 153,005. We can assume that the population estimates are more accurate than the population projections as these are based on latest data sets



Newport Birth Rates

Based upon data provided by Aneurin Bevan University Health Board Health team between 2017 and 2021 there has been a consistent decrease in births across Newport. In accordance with Health Population information 2017 figures show that Newport had a total of 1,969 births in comparison with a total of 1,783 in 2021, concluding that births in Newport are down by 9.4%.

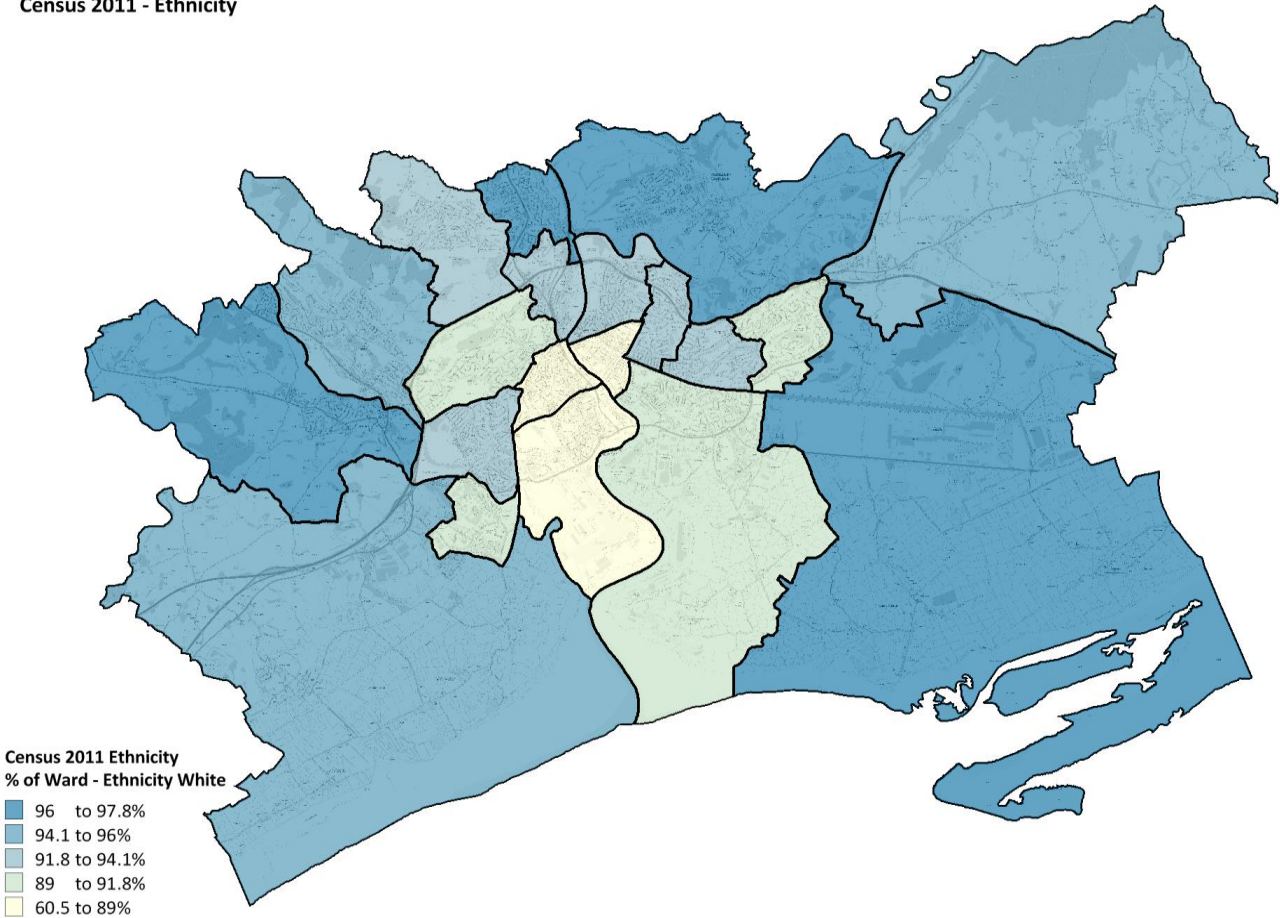
	13/05/2020 13/05/2021	12/05/2019 - 12/05/2020	11/05/2018 - 11/05/2019	10/05/2017 10/05/2018
Allt-Yr-Yn	85	100	105	97
Alway	127	102	112	119
Beechwood	84	83	103	77
Bettws	96	118	106	136
Caerleon	60	69	60	70
Gaer	70	116	110	111
Graig	43	63	57	69
Langstone	41	38	52	44
Liswerry	194	195	215	197
Llanwern	67	61	71	55
Malpas	88	76	75	94
Marshfield	41	47	47	47
Pill	153	134	162	156
Ringland	84	84	97	115
Rogerstone	128	119	150	139
St Julians	108	115	89	94
Shaftsbury	54	65	63	75
Stow Hill	58	50	69	74
Tredegar Park	66	73	61	59
Victoria	136	135	154	141
TOTAL	1783	1843	1958	1969

Number of families from ethnic minority backgrounds

The 2011 Census shows the following percentages classed as BME populations in each local authority compared to Wales in accordance with the Social Services and Well-being Act Population Needs Assessment Gwent Region Report Newport has a higher population of BME in comparison with neighbouring Local Authorities and across Wales.

BME Groups	
Blaenau Gwent	1.5%
Caerphilly	1.6%
Monmouthshire	1.9%
Newport	10.1%
Torfaen	2.0%
Wales	4.4%

Census 2011 - Ethnicity



Ethnicity

The latest data held on ethnicity is the 2011 census. This shows an ethnic minority population of 13% which is above the Wales average. This does not take in to account the changes that have taken place since 2011.

