...one of Europe’s most vibrant waterfront cities where an outstanding quality of life is enjoyed by everyone...

I wonder what Plymouth’s current population is?

How many jobs are there in Plymouth?

How many new homes were built in Plymouth last year?

How fast is the broadband speed in Plymouth?

How many veterans live in Plymouth?

How many students are there in Plymouth?

How many Plymout children are living in poverty?

DATA
Plymouth

OFFICIAL
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I. INTRODUCTION

The Plymouth Report provides an overview of the key needs and issues facing the city, with an accompanying narrative about the shared challenges and opportunities it faces in its aspiration to become one of Europe’s most vibrant waterfront cities where an outstanding quality of life is enjoyed by everyone.

The Plymouth Report plays a crucial part in the review cycle of the Plymouth Plan, the city’s strategic plan, and aims to stimulate debate and discussion as to whether city plans and resources are aligned with meeting the needs of its residents and communities. The report is compiled using the best available evidence from a wide range of existing data sources and reports, most of which can be found on the Data Plymouth website.

The Plymouth Report also meets the locally defined requirement to produce a Joint Strategic Needs Assessment (JSNA).

The report is presented across six sections, as follows:

**LIVING** This section introduces the city’s geography and population, and highlights some of the key issues across the city such as community cohesion, the environment, crime, deprivation, and education.

**HEALTHY** This section covers issues including life expectancy, mortality, chronic diseases, mental health, child health, lifestyle behaviours, vulnerable groups and health care.

**GROWING** This section covers employment and jobs, wages, productivity, innovation, labour demand, and skills and education.
**INFRASTRUCTURE** This section covers housing demand and provision, local and strategic transport connectivity, and place based investment.

**INTERNATIONAL** This section covers exports, culture, and the visitor economy.

**CHALLENGES AND CONCERNS** In the context of the city’s aspirations, this section presents the main areas of concern that have emerged from the preceding sections, aiming to provide policy makers with some further food for thought.

**EXECUTIVE SUMMARY**

**LIVING**

Plymouth has a current population of 263,070 and this is estimated to grow to around 274,300 by 2034, a projected increase of 4.3 per cent. Due to approximately 26,000 students residing in the city, the percentage of 18-24 year olds (12.2 per cent) is higher than found in England as a whole (8.7 per cent).

There will be a major shift in the population structure of Plymouth over the next 20 years as the proportion of the population aged 65 and over increases and the population aged 0-4 years decreases. ONS projects a rise in the percentage of the Plymouth 65+ population from 17.9 per cent in 2016 to 22.7 per cent by 2034. An ageing population suggests an increasing need for care and support services and also an increasing burden placed on the working age population.

Residents appear to be enjoying a lifestyle above that of the average England resident. Plymothians are, on average, happier (37 per cent scoring very high for happiness, compared to 34.8 per cent national average); feel their life is more worthwhile (38.2 per cent scoring highly compared to 35.2 per cent national average); and are more satisfied with life (30.9 per cent scoring highly compared to 20.8 per cent national average). However, young people (aged 16 to 24) and people with disabilities are less likely to be satisfied with the city as a place to live.

The quality and quantity of social relationships can affect people's mental and physical health with evidence linking both social disconnectedness and loneliness to early mortality. The most recent statistics available for community cohesion come from the Plymouth City Survey 2018 and show that 58 per cent agreed that they feel they belong to their local area. 59 per cent of residents agreed that they have pride in their local area and 42 per cent agreed they were aware of community groups / activities. However, only 19 per cent agreed they took part in these groups or activities. There is an opportunity with the upcoming Mayflower 400 activities to involve more local people with community initiatives which should help to foster a sense of belonging and a greater feeling of inclusivity.
Whilst Plymouth has a lower rate of child poverty than some of its comparators, the extent is still significant. 18.6 per cent of Plymouth children live in poverty (9,990 children), and the vast majority (76.9 per cent) are living in workless households. The proportion of children in poverty living in working households is rising and there are still some suggestions that data underestimates the volume of ‘in work’ poverty.

Overall recorded crime in Plymouth has increased by 8 per cent (1,821 more crimes) over the last twelve months. This mirrors the national trend. Despite this rise, Plymouth has a comparatively low crime rate for a city of its type (88.6 crimes per 1,000 resident population compared to 104.4 per 1,000 in similar areas).

Plymouth has made good progress in recent years in education, skills, and opportunities for young people, with improvements in school performance and better educational outcomes and attainment for our children. However, by the end of Key Stage 4 (age 14 – 16), results remain below the national average in terms of attainment and progress. The percentage of pupils achieving ‘the basics’¹ in Plymouth is 58.8 per cent which is slightly below the national average of 59.4 per cent and statistical neighbour average of 61.5 per cent.

Overall, Plymouth pupils with special educational needs and disabilities (SEND) out-performed pupils with SEND nationally, regionally, and from within our statistical neighbour authorities. Additionally, the gap between the attainment of disadvantaged children and all other pupils in Plymouth is smaller than the gap nationally, regionally, and amongst our statistical neighbours.

Plymouth offers a high quality of life. Enclosed by both Plymouth Sound and Dartmoor the city’s natural capital assets are unparalleled. Plymouth is fortunate to have green and blue assets that are unrivalled amongst major UK cities. Over 40 per cent of Plymouth is designated as greenspace, and three Areas of Outstanding Natural Beauty, a European Marine Site, a Marine Conservation Zone and Dartmoor National Park surround the city. The 60 kilometres of Plymouth’s waterfront, consisting of the land and the adjacent waters, is arguably the city’s most valuable asset and is central to its identity as Britain’s Ocean City and vision to become ‘one of Europe’s most vibrant waterfront cities’.

HEALTHY

Life expectancy in Plymouth has improved for both males and females in recent years however it remains below the England average. Healthy life expectancy in Plymouth (the average number of years a person can expect to live in good health) is significantly lower than the England average for both males and females.

In terms of inequalities, the life expectancy gap between those living in the most deprived areas and those in the least deprived areas remains significant. Life expectancy in the most deprived group of neighbourhoods in Plymouth (at 78 years and 2 months) is 4 years and 9 months lower than the least deprived group of neighbourhoods.

¹ Achieving a standard pass of 9-4 in English and Maths
Valuing mental health to the same degree as physical health enables NHS and local authority health and social care services to provide a holistic, ‘whole-person’ response to each individual in need of care and support. In 2017 there were over 26,500 people (aged 18-64) in Plymouth estimated to be suffering from common mental health problems including depression, anxiety, and obsessive compulsive disorder. Over 11,900 Plymouth residents aged 18-64 years in 2017 were estimated to have more than one mental health problem; a figure that is projected to remain fairly static over the next 10-15 years.

There has been an increase in the number of referrals to the Child and Adolescent Mental Health Services (CAMHS) in Plymouth. Service providers also report an increase in the complexity of children and young people’s needs and issues requiring attention. Hospital admissions of young people (aged 10-24 years) for self-harm in Plymouth are higher than the England average (706 per 100,000 population compared to 421 per 100,000 population).

Four lifestyle behaviours (poor diet, lack of exercise, tobacco use, and excess alcohol consumption) are risk factors for four diseases (coronary heart disease, stroke, cancers, and respiratory problems) which together account for 54 per cent of deaths in Plymouth.

Alcohol and drug (illegal and prescribed) dependence are significant issues for Plymouth. These dependencies are commonly associated with mental health problems, homelessness, offending, and have negative impacts on families and children. Plymouth has a lower rate of alcohol related hospital admissions than nationally. However the rate of admissions for alcohol specific conditions in under 18s stands at 47.3 per 100,000 population aged under 18 in Plymouth; a rate higher than the England average (32.9 per 100,000 population).

GROWING

Plymouth is one of the largest cities on the south coast and the 15th largest city in England with a population of approximately 263,070, an economic output of £4.99 billion, providing 109,000 jobs. Plymouth is the most significant economic centre in the southwest peninsula and the largest urban area in the Heart of the South West (HotSW) Local Enterprise Partnership (LEP).

Plymouth currently has a marginally higher employment rate than nationally (76.8 per cent compared to 75.1 per cent) and an economic activity rate also slightly higher than the national average (79.6 per cent compared to 78.5 per cent). However the city has traditionally struggled to raise its competitiveness and productivity (Plymouth’s GVA per hour worked stands at 83.7 per cent of the UK average). This is, in part, due to a low business density and start-up rate, for which the city ranks 61st and 62nd respectively amongst the UK’s 63 Cities; poor connectivity with the rest of the region and country a potential deterrent for inward investment and the migration of skilled workers.

Plymouth is ‘Britain’s Ocean City’. The city’s connections to the sea go back to the sailing of the Mayflower in 1620 and now include western Europe’s largest naval base, a thriving commercial and ferry port, a significant fishing industry, and one of the most significant global concentrations of marine research and production. This has led to a world-leading marine technology capability where Plymouth has significant sector strengths and competitive advantage on which it can build.
The city’s distinctive industry strengths are in advanced engineering, marine technology, and defence-related nuclear expertise as well as an emerging specialism in the health and life sciences sector. Global companies and world-leading research institutions across these industries are already based in the city.

The city is a global centre of excellence for marine science and technology with one of the largest clusters of expertise in Europe. The Marine Business Technology Centre with the Smart Sound test range has recently been launched and is based in the UK’s first marine Enterprise Zone at Oceansgate connecting marine related and supply chain businesses with the research knowledge base across the HotSW. Plymouth alone accounts for 9.2 per cent of England’s entire marine industry and marine manufacturing in Plymouth generates £408.6m in GVA.

Plymouth’s average full time weekly earnings by place of residence currently stands at £525.10 compared to £537.60 in the South West and £571.10 nationally. The gender pay gap in the city also persists with men earning on average £61.80 weekly gross pay compared to women at £477.10 in 2018. Lack of opportunity for wage growth and a lack of income resulting in poverty both lead to a city that is unfair for some. Inclusive growth was highlighted as a challenge facing cities such as Plymouth in the last Plymouth Report and still remains a priority.

The percentage of pupils in education, training, or employment is 89.5 per cent. The rate of care leavers who are participating in education, employment, or training is 57.5 per cent, which is slightly higher than the England average of 51 per cent.

Improving skills and addressing current and future skills gaps, particularly in Science, Technology, Engineering, and Mathematics (STEM) subjects, to grow, keep and attract a skilled workforce now and in the future is a critical challenge. This needs to be coupled with greater freedoms in developing the right skills within our workforce, including better careers advice and a more flexible skills offer that is informed by closer working with local businesses.

**INFRASTRUCTURE**

The delivery of housing is central to the city’s growth agenda. Building the right type of homes in the right place at the right price, while creating quality environments, is necessary for Plymouth’s citizens to thrive. A profile of Plymouth’s housing stock shows that Plymouth has less detached houses than regionally or nationally and more terraced houses and flats. In comparison with the UK and much of the South West, Plymouth has relatively low levels of owner occupation.

The Joint Local Plan (JLP) for Plymouth and South West Devon seeks to deliver 26,700 new homes, of which 6,600 should be affordable, by 2034 across the two policy areas of Plymouth and the Thriving Towns and Villages of South West Devon. 71 per cent of the new homes (19,000) are to be built in the Plymouth policy area.
The Plan for Homes (2014-2019) had an aspiration of creating 5,000 new homes in five years. The figures suggest that the city is on track to exceed this ambition having supported the delivery of 4,462 new homes (gross) in the first four years of which 1,108 were affordable (24.8 per cent). This figure coupled with the number of homes under construction as at April 2018 of over 1,400 suggests the city will achieve the 5,000 homes in five years (by March 2019). The recently launched Plan for Homes 3 has re-stated the ambition to deliver at least 1,000 new homes each year over the next five years.

Plymouth also has a strong track record of delivering affordable homes however house prices in Plymouth have risen by 20 per cent since 2011 and, despite being 40 per cent less than the national average, affordability remains a local issue with a mean house price to income ratio of 7.9 (above the usual mortgage lending ratio of 3.5 times gross income).

Recent welfare reforms have impacted on the affordability of both social and private rented tenancies, with levels of benefit reduced for some tenants. Data suggests that there are significant inequalities in the quality of housing, particularly for certain groups (such as those on a low income, vulnerable families and migrant workers) who are increasingly being reported as living in poor conditions. Around 13,500 households are believed to be in fuel poverty.

Plymouth’s superfast broadband coverage (>24Mbps) at 99.2 per cent is greater than across the UK as a whole (95.7 per cent). However, In order for local businesses to keep pace in today’s markets, the city will need a significant expansion in the availability of full fibre as Plymouth has only 0.71 per cent coverage compared to the national average of 6.53 per cent, and lags behind compared to our regional partners.

Plymouth is located 230 miles from London with the average train journey time of three hours and fifteen minutes and a route that is subject to low levels of reliability and resilience. Also, despite being a designated port on the Trans-European Network with commercial links to Spain and France, Plymouth is the largest city in England with no direct road or rail connections on the network of Strategic National Corridors (which stops at Exeter). One of the city’s highest priorities is connectivity and redressing historic underinvestment in transport infrastructure leading to issues around capacity and resilience. This will require major strategic investment to upgrade the rail links that serve the South West as well as upgrading the strategic road network.

**INTERNATIONAL**

One of Plymouth’s core objectives is to secure its place as an ‘international city’; one that is renowned as Britain’s Ocean City and is the UK’s premier marine city, famous for its waterfront. By capitalising on its natural assets and rich heritage, Plymouth aims to raise its prosperity and wellbeing through increased investment, tourism, and cultural experience.
The city is home to three universities and two specialist marine research institutions, attracting nearly 26,000 students to the city. The University of Plymouth is now the UK’s 15th largest university, with more than 20,000 students, 2,000 of which are international students from the EU and further afield helping to raise its profile, and that of the city, on an international stage.

Plymouth had 486 businesses exporting £325 million to the EU, and 485 businesses exporting £278 million outside the EU. In terms of international exports, Plymouth’s most valuable sectors for international exports are manufacturing, marine, and advanced manufacturing and engineering.

Plymouth’s creative industries generate an estimated turnover in excess of £250 million per year. The sector is worth £51.5 million GVA, supports 3,800 jobs, and accounts for more than five million day visitors a year. Plymouth is also home to a dynamic and diverse digital sector which generates £108.8 million in GVA for Plymouth.

Tourism is a major contributor to the city’s economy. Plymouth has 5,116,000 visitors a year, spending £322 million a year. Plymouth’s Mayflower 400 celebrations in 2020 (of which Plymouth has been designated lead city), and the development of ‘The Box’, the new £38 million gallery and museum redevelopment, seek to increase the number of visitors to the city and offers a real opportunity for Plymouth to raise its profile internationally.
LIVING CITY - fulfilling the role as a regional city and a major economic driver for the Heart of the South West, building on rich cultural, natural and built assets.

- Approximately 26,000 students reside in the city.
- Plymouth has 39 neighbourhoods and 20 electoral wards.
- 59% of Plymouth residents agreed that they have pride in their local area.
- 75% of residents agree that Plymouth is a great place to live.
- 468 hate crimes reported in Plymouth per year (Nov 2016/2017).
- 9,990 children are living in poverty.
- 72% of Plymouth pupils attend a school which is judged as good or better by Ofsted.
- Over 40% of the city is designated as greenspace.
- 65% population projection 32.7% increase in the number of people aged 65 or over between 2016 and 2034 (an additional 15,400 individuals).

Plymouth’s current population 263,070

- There are around 18,899 to 20,281 military veterans in the city.
- The proportion of the working-age (15-64 year old) population is 65% which is higher than that in the South West 62% and England 64%.
- 18% of people in Plymouth are aged 65 years and older.
- 90% of respondents felt safe outside in their local area during the day whilst 60% after dark.
- Population of Plymouth is projected to increase to 274,300 by 2034.
- 9,990 children are living in poverty.
- 72% of Plymouth pupils attend a school which is judged as good or better by Ofsted.

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- The proportion of the working-age (15-64 year old) population is 65% which is higher than that in the South West 62% and England 64%.
- 18% of people in Plymouth are aged 65 years and older.
- 90% of respondents felt safe outside in their local area during the day whilst 60% after dark.
- Population of Plymouth is projected to increase to 274,300 by 2034.
This section introduces the city’s geography and population, and highlights some of the key issues affecting neighbourhoods across the city such as community cohesion, the environment, crime, deprivation, and education.

2.1 PLYMOUTH GEOGRAPHIES

Plymouth is divided into 39 neighbourhoods. These neighbourhoods are aggregations of the city’s 161 Lower Super Output Areas (LSOAs). As well as existing in their own right, the neighbourhoods can been grouped together to form 20 electoral wards, five neighbourhood deprivation groups, and a variety of other local geographies.

Plymouth’s neighbourhood and electoral ward boundaries are shown in Figure 1.

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2 LSOAs are part of a geographical framework developed for the collection and publication of small-area statistics. They are not often subject to boundary changes and are of a specified minimum population making them suitable for comparison over time.
Figure 1: Plymouth by neighbourhood and electoral ward

The neighbourhoods that make up each of the 20 electoral wards are shown in Appendix A. Local profiles are available that contain a variety of information at sub-city levels (including neighbourhood and electoral ward) in comparison to Plymouth as a whole. The area profiles provide a summary of key health and social care indicators whilst the Census profiles provide some of the main findings from the 2011 Census.

2.2 POPULATION

2.2.1 CURRENT POPULATION

Understanding the size and structure of Plymouth’s population is fundamental if the Council and its partners are to have the ability to prioritise and deliver services efficiently. In light of the current national economic situation, this statement carries considerably greater weight than it has done for many years.

Plymouth, at mid-year 2017, had an estimated population of 263,070; females accounting for 50.2 per cent and males 49.8 per cent (reflecting the England split of 50.7 per cent and 49.3 per cent).

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3 This section uses ONS mid-year population estimates and figures may vary to those used in Plymouth Report 2017. This is reflective of a change in ONS methodology in 2018.

4 ONS 2017 mid-year population estimates, 2018.
Comparisons between Plymouth, the South West, and England by key age-groups are shown in Table 1. In 2017, children and young people under 18 accounted for 20 per cent of the population. Due to approximately 27,000 students residing in the city, the percentage of 18-24 year olds (12.2 per cent) is higher than that found in England as a whole (8.7 per cent).

The proportion of the working-age (15-64 year old) population (65 per cent) is higher than that in the South West (62 per cent) and England (64 per cent). 18 per cent of people in Plymouth are aged 65 and older which is comparable with the England average (18 per cent) but lower than the South West average (22 per cent).

**Table 1**: Numbers and percentages by age group in Plymouth, the South West, and England, 2017

<table>
<thead>
<tr>
<th>Age group</th>
<th>Plymouth</th>
<th></th>
<th>South West</th>
<th></th>
<th>England</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Numbers</td>
<td>Percent</td>
<td>Numbers</td>
<td>Percent</td>
<td>Numbers</td>
<td>Percent</td>
</tr>
<tr>
<td>Under 5</td>
<td>15,308</td>
<td>5.8</td>
<td>300,770</td>
<td>5.4</td>
<td>3,384,925</td>
<td>6.1</td>
</tr>
<tr>
<td>Under 16</td>
<td>47,120</td>
<td>17.9</td>
<td>977,522</td>
<td>17.6</td>
<td>10,637,971</td>
<td>19.1</td>
</tr>
<tr>
<td>Under 18</td>
<td>52,296</td>
<td>19.9</td>
<td>1,096,477</td>
<td>19.7</td>
<td>11,869,346</td>
<td>21.3</td>
</tr>
<tr>
<td>18-24</td>
<td>32,180</td>
<td>12.2</td>
<td>471,357</td>
<td>8.5</td>
<td>4,828,279</td>
<td>8.7</td>
</tr>
<tr>
<td>15-64</td>
<td>170,672</td>
<td>64.9</td>
<td>3,427,027</td>
<td>61.6</td>
<td>35,542,943</td>
<td>63.9</td>
</tr>
<tr>
<td>65 and over</td>
<td>47,686</td>
<td>18.1</td>
<td>1,210,974</td>
<td>21.8</td>
<td>10,030,511</td>
<td>18.0</td>
</tr>
<tr>
<td>75 and over</td>
<td>21,620</td>
<td>8.2</td>
<td>551,000</td>
<td>9.9</td>
<td>4,535,330</td>
<td>8.1</td>
</tr>
<tr>
<td>85 and over</td>
<td>6,376</td>
<td>2.4</td>
<td>170,607</td>
<td>3.1</td>
<td>1,352,056</td>
<td>2.4</td>
</tr>
</tbody>
</table>

ONS mid-year population estimates, 2017
Plymouth’s population is not evenly split across the city. There are higher numbers of people living in the wards to the west and southwest of the city (Figure 2). The ward with the biggest population is St Peter and the Waterfront (17,400) whilst Plympton Chaddlewood has the smallest population (7,900).

The wards to the west, in addition to Efford & Lipson, have the highest numbers of 0-4 year olds in the city (Figure 3). In contrast, wards in the east, in addition to Compton, have the highest numbers of those aged 85 and over (Figure 4).
Figure 3: Population aged 0-4 years (numbers) by Plymouth electoral ward, 2017

2.2.3 POPULATION CHANGE AND MIGRATION

Plymouth’s population has increased by nearly 12,000 (4.7 per cent) over the last ten years, yet this is below the growth rate in both the South West (7.1 per cent) and England (8.2 per cent).\(^5,6\)

The latest available migration data\(^6\) shows that Plymouth experienced a 10 per cent drop in the number of births across the city and a 2.6 per cent rise in the number of deaths. This, combined with the highest number of internal migrants leaving, (despite the highest number arriving), and the number of international migrants coming into the city, although reducing, exceeding the number leaving, the overall effect is an estimated population increase of 0.4 per cent (969) people (Table 2).

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\(^5\) ONS 2007 and 2017 mid-year population estimates  
\(^6\) ONS population projections 2016
### Table 2: Plymouth population change breakdown, 2011 to 2016

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Deaths</td>
<td>2,310</td>
<td>2,420</td>
<td>2,209</td>
<td>2,394</td>
<td>2,438</td>
<td>2,502</td>
</tr>
<tr>
<td>Natural change</td>
<td>1,044</td>
<td>851</td>
<td>898</td>
<td>714</td>
<td>668</td>
<td>313</td>
</tr>
<tr>
<td>Internal: in</td>
<td>13,589</td>
<td>12,321</td>
<td>13,305</td>
<td>12,951</td>
<td>13,031</td>
<td>14,647</td>
</tr>
<tr>
<td>Internal: out</td>
<td>13,700</td>
<td>12,760</td>
<td>13,479</td>
<td>13,808</td>
<td>13,421</td>
<td>15,116</td>
</tr>
<tr>
<td>International: in</td>
<td>1,806</td>
<td>1,674</td>
<td>2,093</td>
<td>2,066</td>
<td>1,953</td>
<td>1,835</td>
</tr>
<tr>
<td>International: out</td>
<td>961</td>
<td>1,044</td>
<td>1,304</td>
<td>1,128</td>
<td>1,317</td>
<td>1,159</td>
</tr>
<tr>
<td>International: net</td>
<td>845</td>
<td>630</td>
<td>789</td>
<td>938</td>
<td>636</td>
<td>676</td>
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<tr>
<td>Special</td>
<td>-631</td>
<td>-196</td>
<td>415</td>
<td>77</td>
<td>37</td>
<td>204</td>
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<tr>
<td>Other</td>
<td>8</td>
<td>2</td>
<td>-8</td>
<td>2</td>
<td>18</td>
<td>-9</td>
</tr>
</tbody>
</table>

### 2.2.4 POPULATION PROJECTIONS

Plymouth’s population will continue to grow. The Office for National Statistics (ONS) estimates that the city’s population will be around 274,300 by 2034, a projected increase of 4.3 per cent.⁷

**Figure 5: Plymouth’s change in population by 2034**

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⁷ ONS subnational population projections (2016 based)
As seen in Figure 5, there will be a shift in the population structure of Plymouth over the next twenty years as the proportion of the population aged 65 and over increases. The ONS projects a rise in the percentage of the national population in this age group, from 18 per cent in 2016 to 23.2 per cent by 2034. In the Plymouth population the percentage of the population aged over 65 is projected to rise from 17.9 per cent in 2016 to 22.7 per cent in 2034.\(^8\) There is a projected 32.7 per cent increase in the number of people aged 65 or over between 2016 and 2034 (an additional 15,400 individuals) in Plymouth compared to a 40.0 per cent increase in Great Britain. Over the same time period, those aged 85 and over will have a percentage increase of 83 per cent (an additional 5,180 individuals in the city and a total in the age-group of around 11,408).

