2022/23 AUTHORITIES MONITORING REPORT

PERFORMANCE SUMMARY

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

Contents

1. Introduction

What is an Authority Monitoring Report?

The production of an Authority 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.

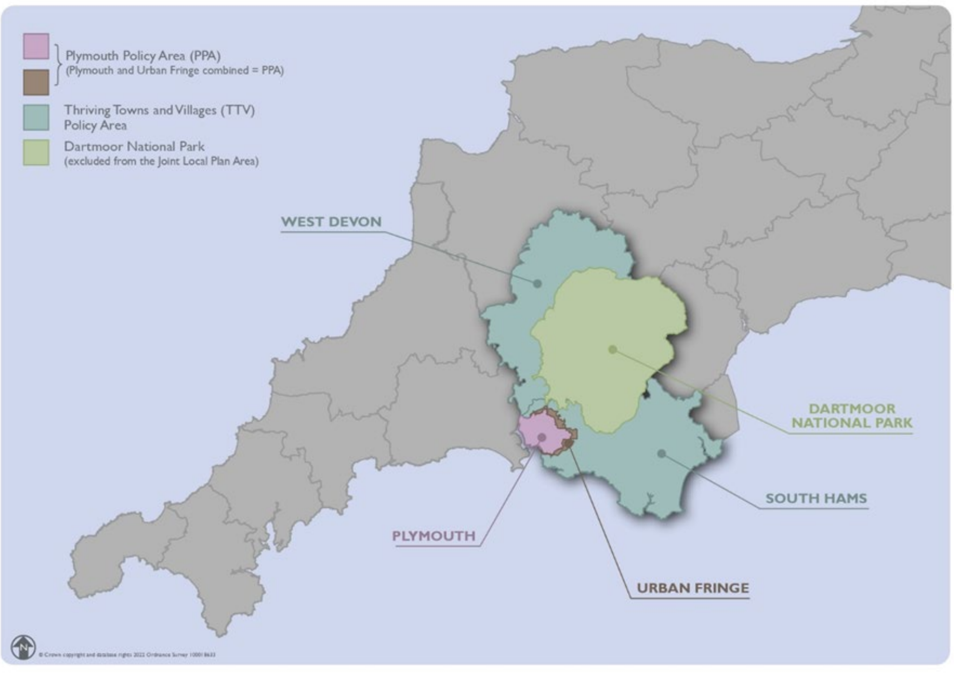
What area does the Joint Local Plan cover?

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 2023 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	27 Neighbourhood Plans had been made within the Plan Area, six of which were made in the monitoring year.	Positive
Plymouth's Population	PPA	Plymouth's population continues to grow, with an estimated 4,882 more people living within the authority area since the start of the plan period (ONS, 2023).	Positive
Total Homes Built	PPA & TTV	Market delivery of homes across the plan area as a whole is currently outperforming expectation. Since 2014, 12,392 new homes (net) have now been added to the housing stock through new development activity. While overall market delivery has been strong, the impact of prolonged market uncertainty is evident in a lower-than-expected number of homes being built in the PPA to date.	Generally positive
Distribution of New Homes Built Within the JLP Settlement Hierarchy	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 76% 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

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
Affordable Homes Built	PPA & TTV	A total of 2,413 affordable net new affordable homes have been provided since the start of the plan period, 300 of which were built within the monitoring year. The total number of affordable homes delivered across the plan area is therefore 557 homes behind the cumulative monitoring target when annualised for 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 homes when annualised for indicative purposes. A review of planning permissions suggests developers proposing new homes on previously developed sites are the most likely to be unable to commit to meeting the JLP's 30% target.	Partly negative
Housing Supply	PPA & TTV	JLP authorities can currently demonstrate a joint 5.84 year supply of deliverable sites for potential new homes to be provided. This means the JLP and made Neighbourhood Plans retain full planning weight when decisions are being made on planning applications.	Positive
Delivery of Employment Floorspace	PPA & TTV	There has been over 90,000 square metres of new floorspace built for employment uses across the plan area. All three JLP authorities are already on target to deliver the 2034 policy target with 10 years of the plan period remaining. There remains national uncertainty regarding future demand for new office spaces which may impact future construction activity. Trends will continue to be monitored to understand if such permissions are being implemented or relevant phases are being built out on mixed use sites. Such monitoring is made more complex by the amalgamation of national planning use classes for employment and high street uses removing the need for planning permission for legal change of use.	Generally positive

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
Distribution of Built Employment Floorspace Across Settlement Hierarchy	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. 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 being 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.	Generally positive
Working Age Population in Employment	PPA & TTV	Latest statistics suggest the working age population has reduced in each JLP authority area consistent with an ageing population in South Hams and West Devon and historic net migration patterns in Plymouth (ONS, 2023). 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, 2023).	Neutral
Number of Jobs in Dockyard and Naval Base	PPA	Due to commercial sensitivities and national security issues, we can no longer publish the employment numbers at Her Majesty's Naval Base, therefore this measure is no longer monitored as an indicator.	Neutral

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
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 83.1% of the UK average at the beginning of the plan period in 2014 (ONS,2023). 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 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. 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.	Neutral
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. Both policy areas have already surpassed their identified capacity for food retail floorspace. Both the Plymouth Policy and Thriving Towns and Villages policy areas have remaining capacity for non-food outlets.	Generally positive
Plymouth City Vacancy Rates	PPA	The city centre vacancy rate of 18.2% was above the national average vacancy rate of 15.3%. 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 lockdown. 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 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 15.3%.	Positive
Visitor spend	PPA	No comparable national surveys have been undertaken by Visit Britain since the COVID-19 lockdown. In their most recent data release for Local Authorities, Visit Britain estimated annual visitor spend in the Plymouth Local Authority area between the years of 2017 and 2019 to be around £114,000,000. This compared favourably with an average of around £106,000,000 in the three-year period of 2014 to 2016.	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. Works have begun in South Hams and West Devon to raise availability levels to 96% and 94% of all premises respectively by 2025.	Positive
Delivery of land use allocations	PPA & TTV	54% of JLP Allocated Sites have been either completed, are under construction or are part complete with 10 years still remaining of the plan period.	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.	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. However, overall passenger counts at stations within the plan area remain lower than pre-lockdown levels based on the latest statistics from the Office from Rail and Road. Notable exceptions are at Ivybridge where passenger counts are already higher than counts before lockdown 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 94,000 passengers in the monitoring year (ORR, 2023).	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 recovered. The average journey time between the two cities remains comparable to when the JLP was adopted in 2019.	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 79% increase in passengers since the previous monitoring year (DFT, 2023). Freight traffic tonnage was similarly affected by COVID-19 lockdowns, despite initial strong recovery, freight tonnage in the latest available figures were 20% lower than pre-pandemic levels and 5% lower than in 2014 (DFT, 2023).	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 2023 is for 2021 as the dataset is released in arears. 2021 is the second year on record to be impacted by COVID-19 lockdowns. Despite an exceptional reduction to driving activity during the third lockdown period, carbon emissions remained above the 50% reduction target for 2034 suggesting further action is required. The highest source of emissions in each JLP authority is petrol vehicle emissions (DESNZ, 2023).	Neutral

Indicator of change	Policy Area	Summary of strategic change at 2023 Monitoring Point	Direction of travel
Air Quality Management Areas	PPA & TTV	Plymouth has one Air Quality Management Area (AQMA). The latest survey results show agreed monitoring points were meeting national air quality objectives. Monitoring will continue in order to check for continued future compliance before any action is taken. South Hams has three AQMAs, the latest survey results show Ivybridge and Totnes results meeting national air quality objectives, however Dean Prior is still exceeding its objectives for Nitrogen Dioxide. Monitoring. All three areas will continue to be monitored to check for future compliance. 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, 2023).	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	66% 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

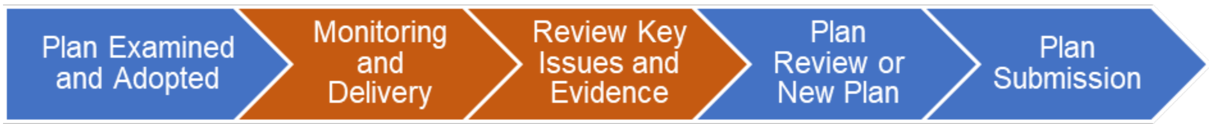
The JLP is adopted and up to date. The plan provides the spatial strategy and planning requirements for new development up to 2034 through its planning policies. This report represents an annual update on the performance of such policies and broader strategic changes within the plan area. It will therefore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

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.

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

The Joint Local Plan strategy is currently being delivered and progress monitored. A Five-Year Review Report will be published in March 2024; the review report can be found on the JLP website. The JLP remains up to date for the purpose of decision making.

Figure 3.1 Current status of the Joint Local Plan



Made Neighbourhood Plans (Indicator 30)

While this report focuses on the JLP, the JLP only forms one part of the decision-making framework for planning applications within the Plan Area. The Plan Area hosted 27 made Neighbourhood Plans at the 2023monitoring point as listed in Table 3.1.

Table 3.1. Neighbourhood Plans made at the March 2023 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
Bickliegh	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

Name of Neighbourhood Plan Area	Date Made
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

Documents under preparation

We are awaiting clarity from central Government on secondary legislation to understand changes to the planning system to inform our long-term timetable for future work through an updated Local Development Scheme. A Five-Year Review Report will be published in March 2024. The JLP remains up to date for the purpose of decision making.

Consultation activity with other Local Planning Authorities

Neighbouring authorities are at various stages of plan making. Table 3.2 indicates plan consultation activity where JLP authorities have taken part in consultation activity within the monitoring year.

Table 3.2. Consultation activity with other Local Planning Authorities in the monitoring year

Authority Area	Consultation Activity Taken Part In	Consultation Period
Teignbridge District	Statement of Common Ground and Duty to Cooperate Meeting	November 2022
Torbay District	Local Plan Update Regulation 18	December 2022

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 Local Authority Performance at https://www.gov.uk/government/statistical-data-sets/live-tables-on-planning-application-statistics.

Planning Obligations and the Community Infrastructure Levy

Information on the money collected by JLP Authorities from planning applications to be spent on identified local and strategic infrastructure needs 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 6,350 people since 2014 (ONS, 2023). 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 the urban fringe as it does not match the national administrative boundaries used by the ONS[1].

Figure 4.1 and Table 4.1 show the latest population estimates for all three JLP authorities[2].