	Newport	%	Wales	%
White; English/Welsh/Scottish/Northern Irish/British	126,756	87.0	2,855,450	93.2
White; Irish	769	0.5	14,086	0.5
White; Gypsy or Irish Traveller	84	0.1	2,785	0.1
White; Other White	3,416	2.3	55,932	1.8
Mixed	2,752	1.9	31,521	1.0
Indian	1,218	0.8	17,256	0.6
Pakistani	3,127	2.1	12,229	0.4
Bangladeshi	1,749	1.2	10,687	0.3
Chinese	600	0.4	13,638	0.4
Other Asian	1,292	0.9	16,318	0.5
Black African	1,499	1.0	11,887	0.4
Black Caribbean	782	0.5	3,809	0.1
Other Black	254	0.2	2,580	0.1
Arab	926	0.6	9,615	0.3
Other ethnic group	512	0.4	5,663	0.2

However, ethnicity does vary across the city. The table below shows the five lowest and five highest ethnic populations of the wards across Newport.

[Community Wellbeing Profile 2019 - Newport Population](#)

Ethnic Population			
Highest Wards	%	Lowest Wards	%
1. Pillgwenlly	44.7%	20. Llanwern	3.2%
2. Victoria	37.8%	19. Caerleon	4.6%
3. Stow Hill	31.8%	18. Malpas	5.5%
4. Allt-yr-yn	13.9%	17. Graig	5.8%
4. Lliswerry	13.9%	16. Langstone	6.4%

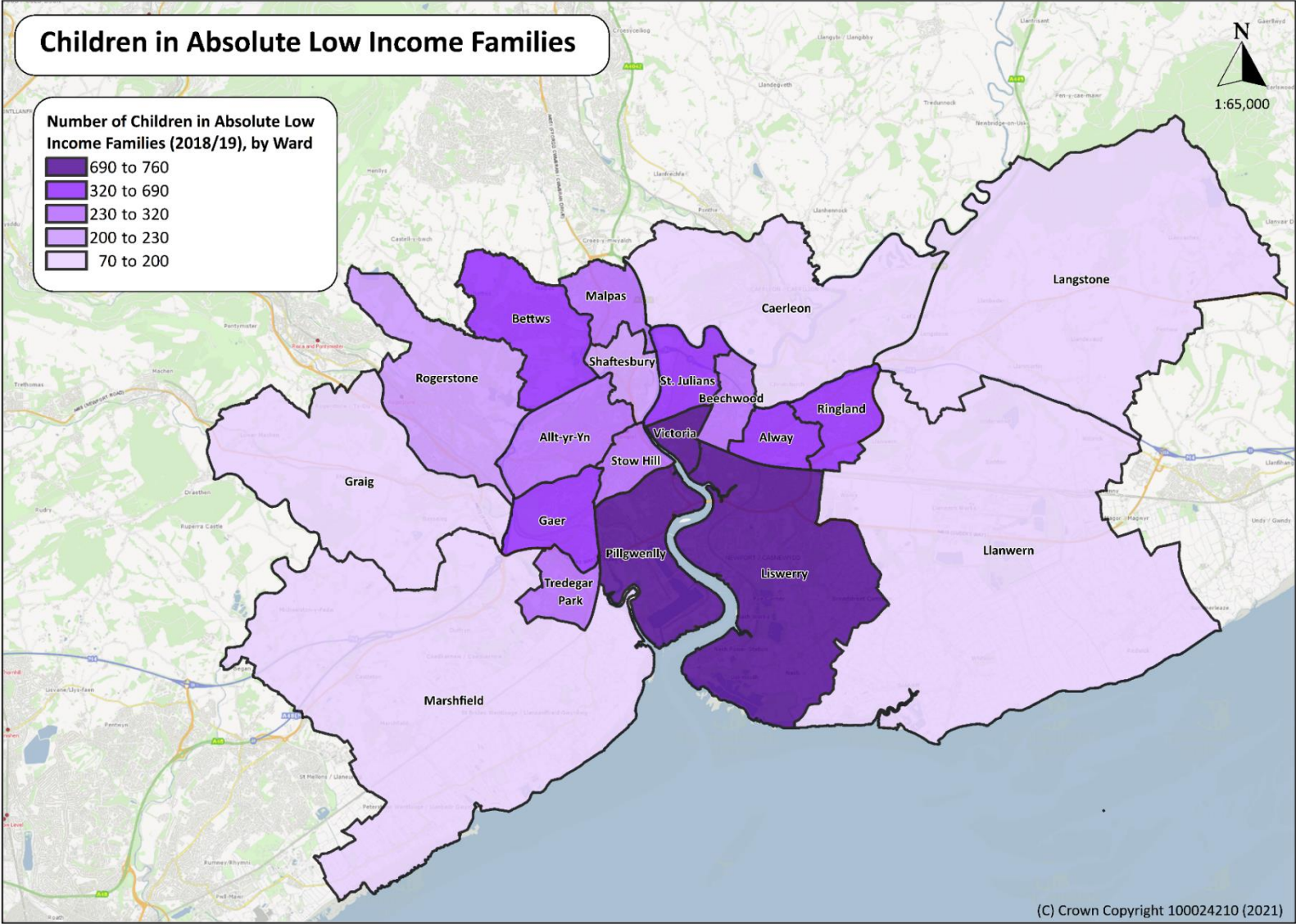
Number of low-income families

It should be noted that there is a significant reporting time lag for this indicator, however the trend shows that for the latest available data little sustained reduction has been recorded in Wales and less so for Newport in the four years shown. However, both Newport and Wales both indicate a small year on year reduction over the period. Low-income measures for families are closely linked with other key indicators of poverty and as such are associated with lone parent households, children with disabilities, certain BME groups and workless families. As low income for families with children is an indicator of poverty, unsurprisingly the geographical pattern across Newport tends to reflect other key deprivation indicators, including the Wales Index of Multiple Deprivation. Pillgwenlly, St Julians, Lliswerry, Tredegar Park, Ringland, Alway and Victoria recording 10% most deprived.

At a LSOA level the differences are larger. The table below shows the least densely and the most densely populated LSOAs in Newport.