At the other end of the age spectrum Plymouth will see a decrease in the percentage of the population aged 0-4 years. This age group is projected to drop 9.8 per cent between 2016 and 2034 (reducing from 15,847 to 14,288 individuals).\(^9\) This is bigger than in Great Britain as a whole which is projected to see a 4.8 per cent decrease.

With an increase in age health and wellbeing needs increase; there is a higher burden of chronic disease, an increased susceptibility to the negative impacts of social isolation, and an associated raised need for health and social care services and carers. This is, to a large extent, a national issue in terms of education, health service, and pension provision. However, care and support is often provided by spouses, partners, family members, friends, and neighbours so the impact is felt locally.

A growing, and overall ageing, population raises a number of challenges for consideration. These include additional demands on the provision of homes and health and social care services. An estimated 1.0 per cent decrease in the number of people of working age in Plymouth over the next twenty years means there will be further implications in terms of balancing income and pensions. Further refreshes of the Plymouth Plan, the strategic plan for the city to 2034, will consider how to plan for an ageing population, including the impact on housing need and demand for jobs, as well as the demand for health and social care services.

Plymouth has ambitious plans to grow its population to 300,000 by 2034. This growth ambition was set out in the Vision for Plymouth which aims to deliver a step change in Plymouth’s economy and reputation, helping the city to become one of Europe’s finest waterfront cities.

The City Council is collaborating with South Hams District Council and West Devon Borough Council to produce the Plymouth and South West Devon Joint Local Plan (JLP). This ground-breaking strategic plan establishes an overarching strategic framework for sustainable growth and a shared direction of travel up to 2034. It enables the growth of Plymouth to be seen in the context of the surrounding areas which rely upon the city for facilities and services.

\(^8\) ONS Population Projections 2016  
\(^9\) ONS sub-national population projections 2016
The JLP will deliver 26,700 new homes across the plan area between 2014 and 2034, 19,000 of which will be built in the Plymouth Policy Area. The Policy Area is larger than the city’s administrative area and includes urban areas that are within South Hams and the city’s urban fringe. It therefore includes Woolwell and the proposed Woolwell urban extension, and the new community being created at Sherford. It is projected that this level of growth will deliver a population of 300,000 people in the Plymouth Policy Area by 2034.

2.2.5 POPULATION SUBGROUPS

Military population

The Armed Forces are an integral part of the history and heritage of Plymouth. As at October 2016 there were 7,530 UK Armed Forces personnel with a Defence Medical Services Registration (primary healthcare services provided by the MOD rather than the NHS) registered to Plymouth.10

As would be expected, schools in the vicinity of military bases have a higher percentage of children from service families, often giving rise to a mix of nationalities and an increase in younger parents with less family stability. Identifying the children of veterans is more difficult as there is currently no mechanism for collecting this data.

Alongside the military bases situated in the city, there are many veterans who have chosen to retire here; it is estimated in the 2017 Veterans Strategic Commissioning Framework that there are around 18,899 to 20,281 veterans in the city.

2.2.6 POPULATION DIVERSITY

Plymouth is becoming more diverse. Whilst the proportion of the population that are White British remains higher than the UK average, this is decreasing. At the time of the 2001 census, 97 per cent of Plymouth’s population were White British, whilst by 2011 this had decreased to 93 per cent. Some areas of the city are more diverse than others, in particular the areas around the university, the city centre, Stonehouse, and the East End.

Children and young people from minority ethnic groups account for just under 7 per cent of all children living in the area, compared with 25 per cent in the country as a whole.11 Plymouth’s black and minority ethnic (BME) communities are very diverse. The Polish, Chinese, and Kurdish communities are amongst the largest. The census records that there are at least 43 main languages spoken in the city and nearly 100 different languages are spoken by Plymouth school children.

The proportion of children and young people with English as an additional language in primary schools is 8 per cent (compared to 21 per cent nationally). In secondary schools it is 6 per cent (compared to 16.6 per cent nationally).

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10 Defence personnel NHS commissioning quarterly statistics: financial year 2018/19
11 DfE school census statistics January 2018
The 2011 Census recorded that Christians (148,917 people, 58 per cent) were still the largest faith community although their numbers had declined significantly since the previous census in 2001. Whilst the majority of people still identify with some religion, our society is becoming more secular: more people than ever before identify with no religion (84,326 or 33 per cent). Some faith communities (Islam and Hinduism) grew rapidly between 2001 and 2011, principally because of migration.

There is no precise local data on sexual orientation in Plymouth, but based on the ONS Annual Population Survey 2017 estimates, approximately 1.7 per cent of the UK population is lesbian, gay or bi-sexual (LGB). This would mean that there are approximately 3,649 LGB people in the city.

More detailed information on diversity can be found in Plymouth City Council’s Summary Equality Profile.

2.3 RESIDENT INSIGHT

The most recent resident insight information available comes from the Plymouth City Survey 2018 which has provided rich intelligence into the feelings of residents about Plymouth as a place to live.

Residents appear to be enjoying a lifestyle above that of the average England resident. Plymothians are, on average, happier (37 per cent scoring very high for happiness, compared to 34.8 per cent nationally); feel their life is more worthwhile (38.2 per cent scoring highly compared to 35.2 per cent nationally); and are more satisfied with life (30.9 per cent scoring highly compared to 20.8 per cent nationally).

Residents were asked to describe Plymouth in one word and generally have very good things to say about the city. The positive words mostly focused around the ‘feel’ of the city and the emotional attachment residents have to it, such as ‘homely’ and ‘lovely’. Conversely, the negative words mostly focused on the physical appearance of the city such as ‘dilapidated’, ‘rundown’ and ‘filthy’. This gives an idea of what issues the residents of Plymouth view as the most important to be addressed.

This positive view of the city is strengthened by 75 per cent of people agreeing with the statement ‘Plymouth is a great place to live’. However, there are disparities between different wards across the city; 64 per cent agreeing with the statement in Devonport compared with 85 per cent in St Peter & the Waterfront. The high level of satisfaction with Plymouth as a place to live for residents in St Peter & the Waterfront correlates with a high community cohesion score (see below), suggesting they are happy living here because they feel their local community gets on well together. They were also much more likely to see positive changes happening in Plymouth than residents from some other wards.

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12 The Plymouth City Survey is a resident postal survey, sent to a random sample of Plymouth residents in 2018. Just under 2,300 responses were received with the final respondent profile ‘weighted’ by ward, age and gender to reflect Plymouth’s population as a whole.
Disparities were found between different age groups, with young people on average having a less favourable view of the city. Those aged 16 to 24 are less likely to agree that ‘Plymouth is a great place to live’. Although their most common words to describe the city were positive, it was followed closely by negative words such as ‘sad’ and ‘bleak’. Respondents in this age group were also significantly less likely to agree that they saw their future in Plymouth; 35 per cent compared to 74 per cent of those aged 35-44.

Plymouth is ranked 164th out of 324 for social mobility\(^\text{13}\) and, as discussed later in this chapter, the city has lower than average educational outcomes. These factors are likely to impact on young people’s view of the city and their hopes for the future. Research undertaken by the Youth Participation Team in 2016 found that local young people have a sense of isolation from the rest of the country, find public transport expensive, and find it difficult to access suitable information on services available for young people. There is also a perceived lack of jobs.

The city’s young people need to see Plymouth as a place where they want to live, prosper, and thrive. These findings are of particular relevance when considering the city’s high growth agenda; the ambitious vision for the future of Plymouth being in stark contrast to the findings from young people who were least likely to say that they saw their future here. It is therefore vital for the city to look at how young people could be better engaged, and believe that there are opportunities available to them.

The Plymouth City Survey also revealed that people with disabilities are less satisfied with the city as a place to live. People who were ‘limited a lot’ by a health problem were significantly more likely to disagree with the positive statements about Plymouth than those who were ‘limited only a little’ or ‘not at all’. They were more likely to disagree that Plymouth was a great place to live (16 per cent compared to 9 per cent); that Plymouth had a lot to offer (29 per cent compared to 19 per cent and 20 per cent); and that they could see positive changes happening (45 per cent compared to 55 per cent). The survey has clearly identified an area which is likely to have a significant impact on Plymouth residents, and further research into why this is and what the city is lacking for disabled people could have a large positive effect on the direction of the city’s development.

### 2.3.1 COMMUNITY COHESION

The most recent statistics available for community cohesion also come from the Plymouth City Survey 2018.\(^\text{14}\) Residents were asked to what extent they felt they belonged to their local area. The overall result showed that 58 per cent agreed that they feel they belong to their local area, while 15 per cent disagreed.

A similar question has been asked in previous surveys and, although direct comparisons can’t be made to previous results, given that the same methodology has been used it can still provide an indication of how residents feel. Table 3 below presents the findings from previous years and shows that the level has remained relatively stable over the past six years.

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\(^{13}\) Social Mobility Index 2017, Social Mobility Commission, November 2017

\(^{14}\) The Plymouth City Survey is a resident postal survey, sent to a random sample of Plymouth residents in 2018. Just under 2,300 responses were received with the final respondent profile ‘weighted’ by ward, age and gender to reflect Plymouth’s population as a whole.
Table 3: Percentage of respondents who feel they belong to their local area

<table>
<thead>
<tr>
<th>Previous question</th>
<th>2012 Listening Plymouth</th>
<th>2014 Wellbeing Survey</th>
<th>Plymouth City Survey question 2018</th>
<th>2018 Plymouth City Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>% who feel they belong to their local area (strength of feeling)</td>
<td>58</td>
<td>54</td>
<td>% who agree they belong to their local area (level of agreement)</td>
<td>58</td>
</tr>
</tbody>
</table>

People aged 75+ were significantly more likely to feel they belonged (78 per cent) compared to young people aged 16-24 (35 per cent). There was also significant variation between wards, ranging from 39 per cent in Drake ward to 80 per cent in Plympton St Mary. Two wards in particular – Drake and Efford & Lipson, featured highly in residents not feeling they belong in their local area.

Residents were also asked whether they had pride in their local area and whether they were aware of local community activities or groups. Overall, 59 per cent agreed that they have pride in their local area and 42 per cent agreed they were aware of community groups/activities. However, only 19 per cent agreed they took part in these groups or activities. Again, there was some significant variation between wards, ranging from 62 per cent in Plympton St Mary to just 20 per cent in Efford & Lipson. Wards where less people were aware of, or took part in, groups or activities were also less likely to feel they belonged to their local area which suggests people are more likely to feel they belong if they are at least aware of local community activities.

Plymouth City Survey 2018 results showed that 39 per cent of respondents agreed that their local area is a place where people from different backgrounds get on well together. This is considerably lower than reported in the 2014 Plymouth Wellbeing Survey (49 per cent) and it is not known whether this is due to a slight difference in methodology or a genuine change in perception. Issues such as leaving the EU and the reported rise in hate crime and violent crime may well have impacted upon people’s perception of how well people from different backgrounds get on with each other. There is variation between areas with Efford & Lipson (26 per cent), Ham (28 per cent), and St Budeaux (29 per cent) being amongst the lowest, and Peverell (59 per cent), St Peter and the Waterfront (54 per cent) and Plympton St Mary (50 per cent) being the highest.

There are large variations by age across the city, with younger people aged 16-34 years and those aged 45-64 less likely to agree that people from different backgrounds get on well together. Respondents from visible minorities also reported low scores for this question however, these findings are based on a very small number of responses and should therefore be treated with caution. Results show that citizens born outside the UK, especially those born in the EU (outside the UK) are more likely to agree that people get on well.
When comparing with the 2015 Index of Multiple Deprivation (IMD), there is a strong correlation between higher deprivation and a poor cohesion score. However, this is not universal. St Peter and the Waterfront ward has a relatively high cohesion score despite being one of the most deprived wards in the city whereas geographically adjacent Devonport has similar levels of deprivation and the lowest cohesion score in the city. St Peter and the Waterfront is the most ethnically diverse ward in the city which may have an influence on its cohesion level.

Using the national methodology for calculating community cohesion, Plymouth’s community cohesion score is 72 per cent. This is considerably lower than the national figure of 82 per cent. Plymouth has a lower percentage of people who think those from different backgrounds get on well together than more ethnically diverse cities such as Newcastle (71 per cent) and Birmingham (79 per cent). These comparisons must be made with caution however as no standardised methodology is used and differences in question construction or survey methodology can produce different results.

There is an opportunity with the upcoming Mayflower 400 celebrations (outlined in the International chapter) and the related Mayflower Community Fund to involve more local people with community initiatives. This should help to foster a sense of belonging and a greater feeling of inclusivity. Concentrating activity on some of the wards that score lower for community cohesion will help to maximise outcomes.

Further information can be found in the Plymouth City Survey 2018 Report.

**2.4 DEPRIVATION, POVERTY, AND HARDSHIP**

There is a long standing awareness of the deprivation that exists in Plymouth. Inequalities occur both geographically across the city, and within and across communities, with disadvantaged and marginalised populations most severely affected.


Figure 6 shows which national deprivation decile each of the 161 LSOAs in Plymouth fall within. Those falling within decile one have been further split to show the areas in the city that are most deprived nationally. One LSOA (found in the St Peter and the Waterfront ward) falls within the most deprived 1 per cent in England.

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18 A deprived area is conventionally understood to be a place in which people tend to be relatively poor and are more likely to face challenges to such as ill health, lower educational attainment, unemployment, limited access to goods and services, and inferior housing.
The proportion of residents in Plymouth experiencing deprivation due to low income has increased in recent years. The number of LSOAs in the most deprived 10 per cent (of the income domain of the IMD) has increased from 12 in 2010 to 19 in 2015. These LSOAs have a combined population of 29,751 residents (11.5 per cent of the Plymouth population).

The ‘Income Domain Affecting Children Index’ (IDACI), a subset of the IMD 2015, highlights that in Plymouth 7,308 children under the age of 16 (15.9 per cent of the total in this age-group) are living in income deprived households. When looking at individual neighbourhoods, more than eight out of 10 children in Barne Barton and more than seven out of 10 children in Devonport are affected by income deprivation. This is also the case for more than half of all children in the neighbourhoods of City Centre, Morice Town, and North Prospect & Weston Mill. The number of children in income deprived areas is of particular concern as a lack of income suggests they are likely to be experiencing child poverty based on traditional measures.

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19 IMD 2015 Plymouth Summary Analysis
21 ‘The proportion of children living in families in receipt of out of work (means-tested) benefits or in receipt of tax credits where their reported income is less than 60 per cent of median income’ (Child Poverty Act 2010)
According to the most recent statistics\textsuperscript{22}, Plymouth has a lower rate of child poverty by local authority area than some of its comparators, although the extent is still significant. 18.6 per cent of Plymouth children live in poverty (9,990 children), and the city is ranked 89th out of 152 local authorities across England. Of those living in poverty, the vast majority (76.9 per cent) are living in workless households, whereas 5.9 per cent are living in working households, and 17.2 per cent are classed as ‘other poor’. The proportion of children in poverty living in working households is rising; however, there are still some suggestions that this data underestimates the volume of ‘in work’ poverty. The Institute for Fiscal Studies (IFS) has also predicted that the number of children living in poverty will rise sharply by 2020, in part due to planned benefit reforms affecting families with children. Plymouth City Council’s Child Poverty Needs Assessment and its Plan for Tackling Child Poverty are currently being refreshed.

Recent research estimates that around one in six people in the UK are in relative low income before housing costs are considered, rising to more than one in five once housing costs are accounted for. These values have remained steady over the past few years.\textsuperscript{23} In Plymouth, this equates to just over 42,000 Plymouth residents living in poverty before housing costs are accounted for and 58,000 residents after housing costs are considered. The proportion of the local population in relative low income is expected to increase from 58,000 to 63,400 by 2021/22.

As discussed in the growing chapter, the city remains a relatively low wage economy with a persistent pay gap between the city and the rest of the region and UK. Average weekly pay in Plymouth is £525 compared to £571 nationally. Plymouth also has an elevated number of people who are economically active due to long-term sickness (7.9 per cent of working age population compared to 6.1 per cent nationally).

Plymouth has a higher level of indebtedness than nationally (17.8 per cent compared to 16.1 per cent). It is the most indebted local authority in the South West with more than 37,000 over indebted individuals, a figure higher than that in the cities of Bristol, Swindon, and Gloucester.

The well documented extent of poverty, deprivation and inequality that exists in Plymouth is strongly linked to poor health outcomes across the city. As shown in section 3.1, there is a substantial gap in life expectancy across Plymouth and lower than average healthy life expectancy. Health issues such as obesity and mental health problems are more prevalent in people from disadvantaged backgrounds.

The pockets of deprivation and poverty in Plymouth also relate to the city’s economic growth and development in a reinforcing cycle. Mirroring a pattern seen nationally, the type and nature of jobs in the city mean that many working families are still struggling to afford to pay for basic essentials such as food and heating and to maintain a good quality home. As discussed in section 5.4.1, around a third of Plymouth’s private sector homes are considered to be of a poor standard, and areas of poor housing are clearly linked to areas of higher deprivation and poor health outcomes. In turn, the levels of poverty and inequality are hampering the city’s ability to grow the local economy.

\textsuperscript{22} HMRC/DWP August 2015
\textsuperscript{23} Poverty in the UK: Statistics, House of Commons Briefing Paper Number 7096, August 2018
To overcome some of the issues outlined above, the city is focusing on delivering inclusive growth. Ensuring that future growth benefits all of the Plymouth population is essential.

### 2.4.1 HOMELESSNESS

Homelessness is a significant challenge for Plymouth and homelessness approaches to the council have increased by approximately 25 per cent on 2017/18. Despite proactive homelessness prevention work, increasing demand and an increase in the complexity of cases means that numbers continue to grow. The biggest pressure is the number of households accessing Bed and Breakfast (B&B) temporary accommodation. Fifty-five households were accommodated in B&Bs each month in 2017/18. In the first nine months of 2018, there have been 171 individual stays in a B&B. Welfare reforms, specifically benefit sanctions, cuts to housing benefit relating to non-dependants, and total benefit caps, are believed to have impacted significantly and resulted in more people approaching the council for support.

Plymouth City Council prevented 900 households from becoming homeless in 2017/18. Of these, 334 (37 per cent) were able to remain in their own home, whilst 566 (63 per cent) were helped to find accommodation, including B&B. The most common reasons that a household is eligible for housing assistance are the presence of dependent children (49 per cent of households) or that the applicant, or a member of the household are vulnerable as a result of mental illness or disability (27 per cent).

It is estimated that there are 26 people sleeping rough in Plymouth. This is based on a single night street count carried out by Plymouth City Council between October and December 2017. Twenty-five of these were male, and all but one were aged over 25 years. Plymouth’s rate of rough sleeping is 0.23 per 1,000 households, comparable to 0.20 for England as a whole.

### 2.5 CRIME AND COMMUNITY SAFETY

Overall recorded crime in Plymouth increased by 8 per cent (1,821 more crimes) in the 12 month period to September 2018 compared with the same period the previous year. This follows on from a 23% reported increase in the previous year and is similar to trends across Devon and Cornwall and other police forces nationally. Some of this can be explained by improvements in crime recording, driven largely by recommendations from the national 2016 Crime Data Integrity Inspection.

Despite the rise in crime, Plymouth has a comparatively low crime rate for a city of its type (88.6 crimes per 1,000 resident population compared to 104.4 per 1,000 in similar areas) and is placed third in its most similar family group of partnerships. On a neighbourhood basis the highest volume of crimes is seen in the City Centre neighbourhood followed by Stonehouse and Mutley.

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24 Following implementation of the Homelessness Reduction Act 2017, data collection from local authorities on statutory homelessness changed from April 2018

25 based on January to March 2018 homelessness submission by the local authority

26 Safer Plymouth Community Safety Strategic Assessment 2018/19
Most types of crime have increased in the past twelve months in line with national trends. Sexual offences and violence with injury provide the only exceptions, where rates of reported offences have escalated more quickly (particularly for sexual offences) than the trends for the most similar family group. Plymouth’s rates for these two types of crime are significantly higher than the family average.

Alcohol-related crime has been fairly static over the last twelve months, despite the adverse trends in violence against the person. This triangulates with a small reduction in evening and night-time economy violence over the same time period. Alcohol has a significant impact on the health of the city’s population, and rates of alcohol-related hospital admissions in Plymouth are significantly higher than the national average. The rising trend has stabilised locally in recent years whereas for England it has continued to increase.

8,924 anti-social behaviour incidents were recorded in the twelve month period to September 2018, of which 10% were related to ‘street drinking’. The volume of anti-social behaviour incidents reported has reduced overall by 11% (1,155 fewer incidents).

2.5.1 DOMESTIC ABUSE
Plymouth has a relatively high prevalence of domestic abuse27 and the numbers of reported incidents show an increasing trend over the past five years. Domestic abuse accounts for approximately 27 per cent of all violent crime in the city compared to a national figure of 16 per cent. There were 6,403 domestic abuse crimes and incidents reported to the police in 2017/18, an increase of 21% on the previous year. The vast majority of the rise can be attributed to ‘violence without injury’ crimes. A Home Office report published in 2010 estimated that the cost of domestic abuse to Plymouth was £49 million per annum.28

2.5.2 HATE CRIME
In 2017/18 there were 468 crimes recorded that were identified as a hate crime. This is an increase of 21 per cent on 2016/17; an increase of 82 crimes. Approximately 1.8 per cent of total crime is flagged as hate crime. This is higher than the rest of the Devon and Cornwall police force area where approximately 1% of all crime is categorised as hate crime. There has been an increase in the last twelve months in the number of disablist, homophobic, and racist crimes reported.

A previous analysis of hate crime offences and hate incidents reveals that around three-quarters (75 per cent) were categorised as racism and the majority involved abuse, threats and harassment, or violence.29 The next most common type of hate crime recorded was homophobic (11 per cent), followed by religious or belief (9 per cent). Public order and violence makes up 94 per cent of all hate crime regardless of type. Half of all hate crimes occurred within the City Centre and Stonehouse neighbourhoods, suggesting a strong link between offending and the evening and night-time economy.

27 Commissioning Plan for the Plymouth Domestic Abuse Partnership 2012-2019, Plymouth City Council
28 Ibid
29 Plymouth Hate Crime Incidents and Crime Reporting Research Report, June 2016, Zebra Collective
Nationally, there was a 57 per cent rise in recorded hate crime offences between 2015/16 and 2016/17. This is likely to have been due to a mix of a genuine increase in hate crime, an increase in the reporting of hate crime, and improved recording of hate crime by police.\textsuperscript{30} Analysis shows that incidents of hate crime ‘spike’ after national events so it is speculated that there will be an increase in reported hate crime in 2019 as the UK formally leaves the European Union.

2.5.3 SELF-REPORTED PERCEPTION OF SAFETY

Results from the Plymouth City Survey 2018 show that 90 per cent of respondents feel safe outside in their local area during the day; a figure that reduces to 60 per cent after dark. These figures are not significantly different to the results of the Plymouth Wellbeing Survey in 2014. The proportion of respondents feeling safe after dark was significantly lower in younger people (35 per cent for age 16-24) and in people over 75 (53 per cent). The proportion of males who felt safe after dark (64 per cent) was significantly higher than females (58 per cent).

Feelings of safety during the day are high across the city with no significant differences found between electoral wards. However, when looking at feelings of safety after dark, results range from 43 per cent in St Budeaux to 75 per cent in Peverell. In St Budeaux, the percentage of respondents feeling safe after dark has reduced over time between 2012 and 2018 (60 per cent to 43 per cent) whereas in Peverell, there has been an increase from 64 per cent to 75 per cent. Further research is needed to identify contributing factors.

