2023/24 AUTHORITIES MONITORING REPORT

PLYMOUTH & SOUTH WEST DEVON JOINT LOCAL PLAN

produced by West Devon Borough Council, South Hams District Council and Plymouth City Council

Contents

Introduction

What is the Authorities Monitoring Report?

The production of an Authorities Monitoring Report (AMR) is an annual requirement for plan making authorities. Each report is subject to the procedures set out in the Planning and Compulsory Purchase Order Act 2004 (as amended by the 2011 Localism Act) and The Town and Country Planning (Local Planning) (England) Regulations 2012. The performance measures included in this report are those agreed with the assigned Planning Inspector at the adoption of the Plymouth and South West Devon Joint Local Plan (JLP), but where possible we also have sought to include extra information to support a greater understanding of trends associated with the Plan Area.

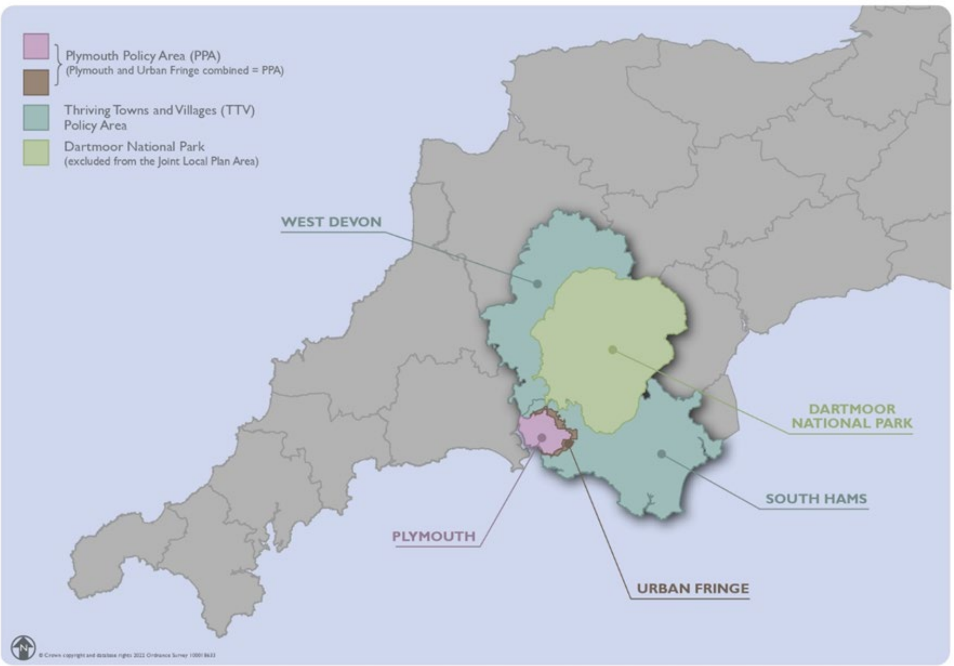
What area does the Joint Local Plan cover?

The JLP was adopted in March 2019 by Plymouth City Council, South Hams District Council and West Devon Borough Council and forms part of the Development Plan for each area. The JLP identifies the Plymouth Housing Market Area as the Plan Area, and uses two policy areas to deliver a spatial strategy.

1. The Plymouth Policy Area (PPA) comprising Plymouth and parts of the city's edge which fall within the South Hams ("the urban fringe"); and,

2. The Thriving Towns and Villages Policy Area (TTV) which comprises the parts of the South Hams and West Devon which are not within the PPA or within Dartmoor National Park. Dartmoor National Park is excluded from the JLP area.

Figure 1.1 Map of JLP Policy Areas



2. Annual Monitoring Summary

Table 2.1 provides a summary of plan progress based on the 'direction of travel' indicators in Annex 2 of the JLP for the 2024 monitoring point. Further details of each indicator are provided throughout the remainder of this report and can be accessed by clicking on the relevant indicator title within the table.

Direction of travel indicators are not always reflective of measures in the direct control of planning policy in the Joint Local Plan, some tell us more about how the plan area itself is functioning and whether past assumptions which underpin our understanding of the places we plan for have been subject to change.

Table 2.1 Progress of JLP direction of travel indicators

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
Number of Neighbourhood Plans Adopted	PPA & TTV	28 Neighbourhood Plans had been made within the Plan Area, one of which was made during the monitoring year (Totnes).	Positive
Plymouth's Population	PPA	Plymouth's population continues to grow, with an estimated 6,756 more people estimated to be living within the authority area since the start of the plan period (ONS, 2024).	Positive
Total Homes Built	PPA & TTV	Since 2014, 13,538 new homes (net) have been added to the overall housing stock across the plan area through new development activity. This would put overall delivery ahead of the plan's target if annualised for indicative purposes. However, since the adoption of the JLP, the standard method for the assessment of local housing need has been adjusted upwards to meet the objectives of the new Government. This change renders the housing target within Policy SPT3 out of date and current delivery is behind target.	Negative
Distribution of New Homes Built Within the JLP Settlement Hierarchy	PPA & TTV	The majority of new homes provided to date have been built in the Plymouth Policy Area and our Main Towns in accordance with the adopted JLP settlement hierarchy.	Generally positive
Development of Homes on Previously Developed Land	PPA & TTV	55% of new homes in the Plan Area have been provided on previously developed land, including 80% of all homes built in the Plymouth Policy Area. The remainder of development sites have been on previously undeveloped land, less than 3% of which have been in residential gardens.	Positive
Affordable Homes Built	PPA & TTV	A total of 2,770 affordable net new affordable homes have been provided since the start of the plan period, 326 of which were built within the monitoring year. The total number of affordable homes delivered across the plan area is therefore 530 homes behind the cumulative monitoring target when annualised for	Partly negative

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
		indicative purposes. This is primarily due to the demolition of poor-quality affordable homes within the early phases of regeneration projects in the Plymouth Policy Area. These losses are being replaced by a supply of high-quality affordable homes that will continue to deliver over the next few years. A sufficient supply of housing is consented and allocated in the JLP area to provide enough affordable homes to meet the plan target. When considered in isolation, the Thriving Towns and Villages Policy Area is currently ahead of the cumulative monitoring target by 169 affordable homes when annualised for indicative purposes, however housing ownership continues to be largely unattainable for many due to sustained and significant rises to house prices in proportion to local wages over the last 20 years. A review of planning permissions suggests developers proposing new homes on previously developed sites are the most unlikely to be able to commit to meeting the JLP's 30% target.	
Housing Supply	PPA & TTV	Since the adoption of the JLP, the standard method for the assessment of local housing need has been adjusted upwards to meet the objectives of the new Government. The changes result in the JLP authorities no longer being able to demonstrate a 5-year land supply for the development of new homes and therefore the JLP housing target set in Policy SPT3 is now considered to be out of date for the purpose of decision making.	Negative
Delivery of Employment Floorspace	PPA & TTV	There has been over 90,000sqm of new floorspace built for employment uses across the plan area to date. All three JLP authorities have made good progress towards delivering the 2034 policy target with 10 years of the plan period remaining. This considered, there remains national uncertainty regarding future demand for new office spaces since the Covid-19 pandemic which may impact future construction activity. Trends will continue to be monitored to understand if such permissions are being implemented and relevant phases are being built out on larger mixed-use sites. Monitoring is made less precise by the amalgamation of national planning use classes for employment and high street uses which remove the need for planning permission for legal changes in land uses.	Generally positive
Distribution of Built Employment Floorspace Across	PPA & TTV	The PPA continues to be the centre of new economic development in accordance with the spatial strategy of the JLP, delivering 74% of all new employment floorspace since the start of the plan period.	Generally positive

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
Settlement Hierarchy		Outside of Plymouth, the majority of new employment floorspace was recorded in locations classed as being within the countryside, these figures are skewed due to existing employment sites including floorspace intensive uses (such as warehousing) being located outside, but near to settlements, being counted as within the countryside when applying the current settlement hierarchy. Changes to the national planning use class order amalgamating employment and high street uses within the new Class E continue to reduce the accuracy of monitoring using planning permissions data.	
Working Age Population in Employment	PPA & TTV	Latest statistics suggest the working age population has reduced across the JLP authority area consistent with an ageing population in South Hams and West Devon and historic net migration patterns in Plymouth (ONS, 2024). These trends highlight the long-term importance of attracting and retaining working age people in the plan area to sustain local businesses and public services. The percentage of residents of working age who are in employment has risen across the plan area since the plan start date. Percentage increases were reported in Plymouth (2%), South Hams (3%) and West Devon (1%) in the latest reporting from the Office for National Statistics (ONS, 2024).	Neutral
Number of Jobs in Dockyard and Naval Base	PPA	The latest figures reported within the Plymouth Port Study (2024) estimate the marine and maritime sector in Plymouth accounts for approximately 13,500 jobs. This is equivalent to approximately 12% of total employment in Plymouth city and 10% in the Plymouth Travel to Work Area (TTWA) (Plymouth Port Study, 2024). The ports continue to attract substantial investment reflecting their importance to the city and the region.	Generally positive
GVA Per Hour	PPA	The latest available Gross Value Added (GVA) per hour index figure for Plymouth was 81.5% of the UK average in 2020 in comparison to 83.4% of the UK average at the beginning of the plan period in 2014 (ONS,2024). The majority of the JLP strategic employment land allocation at Langage (PLY51) was announced as the Plymouth and South West Devon Freeport by national Government in the previous monitoring year. The freeport is private-public partnership and aims to become a national hub for trade, investment, and innovation, creating new high skilled, high wage jobs, and training opportunities, and adding significant value to the local and regional economy.	Neutral

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
		Other strategic employment sites in the PPA include the Plymouth International and Technology Park and Plymouth Science Park, development at both these sites was either part complete or had the benefit of planning permission at the monitoring point. Therefore, while currently GVA is currently behind target, if realised, the future direction is considered generally positive and expected to bring improvements to GVA in the plan subsequent monitoring years.	
Delivery of food and non-food floorspace	PPA & TTV	There is no target for retail development within the JLP, instead an assessed sustainable market retail capacity is identified alongside a flexible policy which allows officers to consider the merits of new planning proposals on a case-by-case basis. Plymouth Policy Area has surpassed the identified capacity for food retail floorspace at adoption of the plan, but the TTV has remaining capacity, however existing permissions continue to deliver positively with the new commercial centre at Derriford under construction at the March 2024 monitoring point. There remains identified capacity for new food retail outlets within the TTV has remaining identified capacity for further provision within the policy area based on current evidence. Both the Plymouth Policy and Thriving Towns and Villages policy areas have identified remaining capacity for non-food outlets. The capacity assumptions used within the JLP are trend based and now over five years old, therefore such figures will need to be re-assessed as part of future plan making work.	Generally positive
Plymouth City Vacancy Rates	PPA	Within the latest retail vacancy survey, the city centre vacancy rate was 15.1% which is above the national average vacancy rate of 14%. High vacancy rates highlight the continued need to reevaluate the role and function of Plymouth City Centre and secure investment and improve the quality of the public realm and building stock. This need was recognised in the JLP before structural changes to the retail market and planning use classes during COVID-19 lockdowns. An initial strategy for future investment, including the Transforming Cities Fund and Plan for Homes has been secured working with a variety of stakeholders and public realm improvement works commenced in the previous monitoring year.	Neutral

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
City Centre Catchment Area	PPA	Updated city centre catchment modelling is currently not available. The latest dataset is now 5 years old and thus not a reliable indicator of the current strategic role and function of the city centre beyond what was known at the adoption of the JLP in 2019.	Neutral
Main Town Vacancy Rates	TTV	All of our high streets in our 'Main Towns' continue to perform strongly in comparison to the national average. The highest vacancy rates recorded in this year's survey were at Kingsbridge where 11% of shopping units in primary frontage and secondary frontages were vacant in comparison to the national average of 14%.	Positive
Visitor spend	PPA	Destination Plymouth estimate there were 4.3 million visitors to Plymouth in 2023 with an estimated spend of £335.7 million. These figures suggest the overall number of visitors to Plymouth have still not fully recovered since the pandemic (5.3m in 2019),while visitor spend has recovered to pre-pandemic levels (£334.8 million in 2019).	Neutral
Percentage of premises with access to superfast broadband	PPA & TTV	All authorities have increased availability of superfast broadband across the plan area however our target of 30/Mbps download speeds across the JLP area has not yet been achieved. Availability in Plymouth is currently reported at 97% of all premises. Whilst availability to premises in South Hams and West Devon was reported at 86.2% and 82.8% respectively (OFCOM, 2024).	Generally positive
Delivery of land use allocations	PPA & TTV	Over half of all JLP allocated sites have now either gained detailed planning permission, are under construction, or are complete with 10 years remaining of the plan period.	Generally positive
Method of Travel to Work	PPA & TTV	The latest published Census Travel to Work statistics (Census 2021) suggest the majority of workers (over 50% in all three authorities) commute by car or van with the next most popular modes being working from home (over 20% in each authority area) and walking (over 10% in each authority area). Due to the methodology of the Census 2021, undertaken during COVID-19 lockdown, the ONS have advised to not consider the travel to work statistics to be a reliable indicator of current travel patterns in isolation. Subsequent publications from the ONS have suggested a continued national trend towards working from home for at least part of the working week. This trend is most prominent for those in professional occupations. However, these trends will need to be considered further in future as part of future evidence work before drawing conclusions.	Neutral

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
Rail Station Passenger Numbers	PPA & TTV	There has been a strong recovery in rail passengers counted at stations throughout the JLP area year on year since COVID-19 lockdown, now reaching the numbers seen pre-pandemic. With the exception of Plymouth central station, stations across the authority area are seeing improvements in passenger numbers recorded at the start of the plan period. Notable successes include Ivybridge station which has recorded consistently higher passenger numbers each year since the start of the plan period, and Okehampton where the new station has enabled a dramatic increase in the number of overall passengers travelling by train in West Devon. Okehampton station was estimated to host over 365,620 passengers in the monitoring year (ORR, 2024).	Generally Positive
Train Journey Time Between Plymouth and London	PPA	Pre COVID-19, improvements were made to the regularity of services between Plymouth and London, however service frequency has not yet fully restored. The average journey time between the two cities remains comparable to when the JLP was adopted in 2019. In future monitoring years there is expected to be disruption relating to the delivery of the HS2 Old Oak Common on the Great Western line just west of Paddington Station.	Neutral
Number of Passengers and Freight Tonnage at Ferry Ports	PPA	COVID-19 lockdown led to a dramatic reduction of sea ferry passengers travelling to and from Plymouth port. Overall Passenger levels are reported to have still not recovered to pre pandemic levels although there was a continued increase in passengers since the previous monitoring year (DFT, 2024). Freight traffic tonnage was similarly affected by COVID-19 lockdowns, despite initial strong recovery, freight tonnage in the latest available figures were 16% lower than pre-pandemic levels and 2% lower than in 2014 (DFT, 2024).	Neutral
Progress of Improvements to Plymouth's Northern Travel Corridor	PPA	At the monitoring point 73% of planned improvements to Plymouth's northern travel corridor have either begun construction or been completed.	Generally positive
Carbon Emissions	PPA & TTV	The latest national carbon emissions data produced by the department of Business, Energy, and Industrial Strategy in 2024 is for 2022 as the dataset is released in arears. Whilst there has been progress in all three authorities towards the 50% reduction target, the main source of improvements relates to energy supply rather than	Neutral

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
		planning interventions. There remains work to be done in all authorities to meet the plan target for 2034.	
Air Quality Management Areas	PPA & TTV	There was good progress within the Monitoring Year with the AQMA being revoked in Plymouth. There was continued compliance with air quality objectives within AQMAs at Ivybridge and Totnes showing good progress on previous years of monitoring. Nitrogen Dioxide levels within the Dean Prior AQMA still exceed objective levels, though they have reduced substantially. There are currently no AQMAs in West Devon.	Generally positive
Percentage of deaths from air particulate matter	PPA & TTV	All three authorities recorded a lower percentage of deaths associated with air particulate matter than the average for the UK (OHID, 2024).	Positive
Bathing water quality	PPA & TTV	All 19 bathing water locations monitored by the Environment Agency were rated as good or above for the monitoring year.	Positive
Delivery of Plymouth's strategic green spaces	PPA	Two thirds of planned greenspace improvements in the JLP have either commenced or are part complete.	Generally positive

3. Development Plan Status and Administration

The Joint Local Plan and Supplementary Planning Document

The JLP provides the spatial strategy and planning requirements for new development up to 2034 through its planning policies. This report represents an annual update on the performance of such policies and broader strategic changes within the plan area. It will therefore form part of the evidence base when considering the need for any future change.