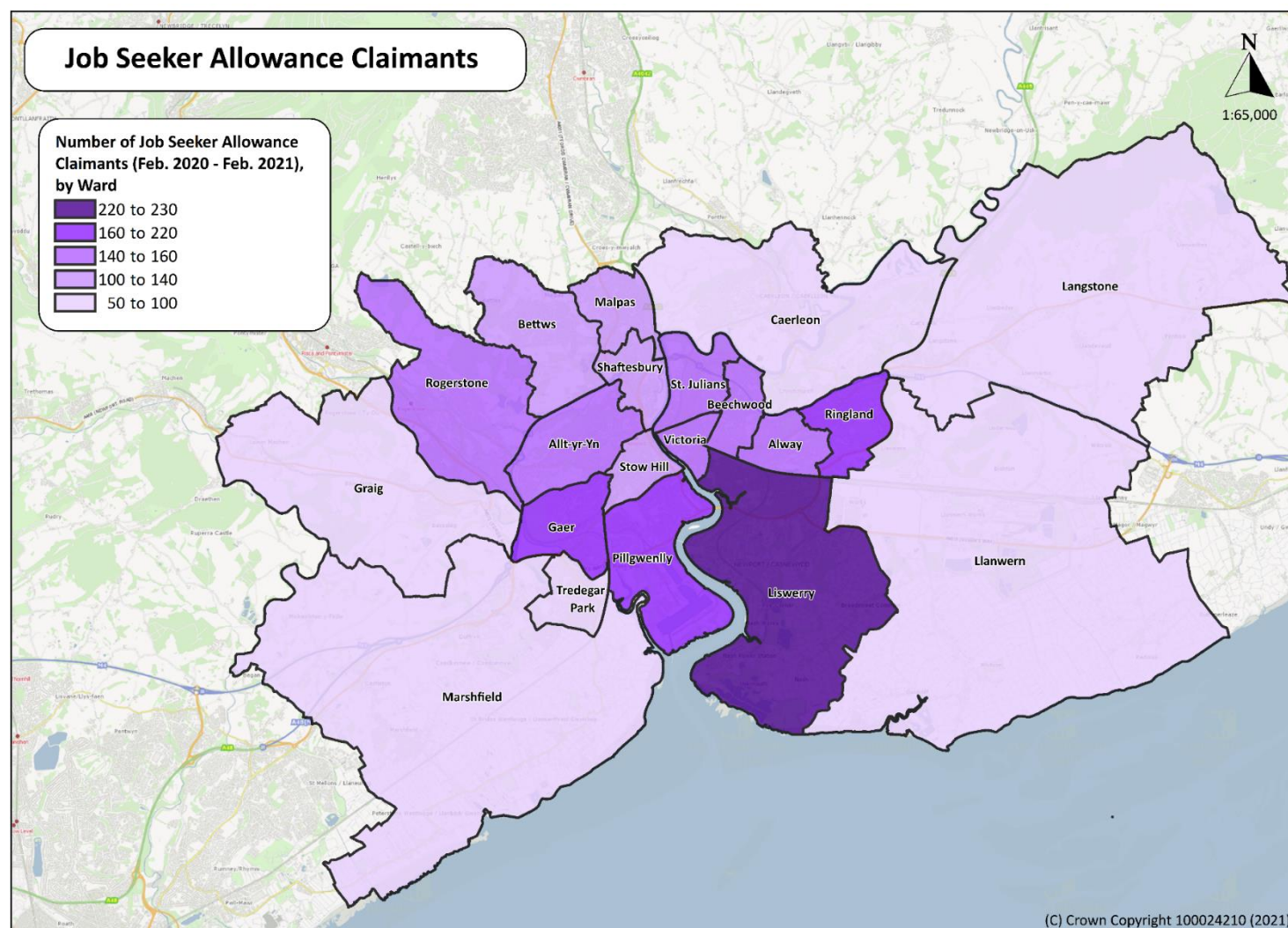
Population Density			
Least densely populated LSOAs	People per km ²	Most densely populated LSOAs	People per km ²
1. Llanwern 1	55.5	95. Victoria 3	10,739.4
2. Langstone 2	73.8	94. St Julians 1	10,051.0
3. Marshfield 4	85.0	93. Alway 6	9,803.9
4. Langstone 3	119.0	92. St Julians 6	9,376.8
5. Caerleon 3	147.4	91. Victoria 1	9,226.2
6. Lliswerry 6	158.1	90. Pillgwenlly 1	8,216.9
7. Marshfield 2	163.7	89. Beechwood 2	7,897.6
8. Graig 2	169.9	88. Lliswerry 3	7,264.8
9. Marshfield 5	232.3	87. Ringland 5	7,118.0
10. Pillgwenlly 2	452.9	86. Victoria 2	7,036.8

The below map identifies the children in absolute low-income families in 2018 / 2019 are recorded in Pillgwenlly, Victoria and Lliswerry.

