

PLYMOUTH CITY CENTRE VISION



Lyflower House
Congress Hall

Royal Parade

1 INTRODUCTION

Plymouth is ‘Britain’s Ocean City’, a thriving coastal city with a rich maritime legacy. Located in the UK’s Southwest, Plymouth offers the benefits of a vibrant, cultural city along with a remarkable quality of life.

Plymouth is the second largest city in the Southwest with a population of 268,700 and an economy worth £6.97 billion, supporting 116,000 jobs.

The city has significant unrealised economic potential that Plymouth City Council is committed to unlocking. At the heart of the Economic Strategy is a £4.5bn investment in defence at HM Devonport Naval Base requiring an additional 5,500 new recruits at Babcock over the next 10 years, plus 2,000 additional construction jobs.

To enable this investment to happen Plymouth must deliver a transformation in skills, house building and connectivity. To this end we have developed a strategic partnership with Homes England focused on the city centre that will deliver:

- 10,000 new homes in the city centre and surrounding area
- 30,000 sqm of new commercial space
- 7,000 construction jobs linked to our regeneration programme
- £50m Plymouth City Council investment
- £1bn of public and private investment.

A first phase of 1,000 homes will be delivered in the next five years supporting 3,000 construction jobs.

Homes England are working with Plymouth City Council and their key stakeholders to identify the first phase of projects that will establish a new residential core in the city centre, stimulate market activity and maximise public and private investment to deliver transformational change.



2 ABOUT THIS DOCUMENT

This document addresses Plymouth’s challenge to create living spaces in the heart of the city by developing a new ‘Town in the City Centre’

Previous city centre masterplans have described how the city centre can be adapted and augmented to allow for the creation of a residential offer where one currently does not exist.

This document identifies opportunities for investment, the barriers to progress and proposes a delivery plan to transform Plymouth City Centre beyond a regional centre into a new mixed-use community in its own right, with thousands of new homes.

More specifically this document:

- Describes the context and barriers to investment, with analysis of potential routes to unblock them.
- Summarises the existing strengths and success of the city.
- Articulates the multi-year government-led investment that has been secured and how

this will create a significant demand for residential accommodation.

- Identifies opportunity sites and how significant public sector land and property ownership in the city centre can be leveraged to deliver on the increased demand.
- Provides a framework for delivery and investment in new residential and commercial products in Plymouth.

This document sets out a Vision for the city centre and describes the creation of a programme which seizes the opportunities described in the Economic Strategy to unlock and accelerate sustainable and inclusive housing and employment growth for the area.

The regeneration of the city centre will be based on the pillars of the existing Plymouth Plan 2014-34, and the Joint Local Plan.



3 GUIDING PRINCIPLES

The regeneration of the city centre will be underpinned by the following strategic aims and guiding principles:

- Plymouth will be one of **Europe's most vibrant waterfront cities** where an **outstanding quality of life** is enjoyed by everyone.
- Plymouth as a regional city and a major **economic driver for the Southwest**.
- Plymouth as a **healthy city**, where people live in happy, healthy, safe and aspiring communities.
- Plymouth as a **growing city**, where economic, social, environmental and cultural strengths are harnessed to deliver **sustainable and inclusive growth**.
- Plymouth as an **international city**, renowned as the UK's premier marine city and famous for its waterfront, maritime heritage and culture.



4 UNDERPINNING ECONOMIC, PLANNING AND HOUSING POLICY

In March 2024 Plymouth City Council adopted a new ten-year Economic Strategy which recognises a clear link between the wider success of the city and its central core.

The Plymouth and Southwest Devon Joint Local Plan (JLP) recognises the key regional role of the city centre as a major economic driver for the Southwest. It specifically addresses demand and opportunities for regeneration of the city centre as a fundamental objective.

Through the JLP the Council promotes a development-friendly policy which allows for flexibility in approach and delivery through diversification and densification of the centre.

Policies PLY6 – PLY15 of the Joint Local Plan provide capacity for over 1500 homes and 34,000sqm of office space through land allocations in the city centre, as well as providing the opportunity for a range of other land uses. This figure increases to 2,900 residential units when taking into account allocations around the city centre. The focus is on delivering a modern, high quality, vibrant, accessible and adaptable centre that represents a showcase for Plymouth.