Figure 4.1. JLP authority area population estimates (ONS, 2023)

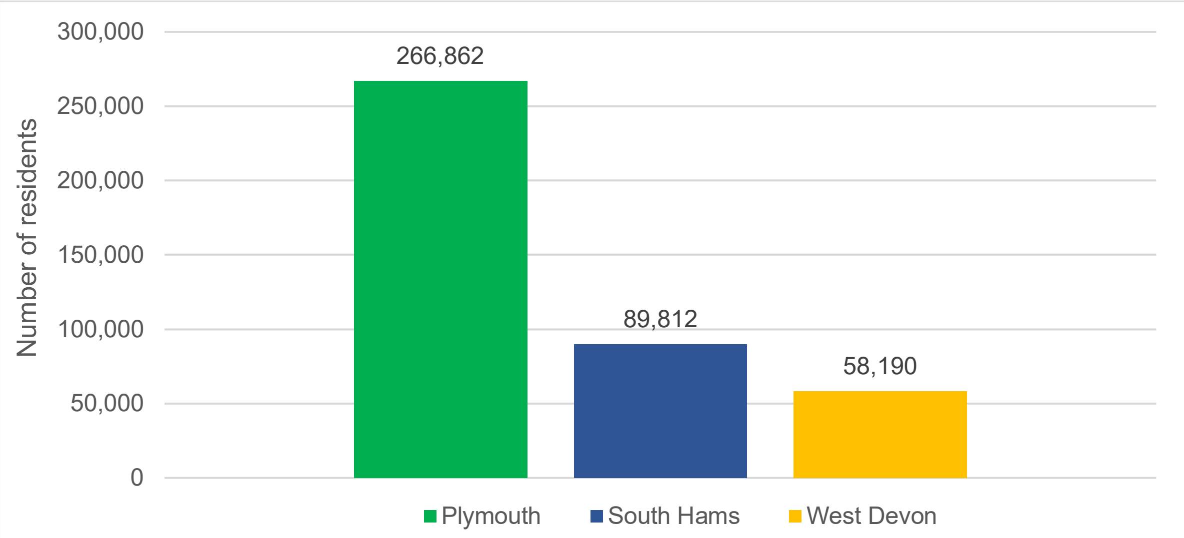


Table 4.1 Joint Local Plan authority area population estimates (ONS, 2023)

Council Area	Population Estimate (ONS 2023)
Plymouth City Council Authority Area	266,862
South Hams District Council Authority Area	89,812
West Devon Borough Council Authority Area	58,190

[1] It is understood the publication of updated estimates for Output Areas later in the year will make it possible to provide an indicative estimate of change over time in next year's AMR.

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

Average age of the population

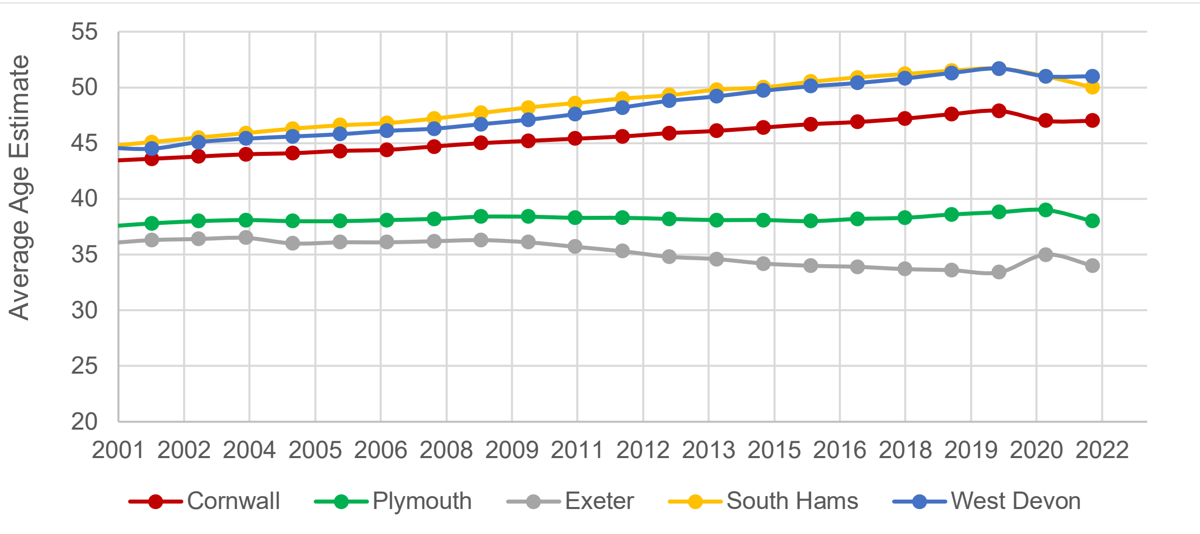
The average age of the population in each JLP authority has been increasing over time in keeping with national trends. This trend is most prominent in our rural areas where the average age of populations was already higher than in more urban areas. The average age in South Hams and West Devon are currently estimated to be 50 and 51 respectively in comparison to 38 in Plymouth (ONS, 2023).

There were more deaths than births all three authority areas within the latest available comparable ONS estimates (ONS, 2023). Within the same time period (2021), the growth of the working age population in each authority area has been supported by net positive inward migration, primarily driven by people moving to the areas from elsewhere inside the UK.

The most common age range of people migrating to Plymouth was 16-24 years old, potentially signalling the attractiveness of Plymouth's higher education facilities. People migrating to the South Hams and West Devon tended to be older, with the majority of migrants being between 35 and 64 years old, while there was a net loss of 16–24 year olds from the both authority areas in the same year (ONS, 2023).

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, 2023)



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 (2023) suggest the following:

- The overall number of people in employment in Plymouth Authority Area is estimated to have increased from around 119,500 in 2014 to 122,200 in 2023. This is despite a reduction in the overall working age population of around 500 people within that time period. An estimated 73% of the working age population were in employment which is below with the UK national average employment rate (75%).

- The overall number of people in employment in South Hams Authority Area is estimated to have increased from around 33,300 in 2014 to 33,500 in 2023. This is despite a reduction in the overall working age population of around 1,600 people. An estimated 71% of the working age population were in employment which is below the UK average employment rate.

- The overall number of people in employment in West Devon Authority Area is estimated to have decreased from around 24,200 in 2014 to 23,700 in 2023. There has also been an estimated reduction in the overall working age population of around 1,200 people in that same period. An estimated 79% 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. However, due to commercial sensitivities and national security issues we cannot publish up to date employment numbers at the Her Majesty's Naval Base and this measure is no longer actively monitored and reported on.

The share of the total economy of the city based on the latest available reporting (taken from the Plymouth Report 2019) attributes 14.1% of Plymouth's Gross Value Added (GVA) to Her Majesty's Naval Base, including the wider supply chain. This equated to 10.1% of Plymouth's full time employment figure at that time.

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

The latest published GVA per hour index figure for Plymouth was 81.5% of the UK average in 2021 (ONS, 2023). The 2020 GVA per hour index figure for Plymouth has been revised to 83.2% in the most-up-to-date reporting, suggesting an adjusted annual fall in productivity of 1.7% (ONS, 2023).

This remains above the average across the Heart of Southwest LEP where the average GVA per hour figure was 81.0% of the UK average for 2021 (ONS, 2023).

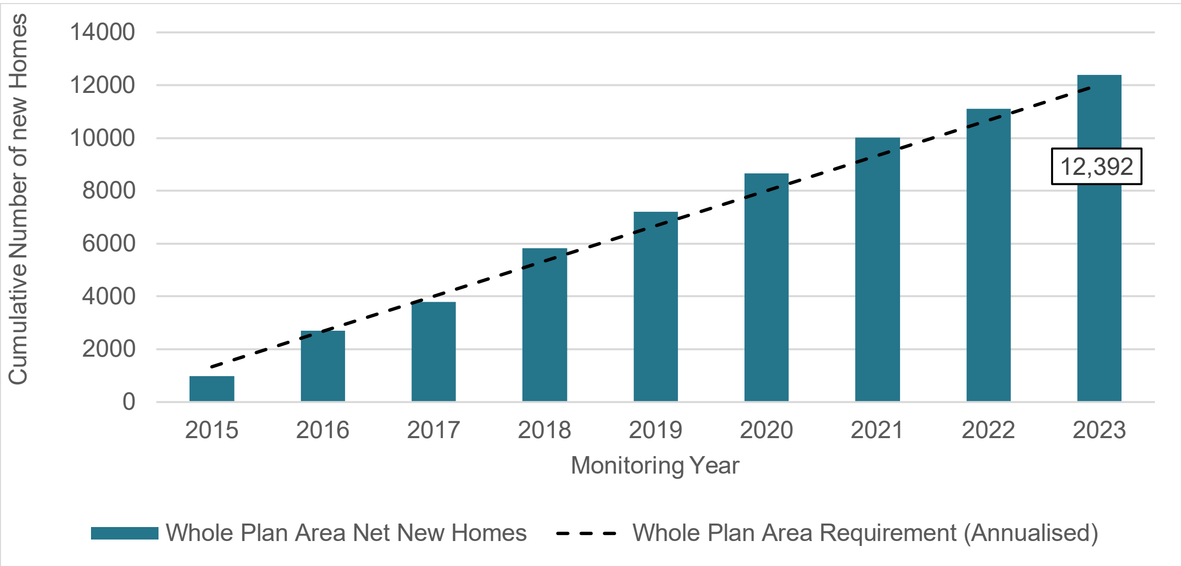
5. Housing Indicators

The JLP seeks 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 sets 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). We monitor the total number of net additional homes built each year against an annualised monitoring target of 1,335 net additional homes a year to understand whether the JLP is successfully facilitating enough homes being built and whether further actions may be required to support housing delivery.

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

A total of 12,392 net additional homes had been built in the JLP Area up to the monitoring point. This represents 377 more dwellings than the monitoring target when using an indicative monitoring target of 1,335 homes per year. Figure 5.1 shows the increase in the total net number of homes delivered within the plan area per year since March 2014.

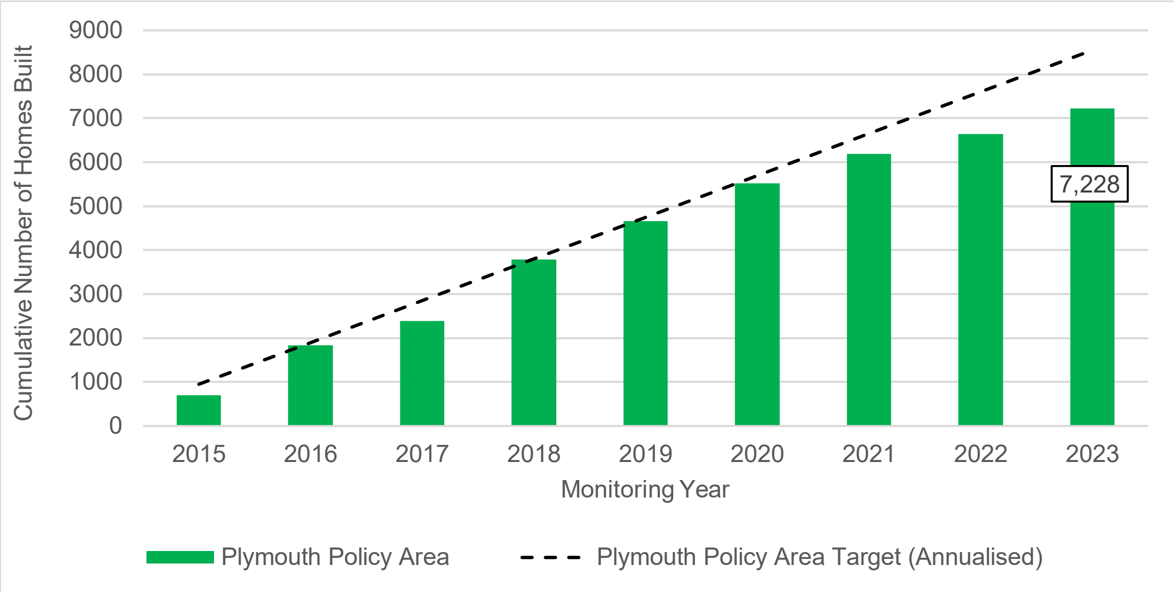
Figure 5.1 Total net new homes by monitoring year against an indicative annualised delivery target



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.