2.6 EDUCATION 0-16YRS

2.6.1 EDUCATION PROVISION

Plymouth has a diverse range of childcare settings, and high percentages of children take up their free entitlements. Of these settings 82% are rated ‘good’ or ‘outstanding’ by Ofsted. Plymouth currently has 98 schools, consisting of 20 local authority maintained schools, two non-maintained nursery schools, four free schools and 72 academies. The recently established Plymouth Education Board works across the whole education system at a strategic level to address improvements with an aim of raising attainment and aspirations in all Plymouth schools.

In terms of the quality of provision, at the end of June 2018, 72 per cent of Plymouths pupils attended a school which was judged as ‘good’ or ‘outstanding’ by Ofsted. The number of schools with these ratings can be broken down to: 80 per cent of primary schools; 50 per cent of secondary schools; and 100 per cent of special schools. Whilst there is a desire to improve the quality of school provision overall, the issue for the Plymouth Education Board and the Plymouth Challenge (the local authority working in partnership with local schools, the Regional Schools Commissioner and the Department for Education via a whole-city approach) is to raise standards in secondary schools.

\textsuperscript{30} Understanding the difference: The initial police response to hate crime, HMICFRS, July 2018
2.6.2 EARLY YEARS TAKE UP AND ATTAINMENT

The percentage of children in Plymouth achieving a ‘good level of development’ in the Early Years Foundation Stage (EYFS) has increased over the last five years from 57 per cent in 2013 to 67 per cent in 2018. However, this still sits below the statistical neighbour and national averages (71 per cent and 72 per cent respectively).

The most recent published figures\(^{31}\) show that 84 per cent of two year olds are taking up free early education places. This is significantly higher than the national (72 per cent) and statistical neighbour (70 per cent) averages.

2.6.3 EDUCATIONAL ATTAINMENT
KEY STAGES (KS) 1 AND 2 (AGES 5-11 YEARS)

Educational attainment standards over recent years in Plymouth have shown some variation. In general, attainment has been below average for pupils in KS1.

- The percentage of children meeting the expected standard in phonics decoding in Plymouth has increased from 80 per cent to 82 per cent and is on par with the national figure and with our statistical neighbours.
- Following national trends, the percentage of children meeting the expected standard in reading in Plymouth (72 per cent) has declined slightly from 73 per cent and remains below the national average (75 per cent).
- In line with national trends, the percentage of children meeting the expected standard in writing in Plymouth (67 per cent) has improved but remains below the national average (70 per cent).
- The percentage of children meeting the expected standard in maths in Plymouth (73 per cent) has increased slightly but is below the national average (76 per cent).

At KS2 63 per cent of Plymouth pupils reached the expected standard in reading, writing, and maths (RWM) combined, results which are just below the 64 per cent nationally. Plymouth’s figure is above the statistical neighbour average (62 per cent).

The progress made by pupils from KS1 to KS2 in Plymouth is above that made by similar pupils regionally and within our statistical neighbours for reading, writing, and maths. The progress made by disadvantaged pupils (eligible for Free School Meals) is below that of non-disadvantaged pupils at the end of KS2.

\(^{31}\) Me2 funding figures provided by Department for Work and Pensions on a bi-monthly basis and published annually by the Department for Education. Latest data available is for 2017/18.
KEY STAGE 4 (KS4) (AGES 14-16 YEARS)
By the end of KS4, results remain below the national average in terms of attainment and progress. This year marks the first year of all pupils undertaking Attainment 8 measures. KS4 now reports on the percentage of pupils meeting Attainment 8. Plymouth’s average Attainment 8 score is 44.1 points. This is just below the national average (44.5 points). The rate of decline nationally is greater than the decline locally. The percentage of pupils achieving ‘the basics’ in Plymouth is 58.8 per cent which is below the national average of 59.4 per cent and statistical neighbour average of 61.5 per cent.

By the end of KS4, the progress made by Plymouth pupils is below that made by similar pupils within the statistical neighbour group. The progress made by disadvantaged pupils is below that of non-disadvantaged pupils at the end of KS4.

2.6.4 CHILDREN WITH A STATEMENT OR EDUCATION AND HEALTH PLAN
Pupils who have been identified as having special educational needs have a significantly higher rate of under-attainment at age 16 than other pupils. Overall Plymouth’s SEND pupils outperformed pupils nationally, regionally, and from within the statistical neighbour authorities. SEND pupils in Plymouth achieved a higher Attainment 8 score (17.3 points) than SEND pupils nationally (13.5 points) and regionally (13.5 points). Plymouth has a 29.8 point Attainment 8 gap between SEND pupils and all other pupils in Plymouth. Whilst this gap is significant, it is slightly smaller than the regional and statistical neighbour averages (both 31.8 points) and the national gap (32.2 points).

2.6.5 DISADVANTAGED CHILDREN
As evidenced by the Social Mobility Commission, a persistent and entrenched socioeconomic gap in attainment still exists at a national level. Local data highlights the fact that disadvantaged pupils attain less well than non-disadvantaged pupils and this is true for Early Years through to KS4. A recent report from the Education Policy Institute estimates that progress towards closing this gap is slowing and that it would take well over one hundred years to close the gap in GCSE English and Maths attainment, with similar outcomes between disadvantaged pupils and their more affluent peers not being reached until the year 2155. Plymouth is highlighted as having a large Early Years attainment gap (6.4 months). Attainment 8 data for 2016/17 shows a 17.3 point gap in attainment between local disadvantaged pupils compared to all pupils nationally (31.1 compared to 48.4 points). Locally, there is a 14.7 point gap between disadvantaged pupils and all other pupils in the local area (31.1 compared to 45.8 points).

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32 Attainment 8 measures a student’s average grade across eight subjects
33 Achieving a standard pass of 9-4 in English and Maths
34 Monitoring Poverty and Social Exclusion 2016, Joseph Rowntree Foundation
35 pupils with a Statement or Education, Health and Care plan
2.6.6 LOOKED AFTER CHILDREN
Narrowing the gap in educational achievement between looked after children and the rest of the school population locally and nationally is a priority and there has been some progress on this in recent years. Attainment results for KS2 in 2017 show that Plymouth’s looked after pupils’ achieving the expected standards in reading, writing, and maths (31 per cent) is slightly below the national average (32 per cent) but better than the regional average (27 per cent).

2.7 THE ENVIRONMENT
Plymouth is one of the most unique and diverse natural environments of any city in the country. Over 40 per cent of the city is designated as green space, and it is surrounded by three Areas of Outstanding Natural Beauty (AONB), a European Marine Site, a Marine Conservation Zone and Dartmoor National Park. This enviable setting is able to offer natural solutions to climate change impacts including reducing flooding, improving water quality, and enabling wildlife to thrive.

Access to green space is a key part of a sustainable community and delivers significant health and wellbeing benefits. Overall, Plymouth’s greenspace is estimated to save £9.26 per person in healthcare costs by removing air pollutants from the atmosphere such as particulate matter (PM$_{2.5}$) from vehicles. Currently within Plymouth there are nearly 1,440 hectares of accessible green space including parks and nature reserves, however provision is not spread evenly throughout the city’s electoral wards. The city currently contains 123 children’s play spaces and the aim is to have a play area within 400m of every home.

The city has 10 local nature reserves covering over 250 hectares, over 40 wildflower meadows covering 100 hectares, nine Special Sites of Scientific Interest, and 28 County Wildlife Sites. There are a great variety of species that can be spotted in and around Plymouth. On land, Plymouth is home to the critically endangered Horrid Ground Weaver spider (Notophantes horridus) and the rare Plymouth Pear Tree. Fourteen bat species have been recorded in Plymouth as well as charismatic bird species such as the avocet, little egret, peregrine falcon, cirl bunting, and nightjar. The marine environment (most of which is designated as a European Marine Site) is the most protected area in the city. Offshore, protected species include the pink sea fan, the common dolphin, two species of sea horse, and the basking shark.

More information on the local environment can be found in the Joint Local Plan Evidence Base.

2.7.1 AIR QUALITY
Air pollution is associated with a number of adverse health impacts and is a recognised factor in the onset of heart disease and cancer. Air pollution can impact on the most vulnerable people in society such as children, older people, and those with heart and lung conditions. Areas of poor air quality often correlate with less affluent areas.

Air quality in Plymouth is mainly good and there were only two areas (located along Mutley Plain) where levels of nitrogen dioxide were above government objectives during 2016. These concentrations are largely related to road traffic emissions. Plymouth has a single city-wide Air Quality Management Area (AQMA) as a result of these exceedances.

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36 ONS, Centre for Ecology and Hydrology, July 2018
37 Plymouth City Council Air Quality Annual Status Report, June 2017
HEALTHY CITY - enabling the people of Plymouth to enjoy an outstanding quality of life, including happy, healthy, safe and fulfilled lives.

In Plymouth:
- 40% of mothers are breastfeeding at the 6-8 weeks check in 2017/18.
- 24% of children starting primary school are either overweight or obese, rising to 33% when they leave 2017/18.
- 40% of mothers are breastfeeding at the 6-8 weeks check in 2017/18.
- 68% of adults in Plymouth are estimated to be physically active in 2016/17.
- 55% of adults in Plymouth are estimated to eat the recommended “five-a-day” in 2016/17.
- 18% of adults in Plymouth are estimated to be smokers in 2017.
- 1,523 safeguarding concerns reported in 2017/18.

Plymouth has a premature mortality rate (for persons under the age of 75) of 361 per 100,000 population in 2014-16.

6.5% of Plymouth’s population was diagnosed with diabetes in 2016/17.
3.6% of Plymouth’s population was diagnosed with coronary heart disease in 2016/17.

Life expectancy for males is 78 years and 11 months, healthy life expectancy is 60 years and 8 months. Life expectancy for females is 82 years and 8 months, healthy life expectancy is 57 years and 10 months. In 2017/18 50% of adult social care users reported that they have as much social contact as they would like.

652 children aged 1 to 16 years living in Plymouth had teeth removed under general anaesthetic in 2017/18.

There were 27,247 carers in Plymouth at the time of the 2011 census.

13% of the population registered (18+) with a GP are recorded as having depression in 2017/18.

OFFICIAL

OFFICIAL
Health and wellbeing is determined by complex interactions between an individual’s personal fixed characteristics (age, gender and genetics), and factors such as their lifestyles choices, the social and physical settings in which they live, and the wider socio-economic, cultural, and environmental conditions. Together these factors are often known as the ‘determinants of health’.

- **Socioeconomic status**: it is well established that health follows a social gradient, with worsening health occurring with decreasing socioeconomic position.

- **Education**: the availability of high quality education is key in enabling residents to maximise opportunities. Educational attainment can determine future employment and income as well as lower the risk of alcohol and drug misuse and teenage pregnancy.

- **Physical environment**: environmental themes can play an important role in affecting our quality of life and health. Those living in areas with clean air and decent housing are more likely to be in good health than those lacking such conditions.

- **Social environment**: having support from family, friends, and the local community is important for preventing isolation and loneliness, contributing to good mental wellbeing, and therefore improving overall health.

The following section highlights some of the current health and wellbeing issues in the city around life expectancy, mortality, chronic diseases, mental health, child health, lifestyle behaviours, vulnerable groups, and health care.

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3.1 LIFE EXPECTANCY AND HEALTH INEQUALITIES

Life expectancy is the number of years new born babies are estimated to live based on the age-specific mortality (death) rates of the area where they live. It is a measure of the average number of years a person would live from a given age, if he or she experienced the particular area’s age-specific mortality rates at that particular time period throughout their life. This measure makes no allowance for any future actual or projected changes in mortality and people may live in other areas for at least some part of their lives. In practice, a population’s mortality rate is likely to change in the future, so this period-based life expectancy does not therefore give the number of years someone would actually expect to live.39

From 2001-03 to 2014-16 life expectancy in Plymouth has improved by 3 years and 3 months for males (to 78 and 11 months years). Over this time male life expectancy has been consistently below the England average (79 years and 6 months). The gap in male life expectancy between Plymouth and England has remained consistent over the period.

From 2001-03 to 2014-16 life expectancy in Plymouth has improved by 2 years 3 months for females (to 82 years and 8 months). Female life expectancy has, on occasions, been similar to the England average. Currently the life expectancy for females in Plymouth is lower than the England average (83 years and 1 month).40

Life expectancy varies across the city; from 84 years and 10 months in the Plympton Chaddlewood ward to 77 years and 1 month in St. Peter and the Waterfront ward. Figure 7 highlights that wards just a few miles apart can have a life expectancy value varying by years. Travelling the seven miles south from Southway, each mile closer to St. Peter and the Waterfront represents seven months of life expectancy lost. Travelling west to the same destination from Plympton Chaddlewood, each mile represents over one year of life expectancy lost. The differences in life expectancy across Plymouth are probably due to health inequalities. It should be noted that the Plymouth life expectancy ‘bus route’ is simply a way to illustrate variations in life expectancy across the city. It does not mean an individual would necessarily die sooner if they were to move to St Peter and the Waterfront or live longer if they moved to Plympton Chaddlewood.

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40 Life expectancy in Plymouth 2001-03 to 2014-16, Public Health, Plymouth City Council, 2017

OFFICIAL
Health inequalities impact on individuals and communities and are officially described as ‘differences between people or groups due to social, geographical, biological or other factors. These differences have a huge impact, because they result in people who are worst off experiencing poorer health and shorter lives. Some differences, such as ethnicity, may be fixed. Others are caused by social or geographical factors (also known as ‘health inequities’) that can be avoided or mitigated.\textsuperscript{41}

In terms of inequalities, the life expectancy gap between those living in the most deprived group of neighbourhoods and those in the least deprived group of neighbourhoods remains significant. Life expectancy in the most deprived group of neighbourhoods in Plymouth (at 78 years and 2 months) is 4 years and 9 months lower than the least deprived group of neighbourhoods.\textsuperscript{42}

Using the Public Health England ‘Segment Tool’\textsuperscript{43} it is possible to identify the broad causes of death that contribute most to the gap in life expectancy between Plymouth and England. For men, the three main causes of death making up the gap are cancer (34.5 per cent), circulatory disease (17.9 per cent), and external causes including deaths from injury, poisoning, and suicide (17.4 per cent). For women, the three main causes of death making up the gap are circulatory diseases (33.5 per cent), mental and behavioural factors including dementia and Alzheimer’s disease (15.3 per cent), and cancer (14.1 per cent).

\textsuperscript{41} Positive choices for better health in a growing city, Public Health, Plymouth City Council, 2014/15
\textsuperscript{42} Life Expectancy in Plymouth 2001-03 to 2014-16, Plymouth City Council 2017
\textsuperscript{43} Segment tool, Public Health England, 2016
The estimated healthy life expectancy in Plymouth (the average number of years a person can expect to live in good health, based on how individuals perceive their general health) was lower than the England average for both males and females in 2014-16. Males in Plymouth had a healthy life expectancy of 60 years and 8 months (compared to 63 years 4 months nationally) whilst females had a healthy life expectancy of 57 years and 10 months (compared to 63 years 11 months nationally). Unlike life expectancy, healthy life expectancy in Plymouth shows little difference by sex. However, due to the difference in overall life expectancy males in Plymouth can expect to live on average the last 18 years and 3 months of their lives in poor health whereas for females it’s their last 24 years and 10 months.

### 3.2 MATERNAL AND CHILD HEALTH

#### 3.2.1 LOW BIRTHWEIGHT BIRTHS

Low birthweight is associated with poor outcomes in infancy and increasing evidence suggests that low birthweight is an important predictor of future child and adult health. Of the term babies born (i.e. babies not born prematurely) in Plymouth in 2017, 3.2 per cent were of low birthweight, a value similar to the England average (2.8 per cent). Looking at the trend for the previous 10 years the Plymouth and England values have been similar.

#### 3.2.2 BREASTFEEDING

Breast milk provides the ideal nutrition for infants in the first stages of life. Breastfeeding is expected to reduce illness in young children, have health benefits for the infant and the mother, and result in cost savings to the NHS through reduced hospital admission for the treatment of infection in infants.

Breastfeeding initiation refers to the proportion of mothers who begin breastfeeding in the first 48 hours after birth. Breastfeeding initiation in Plymouth (69.0 per cent of mothers) was lower than the England average (74.5 per cent) in 2016/17. The Plymouth value has remained below England over the past six years and both values have been fairly static.

Levels of breastfeeding at 6-8 weeks (infants either totally or partially breastfed) in Plymouth (40.3 per cent) was below the England average (42.7 per cent) in 2017/18. Due to a change in data collection methods in 2015/16 it is not possible to comment on trends at this time.

#### 3.2.3 TEENAGE PREGNANCY

Most teenage pregnancies are unplanned and around half end in an abortion. While for some young women, having a child when young can represent a positive turning point in their lives, for many more teenagers bringing up a child is extremely difficult. It may result in poor outcomes for both the teenage parent and the child, in terms of the baby’s health, the mother’s emotional health and well-being, and the likelihood of both the parent and child living in long-term poverty.

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45 Low birth weight of term babies, Public Health Outcomes Framework indicator 2.01
46 Breastfeeding initiation, Public Health Outcomes Framework indicator 2.02i
47 Breastfeeding at 6-8 weeks, Public Health Outcomes Framework indicator 2.02ii
In 2016 the rate of teenage conceptions in Plymouth was 19.6 per 1,000 females aged 15-17, a value similar to the England average (18.8 per 1,000). Plymouth’s rate has decreased from 50.5 in 2006. This drop in rate has been greater than England’s and has led to the difference between the Plymouth and England rates becoming smaller.  

3.2.4 CHILDREN’S DENTAL HEALTH

Tooth decay in children can result in pain, sleep loss, time off school and, in some cases, treatment under general anaesthetic. It is a predominantly preventable disease but for many children it remains an important problem.

In Plymouth, 652 children (aged one to 16 years) had teeth removed under general anaesthetic (GA) in 2017/18. There are large differences in the extent of dental decay experienced by children depending on where they live. On an electoral ward basis, the rate of dental extractions ranged from a low of 69 per 10,000 children aged 0-16 years in Compton to a high of 222 per 10,000 children in Ham (this represents over a three-fold difference). Those from more deprived groups of neighbourhoods often suffer from a higher burden of disease. The rate of dental extractions under GA ranged from a low of 82 per 10,000 children in the least deprived groups of neighbourhoods to a high of 187 per 10,000 children in the most deprived groups of neighbourhoods (this represents over a two-fold difference).

3.3 MENTAL HEALTH AND WELLBEING

A mental health needs assessment is currently being prepared that will cover mental health and wellbeing in much more detail than is able to be contained in this document. It will be made available on the JSNA website once complete.

3.3.1 MENTAL HEALTH

Common mental disorders (CMDs) are mental conditions that cause marked emotional distress and interfere with daily function, but do not usually affect insight or cognition. They comprise different types of depression and anxiety, and include obsessive compulsive disorder. In Plymouth in 2017 over 26,500 adults aged 18-64 were estimated to be suffering from common mental health problems, a figure that is projected to remain fairly static over the next 10 to 15 years.

Some adults meet the diagnostic criteria for two or more psychiatric disorders. This is known to be associated with increased severity of symptoms, longer illness duration, greater functional disability, and increased use of health services. In Plymouth in 2017 over 11,900 adults aged 18-64 years were estimated to have more than one psychiatric disorder, a figure that is projected to remain fairly static over the next 10 to 15 years.

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48 Under 18 conceptions, Public Health Outcomes Framework indicator 2.04
49 Dental extractions under general anaesthetic in Plymouth Children 2017/18, Public Health, Plymouth City Council, 2018
50 Mental health problems predictions, Projecting Adult Needs and Service Information, 2018
The number of referrals to the Child and Adolescent Mental Health Services (CAMHS) in Plymouth in 2017/18 was 1,293. In 2017/18, 1,610 children and young people (under 18) have received at least two contacts from CAMHS services. Mental health service providers report that they have noticed an increase in the number of referrals as well as an increase in the complexity of children and young people’s needs and issues requiring attention.\

In 2017/18 hospital admissions of young people (aged 10-24 years) for self-harm in Plymouth was 706 per 100,000 population aged 10-24 years old, a value higher than the England average (421 per 100,000 population). Over the past few years Plymouth has seen an increase in the rate (474 in 2014/15 to 706 in 2017/18) which has led to a widening between the Plymouth and England values.

### 3.3.2 SUICIDE
Suicide is seen as an indicator of the underlying rates of mental ill-health. The suicide rate for the three year period 2015 to 2017 in Plymouth was 9.2 per 100,000 population and was similar to the England average (9.6 per 100,000 population). The rate in Plymouth has been similar to England since the 2013 to 2015 period. The Plymouth three-year rate has fallen from 12.7 in 2012 to 2014 (84 deaths registered) to 10.8 in 2013 to 2015 (72 deaths registered) and further fallen to 9.2 in 2015 to 2017 (64 deaths registered).

### 3.3.3 DEPRESSION
In 2017/18 12.8 per cent of the 18+ Plymouth population registered with a GP were recorded as having depression, a value higher than the England average (9.9 per cent). Over the last four years Plymouth has seen an increase in the prevalence of depression from 9.0 per cent in 2013/14 to 12.8 per cent. This increase is mirrored by an increase in England.

### 3.4 DEMENTIA
In 2017, 3,319 people over the age of 65 were estimated to be living with dementia in Plymouth. By 2030 it is projected that this number will have risen to 4,735.

Looking at GP practice data just under 2,000 people (aged 65+) were recorded as having dementia in Plymouth in 2017.

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51 Children and young people, a single view of need/demand, 2016
52 Child Health Profiles, Public Health England, 2018
53 Suicide rate, Public Health Outcomes Framework indicator 4.10
54 Depression recorded prevalence, Mental Health and Wellbeing JSNA (Public Health England)
55 Projecting Older People Population Information System, 2018
56 Dementia recorded prevalence, Dementia Profile (Public Health England)
3.5 LIFESTYLE BEHAVIOURS

Four lifestyle behaviours (poor diet, lack of exercise, tobacco use, and excess alcohol consumption) are risk factors for four diseases (coronary heart disease, stroke, cancers, and respiratory problems) which together account for 54 per cent of deaths in Plymouth. The four lifestyle behaviours are also risk factors for intervening conditions (such as hypertension, obesity, diabetes, high cholesterol, and depression) that are associated with one or more of the four diseases. Many of the residents with these diseases are also likely to have one or more intervening conditions.

The prevalence of these lifestyle behaviours remain higher in the areas that are more deprived. Addressing these four behaviours is at the heart of the city’s Thrive Plymouth programme to tackle health inequalities.57

3.5.1 DIET

In a health-related behaviour survey of secondary school pupils in Plymouth, 19 per cent reported eating five or more portions of fruit and vegetables on the day prior to the survey in 2017/18.58 This is an improvement compared to 16 per cent in 2013/14 and 2015/16.

In 2016/17 Plymouth had a similar proportion of adults eating the recommended ‘five-a-day’ (55.2 per cent) compared to the England average (57.4 per cent).59

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59 Active Lives Survey: proportion of the adult population meeting the recommended ‘5-a-day’ on a usual day, Public Health Outcomes Framework indicator 2.1.1
3.5.2 PHYSICAL ACTIVITY/INACTIVITY
In a health-related behaviour survey of secondary school pupils in Plymouth, 65 per cent reported that they ‘exercised enough to breathe harder and faster on at least three days in the week’ in 2017/18. This is similar to previous survey findings. In 2016/17 Plymouth had a similar proportion of adults classed as physically active (67.6 per cent) compared to the England average (66.0 per cent).

3.5.3 SMOKING
Smoking prevalence in Plymouth adults was estimated to be 18 per cent in 2017 which was higher than the England average (15 per cent). Over the last six years Plymouth’s smoking prevalence has dropped from 23.4 per cent. The decrease over this time period is similar to England.

Rates of smoking in Plymouth are higher among specific groups of people such as those who live in more deprived areas, those in routine and manual occupations, and those who have never worked. Smoking is an important cause of ill health and a reason for the differences in life expectancy within the city.