The plan also addresses the waterfront area specifically, given its unique character and value to the city as an asset.

The Joint Local Plan was reviewed in 2024 and runs to 2034.

Plan for Homes

Plymouth has published a "Plan for Homes" setting out key objectives and strategic interventions to increase and accelerate the delivery of new and affordable housing across the city. The latest "Plan for Homes" was published in March 2024 and reinforces the ambition to deliver a minimum of 5,000 new homes over the next five years, supports acceleration of new high-quality homes, maximising inward investment, increased choices in the city centre and securing the necessary partnerships to deliver.



5 PHYSICAL, GEOGRAPHICAL AND ECONOMIC BACKGROUND

Location and Connectivity

Plymouth is ‘Britain’s Ocean City’, a nationally significant urban centre located in the south-west of England. Few places can rival its rich cultural, natural and built assets.

Plymouth is easily accessible in just two hours by road and rail from Bristol. Plymouth has a central

train station situated just a short walk from the city centre, and there are 21 daily services running each way between Plymouth and London during the working week, 11 of these services offer journey times of just over three hours.

There are three international airports within a one to two-hour drive and daily ferry sailings to Roscoff and weekly sailings to Santander.

Full fibre broadband is currently being rolled out with 100% coverage expected by the end of 2025.

Population and Demographics

Plymouth is the second largest urban centre in the Southwest (second only to Bristol), with a population of 268,700.

The population of Plymouth has remained relatively constant since the turn of the century with an average population growth of 3.19% between 2011 and 2021 compared to a national population growth rate for England of 6.49%.

Plymouth has an aging population. Before 2016, the number of children (aged 0-15) exceeded the number aged 65+. However, from 2016 (and

most notably from 2020 onwards) the number of people aged 0-15 has fallen below the number aged 65+.

Economy

Today, Plymouth has a real economic output of over £6.97 billion and supports 116,000 jobs. Plymouth’s economy has some significant strengths which provide the foundation for future economic growth:

- Home to the largest Naval Base in Western Europe.
- A large teaching hospital, employing almost 7,000 full time staff.

- There are 3 universities with distinct and high-quality provision and 25,000 students.
- A Science Park employing more than 1,100 people including a cluster of businesses in the Health Technology Innovation and Advanced Digital Manufacturing sectors.

