

High level summary of initial outcomes from Evidence Audit

Context

The review provides a consistent understanding of growth patterns, key allocations and infrastructure priorities, and identifies where the evidence base remains robust and where updates are required to support SDP preparation.

Regional spatial strategy

Across North Wales, there is a clear and consistent spatial pattern: Growth is concentrated along the A55 and A5/A483 corridors, reflecting strong links between:

- Housing;
- Employment; and
- Strategic transport infrastructure.

The Wrexham–Deeside National Growth Area (NGA) is the primary focus for economic and housing growth. A series of Regional Growth Areas (RGAs) along the north coast (e.g. Bangor, Llandudno, Rhyl, Holyhead) act as key service and employment centres. This broadly aligns with Future Wales and is reinforced through LDP strategies across all authorities.

Transport and infrastructure

The region benefits from strong strategic connectivity, anchored by:

- The A55 North Wales Expressway (Holyhead to Chester);
- Proposed improvements through the North Wales Metro; and
- A wide range of planned infrastructure upgrades (rail, road, bus and active travel), now formalised through the RTP and Regional Transport Delivery Plan (RTDP).

The evidence confirms a strong alignment between planned growth locations and existing/proposed transport investment. This provides a solid foundation for integrated land-use and transport planning within the SDP.

Employment patterns

Employment growth is strongly aligned to:

- The Wrexham–Deeside NGA, including major sites such as Wrexham Industrial Estate and Deeside Enterprise Zone;
- Strategic corridors (A55 and A5/A483), with key allocations in Flintshire, Wrexham and along the north coast; and
- Sectoral opportunities including:
 - advanced manufacturing

- energy and nuclear (Anglesey, Trawsfynydd)
- tourism and coastal economies

Rural and more constrained areas (e.g. Eryri) show limited large-scale employment growth, reflecting environmental constraints.

Housing provision

Across adopted LDPs, the review identifies:

- ~46,000 dwellings allocated across North Wales;
- A generally distributed pattern of growth, focused on higher-tier settlements; and
- Strong alignment between:
 - housing allocations
 - employment areas
 - transport corridors

However, there is variation between authorities in the scale of growth and reliance on large strategic sites versus smaller allocations. Recent Welsh Government evidence introduces a significant change in context:

- New estimates indicate substantially higher housing need across Wales;
- Around 35% of need is for affordable housing; and
- Unmet need has increased significantly, driven by rising homelessness.

For North Wales, this creates a potential gap because many existing LDPs are based on older, lower growth assumptions, and there is a risk that continuing these approaches could underprovide against updated evidence. There is also a clear shift in emphasis from allocating land to delivering homes in practice, with a greater role for public sector funding, housing associations, and alternative delivery models.

Constraints, sensitivities and opportunities

Future growth will need to respond to important regional constraints, including:

- Environmental designations (Eryri National Park, AONB/National Landscape, coast);
- Potential new National Park designation in North East Wales;
- Infrastructure capacity; and
- Welsh language and community considerations.

These factors are particularly important when considering how additional housing requirements could be accommodated.

The review highlights several key implications for the emerging SDP:

- Strong foundation: Existing spatial strategies and infrastructure plans provide a clear starting point.
- Balancing challenge: Higher housing need must be reconciled with environmental, community and viability constraints.
- Delivery focus: Greater emphasis needed on how development will be delivered, not just where.
- Changing context: The SDP is being prepared during a period of evolving national policy, including likely future housing targets.

North Wales has a well-established and coherent spatial structure, with growth aligned to key corridors, centres and infrastructure. However, the policy and evidence base is evolving rapidly, particularly in relation to housing need and delivery. The SDP provides a critical opportunity to update and strengthen the regional growth strategy, align with the latest evidence and move towards a more delivery-focused, regionally integrated approach to planning.