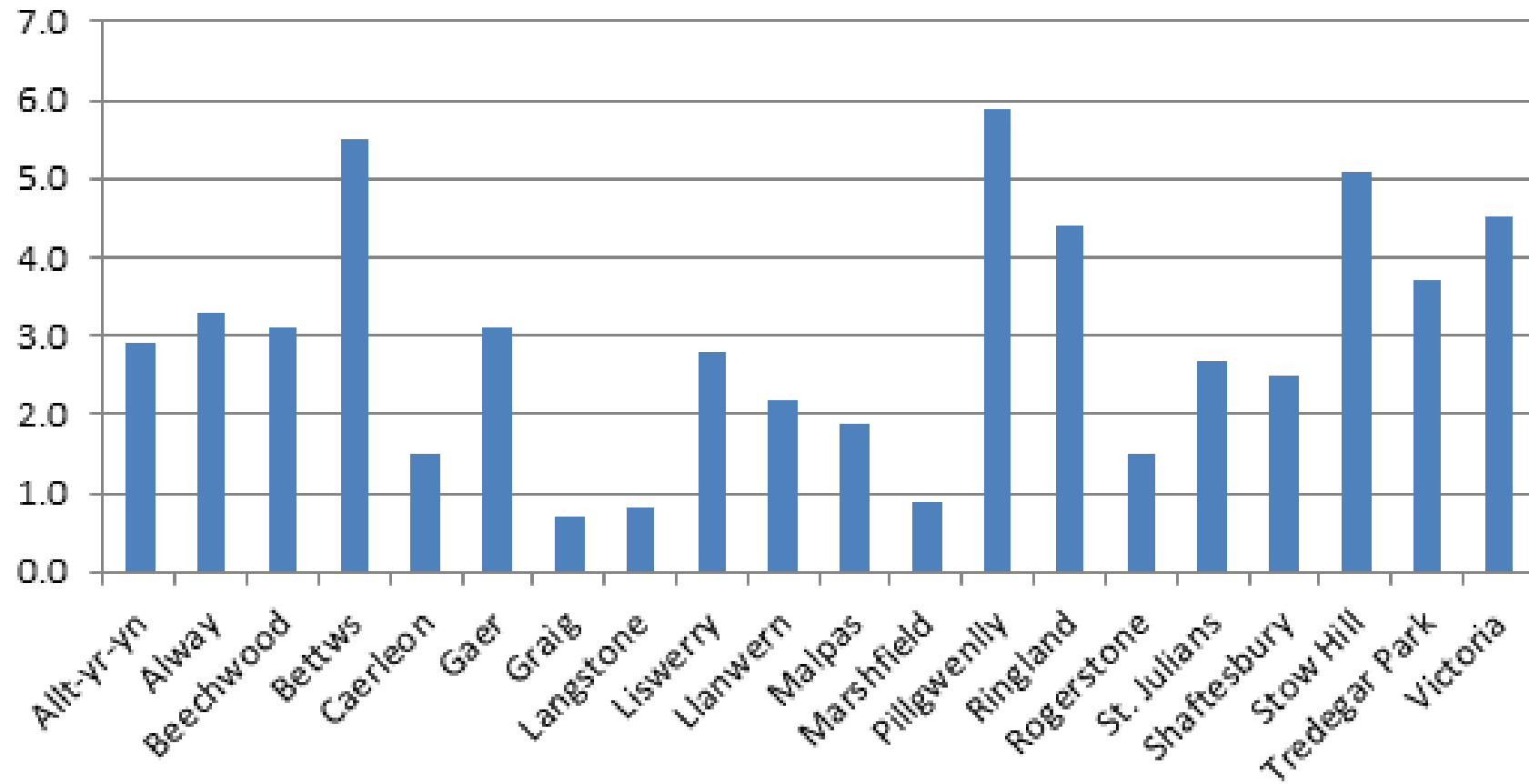


A strong geographical pattern emerges for benefits claimants in Newport which closely reflects wider indicators of deprivation, most notably the Wales Index of Multiple Deprivation. When reviewing the most recent mapping of Newport job seeker allowance claimants between Feb 2020 February 2021 it is evident Lliswerry is the ward with the highest number of claimants followed closely by Pillgwenlly, Ringland and the Gaer.

There is a distinct contrast between the figures in the graph below with reference to the Benefits Claimants in 2015 and the most recent figures February 2020 – February 2021 provided by the Newport Information Hub.



Benefit Claimants 2015 % of ward



Disability Living Allowance

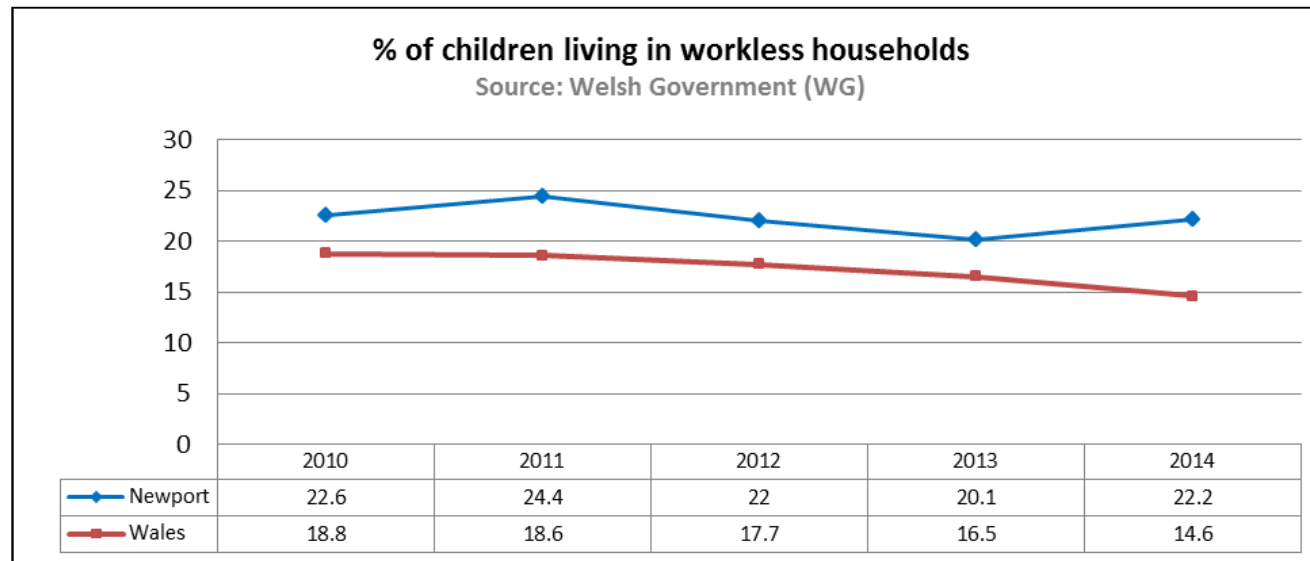
The data available via the Newport Intelligence Hub provides the latest disability living allowance claimant, of which you must be 16 or under to claim, by ward and for Newport as a whole, from the May 2021 quarter.