On 16 January 2025, the JLP Partnership Board agreed a public statement on the intentions of the three councils in relation to the JLP moving forward. This statement followed a lengthy consideration of the implications of the national planning reforms, the new standard method for calculating local housing need and, more recently, the Devolution White Paper and the local government reorganisation agenda. The councils agreed that the next iteration of local plan making for the JLP area will not be as a joint local plan covering Plymouth, South Hams and West Devon. Instead, Plymouth City Council will work on a new local plan based on the city's administrative boundaries. The full statement can be viewed here.

The timetable for new plan making activity will be published within new Local Development Schemes (LDS) for each LPA. These are expected to be available from March within each respective authority:

- Plymouth City Council Local Development Scheme: https://www.plymouth.gov.uk/local-development-scheme
- South Hams District Council Local Development Scheme: https://www.southhams.gov.uk/your-council/council-plans-policies-and-reports/policies/planning-policies
- West Devon Borough Council Local Development Scheme : https://www.westdevon.gov.uk/your-council/council-plans-policies-and-reports/policies/planning-policies

Whilst preparing new plans and until such time that new local plans are adopted, the JLP remains the statutory Development Plan for the purpose of decision making and the effectiveness of the strategy will continue to be monitored to support future plan making.

The Plymouth and South West Devon Supplementary Planning Document was adopted by all JLP authorities in 2020 and provides further guidance on how the policies of the Development Plan will be interpreted by decision makers.

The Climate Emergency Planning Statement was adopted In November 2022.The statement introduces additional requirements for new development and is a material consideration in determining planning applications.

Made Neighbourhood Plans (Indicator 30)

The JLP only forms one part of the decision-making framework for planning applications within the Plan Area. The Plan Area hosted 28 made Neighbourhood Plans at the 2024 monitoring point as listed in Table 3.1.

Table 3.1. Neighbourhood Plans made at the March 2024 Monitoring Point

Name of Neighbourhood Plan Area	Date Made
Plympton St Mary	Made May 2019
Salcombe	Made September 2019
South Milton	Made April 2019
Stoke Fleming	Made November 2018
Bickleigh	Made October 2018
Malborough	Made December 2018
Ivybridge	Made December 2017
Ugborough	Made May 2018
Thurlestone	Made July 2018
Newton and Noss	Made July 2018
Brixton	Made November 2019
Bigbury	Made April 2020
Bere Peninsula	Made October 2018
Aveton Gifford	Made May 2021
Kingston	Made May 2021
Kingswear	Made May 2021
South Huish	Made May 2021
Strete	Made October 2021
Highampton	Made May 2021
North Tawton	Made May 2021
Bridestowe & Sourton	Made September 2021
Ringmore	Made March 2022
Modbury	Made March 2022
Frogmore and Sherford	Made May 2022
Milton Abbot, Chillaton and Kelly	Made July 2022
Dartmouth	Made December 2022
Kingsbridge, West Alvington and Churchstow	Made December 2022
Totnes	Made November 2023

Consultation activity with other Local Planning Authorities

JLP authorities did not take part in any formal consultation activity with other Local Planning Authorities within the monitoring year.

Processing planning applications

Central Government sets target times for decisions on planning applications. Unfortunately, there will always be individual circumstances where a planning decision cannot be made within those timeframes.

Late decisions can have negative impacts for Local Authorities and communities. They have an increased risk of planning appeal which can remove decision taking from local officers and councillors who know their local areas. If there are too many late decisions, authorities may also be subject to longer term central intervention measures.

All three decision taking authorities within the JLP area are performing within the target decision taking thresholds set out by the Planning Inspectorate. You can find further information about LPA Performance at https://www.gov.uk/government/statistical-data-sets/live-tables-on-planning-application-statistics.

Planning Obligations and the Community Infrastructure Levy

Developer contributions are received through Section 106 agreements and, for Plymouth, the Community Infrastructure Levy, to help mitigate the impacts of development, provide infrastructure, and deliver affordable housing. Information on the contributions secured can be found at the following locations:

- Plymouth City Council - https://www.plymouth.gov.uk/annual-infrastructure-funding-statement
- South Hams Borough Council - https://www.southhams.gov.uk/Developer-contribution
- West Devon District Council - https://www.southhams.gov.uk/Developer-contribution

4. Socio-Economic Indicators

Plymouth's population (Indicator 17)

The JLP supports the role of Plymouth as a key driver of regional economic growth. Consequently, we monitor the population growth of the city since the start of the plan period in 2014.

The population of Plymouth is estimated to have grown by 6,756 people since 2014 (ONS, 2024). It is important to note this figure does not include the new population in Plymouth's urban fringe, which is subject to significant development associated with Plymouth through the JLP, but located in South Hams District Authority Area. It is not currently possible to accurately monitor change throughout Plymouth's urban fringe as it does not match the national administrative boundaries used by the ONS.

Figure 4.1 and Table 4.1 show the latest population estimates for all three JLP authorities[1].

Figure 4.1. JLP authority area population estimates (ONS, 2024)

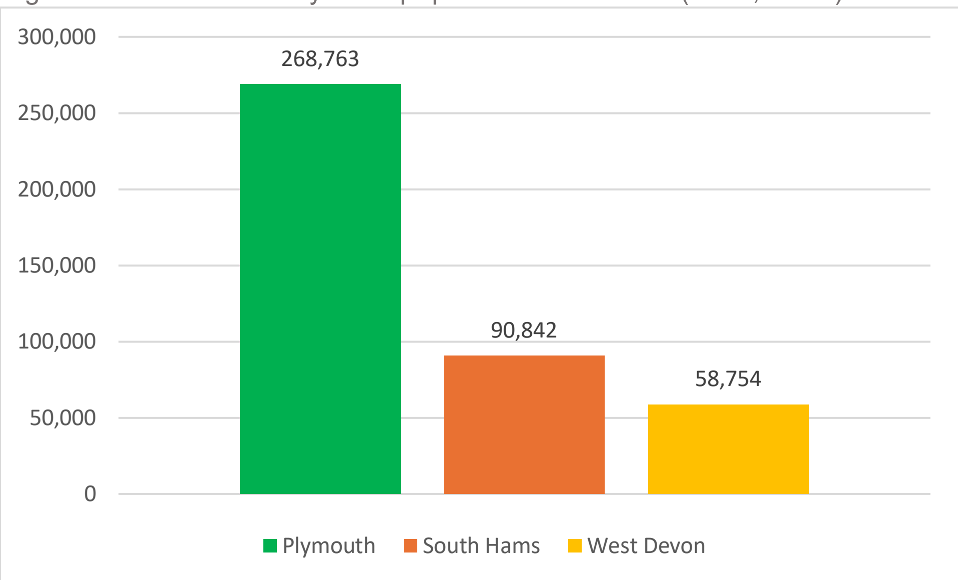


Table 4.1 Joint Local Plan authority area population estimates (ONS, 2024)

Council Area	Population Estimate (ONS 2024)
Plymouth City Council Authority Area	268,736
South Hams District Council Authority Area	90,842
West Devon Borough Council Authority Area	58,754

Average age of the population

The average age of the population within Plymouth has remained consistent since the start of the plan period whilst increasingly incrementally within our more rural

[1] Population figures for the South Hams and West Devon also include population estimates for Dartmoor National Park which is not included within the plan area.

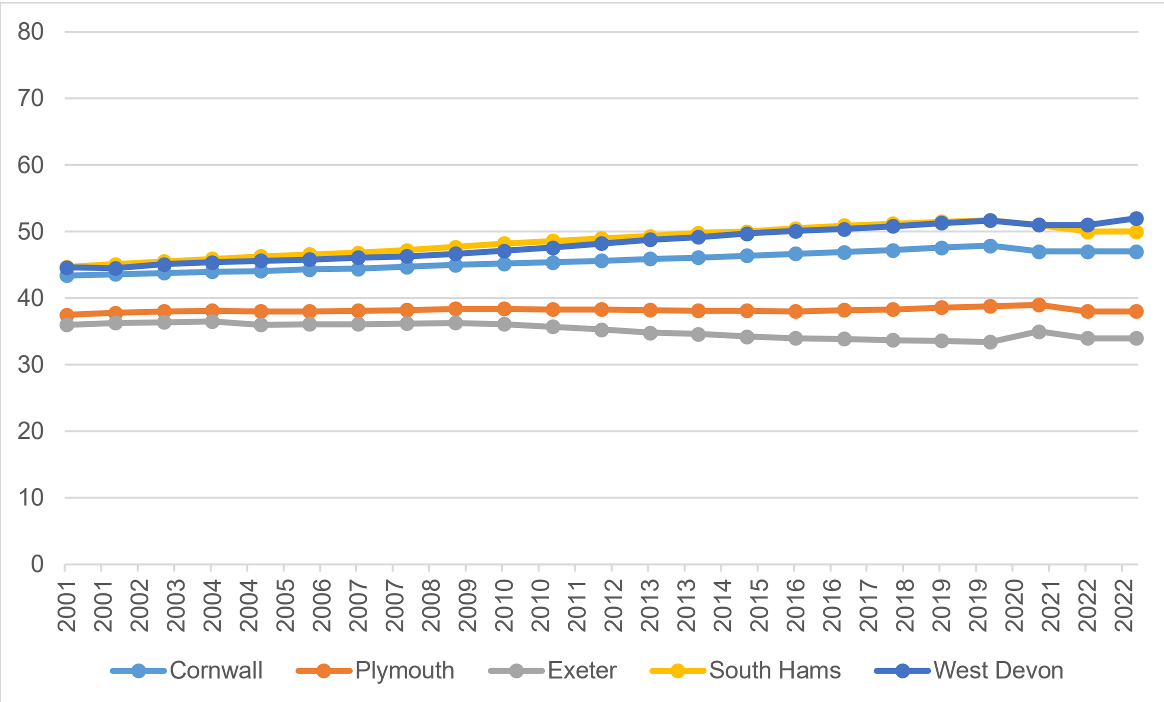
planning authority areas. The average age of residents in South Hams and West Devon was estimated to be 51.5 and 52.5 respectively in comparison to 39.5 in Plymouth within latest published population estimates (ONS, 2024). The overall trend towards an ageing population is consistent with long term national expectations.

There were more deaths than births within all three authority areas within the latest available ONS published estimates (ONS, 2024). Within the same year, the growth of the working age population in each authority area was supported by net positive inward migration, primarily driven by people moving to Plymouth, South Hams or West Devon from within Devon.

The most common age range of people migrating to Plymouth is estimated to be those between 16-24 years old, potentially signalling the attractiveness of Plymouth's higher education facilities. People migrating to the South Hams and West Devon are estimated to be older, with the majority of migrants being between 35 and 64 years old. In the same period there was an estimated net loss of 16–24 year olds from South Hams and West Devon (ONS, 2024).

Figure 4.2 shows the long-term trends in average age across JLP authorities and their neighbours. The most marked increases in average age being in the South Hams and West Devon. This trend is similar to neighbouring Cornwall authority area but contrasts with Exeter which has seen a one-year reduction in average age across its population since 2001, and Plymouth where the average age has remained fairly consistent.

Figure 4.2. Estimated average age by Authority Area (ONS, 2024)



Number of employees and working age population (Indicator 19)

The JLP supports the role of Plymouth as the centre of regional economic growth and employment. Therefore, we monitor the number of employees and percentage of the working age population in employment against national averages. For consistency, we also provide figures for other JLP authorities.

The latest statistics from the ONS annual population survey (2024) suggest the following:

- The overall number of people in employment in Plymouth Authority Area is estimated to have increased from around 122,300 in 2014 to 123,100 in 2024. This is despite a reduction in the overall working age population of around 500 people within that period. An estimated 73% of the working age population were in employment which is below with the UK national average employment rate (75.4%).

- The overall number of people in employment in South Hams Authority Area is estimated to have increased from around 41,900 in 2014 to 42,900 in 2024. This is despite a reduction in the overall working age population of around 1,600 people. An estimated 83.3% of the working age population were in employment which is above the UK average employment rate.

- The overall number of people in employment in West Devon Authority Area is estimated to have increased from around 26,000 in 2014 to 26,500 in 2024. There has also been an estimated reduction in the overall working age population of around 1,200 people in that same period. An estimated 77% of the working age population were in employment which is above the UK average employment rate.

It is important to note the number of people recorded as being of working age includes those who may be students, carers, residents with long-term sickness and those who have retired before the age of 64.

Number of jobs and workers at Plymouth’s naval base (Indicator 21)

Plymouth’s Naval base is a key source of employment across the JLP area, therefore the safeguarding and strengthening of Plymouth’s strategic defence role was seen as a suitable direction of travel indicator for the JLP at plan adoption.

The latest figures reported within the Plymouth Port Study (2024) estimate the marine and maritime sector in Plymouth accounts for approximately 13,500 jobs. At least 8,500 of these jobs are estimated to be provided in Devonport. This is equivalent to approximately 12% of total employment in Plymouth city and 10% in the Plymouth Travel to Work Area (TTWA) (Plymouth Port Study, 2024).

Plymouth City Council’s latest estimates suggest marine and related sector contributes £1.7 billion in terms of GDP and nearly £1 billion in terms of GVA representing around 25% of the city’s total GVA (Plymouth Port Study, 2024).

Plymouth's gross value added per hour index rating (Indicator 18)

The latest published GVA per hour index figure for Plymouth was 83.1% of the UK average in 2022 (ONS, 2024). The 2021 GVA per hour index figure for Plymouth has been revised to 83.4% in the most-up-to-date reporting, suggesting an adjusted annual fall in productivity of 0.3% (ONS, 2023).