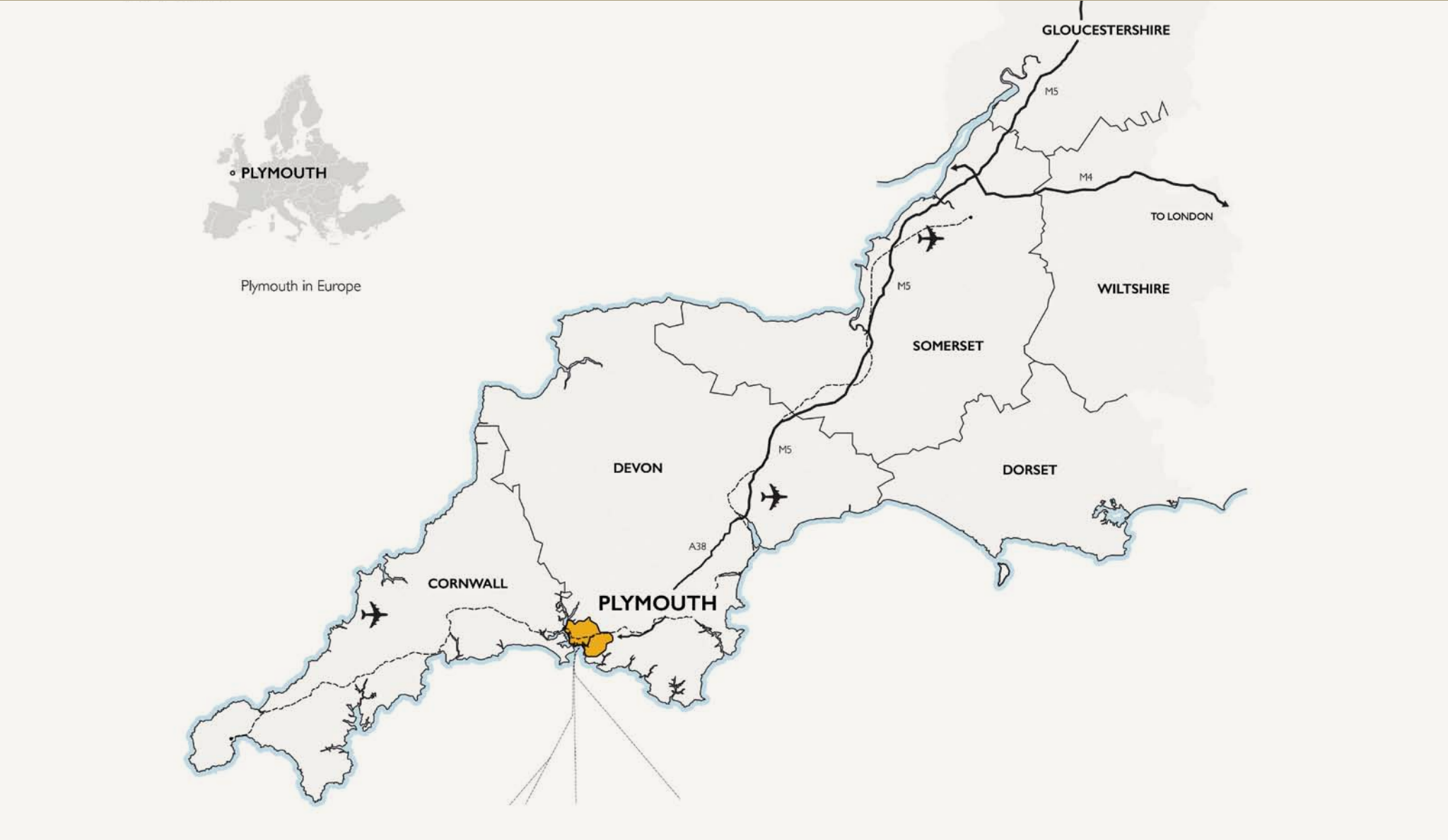
- The highest density of manufacturing employment in the South of England representing 13% of the city’s employment.

- Plymouth is at the forefront of the marine and defence sectors and hosts many leading research and development facilities and companies.