The data available for Newport, indicates that there are an average 3,900 claims per quarter between May 2018 and May 2021 across Newport.

May-21	
National - Regional - LA - Ward	
Allt-yr-yn	162
Alway	203
Beechwood	155
Bettws	286
Caerleon	144
Gaer	259
Graig	101
Langstone	69
Liswerry	317
Llanwern	86
Malpas	169
Marshfield	97
Pillgwenlly	194
Ringland	352
Rogerstone	258
Shaftesbury	109
St. Julians	165
Stow Hill	69
Tredegar Park	129
Victoria	159
Newport / Casnewydd	3477

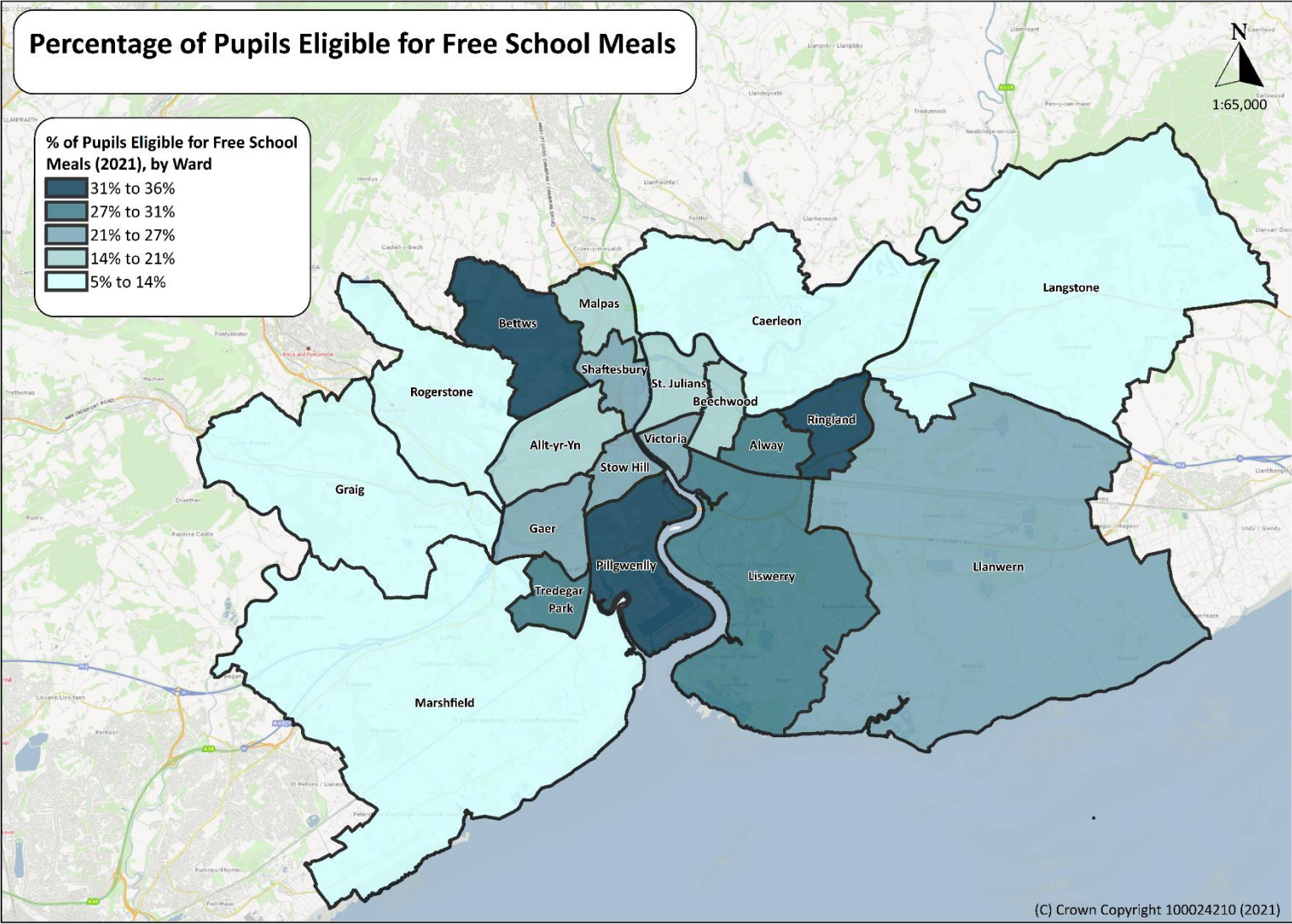
Number of unemployed families with dependent children

The percentage of children in Newport living in workless households between 2010 and 2014 has fluctuated with a slight decrease from 22.6% to 22.2%. However, a decrease from 18.8% to 14.6% has been seen for the whole of Wales.



The number of children living in households in Newport where no one works is not following the same trend as the rest of Wales and the wider UK. In 2014 both Wales and the UK recorded the lowest levels since this measure was first recorded in 1997, whilst Newport has not recorded a significant and sustained reduction in the last five years.

Furthermore, in accordance with data provided from Newport Intelligence Hub, we have further insight into the percentage of people eligible for Free School Meals 2021. Pillgwenlly, Bettws and Ringland are the wards most in receipt at an average of 33.5%.