This remains above the average across the Heart of Southwest LEP where the average GVA per hour figure was 80.1% of the UK average for 2022 (ONS, 2024)

5. Housing Indicators

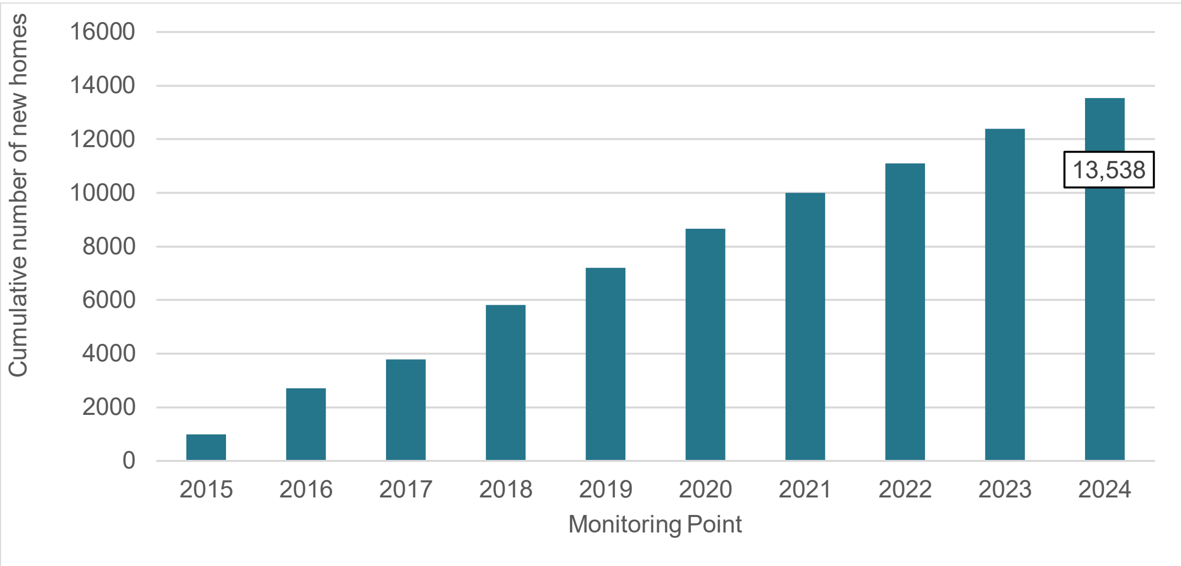
At adoption, the JLP sought to deliver a minimum of 26,700 net additional homes between 2014 and 2034 to meet the needs of the future population. To achieve this, it set a target to deliver 19,000 net additional homes in the Plymouth Policy Area (PPA) and 7,700 net additional homes in the Thriving Towns and Villages Policy Area (TTV).

The publication of updated Planning Practice Guidance has led to a substantial increase in the ‘standard method for assessing local housing need’ rendering the plan targets as set in Policy SPT3 of the JLP out of date for the purposes of decision making. Where we refer to previous targets within the AMR, these are solely to support understanding of trends over time versus expectation at the adoption of the plan.

Total net homes delivered in the plan period (Indicators 1, 5 and 6)

A total of 13,538 net additional homes had been built in the JLP area up to the monitoring point. Figure 5.1 shows the increase in the total net number of homes delivered within the plan area per year since March 2014.

Figure 5.1 Total net new homes by monitoring year against an indicative annualised delivery target



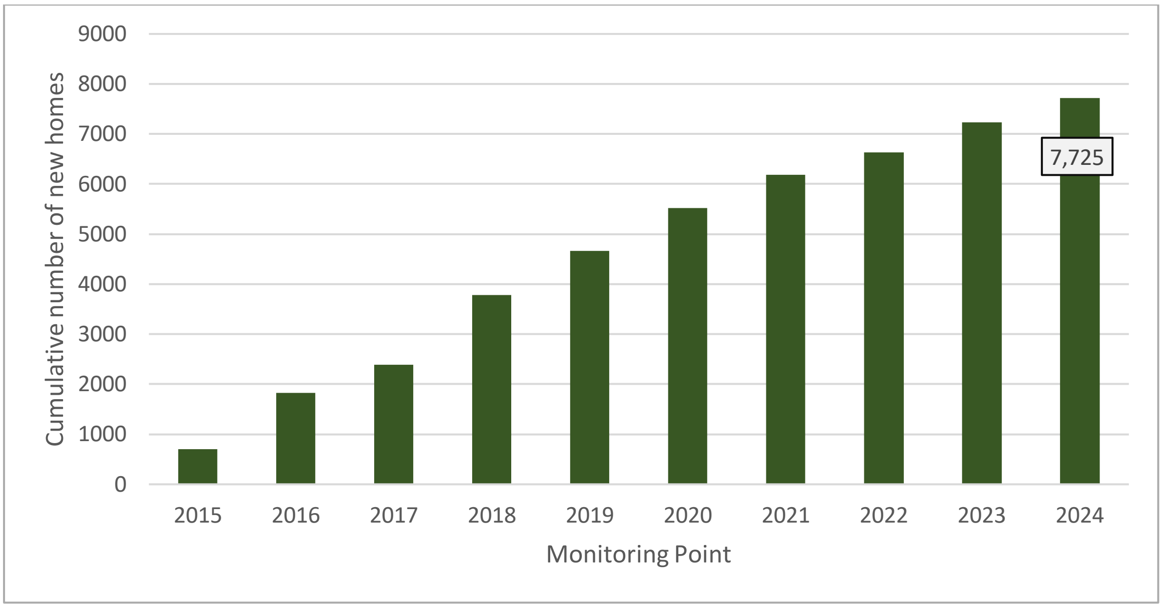
We monitor and publish results for individual Policy Areas to help understand the successes and challenges of building homes in different parts of the plan area.

The PPA remains the focus of new housing development across the JLP area, with 7,725 net additional homes provided up to the 2024 monitoring point. This constitutes 57% of all net additional homes provided in the plan area since March 2014.

1,775 less homes have been provided in the PPA to date at the 2024 monitoring point if applying an annualised monitoring target against our JLP housing policy targets for indicative purposes. There are multiple combining factors leading to the slowdown of market delivery in the PPA. These include rising build costs, COVID-19 lockdowns, and the reduction in demand for homes at new build market prices which attract a premium versus existing housing stock. Market impacts are most evident on strategic and previously developed sites in the PPA where development has slowed or stalled. Previously developed sites are often most affected by market volatility because of the higher financial risk for developers associated with them particularly in low value areas.

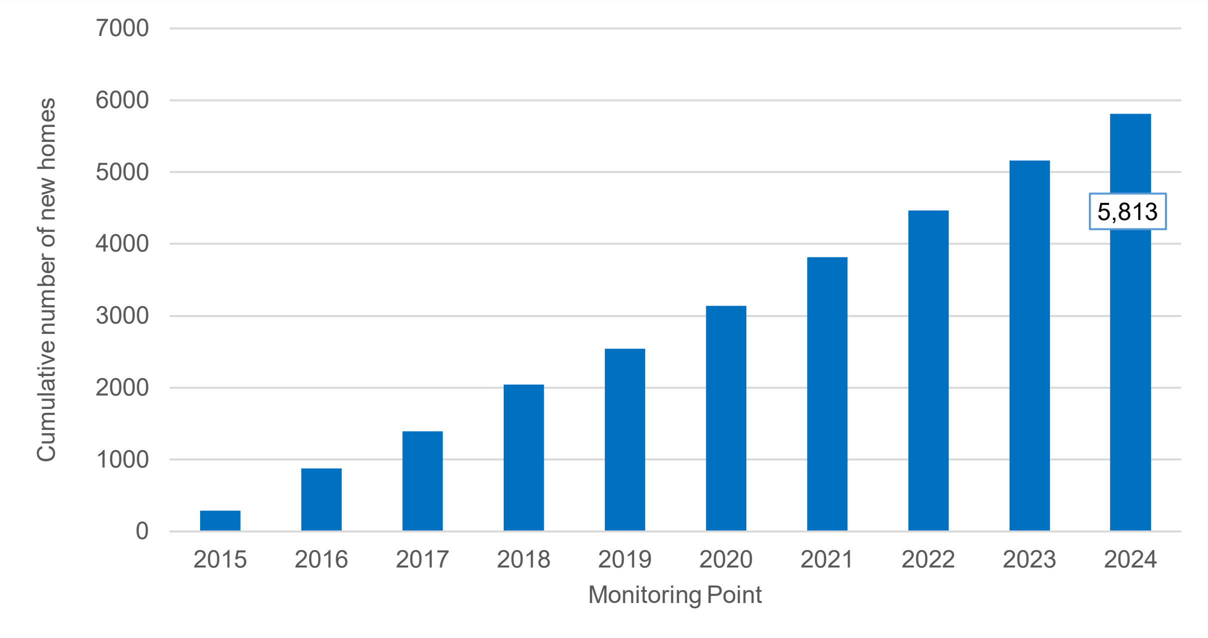
Latest published estimates suggest homes in Plymouth were sold at a price 6.42 times the average wage in 2023 in comparison to 2.9 times the average wage in the year 2000 (ONS, 2024)

Figure 5.2 Total net new homes in the PPA by monitoring year against an annualised delivery target



Market housebuilding continues to perform strongly in the TTV. Figure 5.3 shows a net total of 5,813 homes had been built in the TTV at the monitoring point, this represents 1,963 more homes than was previously expected if applying an annualised monitoring target for the area‘s JLP housing policy target for indicative purposes.

Figure 5.3 Total net new homes in the TTV by monitoring year against an annualised delivery target



Market supply has been strong in the TTV due to the strong demand to live in the area and high price of housing products incentivising developers to invest in the area.

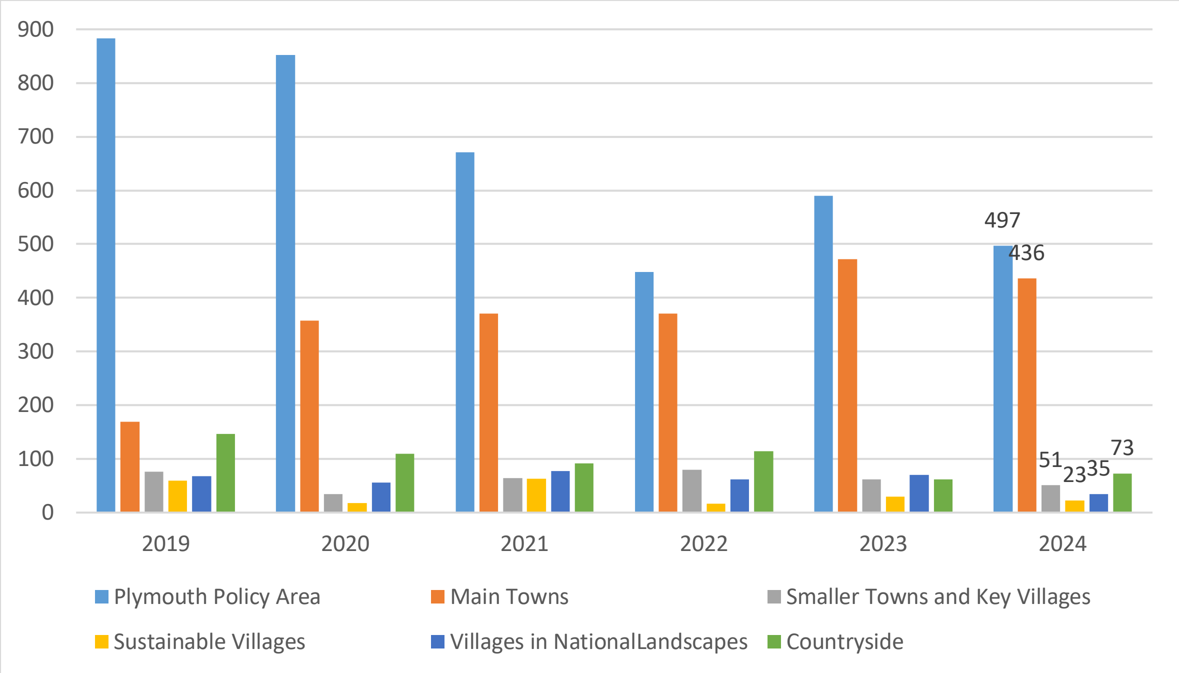
Latest published estimates suggest homes in South Hams were sold at a price 13.09 times the average wage in 2023 in comparison to 5.73 times the average wage in the year 2000 (ONS, 2024). In West Devon, on average, homes were sold at a price 9.91 times the average wage in comparison to 5.63 times the average wage in the year 2000 (ONS, 2024). This is in keeping with the national trend of increasing unaffordability in the housing market over the last twenty years exacerbated by national fiscal and monetary policies.

Location of net new homes built (Indicator 5)

The JLP aims to concentrate new housing development in the most sustainable and accessible locations which are available. In order to do so, the JLP sets out a settlement hierarchy to prioritise development at locations which have the greatest existing range of services and facilities which would be available to potential residents. We monitor the location of all the new homes built to understand whether the JLP spatial strategy is steering development to these locations as aspired to.

Since the adoption of the JLP, the majority of development up to the monitoring point (84%) has been located in the PPA and at our Main Towns in accordance with the spatial hierarchy of the JLP, however development activity has reduced year on year within the PPA (see figure 5.4).

Figure 5.4 Net new homes by settlement hierarchy tier and in National Landscapes



No land has been formally identified for development within National Landscapes and the countryside within the JLP. New homes built in these locations tend to be minor in scale, piecemeal and spread across a much wider area of land than urbanised areas. Homes built in these locations which are outside of settlements tend to originate from planning applications for the conversion, replacement, or sub-division of existing buildings.

Two larger site completions recorded within the monitoring year were villages within national landscapes. These residential developments were located at Holywell Meadow, St. Ann's Chapel, and Vista, Stoke Fleming (13 dwellings at each development).

The development at St. Ann's Chapel on an unallocated site was a proposal that would not normally be considered acceptable due to its assessed potential harm to the National Landscape. However, this site adjoins an existing settlement and met the tests set out for such sites within policy TTV27 of the JLP including the provision of 60% affordable housing, the proposal was therefore assessed to be acceptable as an exception site within the planning balance for the site.

The planning permission for residential development at Stoke Fleming predates the adoption of the JLP and the site was previously allocated for residential land uses in the Council's Rural Areas Site Allocations Development Plan Document (Feb 2011). This means the JLP was not a consideration affecting residential development at this location.

Of the remaining new homes delivered in the countryside, 9 were secured through national permitted development rights.

Homes built at sites not identified within a Development Plan Document

As part of monitoring housing delivery, it is useful to understand how many homes have been built on sites not specifically identified for housing development within a local plan. Such development sites are usually described as 'windfall sites' within national and local planning policy and evidence.

Windfall sites include:

a) Small sites (including conversions and rebuilds) for which land is not allocated in the JLP, instead a numeric estimate is included acknowledging such sites will come forward over time.
b) Large sites which were not identified in the JLP but have subsequently received planning permission. Such circumstances may be due to balanced considerations including the use of previously developed land within proposals, or the delivery of a high proportion of affordable homes as part of a proposal.
c) Sites which achieved planning permission through national Permitted Development Rights (PDR) thus are not controlled by local planning policies.