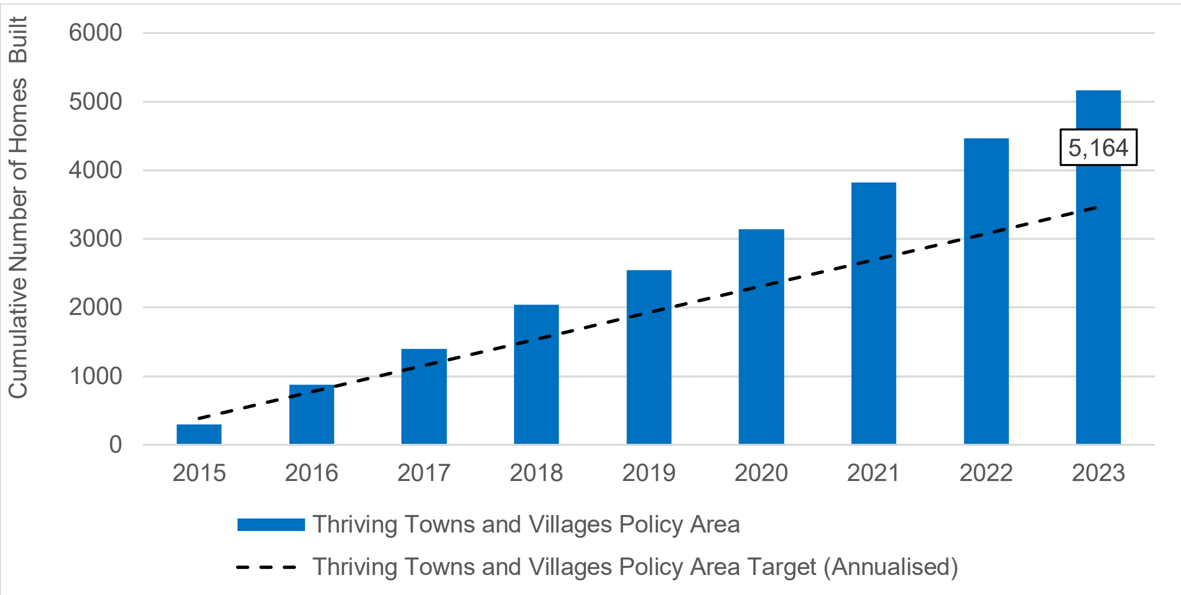
The PPA remains the focus of new housing development, with 7,228 net additional homes provided up to the 2023 monitoring point. This constitutes 58% of all net additional homes provided in the plan area since March 2014. Figure 5.2 shows that 1,322 less homes have been provided in the PPA than would be expected at the 2023 monitoring point if applying an annualised monitoring target for indicative purposes. There are multiple combining factors leading to the slowdown of market delivery. These include rising build costs, COVID-19 lockdowns and reduction in demand for homes at new build market prices. 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.

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



Market housebuilding continues to perform strongly in the TTV. Figure 5.3 shows a total of 5,164 homes had been built in the TTV at the monitoring point, this represents 1,699 more homes than would be expected if applying an annualised monitoring target for the area for indicative purposes.

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



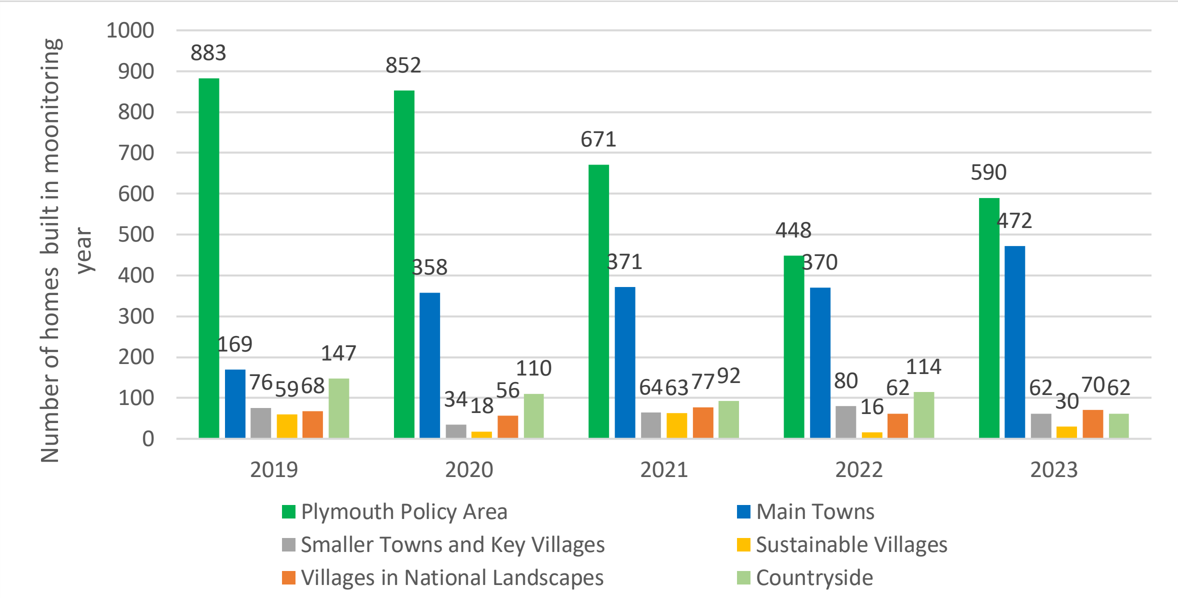
Market supply has been strong in the TTV due to the strong demand to live in the area and high price of housing products incentivising developers to invest in the area. Average house prices have continued to rise year on year making home ownership more unaffordable than ever for first time buyers. At the monitoring point, on average, homes in South Hams were sold at a price 12.79 times the average wage in the area in comparison to 5.74 times the average wage in the year 2000. In West Devon, on average, homes were sold at a price 9.9 times the average wage in the area in comparison to 5.63 times the average wage in the year 2000. 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 has been located in the PPA and at our Main Towns in accordance with the spatial hierarchy of the JLP (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.

The largest numbers of homes built at villages within National Landscapes in the monitoring year were at Canes Orchard, Brixton, St. Ann's Chapel, Bigbury and Abby Meadows, Crapstone (15, 9 & 21 dwellings respectively). Planning applications at these sites predate the adoption of the JLP to when authorities were unable to demonstrate a five-year land supply for new homes, therefore housing policies at the time were considered out of date for the purpose of decision taking.

Of the 62 new homes in the countryside built in the monitoring year, five were secured directly through national permitted development rights. An additional five homes were built by developers using these rights as a ‘fall-back position’ to achieve new planning permissions with demonstratable improvements to those already secured through national Class Q permitted development rights.

Homes built at sites not identified within a Development Plan Document

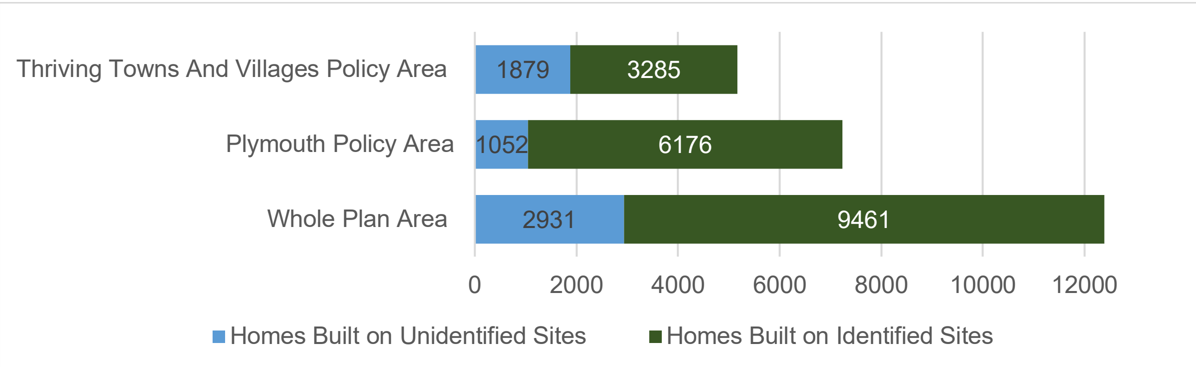
As part of monitoring housing delivery, it is useful to understand how many homes have been built on sites not specifically identified for housing development within a Development Plan Document. Such development sites are usually described as ‘windfall sites’ within national and local planning policy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

The type of development sites categorised as 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.

Figure 5.5 shows the proportion of homes which have been built which were identified for delivery in current and previous Development Plan Documents versus windfall sites. 77% of net additional homes provided in the plan period have been built on sites identified within a Development Plan Document. The largest source of new homes on unidentified sites is the development of small housing sites within the TTV. These sites are estimated to constitute 31% of all homes provided in the TTV and 55% of all windfall development in the plan period to date.

Figure 5.5 Net new homes built on sites identified in a Development Plan Document



The largest amount of building relating to windfall housing sites in the monitoring year included:

- 21 homes to the south of Crapstone (0147/17/OPA),
- 25 homes south of Exeter Road Industrial Estate, Okehampton (0032/18/OPA); and
- 15 homes to the north of Brixton (1825/16/OPA).

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. In these circumstances the strategic policies directing housing growth to allocated land for housing are considered out of date for purpose of decision making until the shortfall of land can be demonstrated to have been met by the market and/or new plan making activity. These sites would not accord with the JLP if a decision were made today.

A further 23 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.

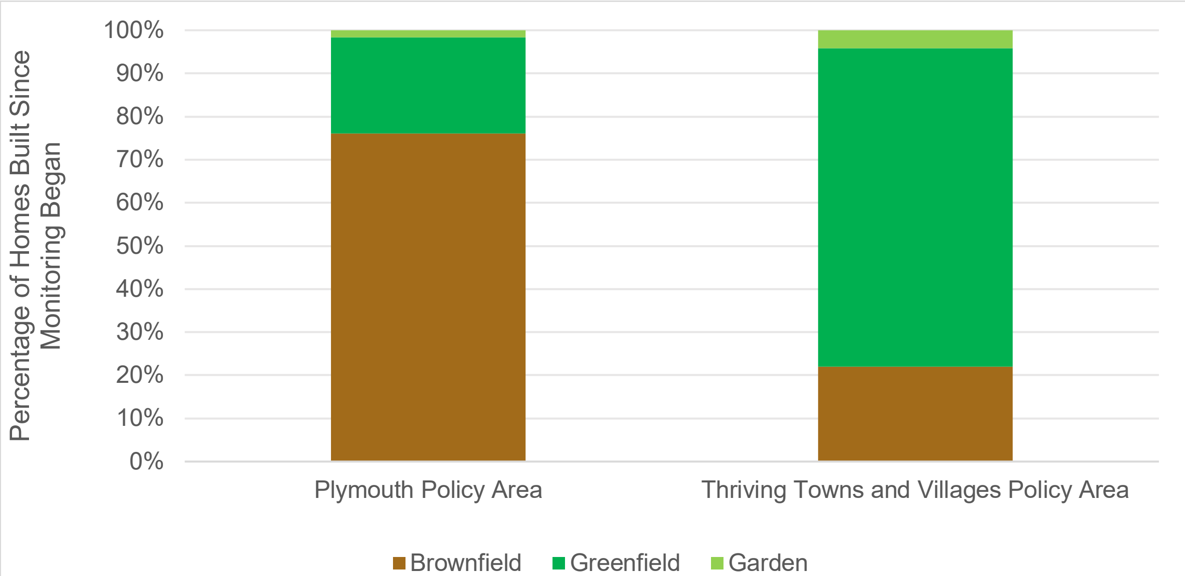
The majority of housing development on identified sites in Plymouth continues to relate to the redevelopment of existing buildings through planning permission or general permitted development rights. The redevelopment of previously developed land in sustainable locations is supported in principle by 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 5.6 shows that the majority of homes built in the PPA since 2014 have been on previously developed land (76%). 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 5.6 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. 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.