Welsh Language

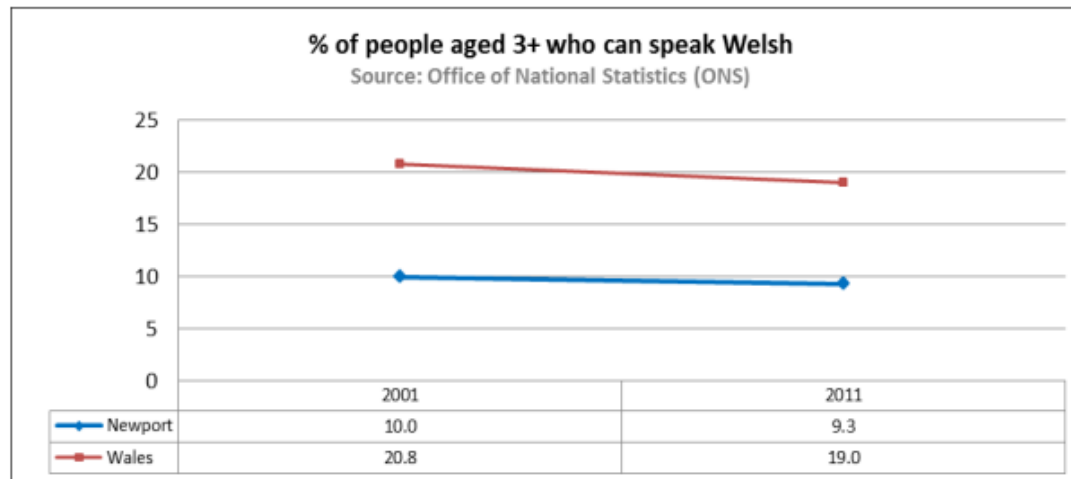
The Welsh Language strategic framework 'More than just words' aims to improve frontline health and social services provision for Welsh speakers, their families and carers. In keeping with the principles in the framework, the regional planning systems will include references to the linguistic profiles of local communities and ensure this is reflected in the service delivery.

A detailed Welsh Language community profile has been completed by local Public Service Boards (PSBs) for inclusion in the local well-being assessment in each area. This PNA will use the profile to effectively identify actions required to deliver the range and level of services identified as necessary through the medium of Welsh.

[Population Needs Assessment Gwent Region Report May 2017 \(newport.gov.uk\)](http://newport.gov.uk)

There are different datasets on who speaks Welsh in Newport, and the results vary greatly. The census data is the information gathered from the whole population, whilst the others are smaller sample based datasets.

The percentage of people aged 3+ years who could speak Welsh at the time of the last Census (2011) in Newport was 9.3%, compared to 19.0% for Wales. Between the 2001 Census and the 2011 Census there was a decrease of 0.7 percentage points in Newport, this compares with a 1.8 percentage point decrease for Wales.



If we look at the table, it is possible that parents overestimated their children's ability to speak Welsh. In 2011, parents completing the census said that 42% of children and young people aged 11-14 speak Welsh. The figure was 46% in 2001. In tracing that cohort from the 2001 to 2011 the figure drops from 46% of 10–

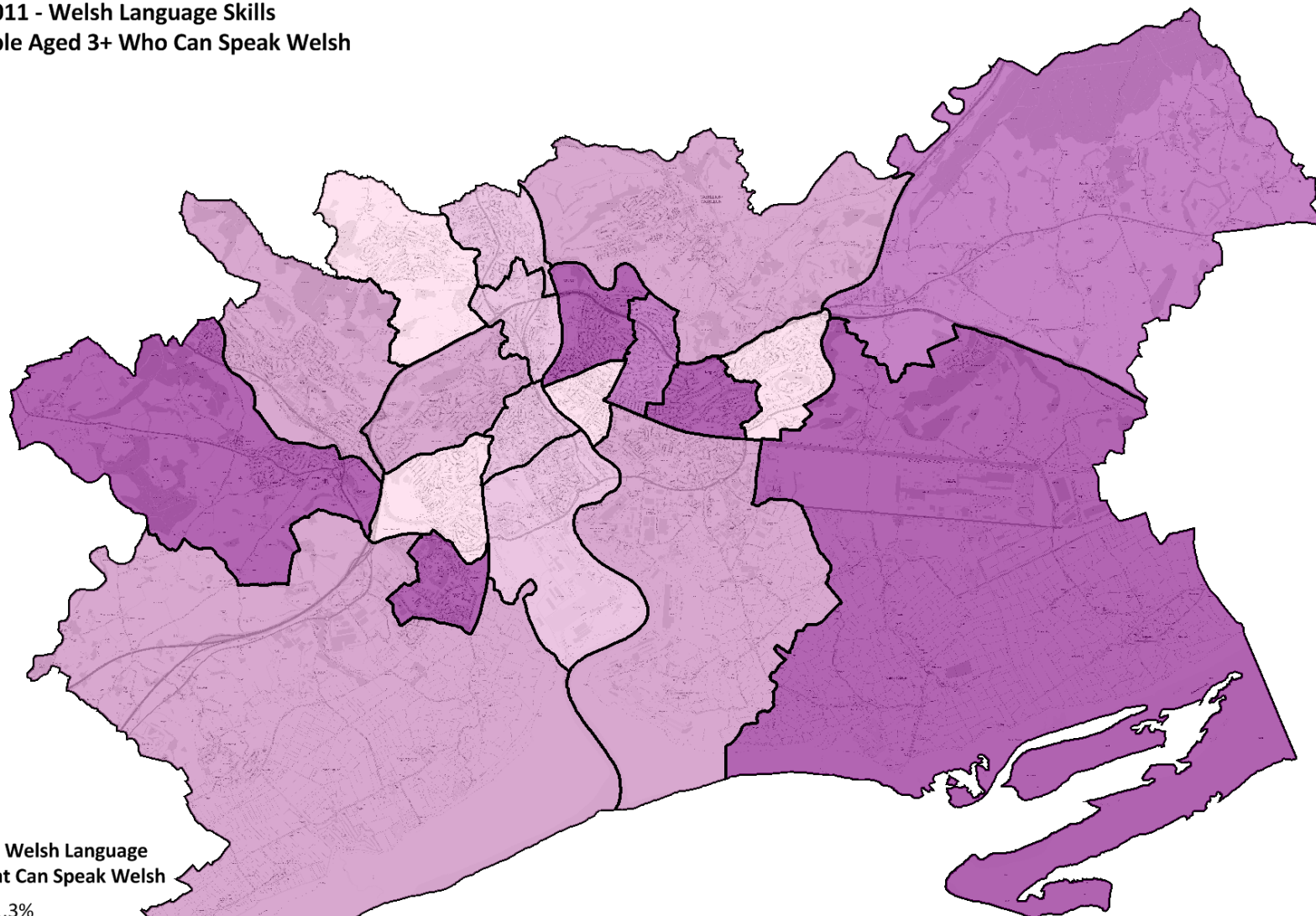
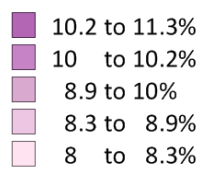
14-year-olds to 7.8% of 20–24-year-olds speaking Welsh over a decade later. It is unlikely that individual skill levels would change this significantly over a decade and brings into question the validity of the data.