At the monitoring point, around 75% of net additional homes provided in the plan period have been delivered on land allocated for development. The majority of planning permissions which relate to windfall development still currently relate to planning permissions granted prior to the adoption of the JLP.

The largest windfall housing sites delivering homes in the monitoring year included:

- 43 homes at the former Brutus Centre, Fore Street, Totnes
- 25 homes south of Exeter Road Industrial Estate, Okehampton
- 19 homes at Batheway Fields, west of High Street, North Tawton

The 43 units in Totnes were provided at a previously developed former supermarket site which had been closed for some time and the principle of residential development in Totnes is supported by the Plan.

Planning permissions securing the principle of development on these sites were granted prior to the adoption of the JLP when South Hams and West Devon Local Planning Authorities were unable to demonstrate a five-year supply of land to deliver new homes in accordance with national planning policy.

A further 15 homes were built at Woolwell (1954/18/OPA). The original decision at this site also predates the adoption of the JLP, but the development proposal was considered to be in general accordance with the emerging plan which recognised the site location as a sustainable location for the provision of new homes to meet housing needs.

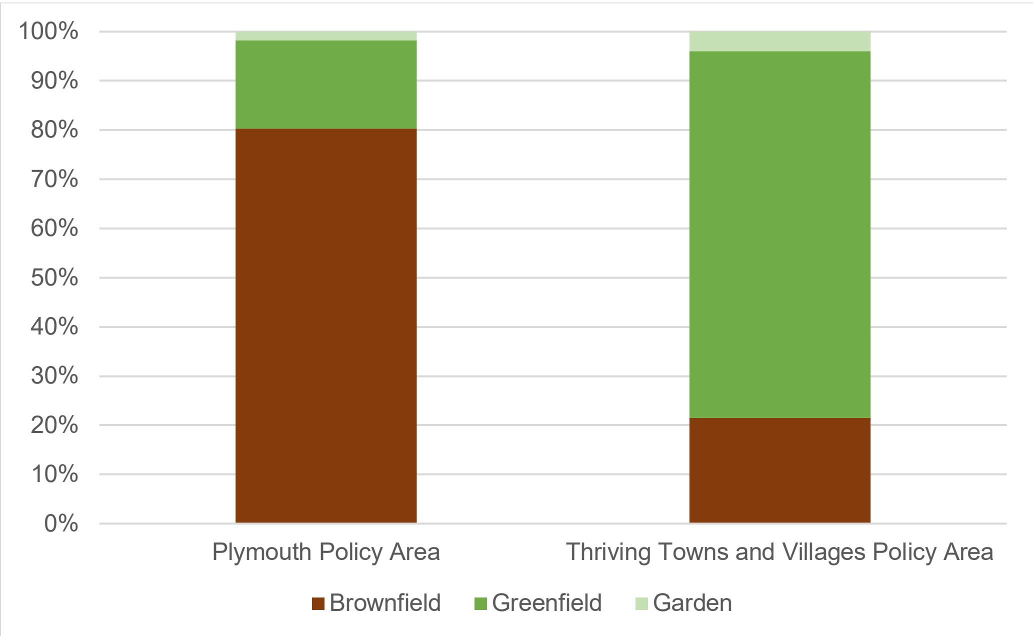
The majority of housing development on unallocated sites in Plymouth continues to relate to the redevelopment of previously developed land through planning permission or general permitted development rights. The redevelopment of previously developed land in sustainable locations is supported in principle by the policies of the JLP.

Amount of housing development on previously developed land

Previously developed sites are often in central locations with good access to services and facilities, and where viable the redevelopment of such land can provide an efficient use of land and rejuvenate urban areas. Such development is supported in principle in the JLP and through specific sites allocated for residential development. We therefore monitor the percentage of homes that are delivered on previously developed land to help understand development trends to date.

Figure 5.5 shows that 80% of homes built in the PPA since 2014 have been on previously developed land (6,524 new homes). This is consistent with Plymouth's geographic characteristics as an urbanised area with the most viable opportunities for the redevelopment of large pieces of land and buildings. It is expected this percentage may begin to reduce over the plan period as strategic green field sites in Plymouth's urban fringe continue to be built out.

Figure 5.5 Percentage of homes delivered on previously developed land



Around 22% of new homes in the TTV have been built on previously developed land since the start of the plan period in 2014 (1,285 new homes). This is consistent with the geographic characteristics of the area and the sites which were both available and viable for development when the plan was adopted.

Less than 3% of new homes across the plan area have been built in locations classed as garden development (378 new homes).

Net new affordable homes built within the plan period (Indicator 2)

The JLP seeks to enable the delivery of 6,600 net additional affordable homes from development between 2014 and 2034, with 4,550 in the Plymouth Policy Area and 2,050 in the Thriving Towns and Villages Policy Areas.

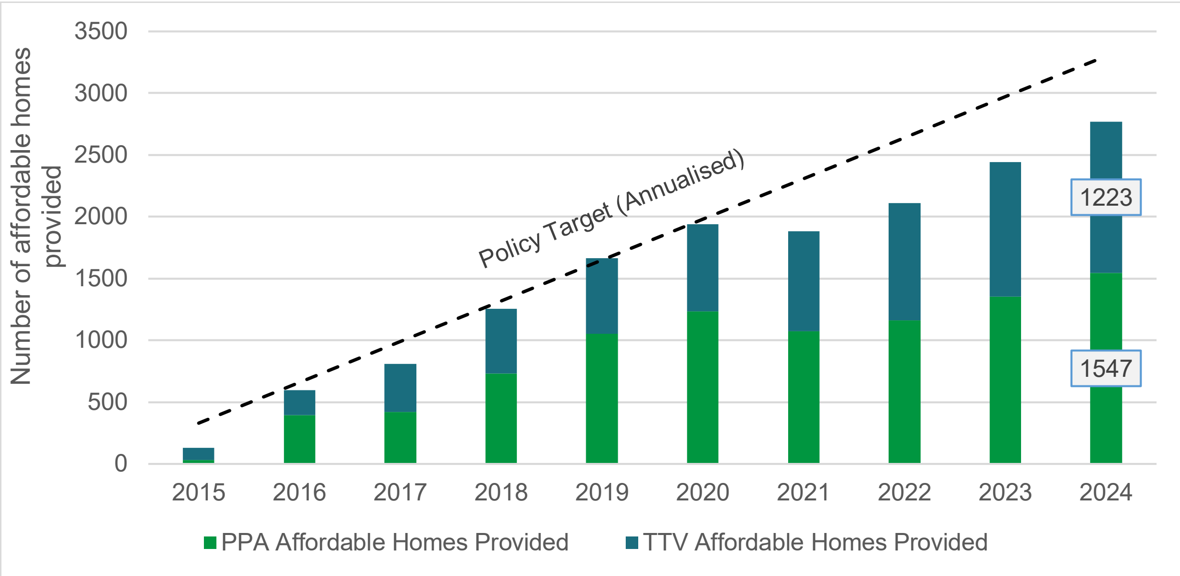
The publication of updated Planning Practice Guidance has led to a substantial increase in the 'standard method for assessing local housing need' rendering the plan targets as set in Policy SPT3 of the JLP out of date for the purposes of decision making. However, we continue to refer to the annualised monitoring targets set out within the JLP for affordable housing delivery for indicative purposes to support our understanding of current performance against expectations at the start of the plan period.

A total of 2,770 affordable net additional homes have been provided since the start of the plan period, 326 of which were provided within the monitoring year. The total number of affordable homes across the plan area would therefore be 530 homes below the monitoring target in the JLP when annualised for indicative purposes.

The main reason being a net loss of poor-quality affordable homes early in the plan period associated with the initial stages of regeneration projects in Devonport, North Prospect and Barne Barton, and the slowdown of market building activity across residential sites within the PPA during what has been a sustained period of economic uncertainty over the last five years (see figure 5.6).

The delivery of affordable homes in the TTV would be 198 dwellings ahead of its individual monitoring target when annualised for indicative purposes. This pattern reflects the wider performance of the housing market in this area. However, average house prices in the South Hams and West Devon remain significantly beyond the reach of local average wages across all housing tenures. This is in keeping with the national trend of increasing unaffordability in the housing market over the last three decades, exacerbated by national fiscal and monetary policies.

Figure 5.6 Net additional affordable homes by monitoring year against an annualised monitoring target



Details of total financial contributions to offsite affordable housing are provided in the relevant Infrastructure Funding Statement for each LPA. You can access these documents at the following links:

- Plymouth City Council - https://www.plymouth.gov.uk/annual-infrastructure-funding-statement

- South Hams Borough Council - https://www.southhams.gov.uk/Developer-contribution
- West Devon District Council - https://www.southhams.gov.uk/Developer-contribution

Five-year housing supply

The JLP authorities report on 5-year land supply within our housing position statements which can be accessed at through the following links:

- Plymouth City Council - https://www.plymouth.gov.uk/5-year-housing-land-supply-position-statement-and-housing-delivery-test-result
- South Hams Borough Council - https://www.westdevon.gov.uk/your-council/council-plans-policies-and-reports/policies/planning-policies/plymouth-and-south-0/5
- West Devon District Council – https://www.westdevon.gov.uk/your-council/council-plans-policies-and-reports/policies/planning-policies/plymouth-and-south-0/5

The reports include details of each location for potential new homes to be built and the estimated build out rate for each site over the next five years.

Due to changes to the National Policy approach to the ‘standard method for assessing local housing need’, the JLP authorities are no longer able to demonstrate a 5-year supply of land to meet housing needs.

6. Employment Indicators

The JLP seeks to deliver a net increase of 375,200sqm of employment floorspace between 2014 and 2034, with specific targets for different uses within the PPA and TTV Policy Areas. We monitor the amount of new consented floorspace and whether it is built or under construction to ensure we are on track to provide sufficient spaces for new employment opportunities by the end of the plan period.

Changes to the Planning Use Class Order

For the purpose of monitoring, we currently refer to the pre–September 2020 Use Class Order which was the basis of JLP policy making and agreed monitoring targets within the plan. These Use Classifications are summarised in Table 6.1.

Table 6.1 Changes to the employment use class order

Employment Uses	Pre-September 2020 Use Class referenced in Monitoring Targets	Current Use Class for Planning Decisions
Offices	B1(a)	E(g)(i)
Research and development of products or processes which can be carried out in a residential area without detriment to its amenity	B1(b)	E(g)(ii)
Industrial processes which can be carried out in a residential area without detriment to its amenity	B1 (c)	E(g)(iii)
Use for industrial process other than one falling within class E(g) (previously class B1) (excluding incineration purposes, chemical treatment or landfill or hazardous waste)	B2	B2
Storage and Distribution	B8	B8

It is important to note that, in future, buildings will usually not need to apply for change of use within the E use class which now includes non-employment uses. This means that monitoring figures, which rely on planning permission data, may no longer accurately reflect potential changes to employment spaces.

Less than half-way through the plan period there remains a healthy pipeline of employment sites throughout the JLP area. Sustainable opportunities for development generating new jobs opportunities will continue to be supported through the JLP including new proposals at the Plymouth and South Devon Freeport.

Wider changes to employment needs will require reassessment as part of any future policy work.

Employment floorspace in the Plymouth Policy Area (Indicators 3 and 5)

The monitoring target for Plymouth Policy Area is based on an evidenced requirement to support the proposed spatial strategy of JLP. The JLP seeks to locate the majority of employment development in the PPA as it is the largest centre for population, services and facilities and thus provides the largest opportunity for sustainable travel patterns.

The PPA has delivered the majority of new employment floorspace during the plan period to date. The city and the urban fringe have been the location of 74% of all new employment floorspace built in the plan period to date.

Figure 6.1 and Table 6.2 indicate the total amount of new employment floorspace which has been completed during the plan period as well as potential future employment floorspace in extant planning permissions. Including planning permissions, there is currently sufficient land to potentially deliver the majority of the plan target for new employment floorspace in the PPA.

Figure 6.1 Net employment floorspace completed or within planning permissions (PPA)

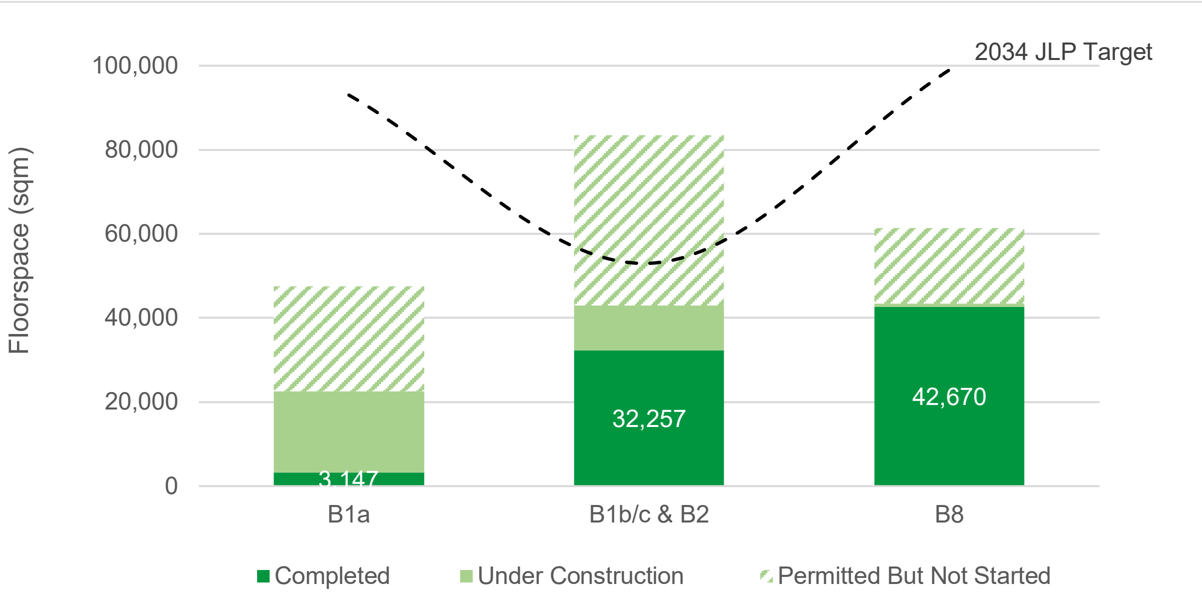


Table 6.2 Net employment floorspace completed or within planning permissions (PPA)

Stage of delivery	B1a	B1b/c and B2	B8
Completed	3,147sqm	32,257sqm	42,670sqm
Under construction	19,462sqm	10,756sqm	796sqm
Permitted but not started	24,841.75sqm	40,491.5sqm	17,689sqm

Notable changes in the monitoring year include a large reduction in net office floorspace within the PPA in comparison to the previous year due the completion of the redevelopment of 65-71 Cornwall Street, into a hotel (Class C4) now ‘OYO Plymouth Central Hotel’ (-4374sqm).