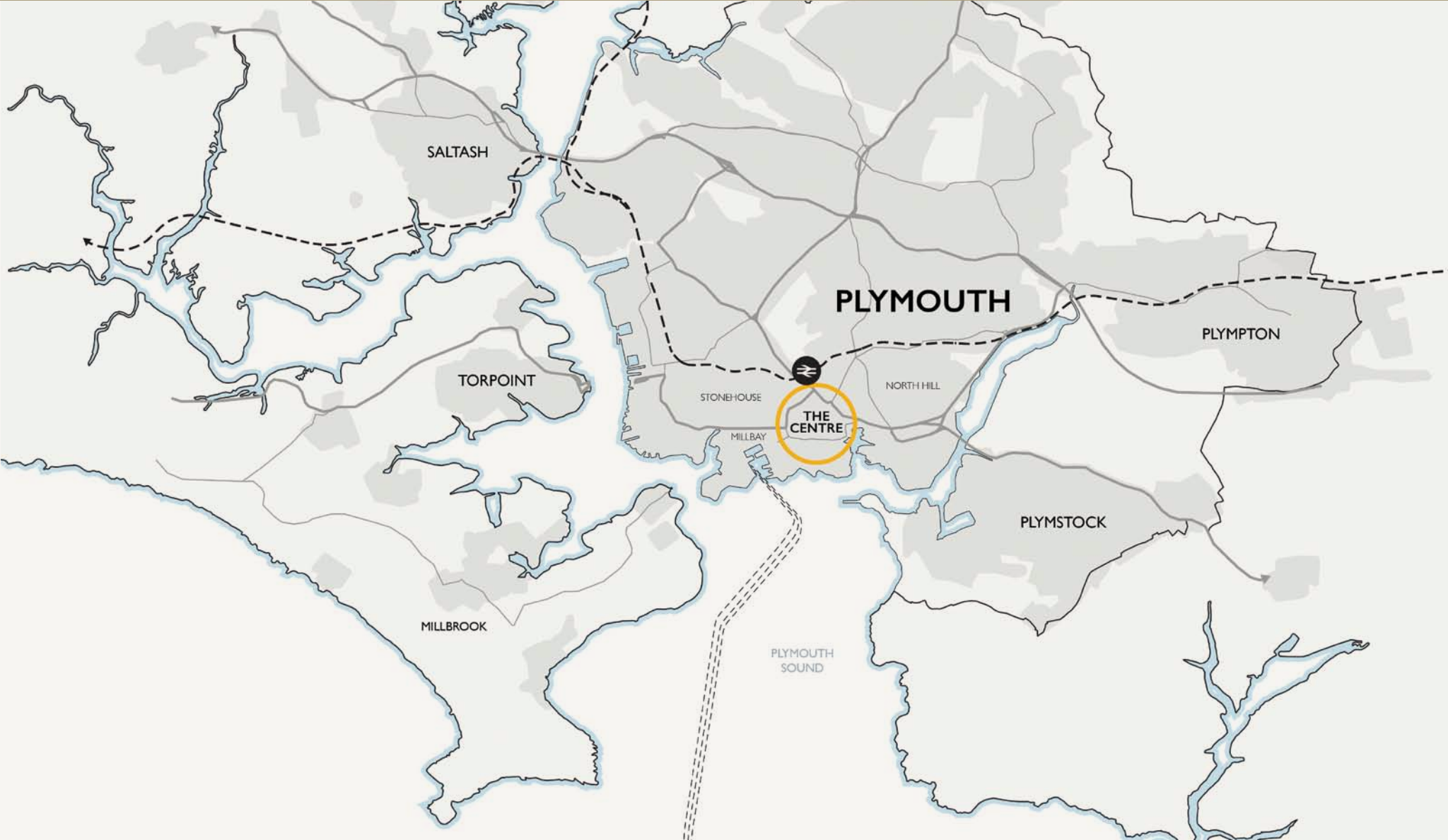
- The total number of employees within Plymouth has increased significantly in recent years and the data shows that this growth has been driven by full-time workers.
- There is strong demand for labour with a high number of unique job postings and significant demand for skilled workers.
- Overall wages for the residents within the city have largely followed national trends and increased by roughly 5.8% since 2019.



Location of Plymouth



Location of Plymouth City Centre



Plymouth City Centre: shaped by history, ready to be redefined and repurposed for the 21st century.

Plymouth City Centre is connected to the marine and maritime vistas of Plymouth Sound by the world-famous Hoe and a wide, open boulevard which runs over a mile from Plymouth station in the north, to the sea. Branded as Britain's Ocean City, Plymouth recognises and celebrates what is undoubtedly one of the most iconic settings of any major waterfront city in Europe.

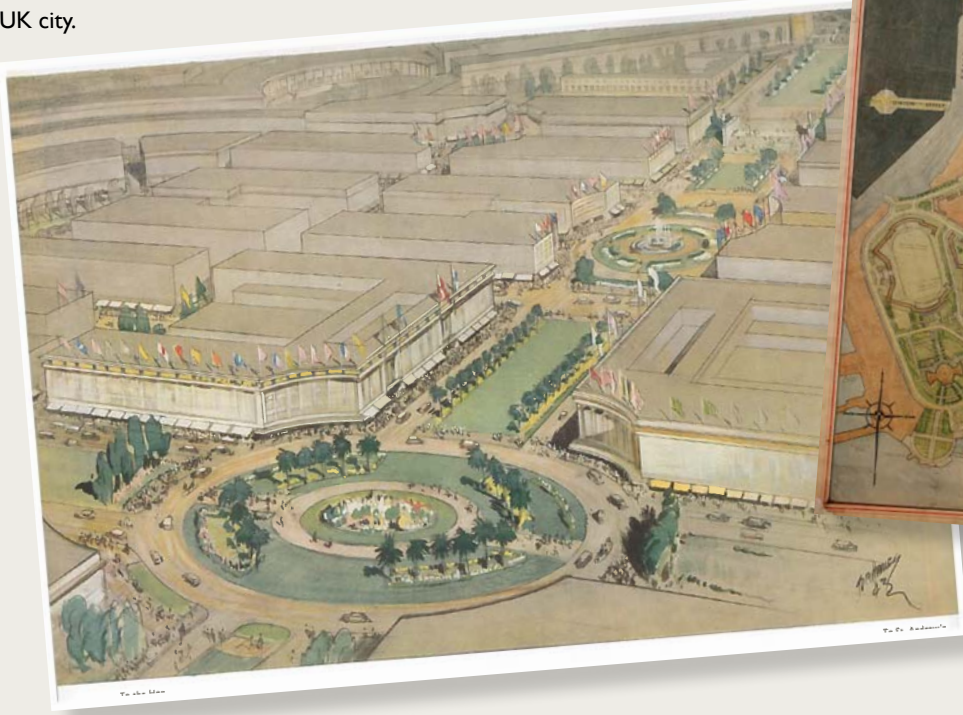
During the 1941 Blitz of World War II, almost all of the city centre was destroyed by incendiary bombs. Sir Patrick Abercrombie, an architect and town planner; and James Paton-Watson, Plymouth's City Engineer, were appointed to create "The Plan for Plymouth", an ambitious scheme designed to raise Plymouth out of the rubble and turn it into a 21st century city.