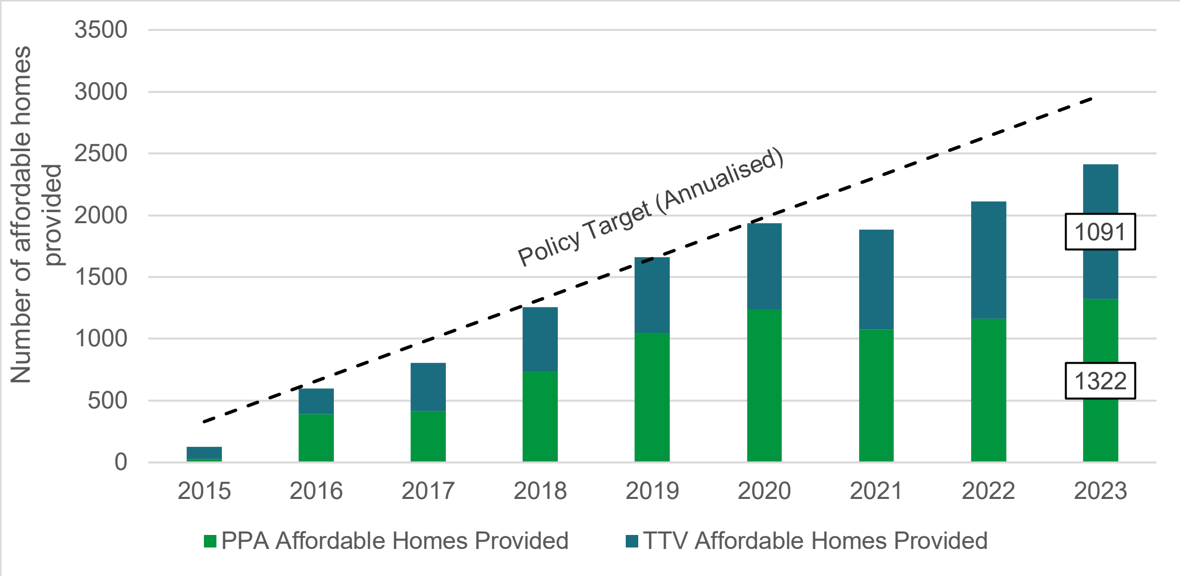
Net new affordable homes built within the plan period (Indicator 2)

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. We monitor the net additional affordable homes provided each year to understand whether the development industry is currently on track to provide these homes by the end of the plan period.

A total of 2,413 affordable net additional affordable homes have been built since the start of the plan period, 300 of which were built within the monitoring year. The total number of affordable homes across the plan area is therefore 557 homes below the monitoring target 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 three years(see figure 5.7). There remains an adequate supply of existing land identified for housing development in the JLP for the remainder of the plan period to still meet the 2034 affordable homes plan target.

The delivery of affordable homes in the TTV is 169 dwellings ahead of its individual monitoring target when annualised for indicative purposes reflecting the wider performance of the housing market in this area. 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 twenty years leveraged by national fiscal and monetary policies.

Figure 5.7 Net additional affordable homes by monitoring year against an annualised monitoring target



Planning permissions securing affordable housing since adoption of the Joint Local Plan

Housing developed up to 31 March 2023 is still mainly reflective of planning decisions made prior to the adoption of the JLP. The number of affordable homes secured within planning permissions since the adoption of the JLP up to the monitoring point therefore gives a clearer indication of the current performance of affordable housing policies in the JLP to date at this early stage of plan implementation.

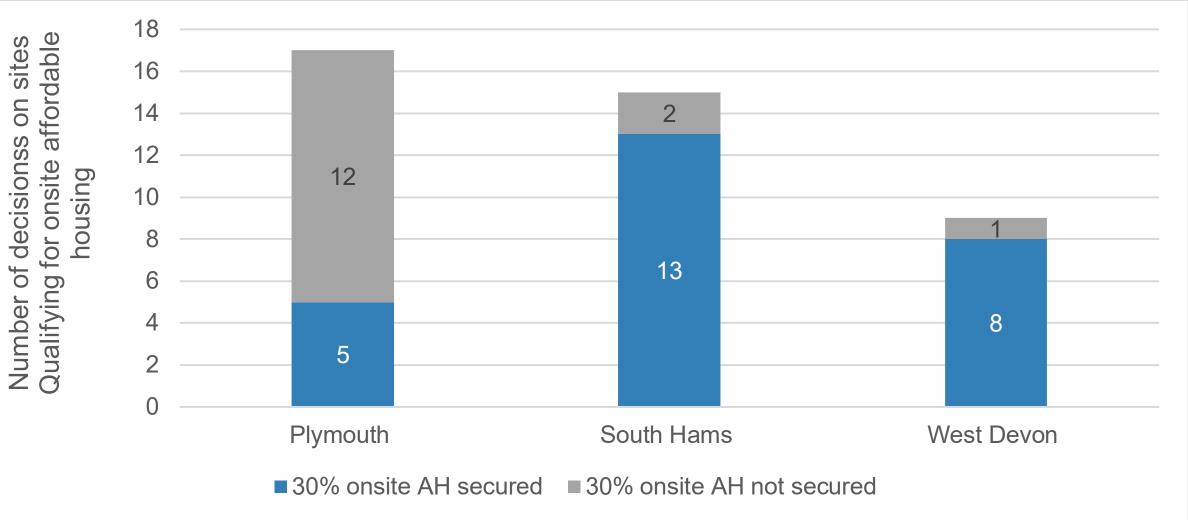
Since 2019, 26 out of 41 planning applications qualifying for the delivery of 30% onsite affordable housing met the policy target at the principal planning decision stage. Only five of these permissions were for sites in Plymouth, the remaining 21 permissions were in the South Hams and West Devon.

The five sites in Plymouth able to commit to policy compliance at the planning decision stage all stated they would be in receipt of subsidies from either national or local government, but were willing to commit to the delivery of such homes at the planning decision stage to guarantee those proposals would be acceptable in planning terms.

All sites unable to achieve the policy target were previously developed. At each site developers were judged to have submitted robust viability evidence to demonstrate that the delivery of 30% affordable homes onsite would not be viable alongside other planning obligations. Decision makers in these cases decided that on balance proposals would not be in conflict with the JLP when read as whole. The JLP supports the redevelopment of previously developed land in sustainable locations.

Previously developed sites often rely on national or local subsidies to deliver affordable homes following the grant of planning permission. Such funding mechanisms usually should not be captured within planning permissions as they are secured outside of the planning system.

Figure 5.8 Number of sites qualifying and securing 30% affordable homes at the planning permission stage



Details of total financial contributions to offsite affordable housing are provided in the relevant Infrastructure Funding Statement for each Local Planning Authority. 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

To ensure we can meet future housing needs within the whole JLP Area, we must ensure we have an adequate supply of land which is identified as having a realistic prospect of enabling housing development. At the monitoring point, central government required we demonstrate this through publishing evidence of a five-year supply of available land for housing. We have published this evidence in our Housing Position Statement which can be accessed at https://www.plymouth.gov.uk/5-year-housing-land-supply-position-statement-and-housing-delivery-test-result. The report includes 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.

The whole plan area can currently demonstrate a five-year land supply of 5.84 years. This means that the JLP and made Neighbourhood Plans have full weight in planning decisions and there is less risk of speculative planning applications for development in the JLP area.

6. Employment Indicators

The JLP seeks to deliver a net increase of 375,200 square metres 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 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)

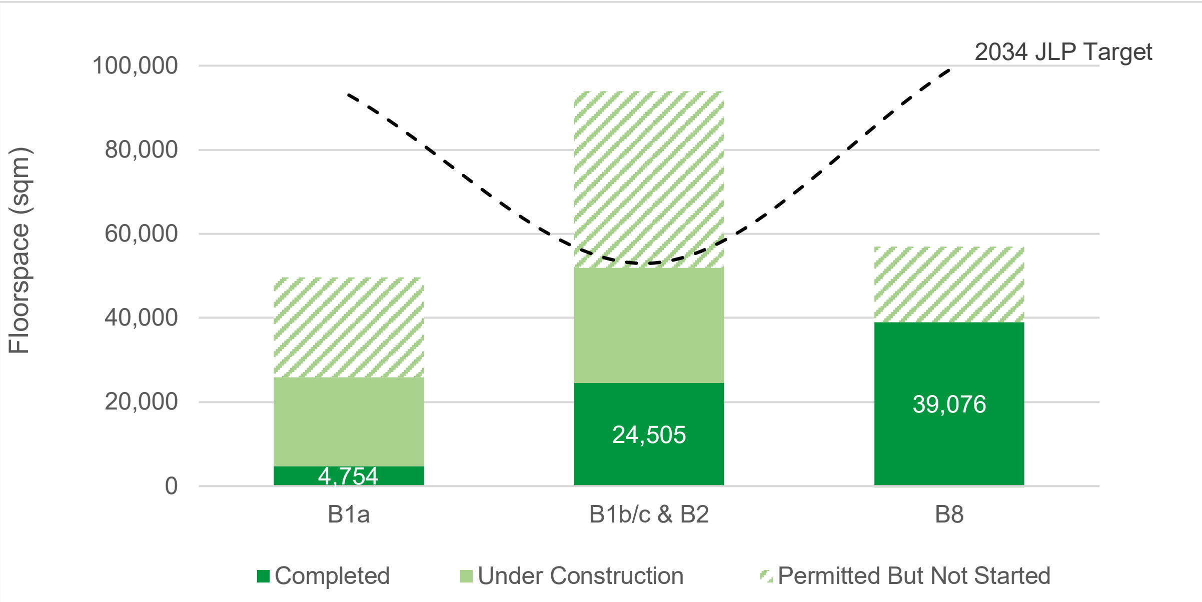


Table 6.2 Net employment floorspace completed or within planning permissions (PPA)

Stage of delivery	B1a	B1b/c and B2	B8
Completed	4,754sqm	24,505sqm	39,076sqm
Under construction	21,133sqm	27,424sqm	-300sqm
Permitted but not started	23,738sqm	42,058sqm	17,849sqm

This year's survey results show a large reduction in net office floorspace within the PPA in comparison to the previous year due the completion of the redevelopment of Intercity House, now 'Intercity Place', for educational uses as a part of the Plymouth University in accordance with policy PLY16 of the JLP.

There remains some 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.

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

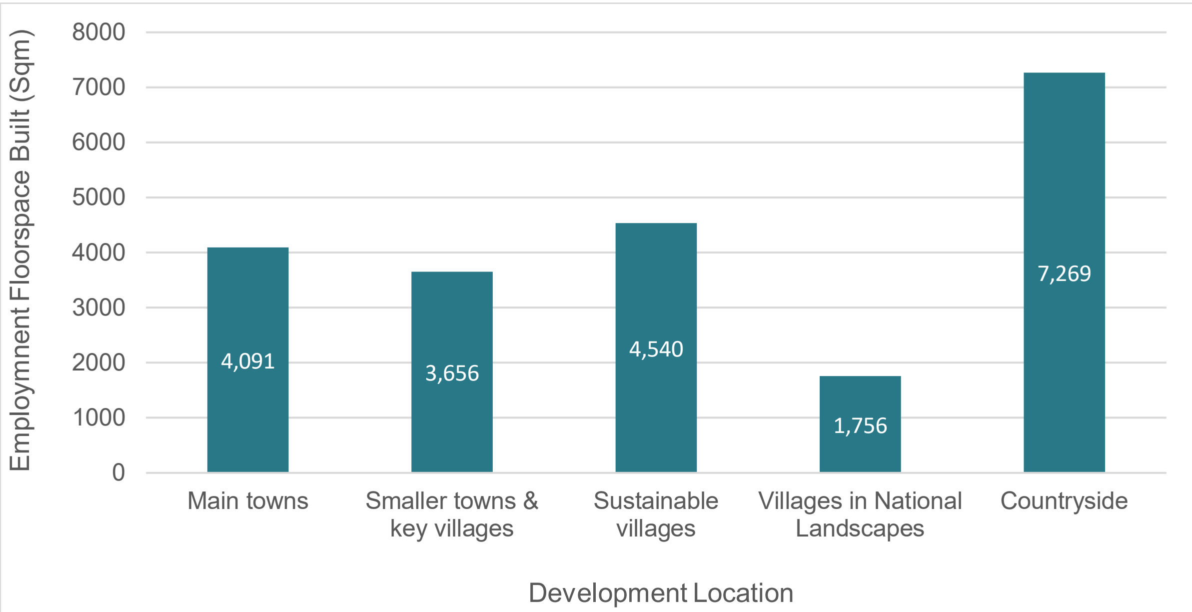


Figure 6.3 and Table 6.3 and indicate the total amount of new employment floorspace which has been completed during the plan period as well as potential future employment floorspace in extant planning permissions[3]. They show there is currently enough potential employment floorspace either completed or with planning permission to deliver the majority of TTV 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

[3] An 'extant planning permission' effectively refers to land which currently benefits from a live planning permission.