3.5.4 SUBSTANCE MISUSE
Alcohol and drug (illegal and prescribed) dependence are important issues for Plymouth. Dependence is commonly associated with mental health problems, homelessness, and offending behaviour, and has negative impacts on families and children. In 2017 over 5,500 people in the city aged 18-64 were estimated to be dependent on drugs, and just over 10,000 were predicted to be alcohol dependent. Alcohol and drug misuse has important consequences and costs for the city in terms of individual health and wellbeing, family breakdown, social cohesion, and crime & disorder.

The number of alcohol related hospital admissions provides a measure of the burden of health harms and the impact of alcohol related disease and injury. In Plymouth in 2017/18 there were 2,159 hospital admissions per 100,000 population; a rate lower than the England average (2,224 per 100,000 population). Over the last eight years Plymouth’s rate has remained similar; 2,177 in 2009/10 to the latest value of 2,159. The gap in rates between Plymouth and England has narrowed over this time. Rates of alcohol-related hospital admissions were higher in the more deprived areas.

The rate of admissions for alcohol specific conditions in under 18s was 47.3 per 100,000 population aged under 18 in Plymouth; a rate higher than the England average (32.9 per 100,000 population) during 2015/16 to 2017/18. Over the last 10 years the Plymouth rate has decreased from 116.5 to 47.3 and the difference between Plymouth and England values has decreased.

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60 Active Lives Survey: percentage of inactive adults, Public Health Outcomes Framework indicator 2.13ii
61 Drug/alcohol predictions, Projecting Adult Needs and Services Information, 2018
3.6 OBESITY

There is concern about the rise of childhood obesity and the implications of such obesity persisting into adulthood. The risk of obesity in adulthood and risk of future obesity-related ill health are greater as children get older. Studies tracking child obesity into adulthood have found that the probability of overweight and obese children becoming overweight or obese adults increases with age. The health consequences of childhood obesity include: increased blood lipids, glucose intolerance, Type 2 diabetes, hypertension, increases in liver enzymes associated with fatty liver, exacerbation of conditions such as asthma, and psychological problems such as social isolation, low self-esteem, teasing and bullying.

Results from the ‘National Child Measurement Programme’ (NCMP) in Plymouth in 2017/18 show that 24.4 per cent of children starting primary school were either overweight or obese; a value higher than the England average (22.4 per cent). Looking at trend data, the proportion of children starting primary school that are either overweight or obese has been fairly static over the last 10 years.

Results for year 6 pupils in Plymouth in 2017/18 show that 33.2 per cent of children were either overweight or obese; a value in line with the England average (34.3 per cent). Looking at trend data, the proportion of children in Year 6 that were either overweight or obese has been fairly static over the last 10 years.

Information for 2016/17 shows that by the time they start primary school around one in four children living in Plymouth are either overweight or very overweight and by the time they leave primary school this has increased to one in three.63

Compared to England, more children in Plymouth are overweight or very overweight when starting primary school, however fewer children are overweight or very overweight when leaving primary school. This suggests that the environment in Plymouth may be more obesogenic for pre-school children but less obesogenic for those of primary school age when compared to England.

As a result of more sedentary lifestyles and increased availability and affordability of high calorie food the prevalence of obesity among adults has grown considerably over the past few decades. Survey data for Plymouth in 2016/17 shows that 67 per cent of adults aged 18+ were classified as overweight or very overweight; a value higher than the England average (61.3 per cent).64

3.7 LONG-TERM CONDITIONS

3.7.1 DISABILITY
More people are living with a disability now than in the past because the population as a whole is living longer and improved medical treatments are enabling more people to manage long-term health problems.

There are higher levels of long-term health problems or disability, and lower levels of reported ‘good’ or ‘very good’ health in Plymouth compared to England. According to the 2011 Census, 10 per cent of Plymouth residents reported having a long-term health problem or disability that limits their day-to-day activities a lot and has lasted, or is expected to last, at least 12 months. The England average was 8.3 per cent. The 2011 Census also reported fewer Plymouth residents thought their health was ‘good’ or ‘very good’, compared to England.65

Overall prevalence of learning disabilities in Plymouth was 0.6 per cent in 2016/17; this is higher than the England average (0.5 per cent).66 In 2018 the rate of children with autism known to Plymouth schools was 18.3 per 1,000 pupils; a value higher than the England average (13.7 per 1,000). The rate of children with learning disabilities known to Plymouth schools was 28 per 1,000 pupils; a value lower than the England average (33.9 per 1,000). In 2015/16 the rate of adults (18 to 64 years) with learning disabilities receiving long-term social care support was 4.3 per 1,000 population; a value higher than the England average (3.3 per 1,000).

It is estimated that approximately one per cent of the adult population in England will have an autism spectrum disorder (ASD). In Plymouth an estimated 1,700 people aged 18-64 are thought to have an ASD.67

3.7.2 CHRONIC DISEASES
Data for chronic diseases is available at either local unitary authority (UA) level or at clinical Commissioning Group (CCG) level. Plymouth sits within the Western locality of the NHS Northern, Eastern, and Western (NEW) Devon CCG.

Coronary heart disease (Plymouth UA)
The prevalence of coronary heart disease in Plymouth was 3.6 per cent in 2016/17; a value higher than the England average (3.2 per cent). Over the last five years Plymouth’s prevalence has remained static, whilst England’s prevalence shows a slight reduction over the same time period.68

Stroke (Plymouth UA)
The prevalence of stroke in Plymouth was 1.8 per cent in 2016/17; a value similar to the England average (1.7 per cent). Over the last five years Plymouth and England values have been static.69

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65 2011 Census table QS303EW (long-term health problem or disability), Office for National Statistics.
66 Learning disabilities profile, Public Health England, 2018
67 Projecting Adult Needs and Service Information System, 2018
68 NHS Health Check profile, Public Health England
69 NHS Health Check profile, Public Health England
Cancer (NEW Devon CCG)
The prevalence of cancer in NEW Devon CCG was 3.3 per cent in 2017/18; a value higher than the England average (2.7 per cent). Over the last eight years NEW Devon CCG and England have both seen an increase in cancer prevalence. ⁷⁰

Respiratory disease (NEW Devon CCG)
The prevalence of Chronic Obstructive Pulmonary Disease (COPD) in NEW Devon CCG was 2.1 per cent in 2017/18; a value higher than the England average (1.9 per cent). Over the last eight years NEW Devon has seen a slightly bigger increase in prevalence compared to England. ⁷¹

Diabetes (Plymouth UA)
Around 90% of those with diabetes will have Type 2 diabetes, and around 10% will have Type 1. ⁷² Type 2 diabetes is often influenced by lifestyle and initial treatment frequently focusses on eating well and moving more. The prevalence of diabetes in Plymouth was 6.5 per cent in 2016/17; a value lower than the England average (6.7 per cent). Over the last eight years the prevalence in Plymouth has increased in line with England. ⁷³

3.8 VULNERABLE GROUPS

3.8.1 FAMILIES WITH CHILDREN UNDER FIVE
The Plymouth Health Visitor caseload survey collects subjective information about the health circumstances for every family with children under five in Plymouth (around 11,000 in 2018). It assesses each family against a set of 31 factors covering their social and lifestyle situation together with disabilities and illnesses they may be experiencing.

Families which experience four or more of the 26 original factors (there are 31 factors in total, 26 of which have been in the survey since it started) are considered ‘vulnerable’. In 2018 2,263 families (20.7 per cent) were in this category, an increase from 18.2 per cent in 2016. The St Peter and the Waterfront ward had the highest percentage of vulnerable families in 2018 (37.7 per cent; 223 families), whilst the Plympton St Mary ward had the lowest percentage (6.4 per cent; 27 families).

3.8.2 CHILDREN IN CARE
For the last three years the number of children and young people in care in Plymouth has ranged between 391 and 417 (417 at 31 March 2018). Whilst Plymouth’s number of children and young people in care has increased at a faster rate than last year for the south west region and England, over the last three years the increase has been at a much slower pace.

In 2017/18, 213 children and young people (114 males, 99 females) came into the care of the local authority. Of these, 82 were aged 0-4 years, 45 were aged 5-9 years, and 86 were aged of 10-17 years.

⁷⁰ Cancer Services profile, Public Health England
⁷¹ National General Practice Profiles, Public Health England
⁷² Diabetes UK facts and figures https://www.diabetes.org.uk/professionals/position-statements-reports/statistics
⁷³ NHS Health Check Profile, Public Health England
3.8.3 FAMILIES WITH MULTIPLE AND COMPLEX NEEDS/ SAFEGUARDING CHILDREN
In Plymouth the main problems facing families with children subject to a child protection plan are unsafe parenting (64.8%), domestic abuse (54.0%), parental mental health problems (47.5%), drug misuse (25.4%), and alcohol misuse (18.2%). 77% of protection plans had more than one parental factor classification recorded (e.g. unsafe parenting and drug misuse).

3.8.4 CARERS
In England and Wales there are around 5.4 million people providing unpaid care for an ill, frail, or disabled family member or friend. Using data from the 2011 Census, there were 27,247 of these carers in Plymouth. This was a 13 per cent increase on the number identified in the 2001 Census. The majority (57.3 per cent) provided 1-19 hours of care per week but nearly 30 per cent (7,566 individuals) were committing over 50 hours.

In 2017/18 in excess of 1,500 carers received an assessment and some form of subsequent carer support (direct payment, advice and information, or another universal service). Support to carers is primarily delivered via Improving Lives Plymouth and Livewell Southwest, both providers commissioned by Plymouth City Council.

3.8.5 YOUNG CARERS
Young carers are the children and young people who take on the responsibility of caring for a family member, most often a parent or sibling, who has a condition such as a disability, illness, mental health condition, or a drug and/or alcohol problem. The approximate total number of children and young people aged 18 years and younger in Plymouth is 56,155. Using the national estimate, that 1.5 per cent of young people are carers, it suggests there are at least 840 children and young people with caring responsibilities in the city. There are only around 200 young carers under the age of 18 known to Plymouth City Council, therefore there could be around 640 young carers unknown to the local authority.

3.8.6 COMMUNITY-BASED CARE
Plymouth’s ageing population (described in section 2.2.4) is likely to put increasing pressure on community-based provision within the definition outlined in the ‘Community-based care commissioning strategy’. One of the most significant factors that will impact on further demand for community services is the growing number of older people in Plymouth. There is a projected 32.7 per cent increase in the number of people aged 65 or over between 2016 and 2034 (an additional 15,400 individuals) in Plymouth.

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74 Adult Social Care Short and Long Term (SALT) activity return, 2017/18
75 Children and young people, a single view of need/demand, 2016
76 Community-based Care Commissioning Strategy, 2016
Community-based care delivers targeted services for people who need support in the community to maintain independence or who may be at risk in the future of losing their independence. The services assist people with multiple care and support needs, people requiring urgent care, and people with long-term needs who require ongoing personalised support. The ‘Community-based Care Needs Assessment’ undertaken in 2016 provides an extensive overview of community-based care needs and demand. In Plymouth 1,483 people aged 18 to 64 and 2,029 people aged 65 and over received a long term social care service based in the community. The number of people receiving community-based care increased in 2017/18 by 2% (70 people).

People with multiple care and support needs
Local information, combined with national modelling, indicates that adults experience complex needs (relating to homelessness, substance misuse, offending, and mental health) at different levels. Within Plymouth the ‘Community-based Care Needs Assessment’ identifies that:

- there is a core group of approximately 270 individuals requiring intense support for a number of issues at the same time;
- there are approximately 3,000 people who are not in immediate crisis but could shift into the core group without appropriate intervention; and
- there are approximately 5,000 people who have complex needs but are stable and engaging with support.

People requiring urgent care
These people may need services such as rapid response home care, mental health support services, reablement and / or community equipment.

The ‘Community-based Care Needs Assessment’ reports that the number of emergency admissions to hospital is expected to rise by around 1.1 per cent per year. However, due to the ageing population it is expected that the total number of emergency bed days will increase by around 1.6 per cent per year. It is also known that the prevalence of long-term conditions is rising, which will place an additional demand pressure on the urgent care system.77

There has already been an increase in the number of domiciliary hours commissioned by Plymouth City Council and NEW Devon CCG. A 12.5 per cent increase in hours was reported in 2014/15.78

People with long-term needs requiring ongoing personalised support
In 2017, a total of 12,614 people over the age of 65 were predicted to have a long-term limiting illness where their day-to-day activities were limited a lot (self-definition as per the 2011 Census). Between 2017 and 2035, it is expected that the number of people aged over 65 with a limiting long-term illness will rise from 12,614 to 18,012.79 Reasons for requiring long-term support include; sensory impairment, dementia, frailty, mental health issues, and learning disabilities.

77 Community-based care needs assessment, 2016
78 Community-based care commissioning strategy, 2016
79 Projecting Older People Population Information System
3.8.7 RESIDENTIAL AND NURSING CARE

In 2017/18, 1,042 people accessed long term residential care support. Numbers remain stable with 1,019 accessing support in 2016/17 and 1,092 in 2015/16. The average annual cost of a long term residential care package has risen, from £31,530 at 2015/16 year end to £34,419 as at the end of November 2016.

The numbers in long-term nursing care continue to increase. In 2017/18, 270 people accessed long term nursing care support, an increase of 12 per cent (30 people). The average annual cost of a long-term nursing care package has also increased, from £27,764 at 2015/16 year end to £31,659 as at the end of November 2016.

The quality of residential and nursing care provision in Plymouth remains high. 127 homes providing social care support have received a CQC ‘new approach’ rating. As at July 2018, 6 per cent (seven homes) were rated ‘outstanding’, 74 per cent (94) rated ‘good’, 20 per cent (25) require improvement, and one home was rated ‘inadequate’.

The 2017/18 Adult Social Care Client Survey also showed that 73 per cent of people in receipt of long-term social care were either ‘satisfied’ or ‘very satisfied’ with the care they receive, an increase of 4 per cent on the 2016/17 survey. Historically satisfaction rates in Plymouth are higher than the national and comparator group averages.

3.8.8 SAFEGUARDING ADULTS

The Adult Safeguarding Health Needs Assessment provides an in-depth analysis of the people in Plymouth who are in need of safeguarding80.

In 2017/18 there were 1,523 safeguarding concerns reported, involving 1,215 individuals; 954 of these concerns progressed to the investigation stage (known as an enquiry). Those most at risk of being a victim are older people in receipt of physical support and who are resident in a care home setting or who live in their own home. Older people who are the subject of a disproportionately low number of safeguarding alerts are those in receipt of social care support via a direct payment, less is known about their circumstances as they are subject to much less social care supervision.

3.8.9 SOCIAL ISOLATION

The percentage of families with children under-5 surveyed in the biennial health visitor survey in Plymouth and indicated to experience social isolation has increased from 5.3 per cent in 2014 to 8.5 per cent in 2018.81

In contrast, adult social care users reporting ‘that they have as much social contact as they would like’ has increased from 46 per cent in 2016/17 to 50 per cent in 2017/18. Plymouth has for the last two years performed above the England average for this Adult Social Care Framework indicator.

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80 People in need of care and support who also, due to these needs, may be unable to protect themselves, and therefore must be protected from the risk of abuse, or actual, abuse.

81 Survey of health visitor caseloads 2002 to 2018, Public Health, Plymouth City Council
3.9 MORTALITY

The mortality rate (all-age all-cause) in Plymouth was 1,026 per 100,000 population in 2016 compared to 960 for England. In 1995 the rate was 1,443 for Plymouth, since then the rates have reduced for both Plymouth and England.

In Plymouth the mortality rate for males is 1,138 per 100,000 population compared to 928 per 100,000 population for females in 2016.\textsuperscript{82}

Rates across Plymouth for the three year period 2014 to 2016 vary from a low of 730 in the Plympton Chaddlewood ward to a high of 1,318 per 100,000 in the Stoke ward as shown in Figure 8.\textsuperscript{83}

**Figure 8:** All-age all-cause mortality rate, 2014 to 16 by wards

The infant mortality rate (for those under the age of one) in Plymouth is 2.6 per 1,000 live births for the three year period 2014 to 2016; a value similar to the England average (3.9 per 1,000). The Plymouth three year rate has fallen from 5.5 per 1,000 live births in 2001 to 2003 to 2.6 per 1,000 live births in 2014 to 2016; a trend which is in line with England.\textsuperscript{84}

\textsuperscript{82} Office of National Statistics, Deaths registered by area of usual residence, 2017

\textsuperscript{83} Public Health, Plymouth City Council, Aug 2018

\textsuperscript{84} Local authority Health Profiles, Public Health England, 2018
The premature mortality rate (for persons under the age of 75) for Plymouth in 2014 to 2016 is 361 per 100,000 population. Premature mortality varies across the city with more deprived groups of neighbourhoods having rates nearly twice as high as the least deprived group of neighbourhoods.\textsuperscript{85}

Plymouth has a higher premature mortality rate than England for cancer (150 compared to 137 per 100,000 population in 2014 to 2016). The premature mortality rate for cardiovascular diseases (including heart disease and stroke) in Plymouth is similar to the England average (79 compared to 74 per 100,000 population in 2014 to 2016), as is the premature mortality rate for respiratory diseases (36 compared to 34 per 100,000 population in 2014 to 2016).\textsuperscript{86}

\textsuperscript{85} Ibid
\textsuperscript{86} Public Health Outcomes Framework indicators 4.04, 4.05 and 4.08
**GROWING CITY** - using Plymouth’s strengths to drive quality growth which transforms the city’s long term prosperity, to meet the needs of all its people.

- **Plymouth** is the **15th largest** city in England.
- Plymouth has an employment rate of **76.8%** that is higher than the national average.
- Plymouth has a population of **263,070**.
- Plymouth’s ports handled over **2.3 million** tonnes of cargo in 2017.
- Plymouth’s full-time weekly earnings by place of residence is **£525.10** compared to **£571.17** nationally.
- Plymouth’s productivity stands at **83.7%** of the UK average.
- **HM Naval Base Devonport (HMNB)** is the **largest naval base** in Western Europe and directly accounts for **14.1%** of the city’s economic value in terms of GVA and **10.1%** of Plymouth’s total employment.
- Plymouth’s has **21%** of the UK’s marine manufacturing capacity.
- Marine manufacturing in Plymouth generates **£408.6 million** in GVA.
- Plymouth’s economic activity rate of **79.6%** that is higher than the national average.
- The fishing industry brings over **£12 million** in GVA to Plymouth each year and lands **13.2%** of England’s total fish catch each year putting Plymouth in the **top 3** fishing ports in England.
- Plymouth already outperforms the national average in apprenticeship starts **3,560** in 2015/16 rising to **3,770** in 2016/17.

**Economic output of £4.99 billion**

109,000 jobs.

**SCHOOL**

Plymouth has an employment rate of **76.8%** that is higher than the national average.
Plymouth is one of the largest cities on the south coast and the 15th largest city in England with a population of approximately 263,070. The city provides 109,000 jobs and has an economic output of £4.99 billion (2016). Plymouth is the most significant economic centre in the South West Peninsula and the largest urban area in the Heart of the South West (HotSW) Local Enterprise Partnership (LEP), making it a key location for growth.

4.1 THE ECONOMY

4.1.1 EMPLOYMENT AND JOBS
Since the 2008 recession the city’s economic performance has improved and demonstrated increased and sustained output and growth. The city has an annual total Gross Value Added (GVA) of £4.99 billion (2016), an increase from £4.95 billion in 2015, and contributes to 12.1 per cent of the HotSW’s economic output.

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88 The ONS is now reporting a third measure for GVA – the ‘balanced’ measure, which reconciles their other two measures (income and production) into a single estimate of economic activity within a region. New figures are slightly lower, however historic figures have now been updated and this is still an increase on previous years. This change in methodology may however result in discrepancies when looking at proportional impact by industry type.
89 Local enterprise partnerships (LEPs) are voluntary partnerships between local authorities and businesses set up in 2011 by the then Department for Business, Innovation and Skills to help determine local economic priorities and lead economic growth and job creation within the local area.
90 GVA measures the contribution to an economy, producer, sector or region. It equals the value of the ‘outputs’ (normally turnover) of an enterprise less the ‘inputs’ (the cost of bought in goods and services). GVA is important because it is used in the calculation of gross domestic product (GDP) which is a key indicator of the state of a nation’s total economy.
91 GVA (balanced) approach
Currently Plymouth has a marginally higher employment rate than nationally (76.8 per cent compared to 75.1 per cent) and an economic activity rate also slightly higher than the national figure (79.6 per cent compared to 78.5 per cent). Of those aged 16-64 who are economically active but unemployed the figures are slightly higher for Plymouth women than the national average (4.3 per cent and 4.1 per cent respectively) with Plymouth men slightly lower than the national figure (3.2 per cent and 4.2 per cent respectively).

Since employment reached near full-employment levels during the post-recession recovery, employment growth has slowed. It is now productivity-led growth that will further drive output growth. The Royal Society for the Encouragement of Arts, Manufactures and Commerce (RSA) Inclusive Growth Commission’s final report comments that the previous national focus on higher employment has not provided the answer to some of the country’s social problems. The report concludes that focusing on the quantity, rather than the quality of jobs has exacerbated inequalities with many places feeling left behind and trapped in low productivity / low wage cycles.

Plymouth’s future growth potential therefore is more likely to lie in productivity-led growth with a focus on the ‘quality’ of the jobs created. This means increased private sector jobs and the creation of more high-productivity jobs with opportunities to progress into these jobs through career and wage progression. More permanent, full-time, and sustainable job opportunities are needed, rather than low-skilled jobs with zero-hour contracts that lack income security.