	2001%	2011%	%diff	
Age 3 - 4	9.2	14	4.8	↑
Age 5 - 9	36.3	34.8	-1.5	↓
Age 10 - 14	46.1	42	-4.1	↓
Age 15 - 19	21.4	23	1.6	↑
Age 20 - 24	3.8	7.8	4	↑
Age 25 - 29	3.4	4.9	1.5	↑
Age 30 - 34	2.8	3.3	0.5	↑
Age 35 - 39	2.6	3.1	0.5	↑
Age 40 - 44	2.7	2.6	-0.1	↓
Age 45 - 49	2.8	2.4	-0.4	↓
Age 50 - 54	2.7	2.4	-0.3	↓
Age 55 - 59	2.6	1.9	-0.7	↓
Age 60 - 64	2.1	1.8	-0.3	↓
Age 65 - 69	2.9	1.7	-1.2	↓
Age 70 - 74	2.3	1.4	-0.9	↓
Age 75 - 79	2.6	2	-0.6	↓
Age 80 +	2.2	1.8	-0.4	↓
Total	10	9.3	-0.7	↓

Furthermore, the 2011 Welsh in Education Strategic Plan (WESP) figures suggest that about 4% of the 24,000 pupils in Newport sought education through the medium of Welsh. This contradicts the figure of 34.8% of total 5–9-year-olds which the 2011 census claim speak Welsh within the local authority area. In summary, it is likely that both the 2001 and 2011 census overestimates the number and proportion of Welsh speakers in Newport.

Census 2011 - Welsh Language Skills
% of People Aged 3+ Who Can Speak Welsh

Census 2011 - Welsh Language
% Over 3s That Can Speak Welsh



Using Welsh Daily

For the year ending 30 September 2020, the Annual Population Survey reported that 28.8% of people aged three and over were able to speak Welsh. This figure equates to 872,200 people. This is 0.2 percentage points lower than the previous year (year ending 30 September 2019), equating to 2,400 fewer people.

The chart shows how these figures have been gradually increasing each year since March 2010 (25.2%, 731,000), after they had been gradually declining from 2001 to 2007. The number of people reporting to be able to speak Welsh declined from December 2018 to March 2020, before increasing again in the most recent two quarters. This increase should be treated with caution due to the change of survey mode since mid-March 2020 because of the coronavirus pandemic. See 'Changes to the survey' below.

The highest percentages of Welsh speakers can be found in Gwynedd (75%) and the Isle of Anglesey (66%). The lowest percentages of Welsh speakers are in Monmouth (16%), Bridgend, Blaenau Gwent, Torfaen and Newport (18%)

[Annual Population Survey: Welsh language \(gov.wales\)](https://gov.wales/annual-population-survey-welsh-language)

In accordance with data received from Welsh Government and the Annual Population Survey conducted September 2021, 18% of Newport population speak welsh, with an average of 19% of the population able to read, write and understand the welsh language.

Local Authority	Read Welsh	Write Welsh	Understand Spoken Welsh
Caerphilly	20.6	18.8	27.9
Blaenau Gwent	12.4	11.1	17.0
Torfaen	15.0	13.7	19.5
Monmouthshire	16.0	14.5	21.2
Newport	17.0	15.6	24.6
Wales	25.9	23.8	33.7

[Welsh language data from the Annual Population Survey: October 2019 to September 2020 | GOV.WALES](https://gov.wales/welsh-language-data-from-the-annual-population-survey-october-2019-to-september-2020)

Welsh Language in the Future

Our current projection figures suggest there will be slight reduction in Primary Schools pupils over the next 5 years, with overall growth being made up for by strong secondary school growth. However, given that our more recent census figures for the academic year 16/17 are already higher than our projections for the year 17/18, there is increasing evidence to suggest that our projections may underestimate the demand for Welsh medium education in Newport.

	2016/17*	17/18	18/19	19/20	20/21	21/22
Ysgol Gymraeg Casnewydd	305	290	288	284	284	282
Ysgol Gymraeg Ifor Hael	186	168	163	158	153	147
Ysgol Gymraeg Bro Teyrnnon	128	146	164	163	174	181
Primary Pupil Totals	619	604	615	605	611	610
Ysgol Gyfun Gwent Is Coed **	81	135	210	303	396	463
Ysgol Gyfun Gwynllyw	234	217	179	149	92	50
Secondary Pupil Totals	315	352	389	452	488	513
Pupil Totals	934	956	1004	1057	1099	1123

*2016/17 are based on Newport City Council's Autumn 2016 school census

Furthermore, there is a proposed target for increasing the number of Welsh speakers in Newport to ensure that we do not see growth in Welsh medium education plateau over the next five years, we have set a target to increase the number of Newport pupils in Welsh medium education from 934 in 2016/17, to 1,250 or more in 2022/23. This is based on filling the reception classes of the 3 Welsh medium primary schools to their capacity. The chart below demonstrates how the target looks to improve on our current cohort size. By 2022 this strategy, working in conjunction with the Welsh in Education Strategic Plan (WESP), looks to increase the number of children in Welsh medium primary schools by 19.1% over the current cohort population. This represents a growth from 4% of the school age population to 5%.