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.

Larger buildings for employment within the monitoring year included a 650sqm upgraded production facility at Townstal Industrial Estate and 140sqm of new storage facilities for gig boats at Coronation Park.

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

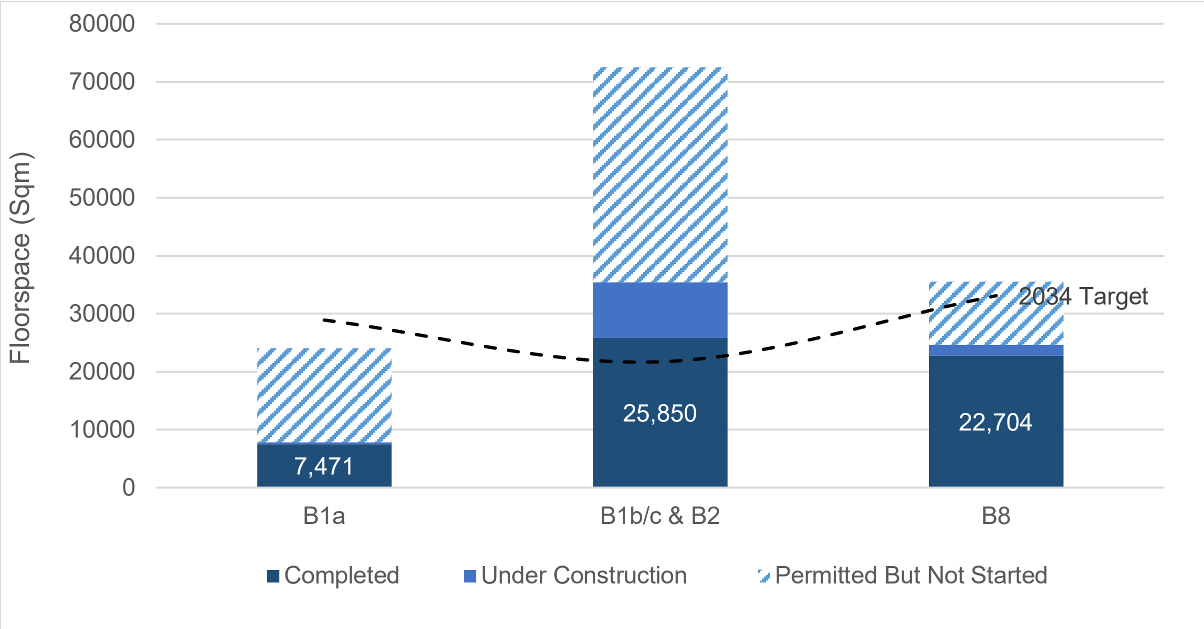


Table 6.3 Net employment floorspace completed or within planning permissions in the plan period to date (TTV)

Stage of delivery	B1a	B1b/c and B2	B8
Completed[4]	7,471sqm	25,850sqm	22,704sqm
Under construction	377sqm	9,584sqm	1,879sqm
Permitted but not started[5]	16,240sqm	37,072sqm	10,952sqm

[5] 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)

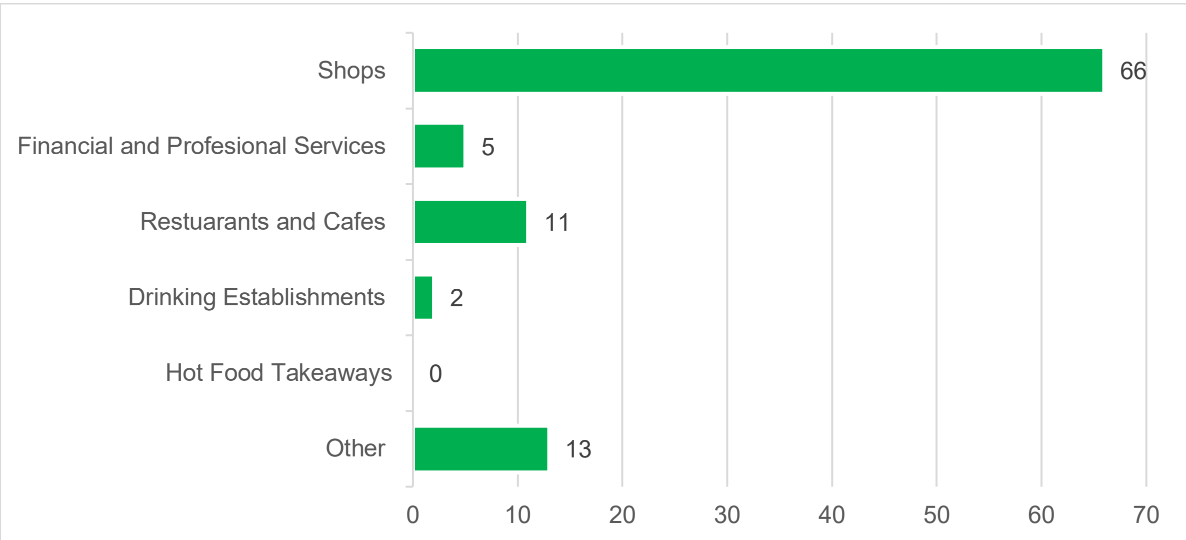
The JLP supports the important strategic role played by retail in Plymouth's city centre and recognises the need for attracting investment to enable the strategic renewal and enhancement of the centre. To measure performance and change in the city centre over time we monitor annual vacancy rates.

The overall surveyed vacancy rate in Plymouth City Centre is 18.2% which remained higher than the national average vacancy rate of around 15.3%. Persistently high vacancy rates highlight known structural issues with existing retail stock in the city centre and importance of ongoing city centre regeneration schemes to attract investment.

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 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:

- 27% of units recorded as vacant in this year's survey were also vacant in the previous year's survey. The majority (21 out of 26) 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 have remained below the national average for shopping centres.
- 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)

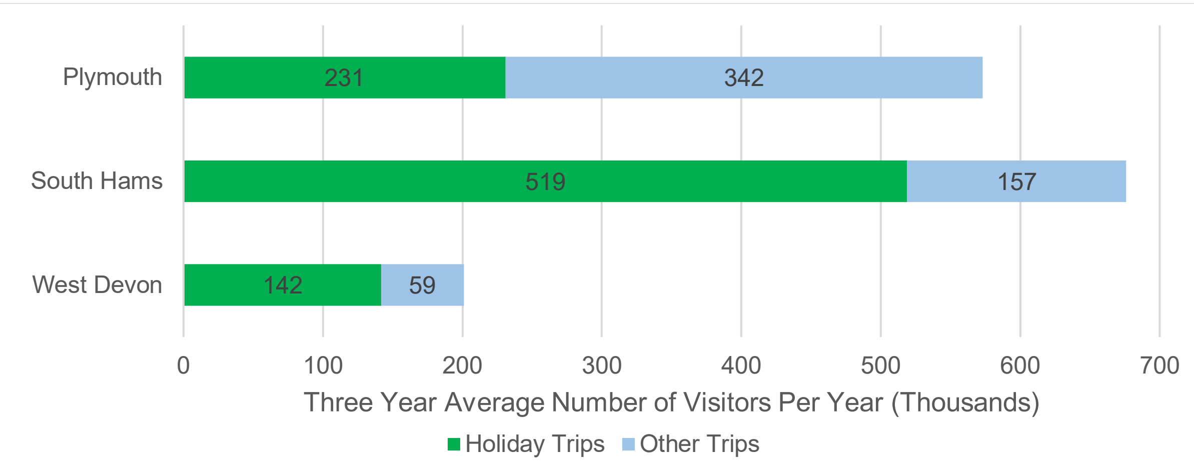
The JLP seeks to support Plymouth as a destination by enabling redevelopment along the waterfront. We use statistics from Visit Britain to estimate changes in the number of people visiting Plymouth and their associated visitor spend as an indicator for people looking to visit the city for business and recreation.

Visit Britain provides comparable indicative data estimates for annual visitor spend by Local Authority. These indicative estimates are based on a three-year average due to the relatively low sample size associated with the Great Britain Tourism Survey. Despite this approach, the survey data for the latest three-year period is still not considered of a reliable sample size for the purpose of analysis.

The average number of trips to Plymouth per year before the COVID-19 pandemic were estimated to have risen from around 563,000 between 2014 and 2016, to 573,000 between 2017 and 2019. In that same time period, the average annual total spend from trips to Plymouth is estimated to have risen from around 106 million pounds to 114 million pounds.

Figure 7.2 indicates the estimated number of trips by JLP authority within the Visit Britain Statistics release. At the time South Hams remained the primary destination for visitors in the JLP area with an estimated average of around 676,000 trips per year between 2017 and 2019. An estimated 77% of these trips are associated with holiday visits in comparison to 40% of visitors to Plymouth which attracted a higher proportion of other visitors including business trips.

Figure 7.1 Three-year average estimates for holiday trips and other visitors for 2017-2019 (Visit Britain, 2021)



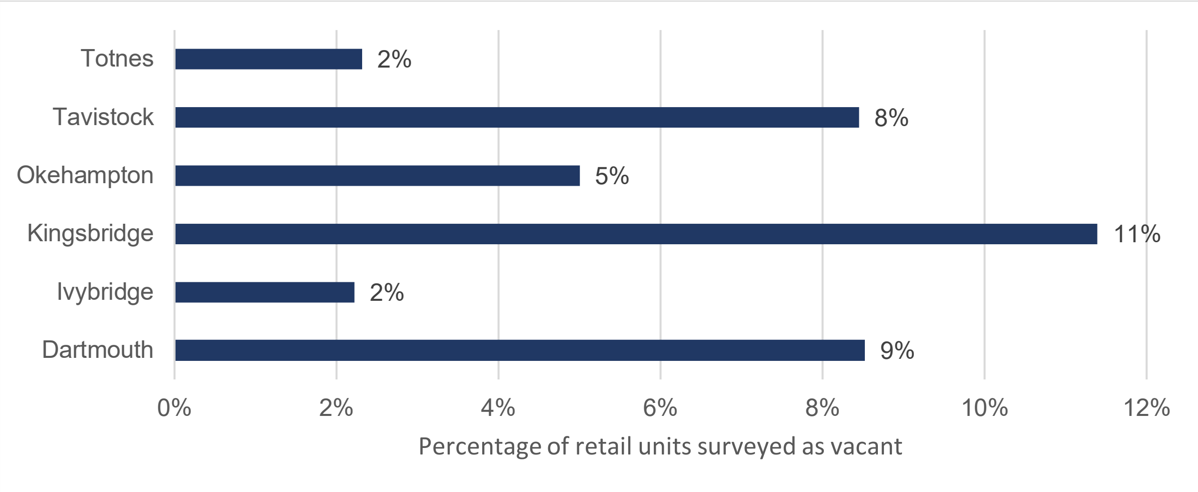
Due to the lack of reliable data, it is still not possible to currently estimate the extent of recovery in visitor numbers since the COVID-19 lockdown period using Visit Britain statistics.