4.1.2 JOB NUMBERS
The latest figures (2017) show the number of jobs in Plymouth has slightly increased from 107,000 in 2016 to 109,000 (a net increase of 2,000 jobs). Of the total jobs in Plymouth, 70,000 were full time and 39,000 were part-time (2017).
### Table 4: Jobs by industry breakdown, 2009 to 2017

<table>
<thead>
<tr>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A: Agriculture, forestry and fishing</td>
<td>31</td>
<td>52</td>
<td>48</td>
<td>63</td>
<td>31</td>
<td>44</td>
<td>90</td>
<td>20</td>
<td>N/A</td>
</tr>
<tr>
<td>B: Mining and quarrying</td>
<td>44</td>
<td>44</td>
<td>42</td>
<td>28</td>
<td>23</td>
<td>22</td>
<td>20</td>
<td>30</td>
<td>30</td>
</tr>
<tr>
<td>C: Manufacturing</td>
<td>12,478</td>
<td>11,363</td>
<td>11,909</td>
<td>12,237</td>
<td>12,563</td>
<td>13,071</td>
<td>12,700</td>
<td>13,000</td>
<td>13,000</td>
</tr>
<tr>
<td>D: Electricity, gas, steam and air conditioning supply</td>
<td>760</td>
<td>772</td>
<td>693</td>
<td>727</td>
<td>615</td>
<td>351</td>
<td>300</td>
<td>500</td>
<td>600</td>
</tr>
<tr>
<td>E: Water supply; sewerage, waste management and remediation activities</td>
<td>242</td>
<td>245</td>
<td>413</td>
<td>344</td>
<td>360</td>
<td>500</td>
<td>400</td>
<td>450</td>
<td>350</td>
</tr>
<tr>
<td>F: Construction</td>
<td>3,768</td>
<td>3,265</td>
<td>3,456</td>
<td>3,325</td>
<td>3,475</td>
<td>3,901</td>
<td>4,200</td>
<td>4,500</td>
<td>5,000</td>
</tr>
<tr>
<td>G: Wholesale and retail trade; repair of motor vehicles and motorcycles</td>
<td>18,015</td>
<td>16,686</td>
<td>16,447</td>
<td>16,033</td>
<td>16,004</td>
<td>15,922</td>
<td>16,300</td>
<td>16,000</td>
<td>16,000</td>
</tr>
<tr>
<td>H: Transportation and storage</td>
<td>5,520</td>
<td>5,412</td>
<td>5,058</td>
<td>4,885</td>
<td>4,993</td>
<td>4,623</td>
<td>5,900</td>
<td>5,000</td>
<td>4,500</td>
</tr>
<tr>
<td>I: Accommodation and food service activities</td>
<td>7,571</td>
<td>7,405</td>
<td>7,006</td>
<td>7,506</td>
<td>7,731</td>
<td>7,699</td>
<td>7,700</td>
<td>8,000</td>
<td>9,000</td>
</tr>
<tr>
<td>J: Information and communication</td>
<td>2,257</td>
<td>1,909</td>
<td>1,850</td>
<td>1,759</td>
<td>1,473</td>
<td>1,756</td>
<td>1,800</td>
<td>1,750</td>
<td>2,000</td>
</tr>
<tr>
<td>K: Financial and insurance activities</td>
<td>2,633</td>
<td>2,509</td>
<td>2,199</td>
<td>2,035</td>
<td>2,218</td>
<td>2,067</td>
<td>1,800</td>
<td>1,750</td>
<td>2,000</td>
</tr>
<tr>
<td>L: Real estate activities</td>
<td>1,026</td>
<td>1,297</td>
<td>1,781</td>
<td>1,801</td>
<td>2,199</td>
<td>2,215</td>
<td>1,900</td>
<td>1,750</td>
<td>1,750</td>
</tr>
<tr>
<td>M: Professional, scientific and technical activities</td>
<td>4,776</td>
<td>4,752</td>
<td>4,195</td>
<td>3,948</td>
<td>4,118</td>
<td>4,665</td>
<td>4,000</td>
<td>5,000</td>
<td>5,000</td>
</tr>
<tr>
<td>N: Administrative and support service activities</td>
<td>7,094</td>
<td>6,417</td>
<td>7,126</td>
<td>7,053</td>
<td>5,608</td>
<td>6,135</td>
<td>6,300</td>
<td>7,000</td>
<td>8,000</td>
</tr>
<tr>
<td>O: Public administration and defence; compulsory social security</td>
<td>5,939</td>
<td>5,268</td>
<td>5,181</td>
<td>7,142</td>
<td>7,029</td>
<td>7,024</td>
<td>5,900</td>
<td>6,000</td>
<td>6,000</td>
</tr>
<tr>
<td>P: Education</td>
<td>11,332</td>
<td>12,479</td>
<td>13,057</td>
<td>12,759</td>
<td>13,635</td>
<td>12,720</td>
<td>12,800</td>
<td>13,000</td>
<td>13,000</td>
</tr>
<tr>
<td>Q: Human health and social work activities</td>
<td>18,192</td>
<td>17,838</td>
<td>18,170</td>
<td>18,668</td>
<td>19,944</td>
<td>20,577</td>
<td>20,300</td>
<td>20,000</td>
<td>19,000</td>
</tr>
<tr>
<td>R: Arts, entertainment and recreation</td>
<td>2,480</td>
<td>2,884</td>
<td>2,436</td>
<td>2,616</td>
<td>2,551</td>
<td>2,780</td>
<td>2,500</td>
<td>2,500</td>
<td>3,000</td>
</tr>
<tr>
<td>S: Other service activities</td>
<td>1,504</td>
<td>1,596</td>
<td>1,502</td>
<td>1,849</td>
<td>1,747</td>
<td>1,634</td>
<td>1,700</td>
<td>1,750</td>
<td>2,000</td>
</tr>
<tr>
<td>T: Activities of households as employers; undifferentiated goods and</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>services-producing activities of households for own use</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>U: Activities of extraterritorial organisations and bodies</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>105,662</td>
<td>102,193</td>
<td>102,566</td>
<td>104,778</td>
<td>106,316</td>
<td>107,706</td>
<td>107,800</td>
<td>107,000</td>
<td>110,230</td>
</tr>
</tbody>
</table>

Nomis (2017), employee jobs by industry

Job figure is slightly higher than total employee jobs due to rounding by industry category
Table 4 shows that Plymouth’s 'human health and social work activities’ sector remains the largest source of employment in the city despite a reduction of 1,000 jobs since 2016. The city’s 'manufacturing sector', represents 11.9 per cent of Plymouth’s total employment (compared to 8.6 per cent nationally) and has seen an increase of 300 jobs since 2015. The most significant increase in jobs has come in the ‘administrative and support service activities’ industry with an increase of 1,000 jobs since 2016.

While significant strides have been made to build diversification and resilience into the Plymouth economy, there is still an over reliance on the public sector for employment. However, since the financial crisis, the number of public sector jobs in the city has steadily decreased. In 2009, 26,517 of Plymouth’s employees (26 per cent) worked for the public sector. This figure has dropped to 21,828 in 2017 (20 per cent)\(^98\). In contrast the HotSW figure has decreased at a much slower rate (21 to 17.6 per cent), therefore bringing Plymouth more in line with the regional average\(^99\).

### 4.1.3 EMPLOYMENT BY OCCUPATION

Although dependent on the types of jobs that are available in the city and the commuting patterns of high earners from outside the city affecting the distribution of the workforce, Plymouth still has a lower percentage of people in employment in major occupation groups 1-3 (38.6 per cent) compared to 46.1 per cent nationally\(^100\).

However, the city has higher than national proportions of people in the ‘associate professional and technical’ occupations (17 per cent compared to 14.7 per cent nationally), ‘Skilled trades’ (11.7 per cent compared to 10.1 per cent nationally), ‘caring, leisure, and other service occupations’ (11.2 per cent compared to 9.1 per cent nationally), and ‘sales and customer service occupations’ (9.2 per cent compared to 7.6 per cent nationally) also remain higher.

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\(^98\) ONS Business Register and Employment Survey (2016) public sector figures, (accessed July 2018) [data file]
\(^99\) Ibid.
Table 5: Employment by occupation

<table>
<thead>
<tr>
<th>Employment by occupation (Standard Occupational Classification (SOC) 2010)</th>
<th>Plymouth (numbers)</th>
<th>Plymouth (%)</th>
<th>South West (%)</th>
<th>Great Britain (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major group 1-3</td>
<td>51,500</td>
<td>38.6</td>
<td>44.9</td>
<td>46.1</td>
</tr>
<tr>
<td>1 Managers, directors and senior officials</td>
<td>9,900</td>
<td>7.4</td>
<td>11.2</td>
<td>10.8</td>
</tr>
<tr>
<td>2 Professional occupations</td>
<td>18,900</td>
<td>14.1</td>
<td>19.1</td>
<td>20.5</td>
</tr>
<tr>
<td>3 Associate professional &amp; technical</td>
<td>22,700</td>
<td>17.0</td>
<td>14.4</td>
<td>14.7</td>
</tr>
<tr>
<td>Major group 4-5</td>
<td>27,400</td>
<td>20.5</td>
<td>21.1</td>
<td>20.3</td>
</tr>
<tr>
<td>4 Administrative &amp; secretarial</td>
<td>11,700</td>
<td>8.8</td>
<td>9.7</td>
<td>10.1</td>
</tr>
<tr>
<td>5 Skilled trades occupations</td>
<td>15,700</td>
<td>11.7</td>
<td>11.4</td>
<td>10.1</td>
</tr>
<tr>
<td>Major group 6-7</td>
<td>27,200</td>
<td>20.4</td>
<td>16.9</td>
<td>16.7</td>
</tr>
<tr>
<td>6 Caring, leisure &amp; other service occupations</td>
<td>15,000</td>
<td>11.2</td>
<td>9.4</td>
<td>9.1</td>
</tr>
<tr>
<td>7 Sales and customer service occupations</td>
<td>12,200</td>
<td>9.2</td>
<td>7.5</td>
<td>7.6</td>
</tr>
<tr>
<td>Major group 8-9</td>
<td>27,300</td>
<td>20.5</td>
<td>17.2</td>
<td>17.0</td>
</tr>
<tr>
<td>8 Process plant &amp; machine operatives</td>
<td>12,000</td>
<td>9.0</td>
<td>6.3</td>
<td>6.4</td>
</tr>
<tr>
<td>9 Elementary occupations</td>
<td>15,300</td>
<td>11.5</td>
<td>10.9</td>
<td>10.5</td>
</tr>
</tbody>
</table>

Plymouth has less employment in ‘administrative and secretarial occupations’ (8.8 per cent) than both the South West (9.7 per cent) and nationally (10.1 per cent). Of those aged 16-64 years old considered economically active 15,900 people or 8.6 per cent were self-employed; less than the national figure of 10.6 per cent.101

4.1.4 WAGES

Workforce earnings can be measured in two different ways – weekly earnings by place of residence or gross weekly workplace wages. The resident-based data set provides information about earnings of employees who are living in the city, who are on adult rates, and whose pay for the survey pay-period was not affected by absence. Workplace pay relates to the earnings of employees who are working in the city.

In terms of Plymouth’s average workplace wages this shows that Plymouth’s wages have stagnated over the last 12 months to November 2018 (+0.2 per cent compared to +3.5 per cent across the UK). However inflation has risen by 2.0 per cent in December 2018 meaning that Plymouth workers were worse off in terms of take-home pay. Plymouth’s pay currently stands at 93.2 per cent of the UK average.102

However Plymouth’s full time weekly earnings by place of residence for all workers shows an increase since 2016. Plymouth’s full time weekly earnings by place of residence for all workers is £525.10 compared to £537.60 in the South West and £571.10 nationally (2018). This is an increase on the 2017 figure of £509.2 and the 2016 figure of £481.90 which saw the full time weekly earnings by place of residence dip for the first time in five years from £483.90 in 2015.\textsuperscript{103}

The gender pay gap in the city still persists with weekly gross pay for men averaging £561.80 compared to £477.10 for women (2018).\textsuperscript{104} This is an increase of £31.70 on the previous year for men and the most significant change year-on-year since 2013/14. Women’s pay has also slightly increased from £454.30 in 2017 to £477.10 in 2018 – an increase of £22.80.

Plymouth’s earnings divide, measured by the gap in resident’s gross weekly pay between the top 20 per cent and the bottom 20 per cent of earners within the city, has decreased by £2.80 from 2017 (a decrease of 0.8 per cent). In 2018 the earnings gap was £352.3 in Plymouth, this is significantly less than the South West (£444.10) and national (£488.0) gaps. Across the Heart of the South West LEP area, median gross weekly pay at the 80\textsuperscript{th} percentile (for the top 20 per cent of working age workers) has grown faster than for the bottom 20 per cent. Between 2014 and 2018 this growth has been 11 per cent for the bottom 20 per cent compared to 7.2 per cent for the top 20 percent of workers. This means that the lowest paid workers are already or close to being worse off with the rise in inflation\textsuperscript{105}.

Lack of opportunity for wage growth and a lack of income resulting in poverty both lead to a city that is unfair for some. Maximising opportunities for all, to ensure that everyone can benefit from the growing economy, is essential to reduce inequalities and equip those who may otherwise be left behind to participate fully in the city’s success. Inclusive growth was highlighted as a challenge facing cities such as Plymouth in the last Plymouth Report and still remains a priority. Plymouth has always taken this challenge seriously, with many initiatives across the city promoting fairness and helping to reduce poverty and inequality.

### 4.1.5 PRODUCTIVITY

Plymouth is the most significant urban area in the HotSW LEP and the South West peninsula with a GVA of £4.99 billion\textsuperscript{106} and an overall workday population of 260,913 (2011 Census).

HotSW productivity has been on an upward trajectory since 2011, and has grown, in nominal terms (i.e. not accounting for inflation), faster than the national average since 2014. Between 2016 and 2017, HotSW’s productivity had grown by 2.9 per cent, compared with 2.5 per cent nationally. In 2017 it was 13.3 per cent higher than in 2011, standing at 82.9 per cent of the UK average (2017).


\textsuperscript{105} Ibid

Growth across the region has been mixed. Plymouth’s productivity is just recovering from a slow in growth since 2012 (after previously seeing faster growth than nationally between 2010 and 2012), and Torbay’s productivity is recovering from a brief decline in 2016. At the same time, Somerset’s and Devon’s productivity levels have been increasing since 2012 and have been growing faster than nationally. In absolute terms, GVA per hour in 2017 was 83.7 per cent of the UK average in Plymouth (a 2.7 per cent growth on the previous year), this is slightly lower than 83.9 per cent in Somerset but higher than 83.2 per cent in Devon and 74.8 per cent in Torbay.

4.1.6 BUSINESS START-UPS
The number of business start-ups in Plymouth has decreased in 2017 to 805 compared to 915 in 2016. This is a rate of 47.8 businesses per 10,000 people of working age compared to a rate of 53.8 in 2016. When measured as a rate per 100 businesses rather than per 10,000 population, Plymouth’s 805 business births (12.3 per 100) represents a rate close to the national rate (13.2) and above the regional rate (10.6). The South West however continues to have the highest five-year survival rate. The UK five-year survival rate for businesses born in 2012 and still active in 2017 was 43.2 per cent. Since 2012, the South West has been the region with the highest five-year survival rate at 45.8%. In Plymouth initial survival rates compare well but there is a sharp drop in business survival after year three.

4.1.7 UNEMPLOYMENT
There were 18,300 people claiming out of work benefits in November 2016. This equates to 10.9 per cent of the resident population aged 16-64 years. This is higher than the South West (7.2 per cent) and national (8.4 per cent) figures. This claimant count has slowly reduced over the last ten years from 21,470 (12.9 per cent) in November 2006. Of those claiming out of work benefits 1,950 or 1.2 per cent are lone parents, a value in line with the national figure of 1.0 per cent. However the number of people claiming out of work benefits who are carers or are disabled is higher in Plymouth than in the South West and nationally. There are 3,480 claimants (2.1 per cent) who are carers, compared to 1.4 per cent in the South West and 1.7 per cent nationally and 1,980 disabled claimants (1.2 per cent) compared to 0.9 per cent in the South West and 0.8 per cent nationally.

Youth unemployment (18-24 year olds) reached an all-time low in December 2015 (735 claimants). This has risen in line with the national trend and now stands at 1,100 claimants (January 2019) accounting for 21 per cent of all Job Seeker Allowance (JSA) claimants.

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107 (Plymouth Growth Board Dashboard February 2019)
Plymouth has 2,590 people (1.5 per cent) on job seekers allowance (JSA/Universal Credit) compared to 0.8 per cent for the South West. This is also higher than the national average (1.1 per cent) suggesting a higher percentage of people in Plymouth rely on welfare relating to unemployment (November 2016). This increase may in part be due to people moving across from employment support allowance (ESA) through the reassessment process.

One of the key challenges faced by the city is the elevated number of people who are economically inactive due to long term sickness. There were 13,380 ESA and incapacity benefits claimants in Plymouth in November 2016 (7.9 per cent of the working age population compared to 5.5 per cent in the South West or 6.1 per cent nationally). These figures have remained persistently static over the last few years risking a widening of economic, health, and social inequalities in the city.

4.1.8 COMPETITIVE ADVANTAGES

Plymouth is continuing to transform and re-balance its economy building a strong inward investment and export portfolio with a focus on productivity, higher value, and knowledge based industries. Our distinctive industry strengths are in advanced engineering, marine technology, and defence-related nuclear expertise as well as an emerging specialism in the health and life sciences sector. Plymouth is recognised for its strength across these industries with global companies and world-leading research institutions already based in the city.

The city is a global centre of excellence for marine science and technology with one of the largest clusters of expertise in Europe. The Marine Business Technology Centre has recently been launched and is based in the UK’s first marine Enterprise Zone at Oceansgate connecting marine related and supply chain businesses with the research knowledge base across the HotSW.

Plymouth has a location quotient\(^{113}\) of 9.90 (GVA), meaning that the marine industry in Plymouth is nearly 10 times more concentrated than the national average. The building of ships and floating structures and the building of pleasure and sporting boats in Plymouth boast location quotients of 40.5 and 42.0 respectively; around 40 times the national average.

The 2016 Business Register for Employment Survey (BRES) outlined how Plymouth alone accounts for 9.2 per cent of England’s entire marine industry. This is larger than the entire Solent LEP area, which accounts for 8.4 per cent. Marine manufacturing in Plymouth generates £408.6m in GVA. Productivity levels (GVA per FTE) for this sector stand at £51,718 (21.6 per cent above the Plymouth average of £49,770). This represents 10.7 per cent of the total Plymouth GVA and is forecast to grow by an average 1.0 per cent per annum to 2030.

\(^{112}\) Nomis (2016), Labour Market Profile, Out of work benefits ESA, November 2016 (accessed July 2018) [data file]. Available from: [https://www.nomisweb.co.uk/reports/lmp/la/1946157352/report.aspx](https://www.nomisweb.co.uk/reports/lmp/la/1946157352/report.aspx)

\(^{113}\) A location quotient (LQ) is a way of quantifying how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region ‘unique’ in comparison to the national average.
Plymouth also has the highest concentration of manufacturing employment on the south coast of Britain, providing opportunities in management, process engineering, and advanced manufacturing. Twelve per cent of Plymouth’s jobs are in the manufacturing industry, far exceeding the 8.3 per cent national average. Furthermore at least 7,100 of these jobs are in marine manufacturing, accounting for 21 per cent of the UK’s marine manufacturing capacity.

Plymouth’s ports provide an opportunity for the city to maximise its export potential and contribute to the UK’s international competitiveness. Plymouth’s ports handled over 2.3 million tonnes of cargo in 2017, up from 2.1 million tonnes in 2015. International ferry services also operate from Plymouth’s Millbay Docks, with one or two services per day to Roscoff in Northern France and a weekly service to Santander in Northern Spain. 449,000 ferry passengers travelled through Plymouth in 2015, making it the UK’s eighth most important passenger ferry port.

The fishing industry brings over £12 million in GVA to Plymouth each year and annually lands 13.2 per cent of England’s total fish catch putting Plymouth in the top three fishing ports in England. In 2016, 11.3 thousand tonnes of fish were landed at a value of £14.7m. Plymouth is the administrative port for approximately 500 fishing vessels (second only to Newlyn in the UK) and the administration port with the highest number of registered fishing vessels. In 2016, Plymouth supported 1,000 full-time fishermen which is more than any other port in the United Kingdom.

HM Naval Base Devonport (HMNB) is the largest naval base in Western Europe covering 650 acres, with 15 dry docks, four miles of waterfront, 25 tidal berths and five basins. It is currently home to the Type 23 frigates and the primary UK location for maintenance of surface ships and submarines including base-porting options for the future Type 26 and Type 31e frigates. HMNB Devonport is of vital importance to the UK’s defence capability and the city’s overall marine offer.

The naval base has world-class infrastructure and a highly skilled workforce which directly accounts for 14.1 per cent of the city’s economic value in terms of GVA and 10.1 per cent of Plymouth’s total employment. The dockyard and naval base encompasses facilities for highly specialised engineering work including the deep maintenance of nuclear submarines. Nuclear technologies are also a significant and growing component of activity at Devonport. With a new class of nuclear submarines coming into service in 2025, the older vessels will require decommissioning. This will mean further developing the skills and capacity of the workforce, both to maintain some of the country’s most expensive assets and to safely decommission the retiring fleet.

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115 Plymouth and South West Devon Joint Local Plan 2014-2034
The city also has an emerging specialism in the health and life sciences sector, anchored by one of Europe’s largest teaching hospitals which incorporates the region’s trauma centre, a teaching trust in partnership with Plymouth University, and a Ministry of Defence Hospital Unit employing around 150 military medical personnel. Plymouth’s health and life sciences sector currently represents 16.8 per cent of the total FTE employment in the city. This includes large public sector activity around healthcare, as well as specialised manufacturing of medical instruments, medical research, and digital technologies (e-health). The potential for growth in the sector is significant due to the wealth of research facilities and collaborative working, building on strengths at the University of Plymouth in artificial intelligence and augmented and virtual reality as well as other university partnering opportunities. Plymouth Science Park also represents a significant asset with the potential for development growth.

4.1.9 SKILLS SHORTFALL
According to the UK Commission for Employment and Skills’ 2017 Employer Skills Survey, 20 per cent of all vacancies are skill-shortage vacancies; this is a slight rise on 20 per cent in the 2015 survey. In line with previous years 33 per cent of vacancies were considered hard to fill and there was an 8 per cent increase in the number of skill-shortage vacancies compared with 2015 in the UK. While 13 per cent of employers reported skills gaps in their workforce shortages were particularly prevalent in some sectors across the UK; the density of such vacancies was highest in construction where over a third of vacancies (36 per cent) were considered skill-shortage vacancies (a similar level to 2015).

Data from the 2015 survey showed that there were 6,884 skills gaps identified across the city (including 7 per cent of the workforce determined as being not fully proficient in their roles). Profile of skills gaps in Plymouth:

- **high-skill**: 8.4 per cent (vs. England 37.1 per cent)
- **middle-skill**: 12.7 per cent (vs. England 23 per cent)
- **service-intensive**: 67.5 per cent (vs. England 19.6 per cent)
- **labour-intensive**: 11.4 per cent (vs. England: 19.8 per cent)

However only 10 per cent of recruits on their first job from school at the age of 16, or from University/other higher education institutions (HEIs), are reported as either ‘poorly’ or ‘very poorly’ prepared. This rises to 30 per cent for 17-18 year olds from Further Education college, and 37 per cent for 17-18 year olds from school. Of these 17-18 year old recruits, the main skills employers report as lacking are:

- **working world or life experience** (7 per cent, and 22 per cent respectively)
- **poor education/numeracy/literacy/other** (5 per cent and 11 per cent)
- **required skills or competencies** (5 per cent and 7 per cent)
- **common sense** (6 per cent and 4 per cent)
- **poor attitude/personality or motivation** (4 per cent and 4 per cent)
Development of most of these skills is aided through a STEM qualification or via work experience. Skilled workers tend to encourage innovation and are better at adapting and responding to changing work environments. Companies’ access to a larger pool of highly skilled workers can improve their productivity. The skills make-up of the UK, much like labour productivity, varies greatly across regions. Half of London’s working age population is classified as highly skilled, i.e. has competencies of Level 4 and above under the National Vocational Qualifications (NVQ) framework. In Plymouth, this proportion falls to 31.6 per cent, which ranks the city 42 out of 63 cities on this scale.\textsuperscript{116}

Improving basic skills, such as numeracy and communication, in school and college leavers is seen by many UK businesses as pivotal for boosting productivity. At a national level, 62 per cent of UK businesses are dissatisfied with school and college leavers’ business and customer awareness, and just over half expressed dissatisfaction with their analytical skills.\textsuperscript{117}

Matching skills with employers’ needs, particularly in sector growth areas was identified as a challenge in the last Plymouth Report and addressing future skills shortages continues to be a concern, especially in the context of leaving the EU. Future demand for construction skills is likely to increase and this could put flagship construction programmes at risk. As well as construction, EU migrant labour represents particular skills sets in academia, advanced engineering, manufacturing, tourism, and care. Fifty per cent of all EU workers in the South West are employed in the manufacturing and retail/hospitality industries. In 2016 it was estimated that just over 4 per cent of Plymouth’s working age population (roughly 11,000) were from EU countries, compared to 5 per cent nationally.\textsuperscript{118}

The Building Plymouth programme ensures that the city is invested in upskilling the resident community to meet the demand for construction workers. Consideration is also being given as to how this model can be applied to other sectors including manufacturing, hospitality, and healthcare.

4.1.10 EDUCATION AND SKILLS (POST 16)

Local data from Careers South West for February 2019 illustrates that the percentage of pupils in education, training, or employment is 90 per cent. The rate of care leavers who are participating in education, employment, or training is 58 per cent, which is slightly higher than the England average of 51 per cent.\textsuperscript{119}

Plymouth’s approach to technical education is published in the city wide STEM strategy, developed in partnership with education, academic, and business stakeholders and is chaired by the University of Plymouth. The strategy was developed in recognition of the need for greater STEM skills and to retain and attract STEM talent in the city through promoting parity between academic and technical routes. As part of the city-wide post 16 education review of the curriculum the city is preparing for the introduction of new T level qualifications through initial discussions with the Gatsby Foundation.