The Abercrombie Plan was one of the most ambitious post-war, city centre masterplans and attracted equivalently ambitious young architects to design individual phases and structures such as the covered pannier market.

The majority of Abercrombie's original plan and buildings still shape the city centre today.

However, the way people live and shop, and the relationship of the port to the city have all changed. Today the city centre is under-inhabited with a surplus of dated commercial and retail spaces.

Despite this, Plymouth retains a unique 20th century architectural integrity and merit that has survived the test of time. Combining this with the historic narrow streets running down to the Barbican and the 17th century fortifications overlooking the sea, **Plymouth has an existing endoskeleton unlike any other UK city.**



The revival and renewal of Plymouth City Centre is already taking shape, with significant recent investment enhancing the retail, tourism and cultural offer within the city.

The University of Plymouth has added modern, efficient and architecturally striking buildings to its campus in recent years.

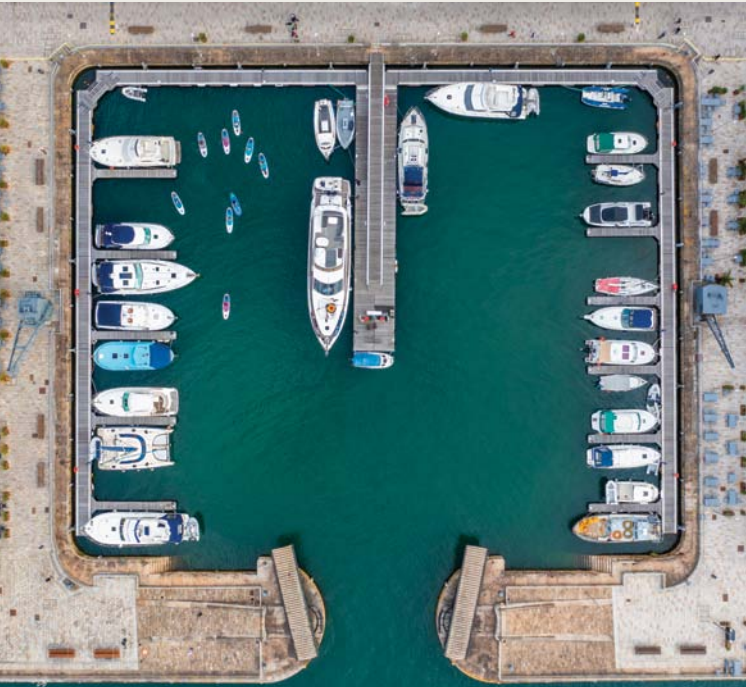
The Box is Plymouth's major new museum, gallery and archive. The largest UK cultural and heritage space to open in 2020, The Box now attracts over 270,000 visitors every year and hosts prestigious touring exhibitions and collections of national and international importance.