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 7.3 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 15.3%.

Figure 7.3 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 on 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 both the Plymouth Policy Area and Thriving Towns and Villages Policy Area have surpassed the identified retail capacity for new food floorspace within each policy area. However, both policy areas still had 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 previous monitoring year associated with the completion of works for the partial conversion of the former Derry's department store to other uses including student accommodation and a hotel. However, there remains a strong supply of planning permissions for future potential retail uses. Most notably, the extant planning permission for retail uses at Sherford for up to 12,834m^2 of new floorspace.

Evidence of demand for new build non-food retail premises in the Thriving Towns and Villages appears to remain limited if based on the number of planning applications submitted and permissions secured to the monitoring point. 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. This work will, when required, need to take into account the national changes to planning use classifications which reduce local planning authority control over established retail uses from change.

8. Land Use Allocations

Joint Local Plan land use allocations overview

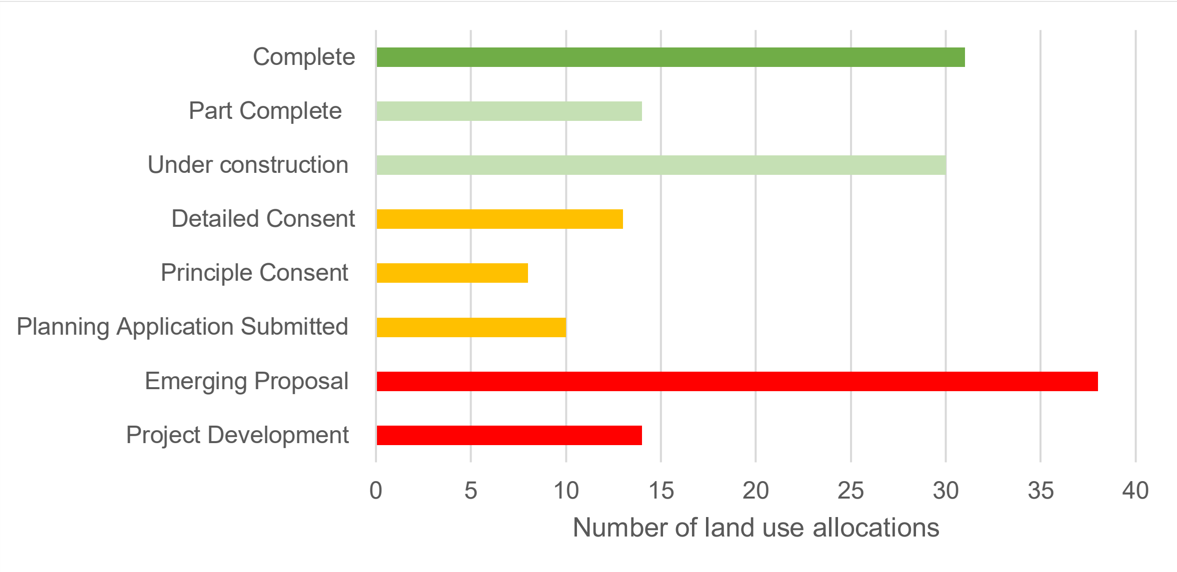
The JLP allocates sites for development, we monitor their status within the planning process to understand how they are progressing.

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.

https://plymcc.maps.arcgis.com/apps/webappviewer/index.html?id=96472f19969d499c8f78a987b898cbd9

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 11 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 Allocations 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. A summary of the progress on projects referenced in the JLP is included in Table 8.2.

Table 8.2. Strategic open space improvements in the Plymouth Policy Area

Strategic Green Space	Joint Local Plan Reference	Progress
Sherford Community Park	PLY49	Part complete
Central Park	PLY19	Completed
Derriford Community Park	PLY41	Works commenced
Woolwell Community Park	PLY44	Outline planning application submitted
Plym Valley Strategic Green Space	PLY45	Works commenced
Saltram Countryside Park	PLY54	Emerging

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[6] 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%

[6] 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 (ORR, 2023) with the majority of the overall reduction at Plymouth Central Station.

Figure 9.1 shows that passenger numbers at Plymouth Central Station in the 2022/23 monitoring year were estimated to be 7% lower than in 2015 despite significant recovery in passenger numbers since COVID-19 lockdown (ORR, 2023).

Figure 9.1 Passenger numbers at Plymouth Central Station

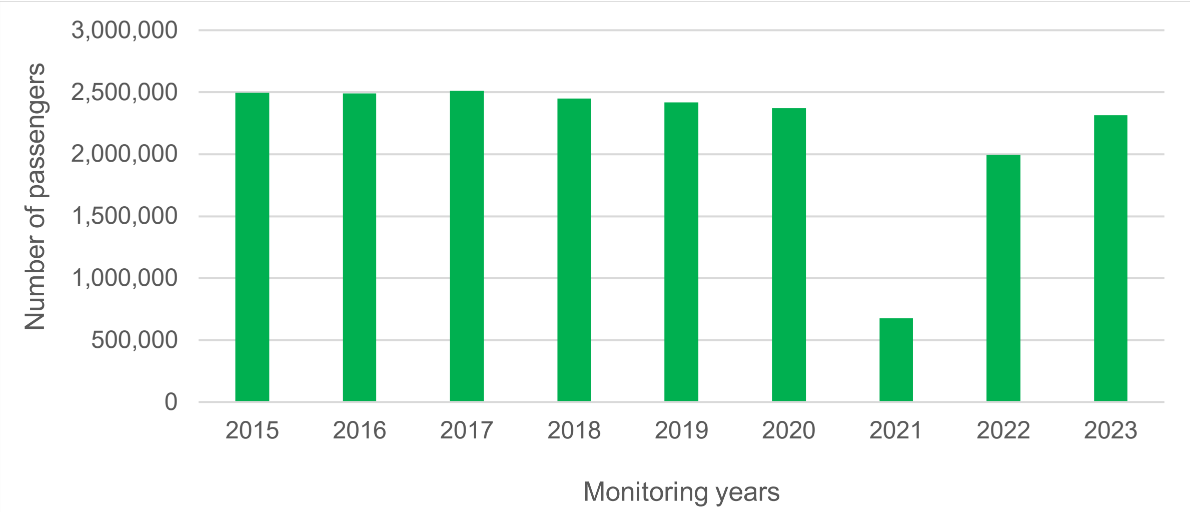


Table 9.4 Passenger numbers at Plymouth Central (thousands)

Train station	Passengers in 2015 base monitoring year	Passengers in 2022 monitoring year	Passengers in 2023 monitoring year
Plymouth Central Station	2,495,000	1,992,020	2,313,092

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 11% higher than at the start of the plan period. The largest percentage improvements to passenger numbers were at Dockyard and Keyham stations (ORR, 2023).

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

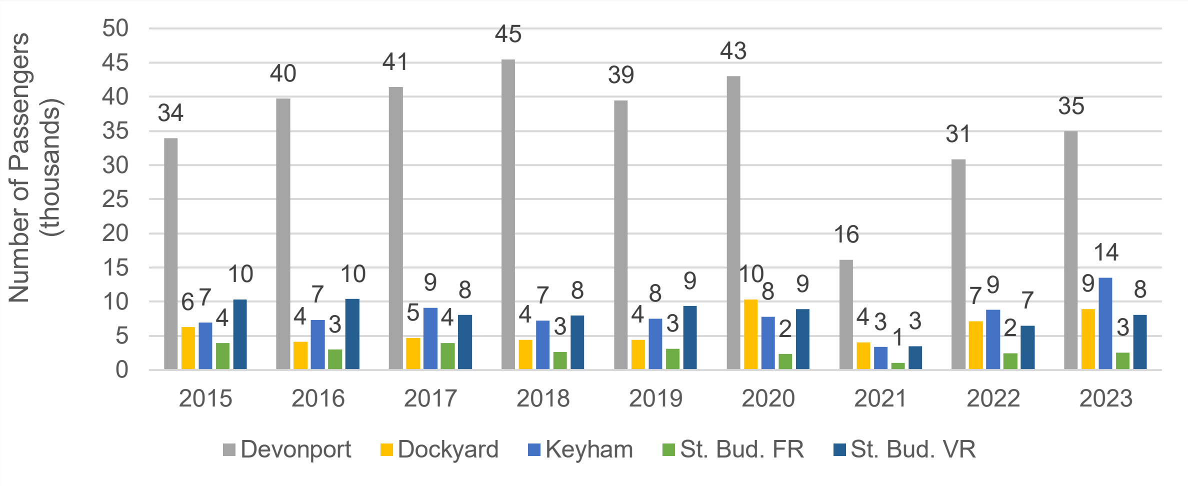


Table 9.5 Passenger numbers at other Plymouth Policy Area stations

Train station	Passengers in 2015 base monitoring year	Passengers in 2022 monitoring year	Passengers in 2023 monitoring year
Devonport Station	33,968	30,866	34,970
Dockyard Station	6,300	7,154	8,960
Keyham Station	6,936	8,786	13,530
St Bud. FR Station	3,926	2,444	2,508
St Bud. VR Station	10,332	6,516	8,098

Figure 9.3 shows overall passenger numbers at South Hams rail stations are estimated to be 9% higher than in 2015. Large increases in passenger numbers have been recorded at both Totnes and Ivybridge stations (ORR, 2023).

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

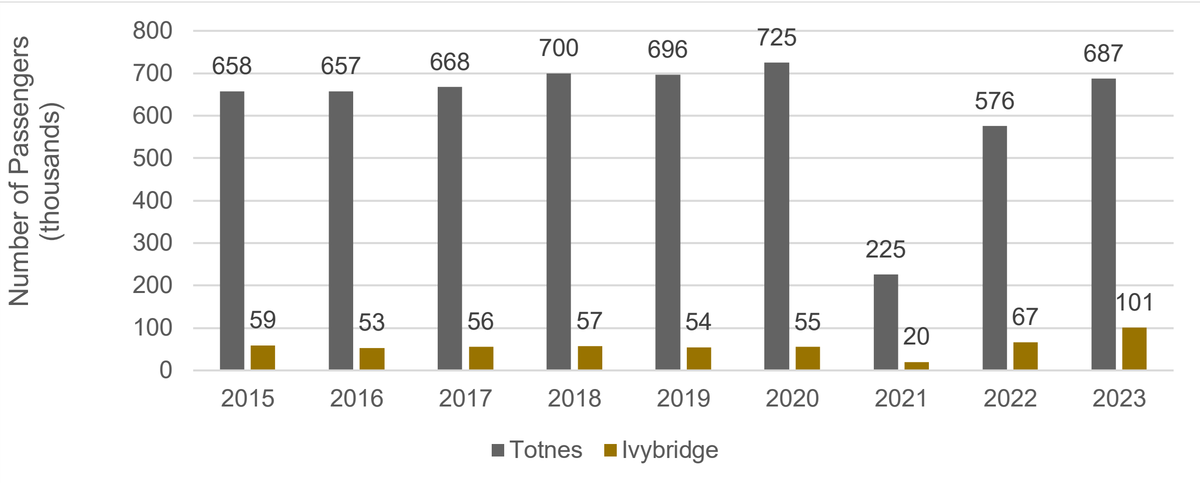


Table 9.6 Passenger numbers at stations in the South Hams

Train station	Passengers in 2015 base monitoring year	Passengers in 2022 monitoring year	Passengers in 2023 monitoring year
Totnes	657,754	575,630	687,394
Ivybridge	59,374	66,764	100,900

Figure 9.4 shows overall passenger numbers at West Devon Stations are estimated to have more than doubled since the start of the plan period due to the reopening of the Okehampton rail station. However, in the same period there was a 21% reduction in passenger numbers at stations on the Bere Peninsula with numbers failing to recover fully to date following the pandemic (ORR, 2023).