\textsuperscript{117} KPMG, Improving UK regional productivity performance, November 2017
\textsuperscript{118} Plymouth City Council, Policy and Intelligence Team, 2016
\textsuperscript{119} Department for Education, 2017/18 Statistical first release data, published October 2018 [data file]
Schools currently provide career education, information, advice, and guidance for their pupils however evidence from employers suggest that there are still gaps in the skills required to grow and expand their businesses, as well as providing for succession planning. Employer productivity improvements are held back by shortages and lack of skills in the local labour market. Businesses are an essential part of the local conversation to re-engineer the education and skills landscape so that industry directly benefits from developing the local workforce. This includes being able to influence appropriate training to match current and future skill requirements, and particularly pre-empting the skills associated with new technologies.

Nationally, apprenticeship starts have declined which is believed to be due to the impact of the apprenticeship levy. Locally, Plymouth’s volume of apprenticeship starts has also declined (3,560 in 2016/17 reducing to 2,520 in 2017/18). However, the quarter one 2018/19 figures (largest out turn period) for Higher Level (HL) apprenticeships starts is 120 which is 80 per cent of available HL apprenticeships. This is much higher than the regional (52 per cent) and the national figure (48 per cent).

For those aged 25+, the current employment support offer is not suitable, nor flexible enough to help them enter employment opportunities or change careers. There needs to be a more creative approach to the re-training of people aged over 25 with more on-the-job training routes being made available.

4.1.11 GRADUATE RETENTION

Plymouth has three Higher Education Institutions (HEIs) that collectively employ 3,125 FTE staff. These organisations contribute hugely to the city’s economy, with Plymouth University alone contributing £468 million to the city.

However, Plymouth is underperforming compared to the national average across a number of measures of productivity and business competitiveness. Ensuring that the skills developed in HEIs in Plymouth meet the skills required locally can help to address this (alongside other interventions). Low graduate retention and the leakage of the city’s young talent can be seen to hold back the knowledge-based growth that the city aims to deliver. Despite the city having approximately 26,000 students, Plymouth suffers with a net graduate out-migration.

National research (Department for Business, Innovation & Skills (BIS) analysis paper No. 2) shows that a 1.0 per cent increase in the share of the workforce with a university degree raises the level of long-run growth by 0.2 to 0.5 per cent. A fresh supply of graduates is also needed to keep up the production of intangible assets, such as training, marketing, and software design. Evidence shows that Plymouth has a lower than average proportion of people with graduate level skills in the economy in addition to under-utilisation of skills. This suggests the need for a combined approach to create additional higher skilled jobs for the workforce and encourage more graduates to stay in the city.

121 Ibid.
FOCUS ON...

THE VALUE OF INCLUSIVE GROWTH IN TACKLING POVERTY

Inclusive Growth is a term commonly used to address growing concerns that the benefits of economic growth are not equally shared. Defined by the OECD as "growth that is distributed fairly across society and creates opportunities for all", many local authorities use alternate terms such as ‘economic fairness’ to describe their own efforts to promote inclusive growth. Plymouth Growth Board currently uses the definition “Growing prosperity that reduces inequality and is sustainable”.

The general assumption is that promoting economic growth increases total income in society, creating more jobs and income which could be redistributed. Economic growth has been a major factor in reducing the levels of poverty over the past 100 years, however it is not necessarily the case that income and wealth will trickle down to the poorest. In fact, economic growth can widen relative poverty because it benefits the highly skilled and wealthy classes more than those at the bottom.

Research shows that while growth can be beneficial for the incomes of the poor, the relationship depends on context and in particular the spatial and sector composition of growth.

Growth at city level can reduce poverty by raising wages and/or increasing employment. There are however, important caveats to this.

- Many of those in employment remain poor – the hidden face of in work poverty.
- All employment is not equal – quality of jobs (hours worked, wage level etc.)
- Ability of groups in poverty to secure new employment opportunities.
- Wage progression.
- Spatial factors such as transport infrastructure and costs.
- A focus on addressing labour demand through commuting and migration.

There are clear implications for local policy makers to ensure that local economic growth translates into jobs for those at risk of, or in, poverty. Possible interventions include the skilling-up of deprived groups, recruitment, management and governance practices that promote a diverse and engaged workforce, and living wage campaigns. The diversification of new jobs is also important to prevent any widening of inequalities across the city. There is also a need to build strong relationships between interventions aimed at delivering inclusive growth, and those more focused on the health and social wellbeing of the individual and family. The extent to which this has happened within Plymouth has not yet been assessed, but doing so could present opportunities for the city to unite and act on.

122 https://www.economicshelp.org/macroeconomics/inequality/policies_reduce_poverty/
123 Kraay 2006, Loayza & Raddatz 2010
INFRASTRUCTURE - all the public systems, services and facilities that are necessary for economic and social activity, including roads, telecommunications, power and water supplies. Collectively they constitute the physical and social foundations of a strong society.

The average property price in Plymouth has increased from £147,000 to £175,000 in the past five years which is an increase of 19%.

The Plan for Homes has supported the delivery of 4,462 in the first four years.

Superfast broadband coverage in Plymouth (>24Mbps) is 99.2% compared to 96% across the UK.

Transport investment for Plymouth averages £35 per head compared to a national average of £98 per head leaving our region some £2bn behind other areas.

There are approximately 1,800 formal bus stops within Plymouth.

There are 666 miles of footways alongside roads within Plymouth.

Plymouth’s coastal setting includes 30 miles of waterfront.

13,578 Plymouth homes are estimated to be in fuel poverty.

28% of Plymouth households do not have access to a car or van.

Average private rental prices - £400pcm for room in a shared house to £1,160 for 4+ bedroom house.

The average train journey time of 3 hours 15 minutes from London to Plymouth. Seven of the ten busiest sections on Highway’s England’s network in the South West occur on the A38 between Plymouth and Exeter.

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Infrastructure includes all the public systems, services, and facilities that are necessary for economic and social activity, including roads, telecommunications, and power and water supplies. Collectively they constitute the physical and social foundations of a strong society.

Infrastructure provision is crucial for sustainable development. The successful delivery of growth will be, to a large extent, dependent on significant improvements to, and investments in, infrastructure. Although much can be achieved through making more efficient use of existing infrastructure such as transport systems and schools, the potential to deliver economic growth and quality of life improvements will be constrained without the delivery of some targeted programmes and projects.

The Infrastructure Needs Assessment (INA) prepared as part of the Plymouth and South West Devon JLP identifies a need for 475 infrastructure projects with a total value of over £1.8 billion for the 20 years of the plan period. Since 2014, 48 of these projects have commenced or been completed, with a total value of £377 million. The specific infrastructure interventions identified for Plymouth’s growth areas are seen as the primary projects needed to deliver a step change in growth and quality of place; this includes transport, public realm, and greenspace projects.

Within the Plymouth Policy area, a total of 316 infrastructure projects have been identified, totalling £1.7 billion. Of these, about half are considered to be key infrastructure projects indicating that they are either critical or necessary for the delivery of growth. One hundred and forty two projects are identified as required in the short term, i.e. the period 2017-22. Transport projects are the highest value sector overall with 107 projects valued at £603 million.

Plymouth City Council’s Capital Programme has been aligned with the Plymouth Plan and JLP to deliver these infrastructure requirements. The capital programme currently runs to approx. £100 million per year of which 50 per cent is on city infrastructure, and a further 10 per cent is on infrastructure maintenance. There is also a close relationship between the JLP councils and the HotSW LEP, ensuring that all plans and associated infrastructure programmes are aligned across the region.
5.1 HOUSING

The delivery of housing is central to the city’s growth agenda. Building the right type of homes, in the right place, at the right price, while creating quality environments, is necessary for Plymouth’s citizens to thrive. Without a new and improved supply of the right homes, the economic and physical regeneration of the city will be constrained.

The Joint Local Plan (JLP) for Plymouth and South West Devon seeks to deliver 26,700 new homes, of which 6,600 should be affordable, by 2034 across the two policy areas of Plymouth and the Thriving Towns and Villages of South West Devon. Seventy one per cent of the new homes (19,000) are to be built in the Plymouth policy area, including 4,550 new affordable homes, and 7,700 new homes in the Thriving Towns and Villages policy area therefore meeting the needs of the Housing Market Assessment in full. The homes will be a mix of housing sizes, types, and tenures that reflect the city’s housing needs and pressures.

5.1.1 CURRENT HOUSING PROFILE

Plymouth has approximately 117,210 dwellings.\(^{124}\) A profile of Plymouth’s housing stock, taken from the 2011 Census, shows that Plymouth has less detached houses than regionally or nationally and more terraced houses and flats (Figure 9). Detached homes account for just over 10 per cent of Plymouth’s housing stock compared to 22 per cent nationally, whereas a third (33.5 per cent) are terraced compared to 24.5 per cent nationally.

Figure 9: Breakdown of property type (2011 Census)

\(^{124}\) Table 100 Dwelling Stock, MHCLG Live Tables, 2017
Plymouth has a larger proportion of smaller dwelling types with one bedroom homes accounting for 15 per cent of properties compared to 11.7 per cent nationally. Conversely, there is a smaller proportion of larger homes, with 14 per cent having four or more bedrooms compared to 19 per cent nationally.

As shown in Figure 10, Plymouth has comparatively more properties in lower council tax bands than regionally and nationally and less in the higher bands.

**Figure 10: Percentage of properties in each council tax band**

In comparison with the UK (64.1 per cent), and much of the South West (68.0 per cent), Plymouth has relatively low levels of owner occupation (59.5 per cent). There are higher levels of private rented housing (20.2 per cent as opposed to 17.1 per cent regionally and 16.8 per cent nationally). Analysis of the change in tenure profile from 2001 indicates Plymouth has seen an above average increase in the private rented sector. Plymouth also has higher levels of social rented housing (19.3 per cent as opposed to 13.3 per cent regionally and 17.7 per cent nationally). From 2001 to 2011 the number of privately rented households increased by 65.3 per cent.

Tenure patterns reveal high concentrations of owner occupation in the east of the city in particular. Lower levels of owner occupation are evident in the south and west of the city, corresponding to higher proportions of social rented tenure homes (Figure 11).

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125 ONS Census 2011
Plymouth’s average household size remained relatively constant between 2001 and 2011 at 2.29 persons per household which was also the picture seen nationally.126

A range of information on Plymouth’s housing characteristics can be found in the Plymouth and South West Devon Joint Local Plan Evidence Base.

5.1.2 STUDENT ACCOMMODATION
As outlined in section 2.2.1 Plymouth has a significant student population. Many first-year students live in halls of residence, private purpose-built halls, or, to a lesser extent, in student housing (flats and houses in multiple occupation). The majority of the remaining undergraduate students (including international) are in private accommodation sourced privately in the city or through the Student Union Letting Agency or the universities’ accredited lists. Postgraduate students are more likely to be in private housing or purpose built private halls.127

126 ONS Census 2001 and 2011
127 Plymouth and South Devon Joint Local Plan SHMA, Peter Brett Associates, 2017
Current housing problems experienced by the students of the universities relate to contract lengths not matching student’s needs, high and unclear fees from letting agents, high upfront costs, and poor stock condition. There is no current plan to increase the size of the University of Plymouth and the aim is to maintain the current student population size for the next five years. The University of St Mark and St John and the Plymouth College of Art plans to grow over the next 10 years which could mean there will be around 1,200 additional students looking for accommodation within the private rented sector, equating to around 300 dwellings.

As the average annual increase in the private rented sector between 2001 and 2011 was 6.5 per cent in Plymouth, analysis shows that the housing market should be able to absorb the growth required in this sector to house the expanding student population comfortably. Therefore it is unlikely that increased demand from students will drive rental prices up however this is something the city needs to monitor.

**5.1.3 HOUSES IN MULTIPLE OCCUPATION**

Houses in multiple occupation (HMOs) are houses that are occupied by more than one household and where common areas such as bathrooms and kitchens are shared, they are often called house shares. There are an estimated 6,000 private rented HMOs in Plymouth.

Students currently occupy significant numbers of HMOs, although the universities have a strategy to provide alternative accommodation through purpose built halls of residence. Government benefit changes will mean a potential for an increased demand for HMOs by non-students under 35 years of age (of around 800 people), potentially increasing this housing sector.

**5.1.4 HOUSING DECENCY**

In Plymouth, around one in five households are privately rented, which is higher than the national average. Around a third of Plymouth’s private sector homes are in poor standard (i.e. a combination of being cold, having health and safety hazards, in a state of disrepair, and/or without modern bathroom or kitchen facilities) which equates to over 7,500 households in the city.\(^{128}\) The estimated repair cost to bring them all to a decent standard is £170 million. About 12,000 private rented homes in the city are energy inefficient and are wasting heat, energy, carbon, and money. A further 5,000+ social houses are considered to be non-decent. In its final report, the Plymouth Fairness Commission highlighted high numbers of private landlords who were not aware of their obligations in terms of maintaining the standard of properties, and recommended that a comprehensive and resourced response to raising standards should be a priority.\(^{129}\)

Twenty one per cent of dwellings (24,000 homes) have category one hazards (2014/15). The most common category one hazard failure across the private sector is excess cold, followed by falls on stairs and falls on the level. Hazards are most commonly found in private rented housing.\(^{130}\) A locality analysis shows that the Plympton area has the greatest proportion of decent stock. The southern localities, the South East and South West, are responsible for some of the greatest challenges in terms of decent stock. Together, they account for 45 per cent of the non-decent dwellings and show the greatest proportions of non-decent dwellings compared to overall housing stock.

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\(^{128}\) Plymouth Plan Local Housing Topic Paper
\(^{129}\) Creating the conditions for Fairness, Plymouth Fairness Commission, 2014
\(^{130}\) Devon STP: Housing Challenge Paper, Public Health England and Public Health, January 2018
There is a correlation between non-decent housing and areas of deprivation, poor health and wellbeing outcomes, and areas where acquisitive crime is higher. This suggests significant inequalities in housing quality, particularly for certain groups such as those on a low income, vulnerable families, and migrant workers, who are increasingly being reported as living in poor conditions.\textsuperscript{131} Non-decent housing contributes to poor health, lower educational attainment and is a recognised contributor to, and symptom of, child poverty, with approximately a third of non-decent housing occupied by people in receipt of some sort of benefit.\textsuperscript{132}

Non-decent housing is also strongly linked to fuel poverty. A household is deemed to be in fuel poverty if it has an income below the poverty line (including if meeting the required energy bill would push it below the poverty line) and if it has higher than typical energy costs. In Plymouth there are an estimated 13,578 households (11.8 per cent) in fuel poverty which is slightly above the national figure of 11.1 per cent.\textsuperscript{133} Households experiencing fuel poverty will have less ability to heat the home to the levels required to maintain good health. Earnings below the national average and a high affordability ratio of housing will inevitably impact on people’s ability to pay to heat their house.

5.1.5 HOUSING NEED

As outlined in section 2.4.1, the city has seen a rise in homelessness and families living in temporary accommodation. There are currently 12,794 households on the housing waiting list of which 8,560 are in priority need. There is also a high demand for one bed units (over 6,000) and larger family homes which have very limited ‘churn’.\textsuperscript{134} With a growing and ageing population, increasing numbers of people in the city are living with a long term health condition or disability (20.4 per cent)\textsuperscript{135} and there are currently 330 Plymouth households that require wheelchair accessible housing. It is therefore critical that the city’s housing delivery achieves the best value in terms of housing outcomes whilst meeting a wide range of housing needs such as extra care housing for older people, wheelchair accessible housing, homes for both single people and couples without children, as well as larger family homes.

5.1.6 HOUSING DELIVERY

The recent upturn in housing delivery is due to the range of initiatives that have been introduced through the Plan for Homes, a response to the need to drive accelerated housing delivery to address the city’s housing needs. This was originally launched in November 2013 and refreshed in April 2016. The Plan for Homes (2014-2019) had an aspiration of creating 5,000 new homes in five years. The figures suggest that the city is on track to exceed this ambition having supported the delivery of 4,462 new homes (gross) in the first four years, of which 1,108 were affordable (24.8 per cent). This figure coupled with the number of homes under construction as at April 2018 of over 1,400 suggests the city will achieve the 5,000 homes in five years (by March 2019).

\textsuperscript{131} Private Sector Housing Stock Conditions, Plymouth City Council, September 2011
\textsuperscript{132} Plymouth Director of Public Health Annual Report 2015/16
\textsuperscript{133} Sub-regional Fuel Poverty Data 2018, Department for Business, Energy and Industrial Strategy
\textsuperscript{134} Devon Home Choice, Plymouth Register accessed 01 November 2018
\textsuperscript{135} Strategic Housing Market Needs Assessment, 2017
Completed schemes demonstrate enhanced housing outcomes on these sites and include extra care housing for older people and people with learning disabilities, service veteran’s self-build homes, and wheelchair and accessible homes. The level of affordable homes on these sites are above policy levels (51 per cent) and the city also has the largest affordable Passivhaus Scheme in the country.\textsuperscript{136}

Plymouth also has a strong track record of affordable homes delivery and is the first out of 13 authorities in its Housing Family Group\textsuperscript{137} for affordable housing delivery over the past five years (Plan for Homes period).

\textsuperscript{136} “A Passivhaus is a building in which thermal comfort can be achieved solely by post-heating or post-cooling the fresh air flow required for a good indoor air quality, without the need for additional recirculation of air.” - Passivhaus Institut (PHI) “Passivhaus buildings achieve a 75 per cent reduction in space heating requirements, compared to standard practice for UK new build. The Passivhaus standard therefore gives a robust method to help the industry achieve the 80 per cent carbon reductions that are set as a legislative target for the UK Government” (Passivhaus Trust).
The recently launched Plan for Homes 3 has re-stated the ambition to deliver at least 1,000 new homes each year over the next five years. It builds on the successful Plan for Homes programme launched in 2013, updating and extending it to 2024. It establishes a Housing Investment Fund with a first delivery programme allocation of £15.8 million in the Capital Programme, to directly support increased and accelerated delivery of new homes to help address identified housing needs and to support the growth agenda. The Plan for Homes 3 has three strategic housing themes at its heart: improving housing conditions and broadening choice; supporting the delivery of the Joint Local Plan housing numbers; and establishing a Housing Investment Fund. These will be supported by a range of housing, planning, and service initiatives to meet identified housing needs and tackle homelessness and poor housing conditions.

5.1.7 HOUSING VALUE AND AFFORDABILITY
According to the National Housing Federation, the South West is facing a combination of high house prices and low wages resulting in an acute housing crisis.\textsuperscript{138} Plymouth house prices have risen every year since 2011 (with the exception of 2013), showing a rise of nearly 20 per cent in the city since 2011. The average property price in Plymouth has increased from £146,967 to £175,339 in the past five years which is an increase of just over 19\%.\textsuperscript{139}

\begin{footnotesize}
\textsuperscript{138} Home Truths 2016/17: The housing market in the South West, National Housing Federation, 2017
\textsuperscript{139} Land Registry UK House Price Index for City of Plymouth December 2013 - 2018
\end{footnotesize}
Despite these increases in house prices, the gap compared to England is widening. House prices in England are 41 per cent higher than they are in Plymouth and the average house price in England is rising more than eight per cent higher than in Plymouth.\textsuperscript{140}

**Figure 14:** Average property price (all property types) in Plymouth, December 2015 to 2018 (Land Registry)

![Average property price graph](image)

The most up to date ratio of mean house prices to mean incomes in Plymouth is 7.9.\textsuperscript{141} Although this is more affordable than most parts of the South West, it is significantly above the usual lending formulae for mortgages which is still based on 3.5 times gross income. Therefore housing affordability is still a big issue and while house prices continue to increase more than wages the gap will widen. This often impacts on local people and those trying to get on the housing ladder.

The city’s lower housing costs could be a draw for people seeking more affordable housing or relocating from other more expensive parts of the country to take advantage of the quality of the surrounding natural environment that living in Plymouth can bring. However, barriers to affordability can exist to those moving to Plymouth from lower cost housing areas in other parts of the country as it can be expensive to relocate given the difference in the cost of housing. At the other end of the scale the city also has a limited mid to high-end housing offer which may make the city a less attractive option to work in for some in the higher occupation ‘managers, directors and senior officials’ group who may choose to live outside the city and commute in.

Average private rental prices in the city range from £400 per calendar month (pcm) for a room in a shared house to £1,160 pcm for a four or more bedroom house.\textsuperscript{142} Private rents in Plymouth are significantly lower than the England average however rent is approximately equivalent to 29 per cent of earnings in Plymouth (comparable with the national average of 30 per cent). This compares favourably with South Hams and West Devon where rent is 34 per cent and 36 per cent of earnings respectively.

\textsuperscript{140} Land Registry, July 2018, UK House Price Index

\textsuperscript{141} Home Truths 2017/18

\textsuperscript{142} VOA administrative database as at 31 March 2018 (from ONS)
Average social rents in the city range from £278 for a one bedroom property to £423 for a four bedroom property. The costs of socially rented properties are significantly below those for private rented housing, particularly for larger homes, indicating a significant potential gap between the social rented and market sectors.143

See the Plan for Private Rented Accommodation and associated charter developed in partnership with local landlords, to improve the quality of private rented housing as well as take action against rogue landlords.

5.2 DIGITAL CONNECTIVITY

The government has stated that 15 million premises are to be connected to full fibre by 2025 and most people across the UK will have 5G coverage by 2027.144 Plymouth’s superfast broadband coverage (>24Mbps) at 99.2 per cent is greater than across the UK as a whole (96 per cent).145

Although these are better than the national average, our relative position for digital connectivity has slipped over recent years. This is particularly evident in the city’s coverage for the much faster full fibre network which is capable of speeds of up to a gigabit. Plymouth has only 0.7 per cent coverage of full fibre compared to the national average of 6.5 per cent, and lags behind compared to our regional partners.146 In order for our businesses to keep pace in today’s markets, the city will need a significant expansion in the availability of the full fibre gigabit-enabled network. This will ensure that the city continues to be an attractive location for companies to locate and grow, as well as providing the right environment to support innovation and greater digital uptake for all our businesses.

Plymouth, South Hams and West Devon are due to receive £3 million in government funding from the Local Network Full Fibre Challenge Fund to boost gigabit speeds across the region. Improved ultrafast ‘Fibre to the Premises’ (FTTP) broadband will be rolled out to over 220 public buildings across the area over the next two years. The buildings include council offices, GP surgeries, hospitals, schools, colleges, and many others. This investment will significantly extend access to full fibre networks making it easier and cheaper for businesses and homes to connect.

Full fibre networks, with connections that allow download speeds of up to a gigabit per second (Gbps), will help Plymouth and its neighbouring rural areas to grow and adapt, taking advantage of modern technology that will benefit public services including healthcare and education, as well as private businesses and homes.

143 Plymouth and South Devon Joint Local Plan SHMA, Peter Brett Associates, 2017
144 HM Government, July 2018, Future Telecoms Infrastructure Review
146 Ibid
5.3 **NATURAL CAPITAL**

Accounting for inlets, Plymouth’s coastal setting, includes 30 miles of waterfront, is arguably the city’s most valuable asset and is central to its identity as Britain’s Ocean City and vision to become ‘one of Europe’s most vibrant waterfront cities’. Plymouth offers a high quality of life; enclosed by both Plymouth Sound and Dartmoor and coupled with three Sites of Special Scientific Interest, the city’s natural capital assets are unparalleled.

Plymouth Sound and Estuaries contains a wealth of rare and diverse wildlife, a significantly important port, and industries reliant on the marine environment. It also forms an arena for communities to interact with the natural environment. Plymouth is therefore in a strong position to become the UK’s first National Marine Park which would bring together existing protections including marine protected areas, marine conservation zones, and the Plymouth Sound and Estuaries Special Area of Conservation.

The area is reliant on abundant natural assets, and the ecosystem services that derive from them, to power economic growth through tourism and employment in sectors that depend directly on natural capital such as agriculture and fisheries. There is more potential for increasing economic benefits from natural capital than in any other region. Many of the digital industries for example cite natural and cultural capital as prerequisites before making investment and locational decisions: the quality of the South West's natural capital is a significant draw and part of its essential character.

5.4 **TRANSPORT**

The patterns of travel in and around Plymouth, and the wider area, result in a complex series of interactions between a large number of people and different modes of transport. These choices are themselves influenced by many local and national factors including cost, time, convenience, user experience, and availability of various modes of transport.