There remains a high level of uncertainty around future office completions due to the volatility of the office market outside of Class A office space which has been impacted by changes to work patterns as a result of the COVID-19 pandemic. It will therefore be important to continue to monitor whether sites under construction or with planning permission begin to reduce over time and/or are displaced by applications for other employment land uses subject to accordance with the JLP policies where possible to do so.

Employment floorspace in the Thriving Towns and Villages Policy Area (Indicators 3 and 5)

The JLP seeks to direct employment development in the TTV to locations either within or close to Main Towns. Figure 6.2 shows that the majority of newly built employment floorspace since the JLP was adopted is classified as being located within the countryside as defined within the JLP settlement hierarchy.

While technically development is classified as being within the countryside or at villages within National Landscapes, larger scale new development in the plan period to date largely represents extensions to existing, established employment areas. These sites lie beyond the edge of existing settlements and are often geographically separated due to industrial and storage and distribution uses (which have the largest floorspace footprints) being less compatible with residential uses.

The largest sites for new employment land uses within the countryside within the monitoring year were at such sites (3,287sqm). The largest sources of other sites within the countryside relate to the development of previously developed land at the former Woodpecker Inn, Avonwick (540sqm) and the extension to existing commercial premises at Totnes Cross Garage, Halwell (630sqm).

Figure 6.2 Location of new employment floorspace within the TTV since plan adoption

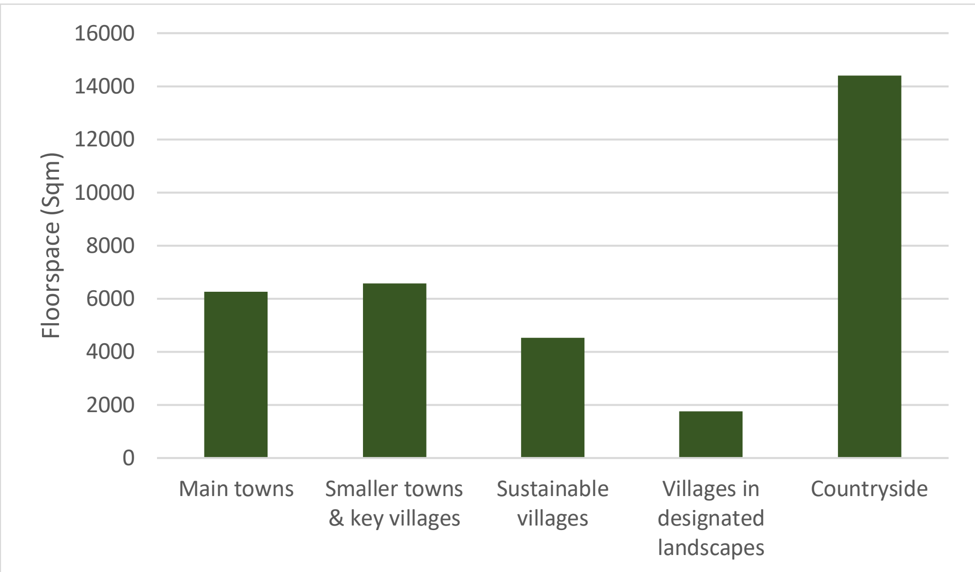
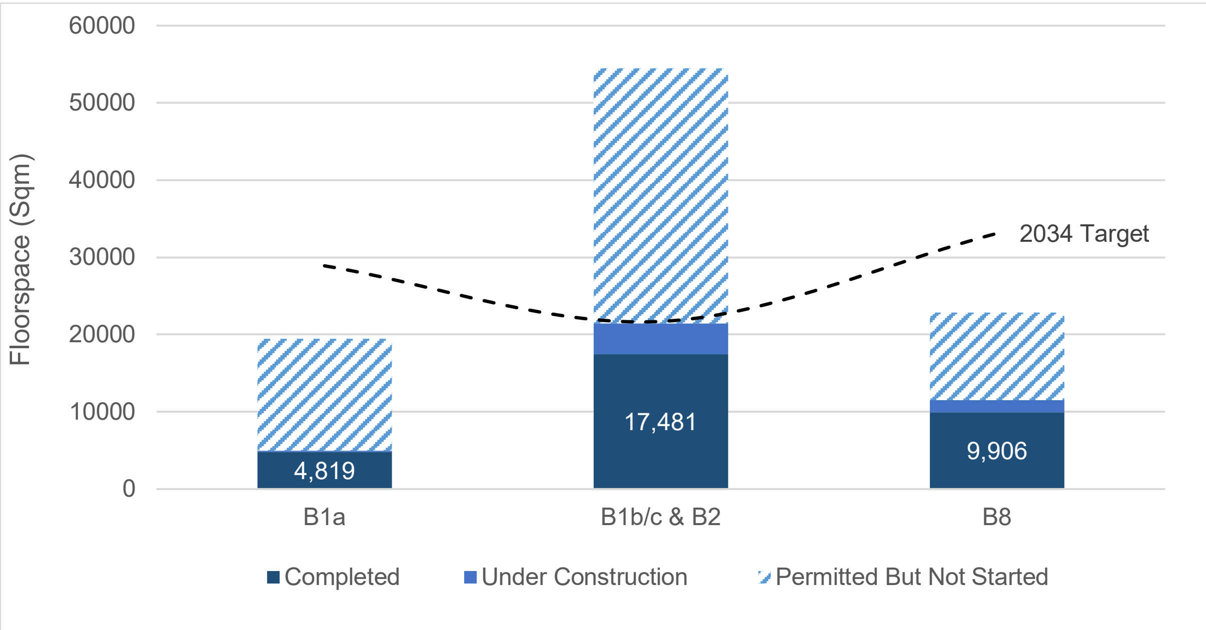


Figure 6.3 and Table 6.3 and indicate the total amount of new employment floorspace which has been completed during the plan period as well as potential future employment floorspace in extant planning permissions[2]. They show there is currently enough potential employment floorspace either completed or with planning permission to deliver the majority of TTV policy target for new employment floorspace for 2034. This considered, planning permissions should not be relied upon as accurate indicators of final build out rates, especially where a site may have a planning permission for a mix of uses and only non-employment elements of the site have been constructed to date. Trends will continue to be monitored and reported within the future AMRs to understand delays on housing led mixed use sites.

The total employment commitments in the TTV policy area is 64,628.73 sqm at 31 March 2024 including sites under construction and those with outstanding planning permission where work has not yet commenced. It includes some mixed-use sites where a start has been made on site or construction of other non-employment elements of the mixed-use scheme is underway, for example, at Little Cotton, Dartmouth and West Alvington Hill, Kingsbridge.

The commitment figure also includes 1,100 sqm consented for employment use at the mixed-use site at Milizac Close, Yealmpton where the residential element (60 units) was delivered nearly 10 years ago and more recently, an open self-storage compound was provided in 2023-24 taking-up part of the 2,500sqm employment allocation (1400sqm).

Figure 6.3 Net employment floorspace completed or within planning permissions in the plan period to date (TTV)



[2] An ‘extant planning permission’ effectively refers to land which currently benefits from a live planning permission.

Table 6.3 Net employment floorspace completed or within planning permissions in the plan period to date (TTV)

Stage of delivery	B1a	B1b/c and B2	B8
Completed	4819sqm	17,481sqm	9906sqm
Under construction	151sqm	4003sqm	1605sqm
Permitted but not started[3]	14,479sqm	33,022sqm	11,370sqm

[3] Where permissions define multiple potential uses, floorspace is split evenly across those use classes for indicative purposes to avoid double counting.

7. Retail Indicators

Retail vacancy rates in Plymouth City Centre (Indicator 22)

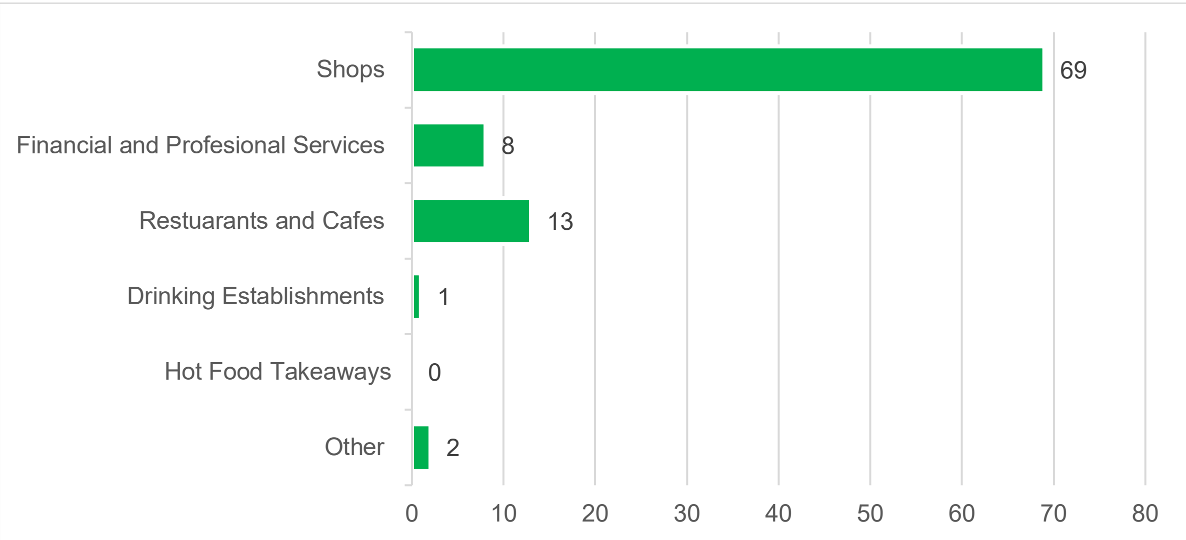
The JLP supports the important strategic role played by retail in Plymouth's city centre and recognises the need for attracting investment to enable the strategic renewal and enhancement of the centre. To measure performance and change in the city centre over time we monitor annual vacancy rates.

The overall surveyed vacancy rate in Plymouth City Centre is 15.1% which remained higher than the national average vacancy rate of around 14%. Persistently high vacancy rates highlight known structural issues with existing retail stock in the city centre, the market shift towards online retail, and the significant size of the primary shopping area in comparison to similar cities. Our vacancy trends highlight the importance of ongoing city centre regeneration schemes to attract investment and support the reimagination of the wider use of the city centre.

Plymouth City Council has secured long term funding towards improvements to the City Centre, including the Transforming Cities Fund and Plan for Homes with substantive public realm improvements which commenced in the previous monitoring year. Such improvements are central to drawing further investment into improving the city centre and the quality of its building stock in accordance with the objectives of the JLP.

Figure 7.1 indicates the number of surveyed vacant units by retail use within Plymouth City Centre. Surveyed figures suggest high churn of traditional shopping outlets in comparison to stronger performance by drinking establishments, professional services, and hot food takeaway outlets.

Figure 7.1 Number of Vacant Units in Plymouth City Centre by Use



Other notable trends in the centre include:

- 86% of units recorded as vacant in this year’s survey were also vacant in the previous year’s survey. The majority (48 out of 68) were outside of the primary and secondary frontages indicated in the Joint Local Plan.
- While the overall vacancy rate in the City Centre is high, vacancy rates in Drake Circus (4.5%) have remained below the national average for shopping centres (17.7%).
- There has been no evidence of effects on vacancy rate from the national removal of planning control for changing between high street uses to date. However, this does not mean changes have not or will not support local businesses in future.

Visitor spend in Plymouth (Indicator 23)

The JLP seeks to support Plymouth as a destination by enabling redevelopment along the waterfront.

Destination Plymouth provides estimates for the number of people visiting Plymouth and their associated monetary spend when visiting the city for business and/or recreation. Destination Plymouth estimate there were 4.3 million visitors to Plymouth in 2023 with an estimated spend of £335.7 million. These figures suggest the overall number of visitors to Plymouth have still not fully recovered since the pandemic (5.3m in 2019), while visitor spend has recovered to pre-pandemic levels (£334.8 million in 2019).

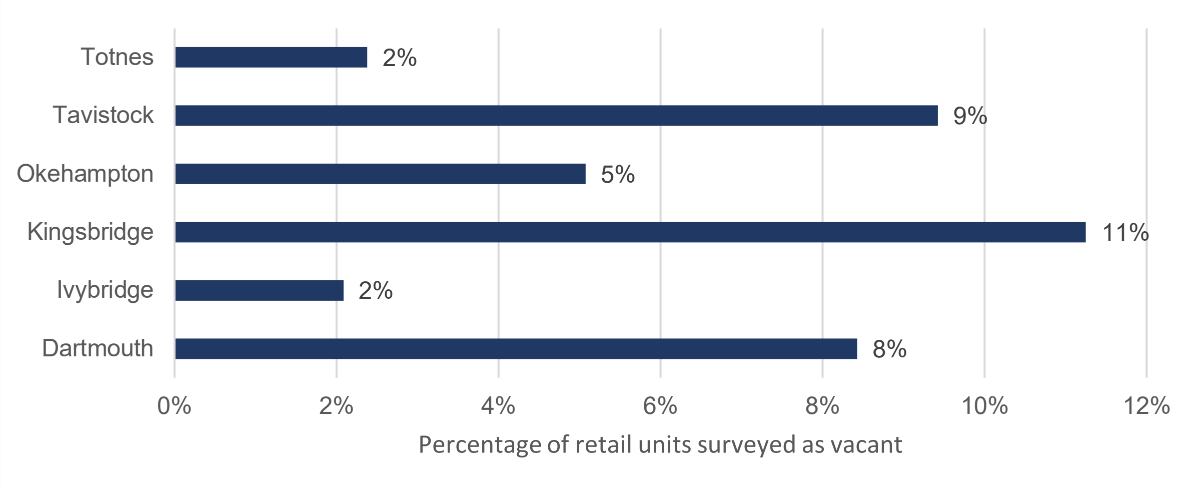
There are currently no reliable comparable up to date figures for the remainder of the plan area.

Vacancy rates in our Main Towns (Indicator 29)

The JLP seeks to sustain and strengthen the role of our Main Towns in providing a broad range of services to support their wider surrounding rural areas. We survey annual vacancy rates in our Main Towns to help flag successes and challenges for retailers and performance of our retail policies.

Figure 7.2 shows that all of our Main Towns continue to perform well with surveyed average vacancy rates on primary and secondary frontages at around 7%. This is below the national average of around 14%.

Figure 7.2 Vacancy Rates in ‘Main Town’ primary and secondary frontages



There were no notable increases in surveyed vacancy in the monitoring year in any of our Main Towns indicating retail centres are proving resilient despite both past and ongoing national economic challenges.

Delivery and future supply of new retail floorspace (Indicator 4)

The JLP does not provide a 2034 target for new retail floorspace due to the low level of identified unmet need within the plan period. Instead, the JLP provides an indicative sustainable retail floorspace capacity for each policy area and allows for retail planning proposals to be decided on their own individual merits.

At the monitoring point, the level of net food retail development in Plymouth Policy Area has surpassed the current identified retail capacity for new food floorspace for the policy area within the JLP. However, Plymouth still has an unmet capacity for non-food retail uses when taking into account potential future supply in extant planning permissions.