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

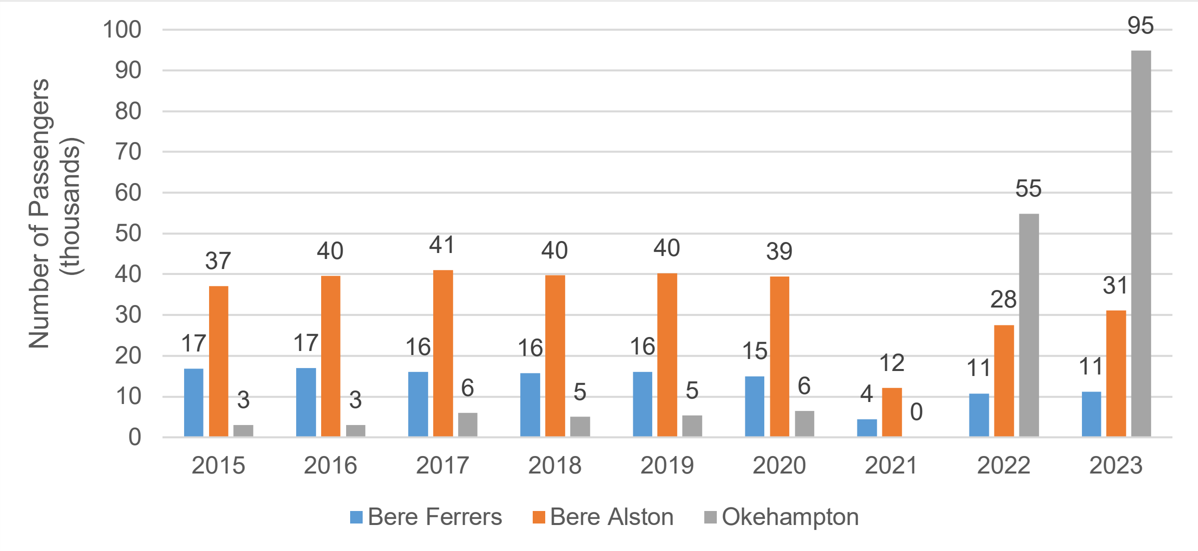


Table 9.7 Passenger numbers at stations in West Devon

Train station	Passengers in 2015 base monitoring year	Passengers in 2022 monitoring year	Passengers in 2023 monitoring year
Bere Ferrers	16,858	10,786	11,258
Bere Alston	37,082	27,588	31,090
Okehampton	2,984	54,904	94,912

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 three hours and slowest journey time being four hours and ten minutes. The average journey time at the monitoring point was three hours and 31 minutes, four minutes slower than in 2019 (Trainline, 2023 and GWR, 2023).

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 2022 are included in figure 9.5 which illustrates a 20% reduction in passengers from pre pandemic levels in 2019 and 5%

reduction from 2014 when the JLP was adopted. The overall number of passengers in 2022 (338,000) was 21% higher than the previous reporting year (72,000).

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

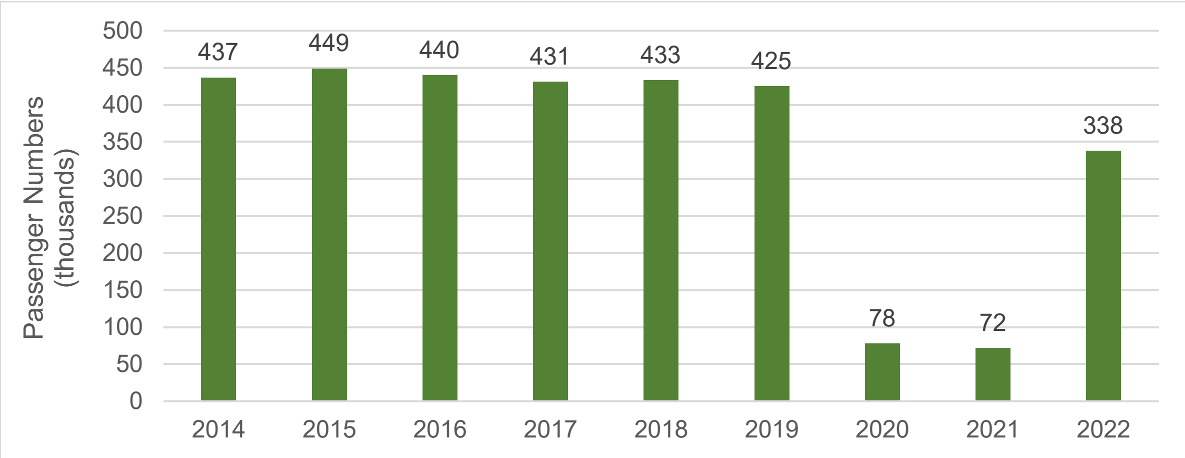


Table 9.8 Number of Ferry Passengers travelling through Plymouth International Port (DFT, 2022)

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

Department for Transport statistics indicate freight tonnage traffic has dropped since the previous monitoring year whilst freight is trending nationally towards reaching pre pandemic levels (see figure 9.6).

Figure 9.6 Port Freight Traffic Tonnage (thousands)

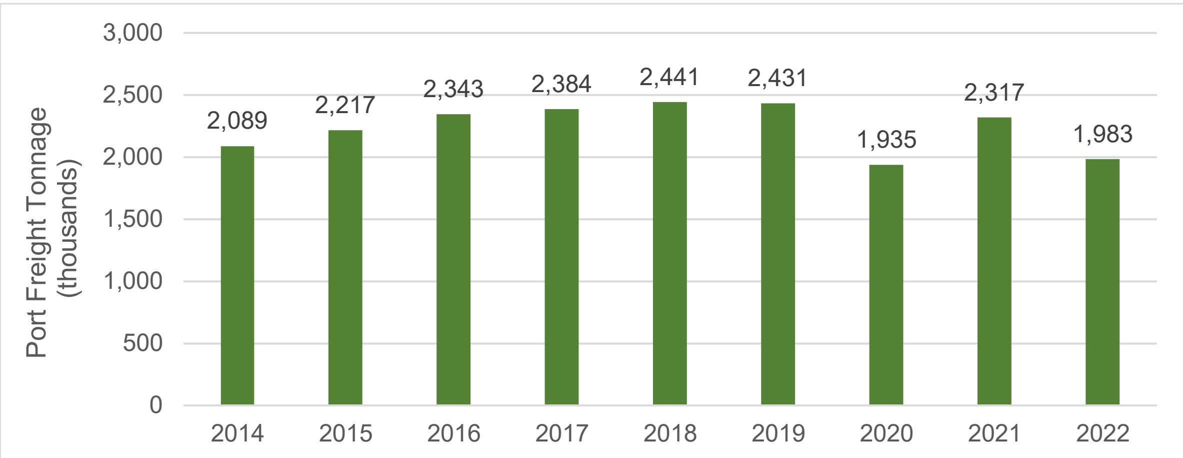


Table 9.9 Port Freight Traffic Tonnage

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

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. Broadband availability is not monitored at an individual site-specific level, consequently we monitor access to superfast broadband at the Local Authority level.

The latest data from the OFCOM Connected Nations report are shown in Figure 9.5. Currently 97% 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 82% and 80% respectively. This is an improvement across all three authority areas from the previous monitoring year.

Connected Devon and Somerset (CDS) manage Government funding and awarded contracts to suppliers to improve connectivity levels within West Devon and South Hams with all works scheduled to be complete by 2025. Once complete superfast broadband coverage is estimated to be at 95% of all premises in West Devon and 96% of all premises in South Hams.

The Government has now passed its national delivery target for Superfast Broadband and has now set an 85% availability target for the delivery of new Gigabit Broadband. 46% of homes in the South Hams and West Devon are currently capable of receiving a gigabit connection according to data reported by Think Broadband.

Central Government is currently looking to appoint a supplier to deliver full fibre premises in West Devon who have less than 100Mbps. Central Government will be part funding delivery through Project Gigabit.

Project Gigabit procurement in South Hams did not identify a supplier to deliver fibre to the remaining premises. It is expected funding will be allocated via vouchers to the remaining premises with less than 100Mbps. It is currently expected that grants for satellite connections in very hard to reach locations will become available to premises without sufficient mobile or broadband connectivity.

Figure 9.7 Internet availability by premises and local authority area (OFCOM, 2023)

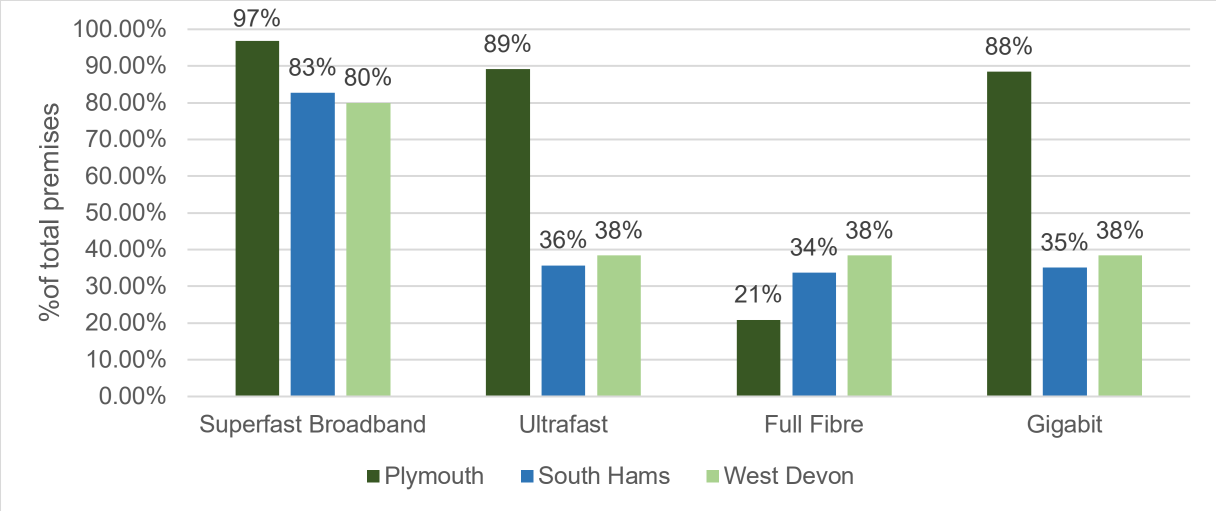


Table 9.10 Internet availability by premises and local authority area (OFCOM, 2023)

	% of premises with access to superfast broadband	% of premises with ultrafast broadband	% of premises with gigabit broadband
Plymouth	97%	89.2%	20.9%
South Hams	83%	35.7%	33.7%
West Devon	80%	38.4%	38.4%