5.4.1 **METHOD OF TRAVEL**

As shown in Figure 15, the majority of journeys to work in Plymouth are made by car. The highest proportions of residents using this mode of transport are found in the Chaddlewood, Goosewell, Tamerton Foliot, and Woolwell neighbourhoods. The lowest proportions of people driving to work are found in Plymouth’s central areas as well as a small pocket around Derriford.\(^{147}\)

\(^{147}\) Plymouth and South West Devon Joint Local Plan Baseline Transport Conditions Report, WSP/Parsons Brinckerhoff, February 2017
Figure 15: Method of travel to work by all residents aged 16-74 in employment, by Plymouth and South West Devon JLP Planning Authority (2011 Census)

However, 28 per cent of Plymouth households do not have access to a car or van; slightly higher than the England and Wales average of 26 per cent, and substantially higher than in the neighbouring authorities (South Hams and West Devon 13 per cent each; and Cornwall 17 per cent). The majority of the city south of the A38 (the Parkway) has lower than average vehicle ownership. More than a third of households have no access to a vehicle in North Prospect, Keyham, Mutley, the East End, and Stonehouse, rising to more than half of households in the City Centre and Devonport. Residential neighbourhoods on the edge of the city have the lowest levels of non-car or van availability; in particular Woodford (13 per cent) and Chaddlewood (8 per cent) on the eastern fringe, and Roborough (12 per cent) on the northern fringe.

Seventy four per cent of residents aged 17 or over hold a full driving licence, although there is a gender imbalance in licence holding – 80 per cent of men versus 68 per cent of women. Only one-third of 17-20 year olds hold a full driving licence.
5.4.2 TRAVEL TO WORK
ONS data relating to commuting patterns indicates that Plymouth is relatively self-contained in terms of employment, with 67 per cent of all workers usually resident in the city also working there. However, there is variation in the levels of self-containment in different parts of the city. Areas which are least reliant on employment in the city (less than 79 per cent of residents commuting to jobs in the city) are either those on the urban fringes; Roborough, Plympton, Chaddlewood, Woodford, and Plympton St Maurice or in central areas such as Mutley and the city centre. However, when account is taken of commuting to urban fringe employment sites (located in South Hams) then all parts of the city have at least four in every five residents working there.

5.4.3 ROAD SAFETY
The number of people injured in road collisions reduced by a third between 2000 and 2015. 810 people were injured on Plymouth’s roads in 2015. Of these, 68 per cent involved pedestrians and powered-two wheeler users. Conversely car occupants account for 60 per cent of slight injuries. A study of the causes of collisions in the city has revealed that the majority of injuries arose as a consequence of user error, with car drivers and passengers aged 17-24 years being the most commonly injured, and accidents most likely to happen between 7am to 9am and 3pm to 6pm.

5.4.4 BUS TRAVEL
An extensive network of bus services cover Plymouth and its fringes. Most local bus services start, terminate, or call at one of the stops on Royal Parade in the city centre and many services operate on a loop through city centre streets (Mayflower Street, Western Approach, Union Street, Derry’s Cross, Royal Parade, Exeter Street, Charles Street) before radiating out along key corridors to serve the city. There are approximately 1,800 formal bus stops within the local authority area. Whilst bus journeys from most parts of the city to the city centre may be straightforward (and to a lesser extent for travel to other local hubs such as Derriford Hospital), orbital or cross-city journeys tend to involve interchange between services. As a consequence these journeys have a resultant time penalty and can require a walk between different stops to complete the journey.

5.4.5 BUS PATRONAGE, PUNCTUALITY AND RELIABILITY
Bus patronage in Plymouth showed a decline in 2017/18, with 2.9 per cent fewer journeys across the network when compared with 2016/17. This reduction reflects the national trend which is linked to the general slowdown in the economy, less disposable income, more internet shopping, and more working from home. Locally, major roadworks on the northern corridor had a significant impact on bus service reliability and this, coupled with the severe winter weather in February and March, contributed to the decline locally.

The annual bus passenger survey conducted by Transport Focus concluded that overall satisfaction with local bus services was 96 per cent, in line with the national average. Both major Plymouth operators performed better locally than across their group average nationally. Satisfaction with punctuality was lower with a citywide average of 82 per cent, but again higher than their national group average of 76 percent.

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148 Plymouth and South West Devon Joint Local Plan Baseline Transport Conditions Report, WSP/Parsons Brinckerhoff, February 2017
5.4.6 RAIL TRAVEL

Plymouth Rail Station on North Road East in the city centre is the busiest of the six stations in the city and acts as the primary gateway for long distance rail travel for the wider region. Just over 2.5 million passenger entries and exits were recorded at Plymouth Rail Station in 2016/17, making it the busiest in the far South West. It is also an important interchange station between long-distance and local services.

Table 6 shows the entries and exits at each of the stations in Plymouth, and selected stations in adjoining areas, calculated from ticket purchases. It highlights the substantial growth in passenger numbers from most stations in the city and its commuter hinterland. It should be noted that these statistics are likely to under-report passenger numbers due to ticketless travel from smaller unstaffed stations.

Table 6: Entries and exits at National Rail stations in the JLP area and selected other local stations

<table>
<thead>
<tr>
<th></th>
<th>1997/98</th>
<th>2006/07</th>
<th>2016/17</th>
<th>% change 97/98 to 16/17</th>
<th>% change 06/07 to 16/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plymouth</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plymouth</td>
<td>1,294,698</td>
<td>1,845,958</td>
<td>2,509,452</td>
<td>94%</td>
<td>36%</td>
</tr>
<tr>
<td>Devonport</td>
<td>38,189</td>
<td>19,655</td>
<td>41,404</td>
<td>8%</td>
<td>111%</td>
</tr>
<tr>
<td>Dockyard</td>
<td>6,005</td>
<td>5,335</td>
<td>4,728</td>
<td>-21%</td>
<td>-11%</td>
</tr>
<tr>
<td>Keyham</td>
<td>8,421</td>
<td>7,976</td>
<td>9,122</td>
<td>8%</td>
<td>14%</td>
</tr>
<tr>
<td>St Budeaux Ferry Road</td>
<td>1,357</td>
<td>1,037</td>
<td>3,976</td>
<td>193%</td>
<td>283%</td>
</tr>
<tr>
<td>St Budeaux Victoria Road</td>
<td>4,991</td>
<td>5,264</td>
<td>8,034</td>
<td>61%</td>
<td>53%</td>
</tr>
<tr>
<td>Devon</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ivybridge</td>
<td>19,683</td>
<td>59,108</td>
<td>55,518</td>
<td>182%</td>
<td>-6%</td>
</tr>
<tr>
<td>Totnes</td>
<td>295,522</td>
<td>433,400</td>
<td>667,730</td>
<td>126%</td>
<td>54%</td>
</tr>
<tr>
<td>South Hams</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totnes</td>
<td>295,522</td>
<td>433,400</td>
<td>667,730</td>
<td>126%</td>
<td>54%</td>
</tr>
<tr>
<td>West Devon</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bere Alston</td>
<td>33,875</td>
<td>26,866</td>
<td>40,978</td>
<td>21%</td>
<td>53%</td>
</tr>
<tr>
<td>Bere Ferrers</td>
<td>15,184</td>
<td>10,824</td>
<td>16,000</td>
<td>5%</td>
<td>48%</td>
</tr>
<tr>
<td>Okehampton</td>
<td>-</td>
<td>-</td>
<td>5,926</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sampford Courtenay</td>
<td>-</td>
<td>-</td>
<td>144</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Cornwall</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liskeard</td>
<td>193,439</td>
<td>267,864</td>
<td>358,324</td>
<td>85%</td>
<td>34%</td>
</tr>
<tr>
<td>Gunnislake</td>
<td>33,462</td>
<td>43,676</td>
<td>54,510</td>
<td>63%</td>
<td>25%</td>
</tr>
<tr>
<td>Saltash</td>
<td>29,559</td>
<td>34,266</td>
<td>78,198</td>
<td>165%</td>
<td>128%</td>
</tr>
</tbody>
</table>
5.4.7 WALKING
There are 666 miles of footways alongside roads within Plymouth and most of the city’s off-road routes are available to both pedestrians and cyclists. According to Sport England’s Active People Survey 78.9 per cent of Plymouth residents walked for any purpose at least once a month (in line with the England average of 78.4 per cent). Census 2011 data shows that 14.7 per cent of Plymouth’s working residents walk to work, this is higher than the England and Wales average of 10.7 per cent. Much of the southern part of the city has a substantial proportion of working residents walking to work (more than 30 per cent of commuters in St Peter and the Waterfront and Drake wards and more than 20 per cent in Sutton & Mount Gould, Stoke, and Devonport), and a small concentration immediately surrounding Derriford Hospital.

5.4.8 CYCLING
According to Sport England’s Active People Survey 13 per cent of Plymouth residents cycle at least once a month for any purpose, less than the England average of 16.9 per cent and the regional average of 19.9 per cent. Census 2011 data shows that 2.6 per cent of Plymouth’s working residents cycle to work, the proportion has remained the same since the 2001 census, and is similar to the England and Wales average of 2.8 per cent.

149 DfT Walking and Cycling statistics, August 2018
5.4.9 STRATEGIC TRANSPORT CONNECTIVITY

Considered part of the far South West, Plymouth is located 230 miles from London with an average train journey to the capital of three hours 15 minutes and a route that is subject to low levels of reliability and resilience. The nearest core city is Bristol, located 120 miles, or two hours away.

5.4.10 SUB-NATIONAL TRANSPORT BODY

The South West was one of only two areas of the country not covered by an established, or shadow Sub-National Transport Body. Two new shadow bodies have been proposed to cover the whole of the South West – Peninsula Transport and Western Gateway. Plymouth will form part of the Peninsula Transport grouping together with Cornwall, Devon, Torbay and Somerset while the Western Gateway will comprise of Bristol, Gloucestershire, Wiltshire, Dorset. Both bodies will work closely together to ensure a joined up approach on areas of mutual interest. Peninsula Transport brings together the area’s five transport authorities to work directly with the Department for Transport on the strategic transport priorities for the region. It will involve both the Heart of the South West and Cornwall and the Isles of Scilly Local Enterprise Partnerships, alongside Highways England, Homes England and Network Rail. The focus is on strategic, transformational, and large scale infrastructure projects with the aim of enabling improvements in regional productivity and growth, including housing.

Road

The key to the realisation of growth in the city and wider region is the role of the A38, Plymouth’s main strategic road link (managed by Highways England). Effective operation and maintenance coupled with modernisation of the A38 to improve journey time reliability on the road network between Plymouth and Exeter is crucial to the growth of the city. It will also help address the challenge of low productivity faced in Plymouth caused, in part, by poor connectivity within the region to London and the rest of the UK.

Ensuring the resilience of the road network in the South West is vital. Currently, incidents which occur on the A38 lead to road closures and lengthy delays and diversions for traffic on the route. Highways England collects data on planned and unplanned road closures. Data obtained for the A30 and A38 between Bodmin and Exeter for five years showed that: In total on the A38 between Bodmin and Exeter there have been 1,570 unplanned closures in the past 5 years, this is equivalent to 6 closures a week. By comparison along a similar length of route there were 460 unplanned closures on the A30. Improvements that modernise the A38 present a real opportunity to strengthen the resilience of the transport network of the wider South West peninsula.

Traffic is forecast to increase on the A38 by around 30 per cent over the next 20 years. Without improvement, vehicle delays on the A38 will increase by over 100 vehicle hours per day per mile. The economy served by the A38 will struggle to achieve its potential if nothing is done. To deliver this plan and support regional growth, the city and the South West region need a modern A38, built to a motorway standard, accommodating planned growth and supporting the South West’s economy in the years to come.¹⁵⁰

¹⁵⁰ The A38 Case for Action – The Wider Economic Case for Investment in the A38 from Bodmin to Exeter, 20 June 2018
The ‘A38 Case for Action – The Wider Economic Case for Investment in the A38’ study indicates that the historic lack of strategic investment in the road is holding back regional economic growth. It shows that nearly £900m of productivity growth and investment would be gained by improving the A38 between Bodmin and Exeter. This would encourage new investment, business start-ups, and benefit growing industries such as aerospace, marine science, engineering, and renewables as well as the area’s well established tourism sector.

**Rail**
Increasing connectivity and capacity, together with improvements to rail network resilience, is vital to help meet Plymouth and the South West’s challenging growth agenda and unlock the city’s potential. The only major rail transport corridor of the far south west runs through Plymouth (from Exeter into Cornwall). Research has demonstrated that for every 100 minutes away from London, productivity falls by six per cent. A journey time reduction of 60 minutes would create a £1.2 billion uplift in GVA for the peninsula. Rail passenger growth in the South West peninsula, has reached 141 per cent in the South West since 1996, outstripping industry forecasts by 2-3.2 per cent per annum leading to overcrowding as demand outstrips supply. Growth in demand has meant that trains have become cramped, and overcrowded, whilst lack of investment and successive timetable changes has meant that services have also become more unreliable and slow.

The South West has lost out because of poor transport investment with spending on rail over the last five years in the South West region at £70 per head compared with a national average of £186 per head. Regional rolling stock is the oldest, dating back to the late 1970s. The Met Office says climate change incidents will become more frequent, and with Network Rail warning that the line at Dawlish will suffer closure every four years by 2065, the South West remains more vulnerable than many parts of the UK.

The Peninsula Rail Task Force’s ‘Closing the gap: The South West Peninsula Strategic Rail Blueprint’ sets out the priorities for investment in the peninsula’s railway network over the next 20 years and must be recognised in the new franchises for Cross Country and Great Western Railway. The priorities in the 20 year plan focus on:

**Resilience and reliability**
The events at Dawlish showed the need for greater resilience across the region’s transport networks with an ongoing impact on trade and commerce. The Dawlish mainline remains the top priority to ensure resilient and reliable services that travellers can rely upon. An adequate diversionary route between Exeter and Castle Cary via Yeovil is also required.

**Reduced journey time and improved connectivity**
The ambition is for faster journey times between our key UK markets, including to London from Taunton in 1:30hr, Exeter in 1:45hr, Plymouth and Paignton in 2:15hr and Truro 3:30hr with an earlier arrival into Plymouth from London by 09:00. The region seeks to at least match the average speeds on the West and East Coast which is 90mph - London to Plymouth is currently 69mph. Journey times can also be improved through maximising the trains bi-mode capability.

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151 The A38 Case for Action – The Wider Economic Case for Investment in the A38
152 Office of Rail and Road, statistical release, 2017
Capacity and Comfort
The ambition is to transform the region’s connectivity by increasing the frequency of trains, the number of seats and pioneering digital services to drive a world leading quality passenger experience through Wi-Fi and mobile connectivity across the rail lines in the South West and to/from the major centres e.g. Bristol and London.

5.4.11 LOCAL TRANSPORT CAPACITY INVESTMENT
Transport and accessibility create the conditions for growth. A combination of targeted infrastructure investment and complementary behavioural change programmes is required in order to support this growth of the city.

Between April 2018 and March 2022 Plymouth will benefit from over £105 million of planned investment in transport (Table 7). Almost 60 per cent of this will be through external grant funding including: £40.6 million Growth Deal 1 and 2 funding from the Local Enterprise Partnership; £9.5 million Growth and Housing funding from Highways England; and £8.3 million National Productivity Investment Funding from the Department for Transport.

In addition to this over £5m has been secured to support the redevelopment of Plymouth Station through Growth Deal 3 and from central government. The capital investment will be delivered alongside a comprehensive smarter choices behavioural change programme, designed to reduce traffic congestion through by providing and promoting realistic travel choice. For example, Personalised Travel Planning (PTP), which is a key part of the strategy, is designed to raise awareness, and use, of sustainable transport. In doing so, it encourages people to review their travel options and consider if there is a different travel mode which might be more convenient and could help them save time and money, explore new places, and become fitter and healthier. Through encouraging behavioural change it releases capacity on the network for vehicular trips thus accommodating the increase in travel demand associated with economic growth.
Table 7: Strategic growth area transport projects 2018 to 2022

<table>
<thead>
<tr>
<th>Growth area</th>
<th>Project</th>
<th>Total investment (approx.)</th>
<th>Delivery timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northern Corridor</td>
<td>Derriford Transport Scheme and Sendalls Way</td>
<td>£17.61 million</td>
<td>2018/19</td>
</tr>
<tr>
<td></td>
<td>Targeted capacity improvements, bus priority and enhanced walking and cycling provision</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Charlton Road</td>
<td>£0.8 million</td>
<td>2018/19</td>
</tr>
<tr>
<td></td>
<td>Road safety improvements at the junction of Charlton Road and the A386 Tavistock Road</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Northern Corridor Strategic Cycle Network (SCN)</td>
<td>£3.51 million</td>
<td>2016/17 to 2019/20</td>
</tr>
<tr>
<td></td>
<td>4.5 kilometres of the SCN with related pedestrian enhancements.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Northern Corridor Junction Improvements</td>
<td>£3.74 million</td>
<td>2018/19</td>
</tr>
<tr>
<td></td>
<td>Junction improvements, walking and cycling enhancements to Mannamead Road.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Woolwell to the George</td>
<td>£15.7 million</td>
<td>2021/22</td>
</tr>
<tr>
<td></td>
<td>Upgrades to junction at Woolwell and road widening between the Woolwell Roundabout and the George Junction.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Morlaix Drive</td>
<td>£4.73 million</td>
<td>2019/20 to 2020/21</td>
</tr>
<tr>
<td></td>
<td>Road widening to improve bus access to Derriford Hospital.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eastern Corridor</td>
<td>Eastern Corridor Strategic Cycle Network</td>
<td>£4.9 million</td>
<td>2016/17 to 2020/21</td>
</tr>
<tr>
<td></td>
<td>Five kilometres of the SCN with related pedestrian enhancements.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Eastern Corridor Junction Improvements</td>
<td>£3.34 million</td>
<td>2018/19 to 2019/20</td>
</tr>
<tr>
<td></td>
<td>Five year rolling programme of junction improvements along the Eastern Corridor including the A374 and A379 with walking and cycling enhancements.</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Forder Valley Link Road (FVLR)</td>
<td>£37.89 million</td>
<td>2018/19 to 2021/22</td>
</tr>
<tr>
<td></td>
<td>New 1 kilometre road linking Brest Road, to Forder Valley Road and Novorossiysk Road. Provision of bus, walking and cycling priority.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Forder Valley Interchange</td>
<td>£8.83 million</td>
<td>2018/19 to 2021/22</td>
</tr>
<tr>
<td></td>
<td>Improvements to the Forder Valley/ A38 Interchange.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City Centre</td>
<td>Charles Cross Transport Improvement Scheme</td>
<td>£4.8 million</td>
<td>2018/19</td>
</tr>
<tr>
<td></td>
<td>Upgrades to the Charles cross Roundabout to provide congestion relief.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The visitor sector is now worth £327 million per year and supports more than 7,640 jobs, which accounts for 7 per cent of Plymouth’s total employment.

86 per cent of respondents agree with the statement ‘I am proud of Plymouth’s place in history’.

Plymouth’s creative industries generate an estimated turnover in excess of £250 million per annum, with the sector worth £51.5 million GVA.

Plymouth is the UK’s first ‘social enterprise city’ - There are approximately 150 social enterprises in the city, employing around 7,000 people and bringing in an income of more than £500 million.

2020 marks the 400th anniversary of the sailing of the Mayflower from Plymouth UK to Plymouth Massachusetts.

The University of Plymouth is the UK’s 15th largest university, with more than 21,000 students.

Plymouth’s businesses export £329m goods to the EU and £430m outside the EU.

Visitor spend in Plymouth £322 million in 2016.

5,116,000 People visited Plymouth in 2016.

The Box, Plymouth’s new £38m cultural centre, will open in 2020 as the flagship building for the Mayflower 400 commemorations.

Visitor spend in Plymouth £322 million in 2016.

OFFICIAL

INTERNATIONAL CITY - projecting Plymouth’s reputation to the wider world, to people who might invest or visit the city, and the sense of pride local people take in their city.
One of Plymouth’s core objectives is to secure its place as an ‘international city’; one that is renowned as Britain’s Ocean City and is the UK’s premier marine city, famous for its waterfront. Projecting the city in this way raises Plymouth’s prosperity and wellbeing through increased investment, tourism, and cultural experience. It also supports and is impacted by the ‘Healthy’ and ‘Growing’ agendas, which are closely linked.

Overall, the international agenda aims to achieve a virtuous circle of improvement to Plymouth. Positive activity in the city leads to an improved image, and an improved image increases the positive activity in the city. Plymouth is fortunate to have some unrivalled natural drama and settings, and a unique 500 year history as a place of embarkation and exploration. These assets are integral to building an international city.

This chapter seeks to present some key available statistics about Plymouth’s profile as an international city. It outlines the activities that appear to most directly contribute towards the international agenda and gives some indicators that might provide a view on the city’s direction of travel, for example the state of the visitor economy. However, by its very nature the ‘image’ of the city is a challenging aspect to measure.

6.1 UNIVERSITIES AND RESEARCH

The city is home to three universities and two specialist marine research institutions (Table 8). Together, these provide a strong academic image and improve the skills available to potential employers expanding in, and coming to, the city.
Table 8: Universities and research institutions in Plymouth, 2018

<table>
<thead>
<tr>
<th>Universities</th>
<th>Research institutions</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Plymouth</td>
<td>The Marine Biological Association</td>
</tr>
<tr>
<td>Plymouth Marjon University</td>
<td>Plymouth Marine Laboratory</td>
</tr>
<tr>
<td>Plymouth College of Art</td>
<td></td>
</tr>
</tbody>
</table>

Table 9: Student enrolments by domicile at higher education providers in Plymouth, 2017/18

<table>
<thead>
<tr>
<th>HE provider</th>
<th>Overseas students</th>
<th>Total enrolments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plymouth College of Art</td>
<td>17</td>
<td>1,863</td>
</tr>
<tr>
<td>University of Plymouth</td>
<td>2,060</td>
<td>20,770</td>
</tr>
<tr>
<td>University of St Mark and St John</td>
<td>554</td>
<td>3,363</td>
</tr>
<tr>
<td>Total Plymouth</td>
<td>2,631</td>
<td>25,996</td>
</tr>
</tbody>
</table>

Please note, from 2010/11 to 2015/16 the University of Plymouth has had a significant reduction in its franchised student numbers following a change in guidance from HEFCE regarding the reporting of partnership arrangements.

The University of Plymouth was founded in 1862 as the School of Navigation and is now the UK’s 15th largest university, with more than 20,000 students, 2,900 staff, and a £238 million annual turnover. It has invested £155 million in improvements to its campus over the past eight years, and is the only post-1992 university to have launched its own medical and dental school. The University of Plymouth placed second in the UK, and 86th globally, in the 2018 Times Higher Education Young University Rankings. The university attracts more than 2,000 international students from the EU and further afield helping to raise its profile, and that of the city, on an international stage.

Almost two thirds of University of Plymouth research outputs were ranked as either ‘World Leading’ or ‘Internationally Excellent’ in the most recent 2014 Research Excellence Framework. In addition, the university ranked as number one nationally for its Clinical Medicine research output.

154 http://www.ref.ac.uk/2014/
6.2 INTERNATIONAL EXPORTS

International trade and exports are important to a country’s economy as they stimulate domestic economic activity through employment, production, and revenues. Recent HM Revenue and Customs (HMRC) statistics show that Plymouth’s propensity to export goods internationally has decreased slightly in 2017 compared to 2016. In 2016, Plymouth had 482 businesses exporting £329 million to the EU this has reduced slightly to £325 million however with a slightly higher number of businesses exporting in 2017 (486 business). While the city saw a greater decrease in the value of exports to non-EU countries from £430 million in 2016 to £278 million in 2017, the number of businesses exporting to outside the EU slightly increased however to 485 (an increase of 19 businesses on 2016). Plymouth’s most valuable sectors for international exports are manufacturing, marine, and advanced manufacturing and engineering at £686 million, £342.2 million, and £296.4 million, respectively.