There was a large loss of non-food retail floorspace in the Plymouth Policy Area during the monitoring year. This is mostly due to conversion of retail space at 16-22 Royal Parade to residential use resulting in a loss of 10,358sqm.

There remains a strong supply of planning permissions for future potential retail uses. Most notably, the extant planning permissions for 3749sqm of retail floorspace at the new Derriford Commercial Centre in accordance with JLP policy PLY38 which was under construction at the monitoring point, and up to 12,834sqm at Sherford.

There was no net change in food retail floorspace within the TTV within the monitoring year. The level of net food retail development therefore remained at 95% of the retail capacity for the TTV identified within the JLP. There remains capacity to absorb extant planning permissions for retail uses recorded in the monitoring year.

Evidence of demand for new build non-food retail premises in the Thriving Towns and Villages would appear to remain limited if based purely on the number of planning applications submitted and permissions secured to the monitoring point. The overall amount of non-food retail floorspace currently within extant planning permissions for such uses equates to an approximate net loss of 450sqm. This trend may continue, in part due to the changes in land demand for comparison retail with an increasing shift to online led retail models.

Retail capacity is susceptible to change with market performance and consumer demand. An updated needs assessment will be required as part of any future plan making work to ensure retail policies continue to reflect and facilitate future needs.

8. Land Use Allocations

Joint Local Plan land use allocations overview

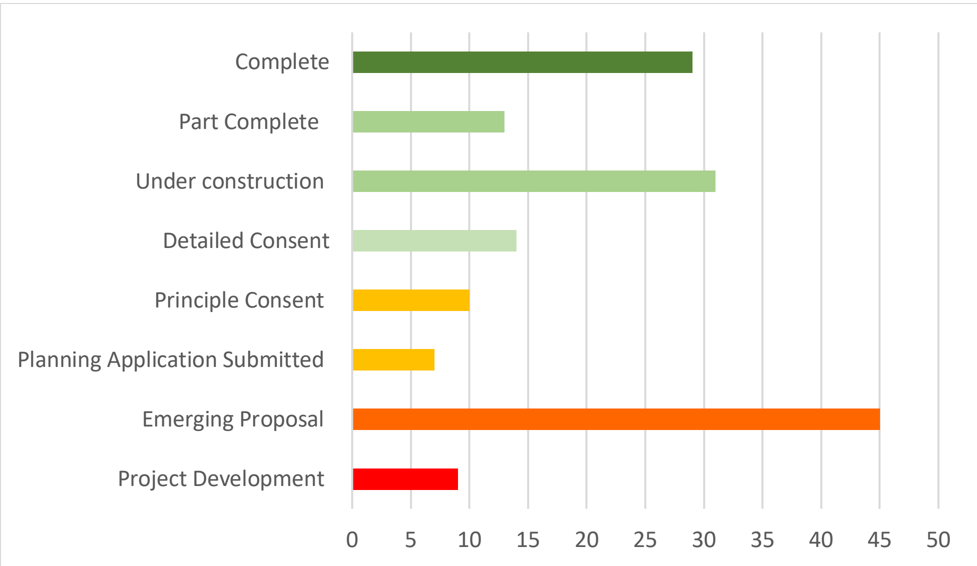
The JLP allocates sites for development, we monitor their status within the planning process to understand how they are progressing.

Click on the link below to see our interactive map. The map shows the location of our land use allocations and at a high level their status and progress at the monitoring point, and a link to the original JLP policy which describes the uses allocated to that land within the Development Plan.

Allocations Monitoring Map

Figure 8.1 shows that at the monitoring point the majority of land use allocations for development in the JLP are either within the planning system, under construction or complete with 10 years still remaining of the plan period.

Figure 8.1 Current planning stage of sites allocated for development in the Joint Local Plan



Derriford and Northern Corridor Growth Area (Indicator 24)

Sites at the Derriford and Northern Corridor are highlighted for individual monitoring within the JLP. Currently two employment land use allocations have been completed at Plymouth International Medical and Technology Park. Five further allocated sites were under construction at the monitoring point, this includes mixed use development at Derriford Commercial Centre (PLY38), Plymouth Science Park (PLY46(6)) and Seaton Neighbourhood (PLY40).

Details of individual sites can be found in the JLP or by clicking on the link to our Allocation Monitoring Map

Progress of Transport Improvements in the Plymouth Northern Corridor (Indicator 25)

The JLP seeks to support the delivery of major transport infrastructure in Plymouth's northern corridor to improve strategic connectivity in Plymouth and the surrounding area (Policy PLY47). A high-level update on these strategic improvements is summarised in Table 8.1.

Table 8.1 Status of transport improvements in the Plymouth Northern Corridor

Improvement Works	Progress
Marjon Link Road	Complete
Northern Corridor Junction Improvements	Complete
A386 Derriford Transport Scheme	Complete
Derriford Hospital Interchange	Complete
Strategic Cycle Network	Part-complete
Forder Valley Link Road	Complete
Forder Valley A38 Exchange	Complete
Woolwell to the George, A386 Dualling Scheme	Emerging
A38 Manadon Junction to Crownhill	Business case submitted
A38 Manadon Junction	Business case submitted
Derriford Car Park (public)	Complete
Improved Northern Corridor P+R Sites and Services	Emerging
B3250 Mannamead Road	Complete
A386 Outland Road	Complete
Morlaix Drive/ Brest Road	Complete

Eastern Corridor Growth Area (Indicator 26)

Sites within the Eastern Corridor Growth Area are highlighted for individual monitoring within the JLP. Strategic development at Sherford (PLY48) is currently under construction with the initial phases completed, and the first of three planned primary schools is open to the community.

At the monitoring point, the construction of new homes at Saltram Meadow (PLY50) and Haye Road (PLY56(1)) was significantly progressed and outline planning permission was secured by Homes England to enable the redevelopment of the China Clay complex subject to reserved matters and planning conditions (PLY53).

Planning permission for employment uses at the Langage strategic site (PLY51) was secured in previous monitoring years with initial works complete at a part of the site. There are now further incentives to support businesses looking to locate themselves at Langage through the Plymouth and South Devon Freeport initiative. More information can be found about the initiative at https://www.plymouth.gov.uk/plymouth-and-south-devon-freeport.

Details of individual sites can be found in the JLP or by clicking on the link to our Allocations Monitoring Map.

Improvements to Strategic Open Space in the Plymouth Policy Area (Indicator 13 and 27)

As part of our objective to protect and harness the area's stunning setting, marine heritage, quality environment and natural assets we measure bathing water quality and the delivery of Plymouth's Strategic Greenspace improvement projects. .

There are six strategic improvements proposed to strategic open spaces across the Plymouth Policy Area within the JLP. Works have commenced on five of these areas with delivery programmes underway. Works at Woolwell Community Park for a new mixed-use development (PLY44) were still at the planning stage at the monitoring point.

9. Strategic Connectivity Indicators

The JLP seeks to maximise the use of active and sustainable travel options. Consequently, we monitor travel to work data, travel time to London and rail passengers at key rail stations. The JLP also seeks to promote and improve the international role of Plymouth's port. We therefore monitor the success of our port, reviewing both passenger numbers and tonnage travelling through the port to have an up to date understanding of its performance.

Travel to work (Indicator 7)

The latest available Census data (2021) suggests that over 50% of people in the Plan Area travel to work by car or van. All three areas recorded a decrease in the percentage of people travelling to work by car or van in comparison to the previous Census in 2011. ONS have highlighted this as a potential anomaly due to the question wording and the timing of the question within the Census during COVID-19 lockdown[4] and recommend this should not be used as a reliable indicator of behavioural change when read in isolation.

The number of respondents saying they work from home grew significantly during COVID-19 lockdown, however further work will be needed to understand the extent of long-term working from home post pandemic and how this should be factored into any plan review.

Table 9.1 Top Three Travel to Work Modes – Plymouth Authority Area (Census, 2021)

Method of travel	Census 2001 (% Population)	Census 2011 (% Population)	Census 2021 (% Population)
Driving by car or van	53.83%	57.95%	51.20%
Working mainly at/from home	6.59%	3%	21.20%
On foot	13.20%	14.73%	10.10%

Table 9.2 Top Three Travel to Work Modes – South Hams Authority Area (Census, 2021)

Method of travel	Census 2001 (% Population)	Census 2011 (% Population)	Census 2021 (% Population)
Driving by car or van	53.34%	62.27%	50.30%
Working mainly from home	15.79%	13.69%	33.10%
On foot	13.38%	11.75	8.90%

Table 9.3 Top Three Travel to Work Modes – West Devon Authority Area (Census, 2021)

Method of travel	Census 2001 (% Population)	Census 2011 (% Population	Census 2021 (% Population)
Driving by car or van	57.93%	62.27%	51.90%
Working mainly from home	17.83%	12.75%	31.40%
On foot	12.64%	14.22%	9.30%

[4] This data should be used with caution due to acknowledged potential inconsistency in the way the question was responded to by different survey participants. Respondents were asked how they travel to work during the lockdown period where only key workers were advised to remain driving to work and furlough schemes were active, results were therefore expected to reflect a much more significant overall reduction in travel to work during this time, this was not the case.

Number of rail Passengers within the Joint Local Plan Area (Indicator 8)

COVID-19 had a dramatic impact on levels of rail travel across the UK during 2020/21. The Office for Rail and Road (ORR) provide statistics on the number of rail passengers using rail stations in any given year. ORR estimates indicate passenger numbers across the national network fell by more than 75% during the pandemic. The overall number of recorded rail passengers across the JLP area were still yet to recover to pre-pandemic levels at the monitoring point, however, there has been a strong recovery in overall passenger numbers (ORR, 2023).

Figure 9.1 shows that passenger numbers at Plymouth Central Station in the 2023/24 monitoring year were estimated to be 2% lower than in 2015 despite significant recovery in passenger numbers since COVID-19 lockdown (ORR, 2024).

Figure 9.1 Passenger numbers at Plymouth Central Station

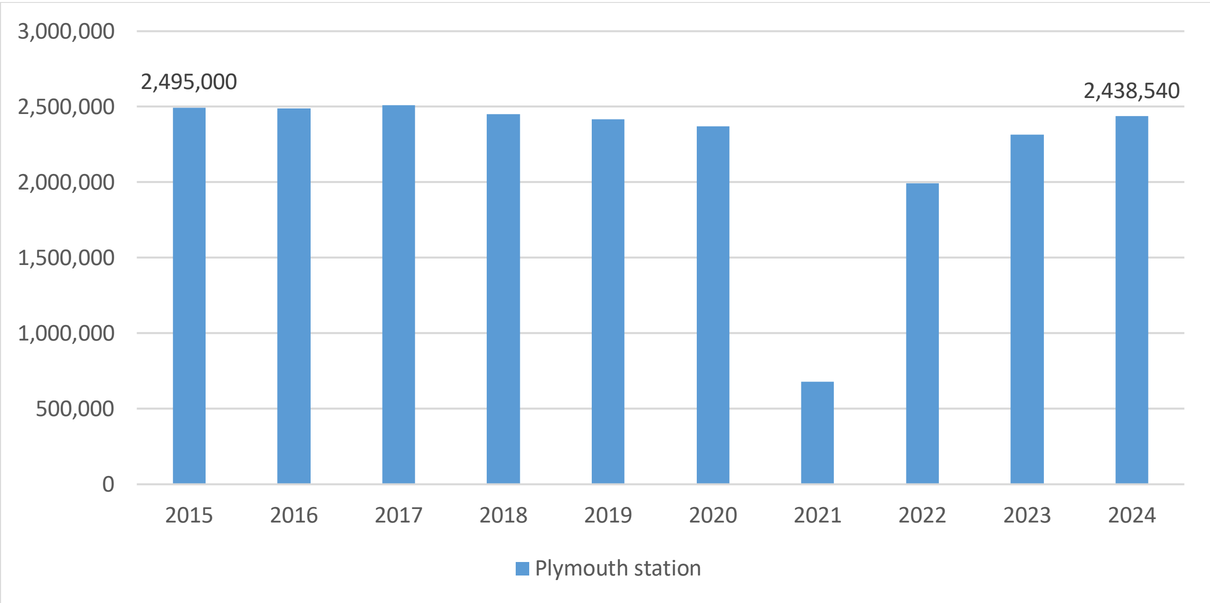


Table 9.4 Passenger numbers at Plymouth Central (thousands)

Train station	Passengers at 2015 monitoring point	Passengers at 2023 monitoring point	Passengers at 2024 monitoring point
Plymouth Central Station	2,495,000	2,313,092	2,438,540

Figure 9.2 shows overall passenger numbers at other Plymouth rail stations are estimated to have now recovered and surpassed pre-pandemic passenger levels. The overall number of passengers using smaller stations in Plymouth is estimated to be 52% higher than at the start of the plan period. The largest percentage improvements to passenger numbers were at Dockyard and Devonport stations (ORR, 2024) reflecting the strategic importance of the dockyard to the city.

Figure 9.2 Passenger numbers at other Plymouth Policy Area stations (thousands)

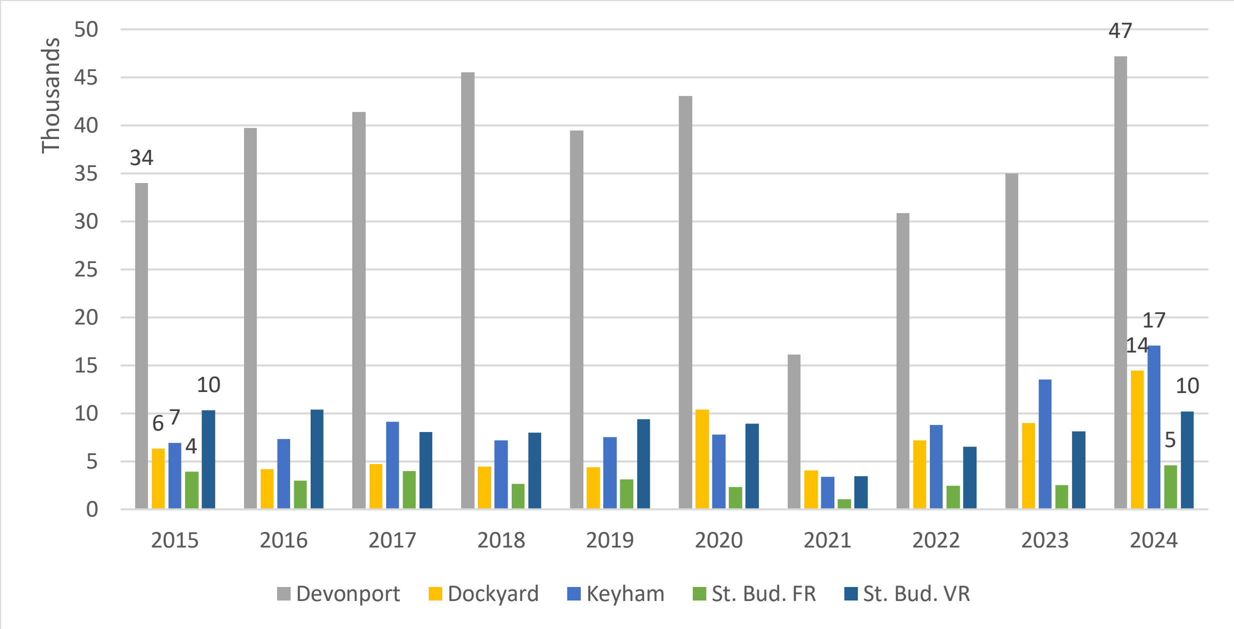


Table 9.5 Passenger numbers at other Plymouth Policy Area stations

Train station	Passengers in 2015 base monitoring year	Passengers in 2023 monitoring year	Passengers in 2024 monitoring year
Devonport Station	33,968	34,970	47,214
Dockyard Station	6,300	8,960	14,424
Keyham Station	6,936	13,530	17,060
St Bud. FR Station	3,926	2,508	4,564
St Bud. VR Station	10,332	8,098	10,190

Figure 9.3 shows overall passenger numbers at South Hams rail stations are estimated to be approximately 15% higher than in 2015 (ORR, 2024).