10. Environmental Indicators

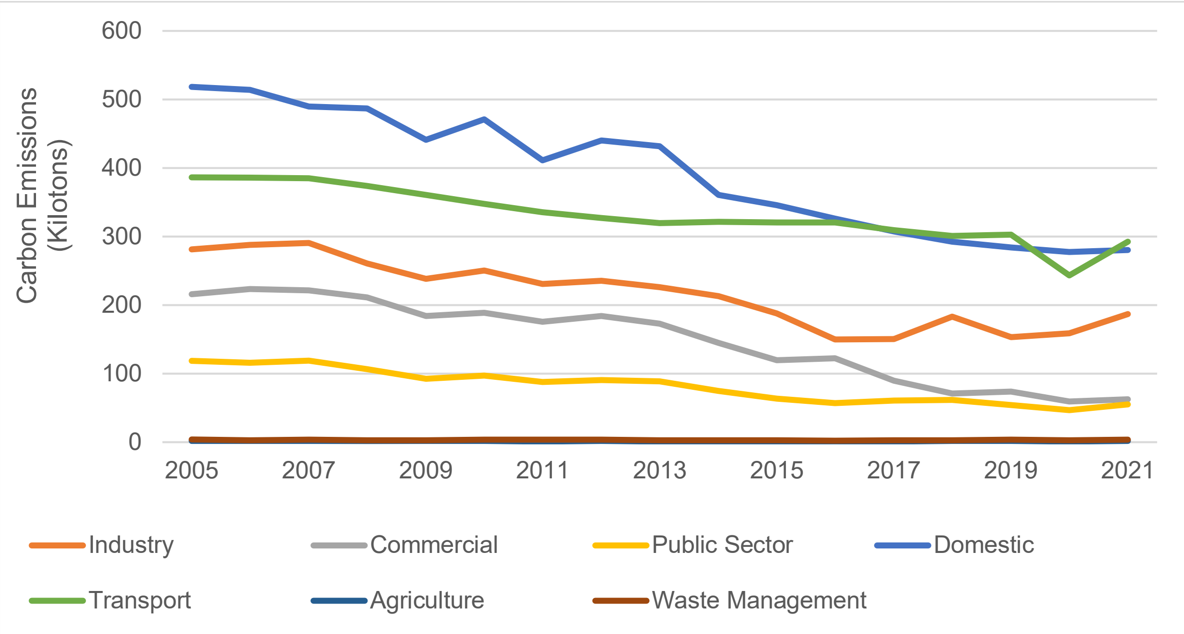
The JLP seeks to reduce potential carbon emissions and protect the environment through locating development in the most accessible locations available and promoting low carbon development. We measure carbon emissions, air quality management and deaths attributable to air particulate matter to understand 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 local authority 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.

DESNZ data runs two years in arears and the data for this monitoring year is the second to include periods of COVID-19 lockdown and the associated behavioural change on carbon emissions during this period. Results therefore continue to be skewed and are likely not representative of any substantive long-term change, however, they do provide a useful indicator of potential impacts on emissions were there to be a substantial changes in long term travel behaviour in future.

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



DESNZ data suggests overall carbon emissions in Plymouth Authority Area in 2021 were 42.25% lower than in 2005 suggesting further action is required to achieve the JLP target before 2034. This represents a per capita reduction of 46.01%. The three highest carbon emitter categories in 2021 were:

1. Road Transport – 33% of overall carbon emissions;
2. Domestic Gas – 23% of overall carbon emissions; and
3. Domestic Electricity – 9% of overall carbon emissions.

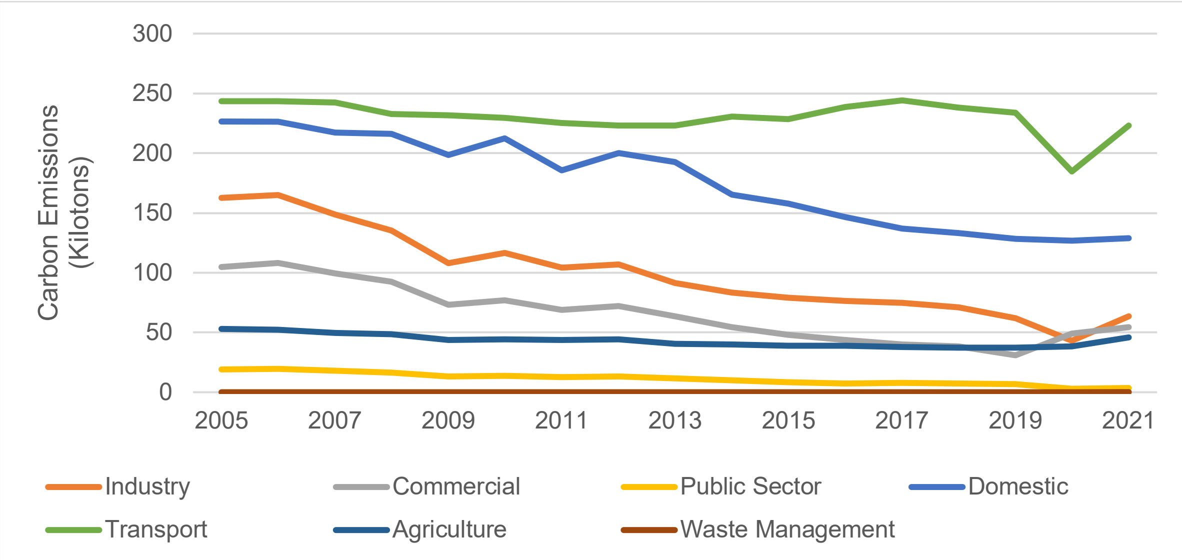
The three sectors which have contributed the most to carbon reductions in the Plymouth Authority Area in 2021 versus 2005 were as follows:

1. Domestic Electricity – 26% of total reductions;
2. Commercial Electricity – 24% of total reductions; and
3. Industry Electricity – 15% of total reductions.

Despite COVID-19 lockdown and the associated 14% reduction in road transport emissions, overall carbon emissions remain more than 50% of emissions in 2005. Per capita emissions in 2021 were 3.32 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 2021 were 41.41% lower than in 2005. This represents a per capita reduction of 45.82%. The three highest carbon emitter categories in 2021 were:

1. Road Transport – 47% of overall carbon emissions;
2. Domestic Gas – 13% of overall carbon emissions; and
3. Domestic Electricity – 9% of overall carbon emissions.

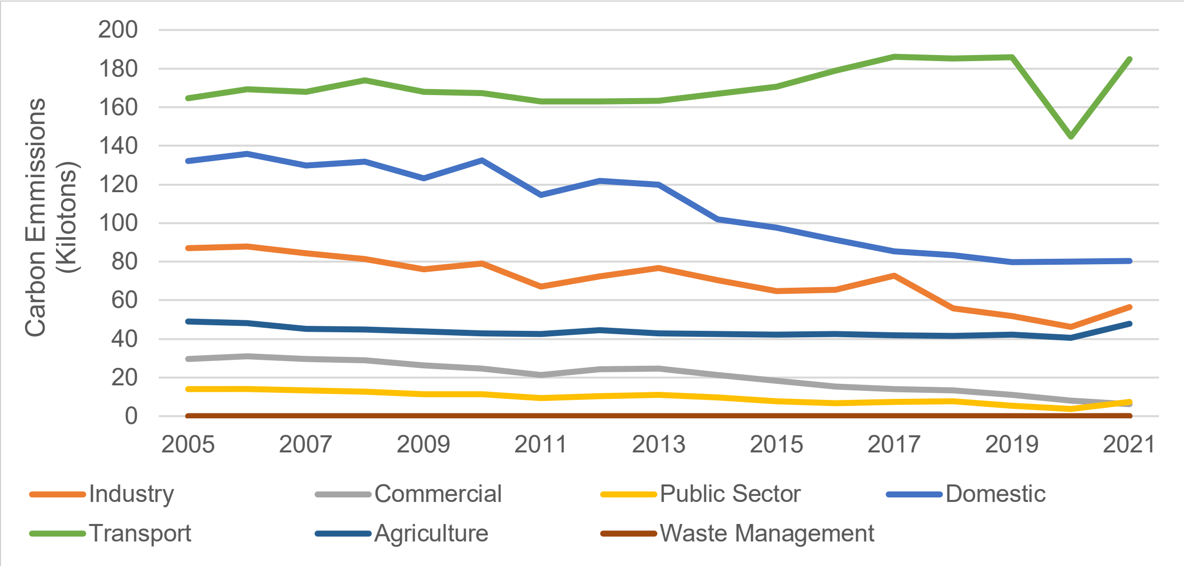
The three sectors which have contributed the most to carbon reductions in the South Hams Authority Area in 2021 versus 2005 were as follows:

1. Domestic Electricity – 22% of total reductions;
2. Commercial Electricity – 21% of total reductions; and
3. Road Transport – 11% of total reductions.

Despite COVID-19 lockdown and the associated temporary 11% reduction in carbon emissions from road transport, overall carbon emissions remain more than 50% of emissions in 2005. Per capita emissions in 2021 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 2021 were 37.14% lower than in 2005. This represents a per capita reduction of 44.80%. The three highest carbon emitter categories in 2021 were:

1. Road Transport – 68% of overall carbon emissions;
2. Agriculture – 14% of overall carbon emissions; and
3. Domestic Gas – 12% 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 – 32% of total reductions;
2. Commercial Electricity – 18% of total reductions; and
3. Industry Electricity – 16% of total reductions.

Despite COVID-19 lockdown, emissions from roads transport were higher than they were within West Devon in 2005. Overall carbon emissions remain more than 50% of emissions in 2005. Per capita emissions in 2021 were 4.79 tonnes.

Air Quality Management Areas (Indicator 15)

Plymouth has a single Air Quality Management Area (AQMA) which was 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 in these areas. The COVID-19 pandemic saw a significant reduction in NO2 levels, however post pandemic levels of NO2 have risen and therefore continued monitoring will be undertaken across Plymouth before any decision is made on the future of the AQMA.

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

- The Ivybridge AQMA continues to meet the air quality objective for Nitrogen Dioxide and it is hoped we will be able to revoke the Air Quality Management order there if and when we have three full years' worth of 'normal' data (following the COVID years of 2020-2021) showing consistent compliance.

- The Nitrogen Dioxide objective levels were also being met throughout most of the Totnes AQMA in 2021, so there are hopeful signs that this AQMA may be able to be revoked in future years.

- At the Dean Prior AQMA, Nitrogen Dioxide objective levels continue to be exceeded though not by as much as in previous years.

There were no exceedances of the DEFRA air quality objectives for Nitrogen Dioxide at West Devon at any monitoring locations.

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. The percentage of deaths attributable to air particulate matter in all three JLP authority areas are below the national average (5.5%).

Table 10.1 Deaths Attributable to Air Particulate Matter in 2020 (Age 30+)

Authority Area	Percentage of deaths
Plymouth	5.1%
South Hams	4.4%
West Devon	4.3%

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 2023 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 2023, which is the same as the previous rating in this location from 2022.

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 (2023). *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

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ONS (2022) *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 (2022) *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

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ONS (2023) Annual population survey. Available from: https://www.nomisweb.co.uk/datasets/apsnew

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

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Environment Agency (2023). *Swimfo: Find a bathing water*. Available from http://environment.data.gov.uk/bwq/profiles/

PLYMOUTH
CITY COUNCIL

Strategic Planning and
Infrastructure Department
Plymouth City Council
Ballard House
West Hoe Road
Plymouth PL1 3BJ
E plymouthplan@plymouth.gov.uk
www.plymouth.gov.uk/plymswdevonplan

South Hams
District Council

South Hams District Council
Follaton House
Plymouth Road
Totnes
Devon
TQ9 5NE
E strategic.planning@swdevon.gov.uk

West Devon
Borough
Council

West Devon Borough Council
Kilworthy Park
Drake Road
Tavistock
Devon
PL19 0BZ
E strategic.planning@swdevon.gov.uk