Projections and target for pupils in Welsh medium education

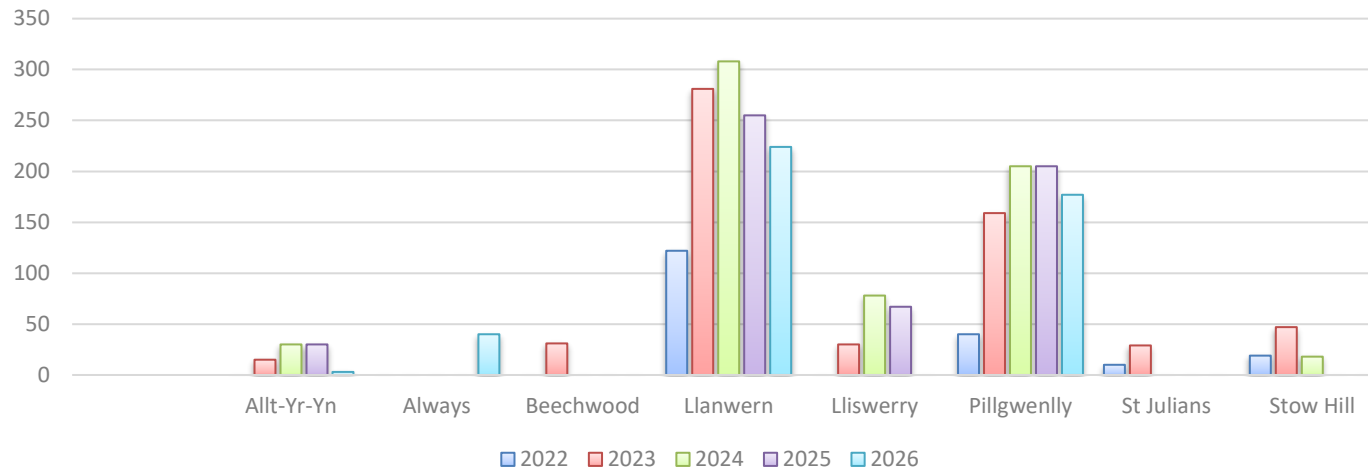
Pupil number	2016/17	Projection 2021/22	Target 2021/22
Welsh Medium Primary Schools	619	610	737
% Welsh Medium Primary Schools	4.7%		5.3%
Welsh Medium Secondary Schools	315	513	513
% Welsh Medium Secondary Schools	3.2%		4.5%
Welsh Medium Primary and Secondary Schools	934	1123	1250
% Welsh Medium Primary and Secondary Schools	4.0%		5.0%

Housing Development – Local Development plan 2011 – 2026

For many years, the Council has been working to produce a [Local Development Plan](#) that provides land use policies and proposals to shape the future growth of Newport up until 2026. The Local Housing Market Assessment indicates an on-going requirement for affordable housing totalling 86% of the overall housing requirement for the LDP. Many people are not able either to access and/or to afford open market housing. Therefore, in accordance with Planning Policy Wales and Technical Advice Note 2: Planning and Affordable Housing (2006), new development will be required to include affordable housing. The viability of development is undertaken on a site-by-site basis. As such, the percentage of affordable housing provision is set at a rate that reflects individual site viability.

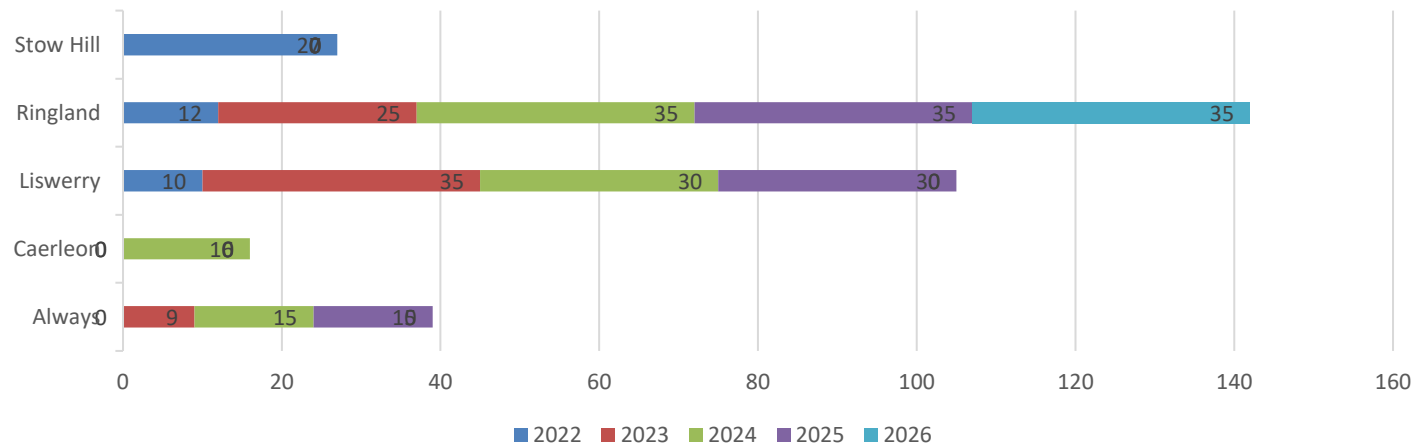
Below sets out the numbers of dwellings planned for the remaining period of the Local Development Plan (2022 – 2026)

Private dwellings planned



Llanwern and Pillgwenlly see the largest number of proposed developments of private dwellings in all years from 2022 – 26 (Llanwern 1190, Pillgwenlly 786).

Housing Association planned



Ringland and Lliswerry see the largest number of proposed developments of housing association dwellings in all years from 2022 – 26 (Ringland 142, Lliswerry 105).

As part of the planning process, a developer may be required to enter into a legal agreement where this is not possible to achieve through planning conditions. These legal agreements are also known as Planning Obligations or Section 106 Agreements and they are secured pursuant to Section 106 of the Town and Country Planning Act 1990 (as amended).

Planning Obligations can cover almost any relevant issue, acting as a main instrument for placing restrictions on developers, often requiring them to minimise the impact on the local community and to carry out tasks which will provide community benefits, and can include the payment of sums of money.