Figure 9.3 Passenger numbers at stations in the South Hams (thousands)

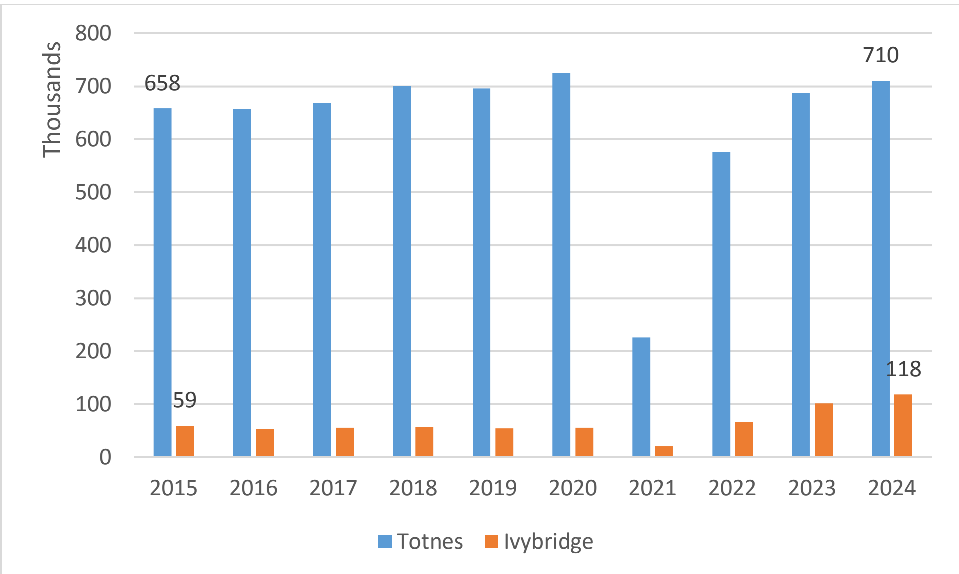


Table 9.6 Passenger numbers at stations in the South Hams

Train station	Passengers in 2015 base monitoring year	Passengers in 2023 monitoring year	Passengers in 2024 monitoring year
Totnes	657,754	687,394	710,378
Ivybridge	59,374	100,900	118,118

Figure 9.4 shows overall passenger numbers at West Devon Stations are estimated to be more than 6 times the number of passengers at the start of the plan period, largely due to the reopening of the Okehampton rail station. Following the COVID-19 Pandemic, there was a significant reduction in passenger numbers at stations on the Bere Peninsula, but numbers have now recovered fully (ORR, 2024).

Figure 9.4 Passenger numbers at stations in West Devon (thousands)

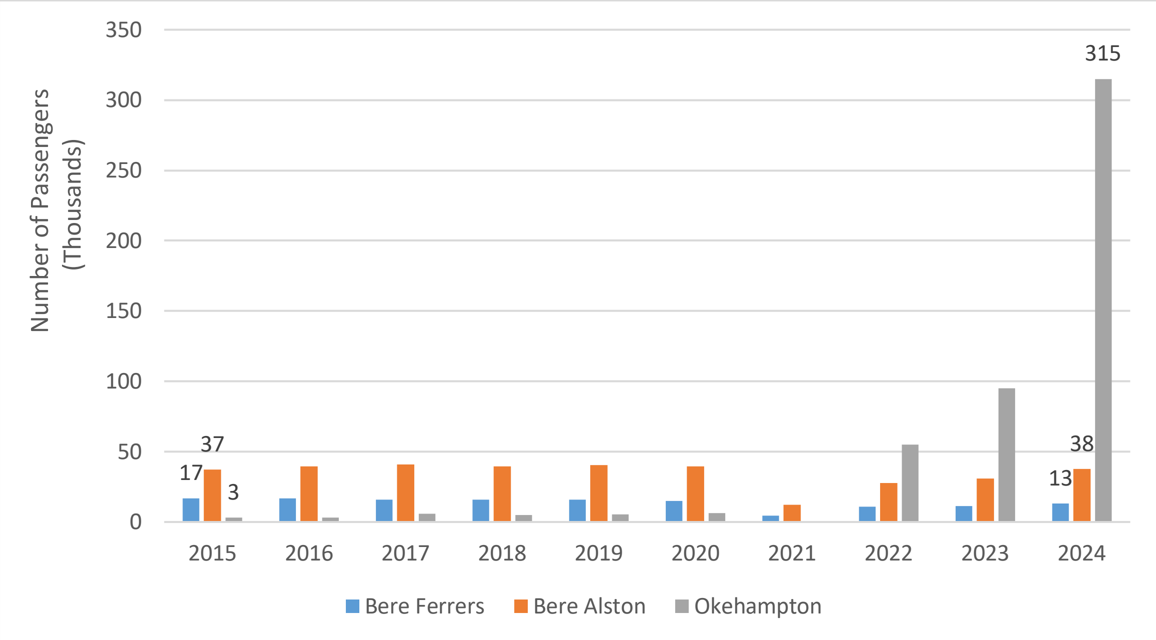


Table 9.7 Passenger numbers at stations in West Devon

Train station	Passengers in 2015 base monitoring year	Passengers in 2022 monitoring year	Passengers in 2023 monitoring year	Passengers in 2024 monitoring year
Bere Ferrers	16,858	10,786	11,258	13,026
Bere Alston	37,082	27,588	31,090	37,610
Okehampton	2,984	54,904	94,912	314,984
Total Passengers	56,924	93,278	137,260	365,620

Train Travel Times to London from Plymouth Central Station (Indicator 10)

At the monitoring point there were significantly fewer train services running between Plymouth and London in comparison to when the plan was adopted. Train journey times remained comparable, with the fastest journey time being 3 hours and slowest journey time being 5 hours and 10 minutes. The average journey time at the monitoring point was 3 hours and 38 minutes, 7 minutes slower than in 2019 (Trainline, 2024 and GWR, 2024).

In the medium term, services are expected to slow and be subject to more disruptions as the HS2 Old Oak Common station is built on the Great Western line just west of Paddington Station. These works are currently estimated to take until 2030 to complete.

Ferry Passengers and Freight (Indicator 11)

International sea passenger movements across the UK were significantly affected by COVID-19. Sea passenger movements at Plymouth International Port fell by more than the national average during the pandemic because the roll-on roll-off ferries that connect Plymouth to France and Spain were suspended for parts of 2020 and 2021 and cross channel sea passenger movements concentrated on a smaller number of routes through other ports.

The latest available figures from the Department of Transport relate to the financial year for 2023 are included in figure 9.5 which illustrates a 18% reduction in passengers from pre pandemic levels in 2019 and 20.5% reduction from 2014 when the JLP was adopted. The overall number of passengers in Plymouth in 2023 (347,000) was 2.6% higher than the previous reporting year (338,000).

Figure 9.5 Number of Ferry Passengers travelling through Plymouth International Port (thousands)

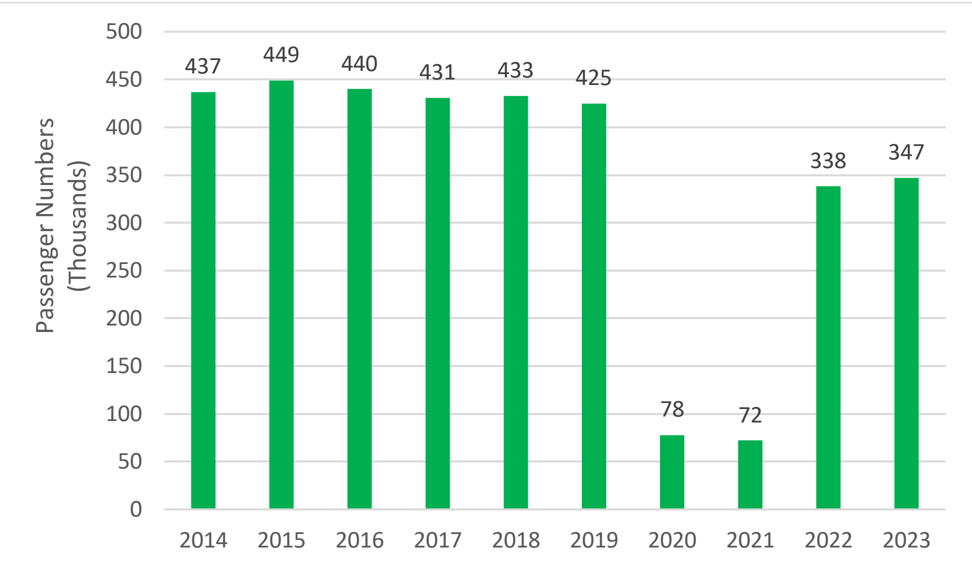


Table 9.8 Number of Ferry Passengers travelling through Plymouth International Port (DFT, 2023)

Category	2014 base monitoring year	2021 monitoring year	2022 monitoring year	2023 monitoring year
Number of ferry passengers (thousands)	437,000	72,000	338,000	347,000

The latest published Department for Transport statistics (2024) indicate freight tonnage traffic has risen since the previous monitoring year but is still yet to recover to pre-pandemic levels which is consistent with national trends (see figure 9.6).

Figure 9.6 Port Freight Traffic Tonnage (thousands)

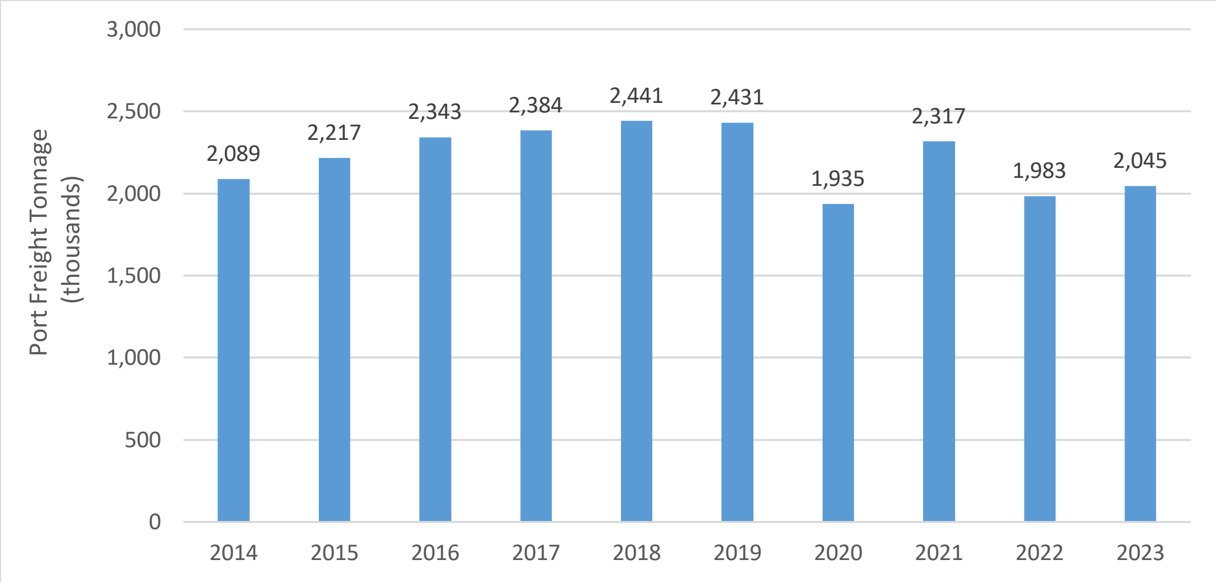


Table 9.9 Port Freight Traffic Tonnage

Category	2015 base monitoring year	2021 monitoring year	2022 monitoring year	2023 monitoring year
Amount of port freight traffic (thousands)	2,089	2,317	1,983	2,045

Households with access to superfast broadband (Indicator 12)

The Joint Local Plan seeks to support opportunities to improve access to digital services and seeks to locate development in areas with the greatest opportunity for digital connectivity. It is not possible to monitor Broadband availability at an individual site-specific level, so we currently monitor access to superfast broadband at the Local Authority level.

The latest data from the OFCOM Connected Nations report (2024) is shown in Figure 9.7. Currently 97.3% of premises were reported to have access to superfast broadband within Plymouth. Superfast Broadband availability to premises in South Hams and West Devon were reported at 86.2% and 82.8% respectively. This is an improvement across all three authority areas from the previous monitoring year.

The Government has now passed its national delivery target for Superfast Broadband and has now set an 85% availability target for the delivery of Gigabit Broadband. The 85% target has already been surpassed in Plymouth, however in the South Hams only 45.5% of homes are estimated to be currently capable of receiving gigabit connection, and in West Devon 49.8% of homes are currently capable of receiving a gigabit connection.

OFCOM currently estimates that by 2027 over 90% of homes in Plymouth and South Hams will have potential access to Gigabit broadband, whilst in West Devon there expected to be potential coverage in 75% of homes (OFCOM 2024).