Moreover, the high propensity to export goods is potentially not shared across the services sector, where economic activities are mostly clustered around public administration, health, education, retail, and tourism support services. This is reflected in the fact that Plymouth ranks 9th out of 63 cities on goods exports per job, whilst ranking 48th on service exports per job.

6.3 SOCIAL ENTERPRISES

Plymouth is the UK’s first ‘social enterprise city’ and is a hot-spot for social enterprise activity in the UK. The city is developing as a globally recognised social enterprise location and the University of Plymouth is the world’s first officially certified ‘social enterprise university’. There are approximately 150 social enterprises in the city, employing around 7,000 people and bringing in an income of more than £500 million. These include mega-social enterprises, such as the University of Plymouth and Plymouth Community Homes, as well as an increasing number of smaller businesses; one in three social enterprises in the city have a turnover under £50,000.

£2.2 million of awards were made between November 2014 and May 2017 as part of Plymouth City Council’s Social Enterprise Investment Fund. This is expected to collectively bring 14 buildings and pieces of land back into productive use, create 127 jobs, and generate in excess of £2.3 million in match funding.

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156 AMORE economic modelling tool, 2017
157 2014 Centre for Cities Outlook analysis
6.4 TOURISM AND VISITORS

Plymouth is Britain’s Ocean City, with tourism being a major contributor to the local economy. Plymouth is following regional and national trends for visitor numbers. Nationally, there was a significant increase in visitor numbers in 2012/13 due to the London Olympics and its legacy and following this, all regions saw a decrease in 2014/15. This was further compounded in the South West by severe storms and flooding in February 2014, and resulted in a subsequent decrease in visitor numbers. Numbers have since started to rise again, with the number of visitors in 2016 totalling 5,116,000 (including day and overnight visitors, both domestic and international); an increase of 10.3 per cent on the previous year.

Visitor spend in Plymouth has also increased, from £317 million in 2015 to £322 million in 2016. At 1.6 per cent, this rate of increase is better than that seen in the South West region (-3.8 per cent) but lower than the rate of increase nationally (7.4 per cent). However, spend from overseas visitors increased by 7.9 per cent in 2016, bringing valued income into the city. More than 85 per cent of visitors to Plymouth are day visitors. In order to increase overall spend the number of overnight visitors needs to increase. Seasonality is still a big factor and development of the city’s offering, specifically between September and March, is needed.

Whilst visitors are an important part of Plymouth’s economy, the number of visitors and their attributable spend also serves to inform how well the cultural offer attracts people to the city. In 2010, Destination Plymouth commissioned a Visitor Plan for Plymouth, with the aim of growing the visitor economy, its economic impact, and the jobs that it supports over 10 years from 2010 to 2020. Since its launch, visitor numbers and spend targets have been achieved and many of the projects outlined in the plan have been delivered or are due to be delivered before Mayflower 400 in 2020. The visitor sector is now worth £327 million per year and supports more than 7,640 jobs; accounting for 7 per cent of Plymouth’s total employment. The Visitor Plan is currently being refreshed and will inform Plymouth City Council and Destination Plymouth on how to further grow Plymouth’s visitor economy over the 10 years from 2020 to 2030.

Work began in 2017 to develop the cruise market and help Plymouth to become a key cruise port in the South West, attracting overseas visitors on cruise liners. The number of cruise visits had declined to zero in recent years, but five cruise liners have been booked for 2019 and six for 2020. The planned regeneration of Plymouth’s railway station and road network, as detailed in the Growing chapter, will improve transport links to the rest of the UK and encourage more people to visit the city. In order to improve the range of accommodation offered in Plymouth and encourage visitors to stay overnight, two Premier Inn hotels are currently being built or extended, and a boutique hotel has recently opened in the historic Royal William Yard.

The Tourist Information Centre and Mayflower Visitor Centre are situated on the Barbican and have seen a strong increase in visitor numbers over recent years. As well as providing information and advice to visitors, the visitor centre also contains a three storey museum with interactive displays about merchant life, the fishing industry, and the harbour, providing visitors with a taste of Plymouth’s history.
As well as encouraging visitors into the city, all of the activities outlined in the new Visitor Plan for Plymouth will lead to benefits for the city’s residents by supporting the creation and retention of jobs and promoting opportunities for education, health, and wellbeing. They will enable residents to take full advantage of Plymouth’s rich history, heritage, environment, and unique cultural offer.

6.5 CULTURE

Plymouth has been named by the government as the lead city for Mayflower 400. The Mayflower Partnership combines culture, arts, heritage, visitors, community, and place-making across 11 UK locations. The impact of cultural investment is well established through the success of ‘Capital of Culture’ and ‘City of Culture’ models. Hull’s year as City of Culture resulted in over 90 per cent of residents engaging in cultural activity and contributed approximately £60 million to the local economy in 2017 alone, while Liverpool’s year as European Capital of Culture in 2018 saw a 34 per cent increase in visitor numbers and generated more than £750 million for the region.

The Mayflower 400 programme carries the potential to extend this impact across multiple UK locations, and in doing so contributes to the goals of the national tourism strategy to increase international visitors and visits outside London. The economic impact of the programme, if fully funded, is modelled to be £147 million in the 2020 year alone, with the period of economic benefit extending in advance of, and significantly after, 2020. It is also anticipated that 70 per cent of residents in Mayflower locations will get engaged in cultural or heritage activity and 140,000 hours of volunteering will be delivered.

The Box is a £38 million gallery and museum redevelopment and the flagship building of the Mayflower 400 commemorations in 2020. It will be a nationally significant visitor attraction with an anticipated increase in visitors from 80,000 to 250,000 to the complex alone, and deliver just over 500 jobs. The opening of The Box in time for the Mayflower 400 celebrations offers a real opportunity for Plymouth to raise its profile internationally.

Plymouth’s creative industries generate an estimated turnover in excess of £250 million per year. The sector is worth £51.5 million GVA, supports 3,800 jobs, and accounts for more than five million day visitors a year. The creative industries are central to the expansion of the city’s cultural offer such as i-DAT, an Open Research Lab for experimentation with creative technology. Plymouth is also host to the nationally significant Theatre Royal, alongside the Plymouth Free School of Creative Arts, and Plymouth College of Art and Design. Plymouth’s creative industries span across design, advertising, marketing, crafts, television, video, radio, photography, publishing, fashion, music, software services, museums, galleries and libraries, and performing and visual arts.

Plymouth is also home to a dynamic and diverse digital sector which generates £108.8 million in GVA for Plymouth.159 The emerging £7 million Devonport Market Hall project will create a hub for digital businesses as well as for community and arts groups. It will continue to increase the visibility of the sector and contribute towards the city’s cultural offer. ‘Smart cities’, where technology is used to improve the quality of life for local people and businesses, was identified as a critical area of development in the last Plymouth Report and continues to be a focus for the city.

159 https://www.visitplymouth.co.uk/invest/why-plymouth/key-sectors/digital
Events are a key part of Plymouth’s vibrant cultural offer, helping to encourage visitors to the city. Plymouth has a strong programme of events, including large national events – such as the British Fireworks Competition, MTV Crashes, and Armed Forces Day – and smaller events, for example Plymouth Pirates Weekend and the Lord Mayor’s Festival. Plymouth is also host to a number of key sporting events, including the British Diving Championships, British Swimming Masters, and The Transat boat race.

Commercial Wharf and Royal William Yard are two of Plymouth’s key cultural hot spots and have both recently been successfully re-developed. Commercial Wharf is now a successful café and boat trips attraction, while Royal William Yard has been developed by Urban Splash into a thriving destination of offices, restaurants, cafes, bars, and a new 14 bedroom boutique hotel. Royal William Yard, an award winning Grade I listed ex-Naval victualling yard, is host to a unique programme of events, including artisan food markets, open theatre, outdoor cinema, and live music and circus performances.

The 2018 Plymouth City Survey gave insight into residents’ perception of Plymouth’s cultural offer. It showed that residents are proud of Plymouth’s place in history, with 86 per cent of respondents agreeing with the statement ‘I am proud of Plymouth’s place in history; only 3 per cent disagreed. This indicates that residents are aware and proud of the city’s heritage and historical importance, which sets a positive underpinning for the upcoming Mayflower 400 celebrations. In the same survey, more than half (57 per cent) of respondents agreed that Plymouth has a lot to offer; 21 per cent disagreed with this statement. Improving residents’ view of Plymouth’s cultural offer is the first step towards making the city a great place to live, work, and visit.

As highlighted in the previous Plymouth Report, the unique lifestyle, leisure, and cultural assets available in Plymouth can entice prospective visitors and investors into the city, whilst at the same time be celebrated assets to those currently living in Plymouth. A challenge and opportunity now is to continue to build on the already impressive cultural programme within the city, particularly with the upcoming Mayflower 400 programme of events.
FOCUS ON...

LEAVING THE EU: WHAT DOES IT MEAN FOR PLYMOUTH?

On the 23rd June 2016, the UK voted to leave the European Union by 51.9 per cent of votes to 48.1 per cent. Plymouth largely voted to leave, at 60 per cent of votes.

Over three years later, there is still little clarity on what this means for the UK, as the final terms of leaving the EU have yet to be agreed. Until this time, it is not possible to accurately predict the impact Brexit will have on Plymouth. However, there are some clear indications of what the impact could be, regardless of the type of Brexit that is agreed.

Migrant labour

One of the biggest impacts that leaving the EU could have on the city is the restriction it will put on migrant labour. EU migrants often have particular skill sets. New migrant laws are likely to have the biggest impact on the city in jobs in manufacturing, education, and health and social care. These fields represent large proportions of Plymouth’s labour force, with manufacturing and education each making up 12.1 per cent, and health and social care 18.7 per cent, of total employment. These are also jobs that require a professional skill level that is crucial to Plymouth, but are unlikely to earn over the £30k per annum salary required for a Tier 2 visa.

There is already large competition for labour in the manufacturing sector and so it is likely to be vulnerable to a constraint on the supply of labour. As it represents 17 per cent of Plymouth’s GVA, any loss in this sector due to difficulty finding staff would be a big loss for the city.

The public sector, a large amount of which is comprised of health and social care, makes up 30 per cent of the city’s GVA, so a loss in staff here would similarly be a big hit. More worrying however, is Plymouth’s aging population. As outlined in the living chapter, the ONS predicts rises of 32.7 per cent of people 65 years and over in Plymouth by 2034, and an 83 per cent increase of those 85 years and over by the same year. If this is the case, there may not be sufficient staff to care for residents.

The construction sector is also one that requires a professional skill level, but likely not at a high enough wage for the Tier 2 visa requirement. If local businesses are unable to employ the necessary staff, there could be an impact on flagship construction programmes in Plymouth and housebuilding initiatives may have to be halted.

160 EU citizens who have been resident in the UK for five years prior to the end of the transition period will be able to remain, and will continue to be treated as UK nationals for the purposes of benefits and entitlements.

161 the measure of the value of goods and services produced in an area, industry or sector of an economy.
**Investment and funding**

Leaving the EU will likely reduce the amount of Foreign Direct Investments (FDIs)\textsuperscript{162} to the region, which will have a significant impact on Plymouth. Following the referendum, the HotSW LEP missed their FDI targets for the first time since 2012. In the South West, EU FDIs have created or safeguarded 13,396 jobs between 2012 and 2016, and so any impact on these FDIs in the UK have the potential to put a lot of local jobs at risk. A number of Plymouth firms are also dependent on larger, European supply chains. Of the 20 largest employers, which collectively contribute nearly £1 billion to Plymouth’s GVA, three quarters have parent companies outside of the UK. Companies have already seen a drop in funding from EU investors following the referendum result. This is therefore also likely to have an impact on the firms that contribute so much to the city.

It is difficult to establish exactly how much direct support Plymouth gets from the EU, but the treasury has indicated that European Structural and Investment Funding (ESIF) programmes will be continued to be funded until December 2020 after which they will be replaced with the UK Shared Prosperity Fund (UKSPF).

**Research and education**

The impact Brexit will have on higher education in the city is also large. For example, the University of Plymouth is an important contributor to GVA: the student spend is estimated to be over £120 million, supporting over 5,000 jobs; and generating over £460 million of output. Over 2,000 international students are attracted to the University each year, and so any restriction from the government on migrant students will have a big impact. Additionally, EU funding constitutes almost 30 per cent of the university’s research income. The current framework programme, Horizon 2020, is the largest to date, with nearly €80 billion of funding available over seven years (2014 to 2020). The university will therefore have to find a new way of funding their ‘World Leading’ and ‘Internationally Excellent’ research, at which two thirds of Plymouth research was ranked in the most recent 2014 Research Excellence Framework. It would be a big loss to the city if the university were constrained in their ability to continue their internationally recognised work.

**Imports**

Brexit will affect foreign ports as tighter customs rules will have to come into play. Risks have been identified especially with roll-on-roll-off ferries. Whilst the volume of traffic is relatively low by comparison with ports such as Dover, Plymouth does not have the infrastructure to deal with the customs and environmental health inspections. This puts existing routes to France and Spain, for goods such as agricultural produce and fish, at risk.

Further information about the impact of leaving the EU on Plymouth can be found [here](#).
CHALLENGES AND OPPORTUNITIES - presenting the main areas of concern that have emerged from the preceding sections. It aims to provide policy makers with some further food for thought.

Housing

Inclusive Growth

Unhealthy Lives

The Productivity Challenge

Strategic Connectivity
The data and analysis presented in this report show that Plymouth faces similar challenges to many other UK cities, and will be impacted by significant change and likely turbulence in response to events that are taking place at both a national and international level.

These challenges must be addressed in order to maximise the city’s potential for growth and prosperity, and to take advantage of opportunities as they arise. However, there are some key concerns raised within this report that warrants attention from city leaders as to whether enough is being done to address such challenges in the context of Plymouth’s ambitions.

The following challenges are fundamentally interlinked, and consideration must be given to the impact and/or benefits that addressing one will have on the other.

7.1 HOUSING

As explored in the infrastructure chapter, housing delivery has increased by 90 per cent over the last two years, delivering housing to meet the needs of our most vulnerable including extra care housing for older people and accessible homes for people with physical and learning disabilities. However, the city still faces a number of challenges in part related to the changing structure of the population and a shifting demand for different housing types e.g. those over 65 living with complex needs, larger families, single people, and couples without children. With homelessness approaches having risen by 25 per cent, more still needs to be done to ensure adequate housing that meets the needs of our most vulnerable.
Housing affordability is a national issue and Plymouth is no exception. With recent increases in house prices of nearly 20 per cent, wages have unfortunately not increased at the same rate. The result is high levels of people living in private rented accommodation of which approximately one third is in poor quality, given the age of the housing stock in the city. There is a clear correlation between non-decent housing, areas of deprivation, poor health and wellbeing outcomes, and lower educational attainment that need to be addressed. Non-decent housing is also strongly linked to fuel poverty.

Given the forecasted changes to the population structure, and consequently the tenure of houses being built to meet demand, consideration should also be given to how this will impact on the local authority’s ability to generate the income needed to fund services through (but not limited to) its council tax base. Plymouth currently has a higher proportion of smaller houses of a lower council tax band and fewer larger dwellings, meaning the city has a lower council tax base than other comparable cities. This has an impact on the local funding that can be raised as a precept, such as adult social care and police services, and is of vital importance to the city at a time of reduced government funding while demand for these services is increasing.
7.2 THE PRODUCTIVITY CHALLENGE

The UK is facing a critical productivity challenge with workers working longer to produce less than the country’s main international competitors and other G7 countries. This challenge is keenly felt in Plymouth and despite a higher than national employment rate, Plymouth has a GVA per hour worked of 83 per cent of the UK average. The UK Treasury recognises five drivers of productivity; skills (including leadership and management skills); innovation (R&D and exploitation of new technologies); enterprise (business opportunities for existing firms and start-ups); investment in physical capital; and increasing competition that incentivises firms to innovate and encourages existing firms to be more efficient.

Plymouth has traditionally struggled to raise its productivity. Having good quality jobs in the local economy is hugely important to tackling low productivity to ensure that communities don’t feel left behind and trapped in a low productivity-low wage cycle. Plymouth’s strengths lie in its significant and productive marine manufacturing base (up to 20 per cent above GB productivity average). It is therefore vital that the workforce has the right skills to meet the future needs of this and other high value industries. Other challenges for Plymouth are in part due to a low business density and start-up rate but also poor connectivity with the rest of the region and country. Higher productivity is characterised by businesses creating more wealth and higher value jobs. Investment is needed in strong business support infrastructure that is visible, accessible, and well-coordinated. This is vital to supporting businesses to become more efficient, and to encourage high growth start-ups which may become the scale-ups of the future. Furthermore without significant investment in the regions transport infrastructure the city will be unable to raise productivity levels and accelerate housing delivery.

7.3 INCLUSIVE GROWTH

Many cities are marked by growing inequality, with too many citizens experiencing financial insecurity. Reducing the damaging effects of this inequality is recognised as a key challenge. Promoting economic growth increases total income in society, creating more jobs and income which could be redistributed. However it is not necessarily the case that income and wealth will trickle down to the poorest. The RSA Inclusive Growth Commission’s final report, ‘Making our economy work for everyone’ (March 2017) recommends that in order for growth to be felt by all we need to make inclusive growth our working definition of economic success. This means committing to both social and economic growth outcomes; emphasising ‘quality’ jobs; investing in social as well as physical infrastructure; giving an equal focus to vocational education; and providing local flexibility to channel resources to need.

Further challenges faced by the city are the number of people who are economically inactive due to long term sickness, and the negligible changes in low wages since the 2008 economic crash. Plymouth also has entrenched pockets of deprivation and health inequalities which need to be addressed if the city is to genuinely achieve an economy that works for all. One mechanism to tackle this is the creation of a network of health and wellbeing hubs across the city which provides an integrated approach for people to easily access a wide range of support services and will integrate issues around health, community development and job.
There are clear implications for local policy makers to ensure that local economic growth translates into jobs for those at risk of or in poverty. Inclusive growth was highlighted as a challenge in the Plymouth Report 2017 and remains a priority for the city.

7.4 STRATEGIC CONNECTIVITY

The key challenge for Plymouth is to strengthen its strategic links with the rest of the UK by reinforcing connectivity and being able to exploit opportunities to become more productive. Research shows that for every 100 minutes travel time from London productivity falls by six per cent. Plymouth is 40 miles away from the M5, the nearest motorway; 230 miles from London; the average train journey times are three hours 15 minutes; and the nearest core city, Bristol is 120 miles away, two hours by road. Increasing productivity through improving connectivity within the South West, and to London will require major strategic investment to upgrade the rail links and road network that serve the South West. Plymouth’s peripherality, both real and perceived, is a significant inhibitor of the city’s potential to grow; government’s historic underfunding of strategic transport infrastructure in Plymouth and the wider region must now urgently be addressed.

7.5 UNHEALTHY LIVES

The estimated healthy life expectancy in Plymouth is significantly lower than the England average for both men and women. Healthy life expectancy is the average number of years a person can expect to live in good health. On average, in 2014-16 men in Plymouth could expect to live the last 18 years in poor health whilst women in Plymouth could expect to live the last 25 years of their lives in poor health. The average for England was 16 years for men and 19 years for women. This theme was also included as a challenge in the Plymouth Report 2017 and remains a priority for the city to address.

Health and wellbeing needs increase with age, with a higher burden of chronic disease, susceptibility to the negative impacts of social isolation, and an associated raised need for health and social care services and carers. While the differing rates of life expectancy across the city are relatively well known, healthy life expectancy is less understood and very concerning in terms of how it affects Plymouth’s ambitions as a city.

The 10-year Thrive Plymouth programme is based on the local 4-4-54 construct, i.e. that poor diet, lack of exercise, tobacco use, and excess alcohol consumption are risk factors for coronary heart disease, stroke, cancers, and respiratory problems which together contribute to 54 per cent of deaths in Plymouth. Changing these four behaviours will help prevent these four diseases and reduce the number of deaths due to them. Continued efforts must be made to improve life expectancy and healthy life expectancy in Plymouth, and to close the gap between the most and least deprived areas of the city.
### APPENDIX A:
**PLYMOUTH ELECTORAL WARDS BY NEIGHBOURHOOD**

<table>
<thead>
<tr>
<th>Electoral ward</th>
<th>Neighbourhood</th>
<th>Electoral ward</th>
<th>Neighbourhood</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budshead</td>
<td>Derriford West &amp; Crownhill</td>
<td>Plympton</td>
<td>Chaddlewood</td>
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<tr>
<td></td>
<td>Whitleigh</td>
<td>Plympton Erle</td>
<td>Plympton St Maurice &amp; Yealmstone</td>
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<tr>
<td>Compton</td>
<td>Higher Compton &amp; Mannnamead</td>
<td>Plympton St</td>
<td>Colebrook, Newnham, &amp; Ridgeway</td>
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<tr>
<td></td>
<td>Mutley</td>
<td>Mary</td>
<td>Woodford</td>
</tr>
<tr>
<td>Devonport</td>
<td>Devonport</td>
<td>Plymstock</td>
<td>Elburton &amp; Dunstone</td>
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<td></td>
<td>Keyham</td>
<td>Dunstone</td>
<td>Goosewell</td>
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<tr>
<td></td>
<td>Morice Town</td>
<td>Plymstock Radford</td>
<td>Plymstock &amp; Radford</td>
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<tr>
<td>Drake</td>
<td>Greenbank &amp; University</td>
<td>Southway</td>
<td>Southway</td>
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<td>Eggbuckland</td>
<td>Tamerton</td>
<td>Tamerton Foliot</td>
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<td>Manadon &amp; Widey</td>
<td>Foliot</td>
<td>Widewell</td>
</tr>
<tr>
<td>Ham</td>
<td>Ham &amp; Pennycross</td>
<td>St Budeaux</td>
<td>Barne Barton</td>
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<tr>
<td></td>
<td>North Prospect &amp; Weston Mill</td>
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<td>St Budeaux &amp; Kings Tamerton</td>
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<tr>
<td>Honicknowle</td>
<td>Ernesettle</td>
<td>St Peter</td>
<td>City Centre</td>
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<td></td>
<td>Honicknowle</td>
<td>and the</td>
<td>Stonehouse</td>
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<td>Lipson and</td>
<td>Efford</td>
<td>Waterfront</td>
<td>Ford</td>
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<td>Laira</td>
<td>Lipson &amp; Laira</td>
<td></td>
<td>Stoke</td>
</tr>
<tr>
<td>Moor View</td>
<td>Estover, Glenholt &amp; Derriford East</td>
<td>Stoke</td>
<td>East End</td>
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<td>Leigham &amp; Mainstone</td>
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<td>Mount Gould</td>
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<td>Peverell</td>
<td>Beacon Park</td>
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<td>Peverell &amp; Hartley</td>
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APPENDIX B: PUBLIC HEALTH ENGLAND DATA AND ANALYSIS TOOLS

A single point of access to all nationally produced Public Health England data profiles and tools can be accessed via the link: http://fingertips.phe.org.uk/

The resources cover a range of public health topics including:
- specific health conditions – such as cancer, mental health, cardiovascular disease, and diabetes
- lifestyle risk factors – such as smoking, alcohol, and obesity
- wider determinants of health – such as environment, housing, and deprivation
- health protection.

The interactive profiles/tools require one or more steps to select the desired geography. Often the option to download a PDF is then available.

APPENDIX C: LINKS TO A SELECTION OF PLYMOUTH JOINT STRATEGIC NEEDS ASSESSMENT PROFILES AND REPORTS

- 2011 Census profiles and 2014 Area profiles
- Alcohol harm mapping: Plymouth neighbourhood profiles 2016
- Health related behaviour survey analysis: secondary education providers in Plymouth 2014
- Index of Multiple Deprivation (IMD) 2015: Plymouth summary analysis
- Life expectancy in Plymouth, 2001-03 to 2014-16
- Physical activity needs assessment for Plymouth 2015 to 2018
- Prevalence of smoking, obesity, and high blood pressure in Plymouth, 2013/14 to 2015/16

The full list can be found here: https://www.plymouth.gov.uk/publichealth/factsandfiguresjointstrategicneedsassessment