Figure 9.7 Internet availability by premises and local authority area (OFCOM, 2024)

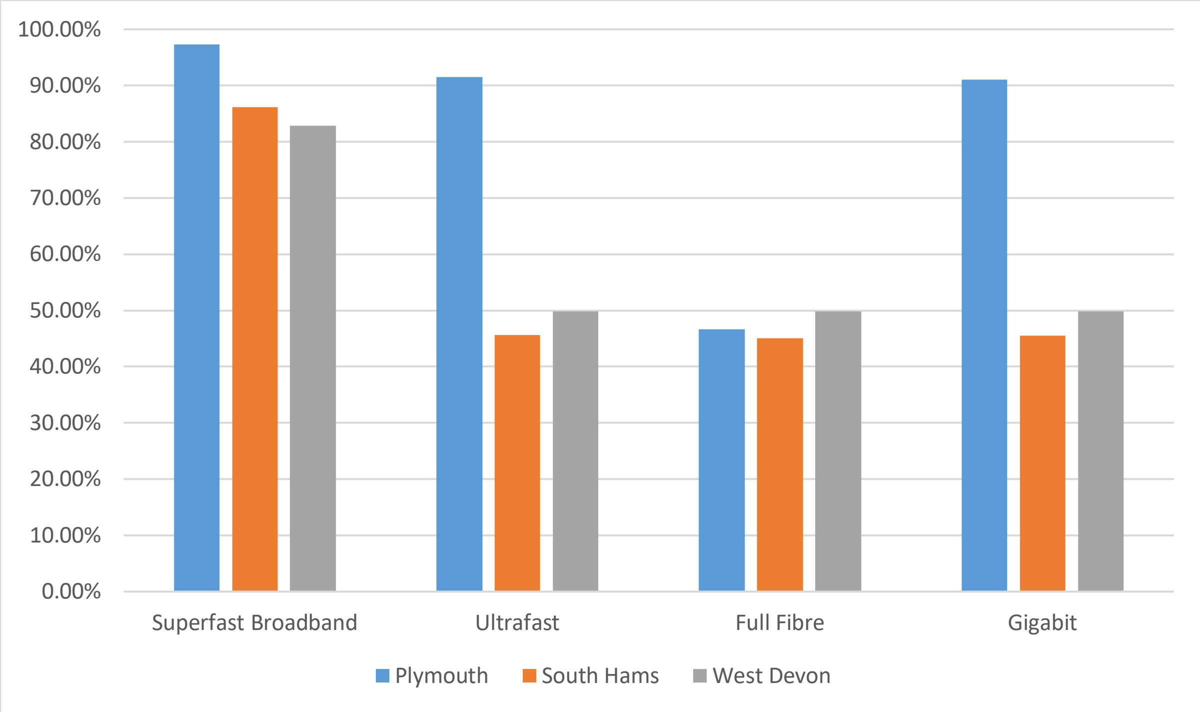


Table 9.10 Internet availability by premises and local authority area (OFCOM, 2024)

	% of premises with access to superfast broadband	% of premises with ultrafast broadband	% of premises with gigabit broadband
Plymouth	97.3%	91.5%	91%
South Hams	86.2%	45.6%	45.5%
West Devon	82.8%	49.8%	49.8%

10. Environmental Indicators

The JLP seeks to reduce potential carbon emissions and protect the environment through locating development in the most accessible locations available and promoting low carbon development. We measure carbon emissions, air quality management and deaths attributable to air particulate matter to understand changes affecting these objectives within the plan area.

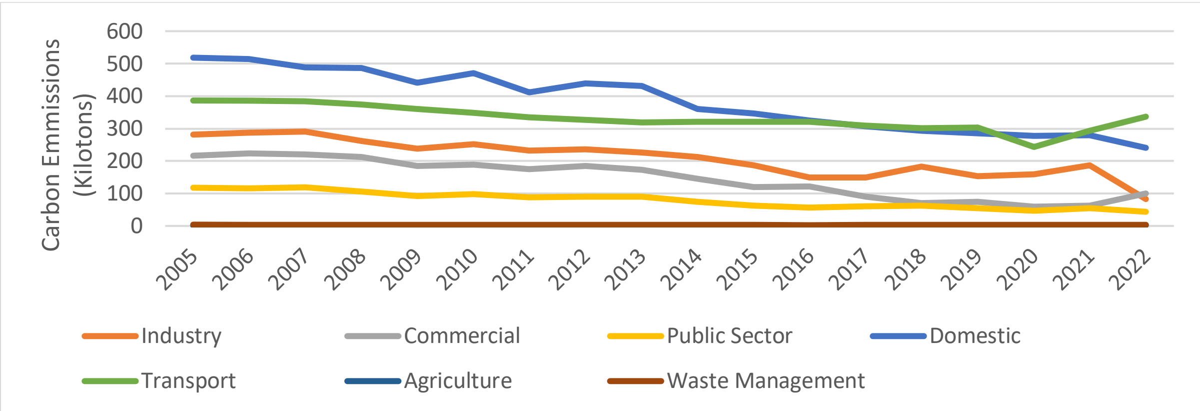
National datasets are produced by the Department for Energy, Security and Net Zero (DESNZ) that record carbon per capita by LPA area. This dataset was used to inform the JLP evidence base study that was used to support the low carbon policies within the JLP. The plan commits to a 50% reduction in annual carbon emissions across the plan area by 2034.

Since the preparation of the JLP all three authorities have recognised the escalated importance of reducing carbon emissions through the declaration of climate emergency. JLP authorities have published the Climate Emergency Planning Statement (CEPS) to provide further guidance to applicants and decision-makers to meet the targets of the JLP.

It should be noted that the the usefulness of the DESNZ dataset is limited due to information being published two years in arears however it still provides a consistent indicator of carbon emissions trends across the plan area.

Carbon Emissions in Plymouth Authority Area (Indicator 16)

Figure 10.1 Carbon Emissions Per Annum by Sector since 2005 Base Date (Kilotons) – Plymouth Authority Area



The latest DESNZ data suggests overall carbon emissions in Plymouth Authority Area in 2022 were 47% lower than in 2005 suggesting further action is still required to achieve the JLP target before 2034. However, the same dataset suggests a per capita reduction of 51% in comparison to 2005 emission levels. The three highest carbon emitter categories in 2022 were:

1. Road Transport – 41% of overall carbon emissions;
2. Domestic Gas – 20% of overall carbon emissions; and
3. Domestic Electricity – 9% of overall carbon emissions.

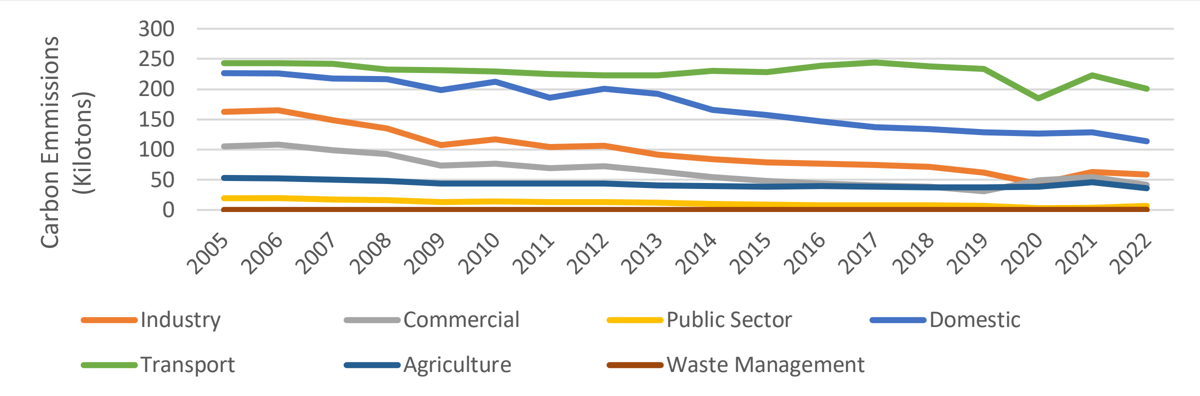
The three sectors which have contributed the most to carbon reductions in the Plymouth Authority Area in 2022 since 2005 were as follows:

1. Domestic Electricity – 24% of total reductions;
2. Commercial Electricity – 24% of total reductions; and
3. Domestic Gas – 14% of total reductions.

Per capita emissions in 2022 were 3 tonnes.

Carbon Emissions in South Hams Authority Area (Indicator 16)

Figure 10.2 Carbon Emissions Per Annum by Sector since 2005 Base Date (Kilotons) – South Hams Authority Area



DESNZ data suggests overall carbon emissions in South Hams Authority Area in 2022 were 41% lower than in 2005. This represents a per capita reduction of 46.18%. The three highest carbon emitter categories in 2022 were:

1. Road Transport – 43% of overall carbon emissions;
2. Domestic Gas – 11% of overall carbon emissions; and
3. Domestic Electricity – 8% of overall carbon emissions.

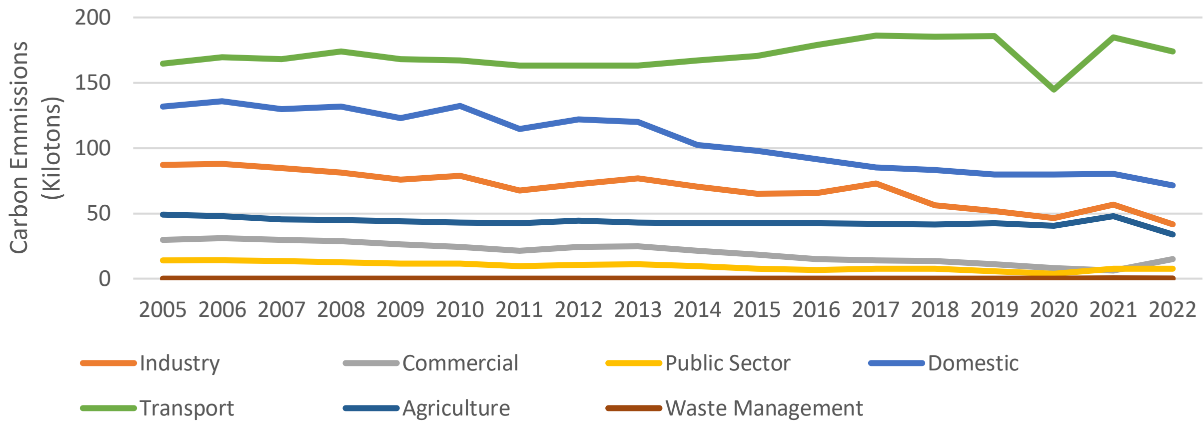
The three sectors which have contributed the most to carbon reductions in the South Hams Authority Area in 2021 since 2005 were as follows:

1. Domestic Electricity – 26% of total reductions;
2. Commercial Electricity – 18% of total reductions; and
3. Industry Electricity - 14% of total reductions.

Per capita emissions in 2022 were 4.65 tonnes.

Carbon Emissions in West Devon Authority Area (Indicator 16)

Figure 10.3 Carbon Emissions Per Annum by Sector since 2005 Base Date (Kilotons) – West Devon Authority Area



DESNZ data suggests overall carbon emissions in West Devon Authority Area in 2022 were 22% lower than in 2005. This represents a per capita reduction of 30.92%. The three highest carbon emitter categories in 2022 were:

1. Road Transport – 50% of overall carbon emissions;
2. Domestic Gas – 9% of overall carbon emissions; and
3. Agriculture other – 8% of overall carbon emissions.

The three sectors which have contributed the most to carbon reductions in the West Devon Authority Area in 2020 versus 2005 were as follows:

1. Domestic Electricity – 46% of total reductions;
2. Commercial Electricity – 28% of total reductions; and
3. Industry Electricity – 16% of total reductions.

Per capita emissions in 2021 were 4.79 tonnes.

Air Quality Management Areas (Indicator 15)

Plymouth had a single Air Quality Management Area (AQMA) declared in 2014 for Nitrogen Dioxide (NO2). This AQMA included the following areas of concern at the time of the declaration: Exeter Street, Mutley Plain, Stoke Village, Royal Parade and Tavistock Road and their connecting roads.

There has been continued compliance since 2019 proven through continuous monitoring in key areas. As a result and following statutory guidance, the decision has therefore been made to revoke the AQMA, from 31st October 2024. An Air Quality Strategy will be implemented to ensure appropriate measures are in place to maintain compliance in the future and continue to reduce local population exposure to air pollution.

There are three AQMAs in the South Hams, these are at Dean Prior (A38), Totnes and Ivybridge.

- In 2023, the Ivybridge AQMA has continued to meet the air quality objective for Nitrogen Dioxide for five years and it is hoped we will be able to revoke the Air Quality Management order.

- The Nitrogen Dioxide objective levels were being met throughout most of the Totnes AQMA in 2023, so there are hopeful signs that this AQMA may be able to be revoked in future years.

- Nitrogen Dioxide levels within the Dean Prior AQMA still exceed objective levels, though they have reduced substantially. This AQMA must therefore be retained.

There are no current declared AQMAs in the West Devon area and no known exceedances of the Nitrogen Dioxide annual mean objective, despite comprehensive monitoring.

Further details about monitoring of AQMAs is released annually through our Air Quality Annual Status Reports for Plymouth, South Hams and West Devon authorities.

Percentage of Deaths Attributable to Air Particulate Matter (Indicator 9)

Public Health England provide area profiles which indicate the percentage of deaths attributable to air pollution at the local authority area level. Within the latest published dataset, the percentage of deaths attributable to air particulate matter in all three JLP authority areas are below the national average (5.8%).

Table 10.1 Deaths Attributable to Air Particulate Matter in 2022 (Age 30+)

Authority Area	Percentage of deaths
Plymouth	3.4%
South Hams	2.5%
West Devon	2.5%

Bathing Water Quality (Indicator 14)

Bathing water quality data is held by the Environment Agency (EA). There are 19 locations within the JLP Area that are usually monitored on an annual basis, stretching from Plymouth Hoe east to Dartmouth Castle. The EA data for 2024 shows that all monitored locations are safe to bathe. Of the 19 measured locations, 18 were rated as excellent and one as good. Mothecombe is the only location where bathing water was classified as ‘Good’ in 2024, which is the same as the previous rating in this location from 2022 and 2023.

11. Data Sources

In case you would like to find out more, a list of sources for third party data used within the AMR follows in order of appearance in this year's report.

GOV.UK (2024). *Live tables for statistics on planning applications at national and local authority level*. Available from: https://www.gov.uk/government/statistical-data-sets/live-tables-on-planning-application-statistics

ONS (2024). *Population estimates – local authority based by single year of age*. Available from: https://www.nomisweb.co.uk/sources/pest

ONS (2024) *Mortality statistics – underlying cause, sex and age*. Available from: https://www.nomisweb.co.uk/query/construct/summary.asp?reset=yes&mode=construct&dataset=161&version=0&anal=1

ONS (2024) *Live births in England and Wales: birth rates down to local authority areas.* Available from: https://www.nomisweb.co.uk/query/construct/summary.asp?reset=yes&mode=construct&dataset=207&version=0&anal=1

ONS (2022) *Detailed Migration data, England and Wales: Census 2021*. Available from: https://www.nomisweb.co.uk/sources/census_2021_mig

ONS (2024) Annual population survey. Available from: https://www.nomisweb.co.uk/datasets/apsnew

ONS (2024). *Labour Market Profile – Plymouth*. Available from: https://www.nomisweb.co.uk/reports/lmp/la/1946157352/report.aspx

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OFCOM (2024). *Connected Nations 2023*. Available from: https://www.ofcom.org.uk/research-and-data/multi-sector-research/infrastructure-research

OFCOM (2024). *Planned Network Deployments 2024.* Available from:

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Connecting Devon and Somerset (2024). *Coverage Maps*. Available from: https://www.connectingdevonandsomerset.co.uk/coverage-maps/

DESNZ (2024). *UK local authority and regional carbon dioxide emissions national statistics*. Available from: https://www.gov.uk/government/collections/uk-local-authority-and-regional-greenhouse-gas-emissions-national-statistics

OHID (2024). *Public Health Profiles*. Available from: https://fingertips.phe.org.uk/search/air%20pollution

Environment Agency (2024). *Swimfo: Find a bathing water*. Available from http://environment.data.gov.uk/bwq/profiles/

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