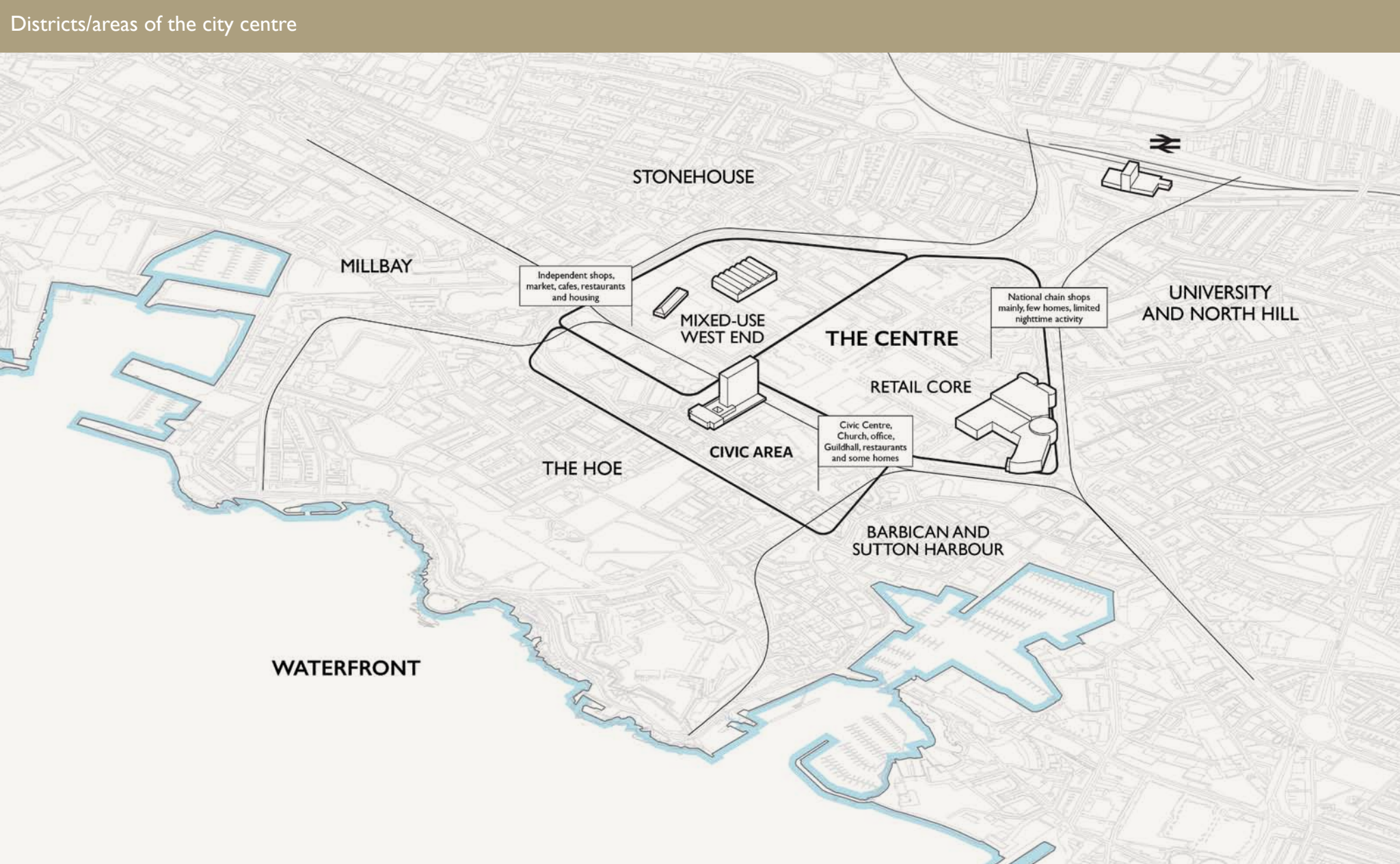
The Barcode is a £50 million development led by British Land, delivered in partnership with Plymouth City Council, which created a new leisure destination in the city centre. The Barcode features 13 restaurants, an 11 screen IMAX cinema, adventure golf and 400 car parking spaces.

Looking beyond the immediate city centre, new developments at Millbay and Royal William Yard are examples of high-quality regeneration, taking full advantage of Plymouth's marine heritage and natural environment.

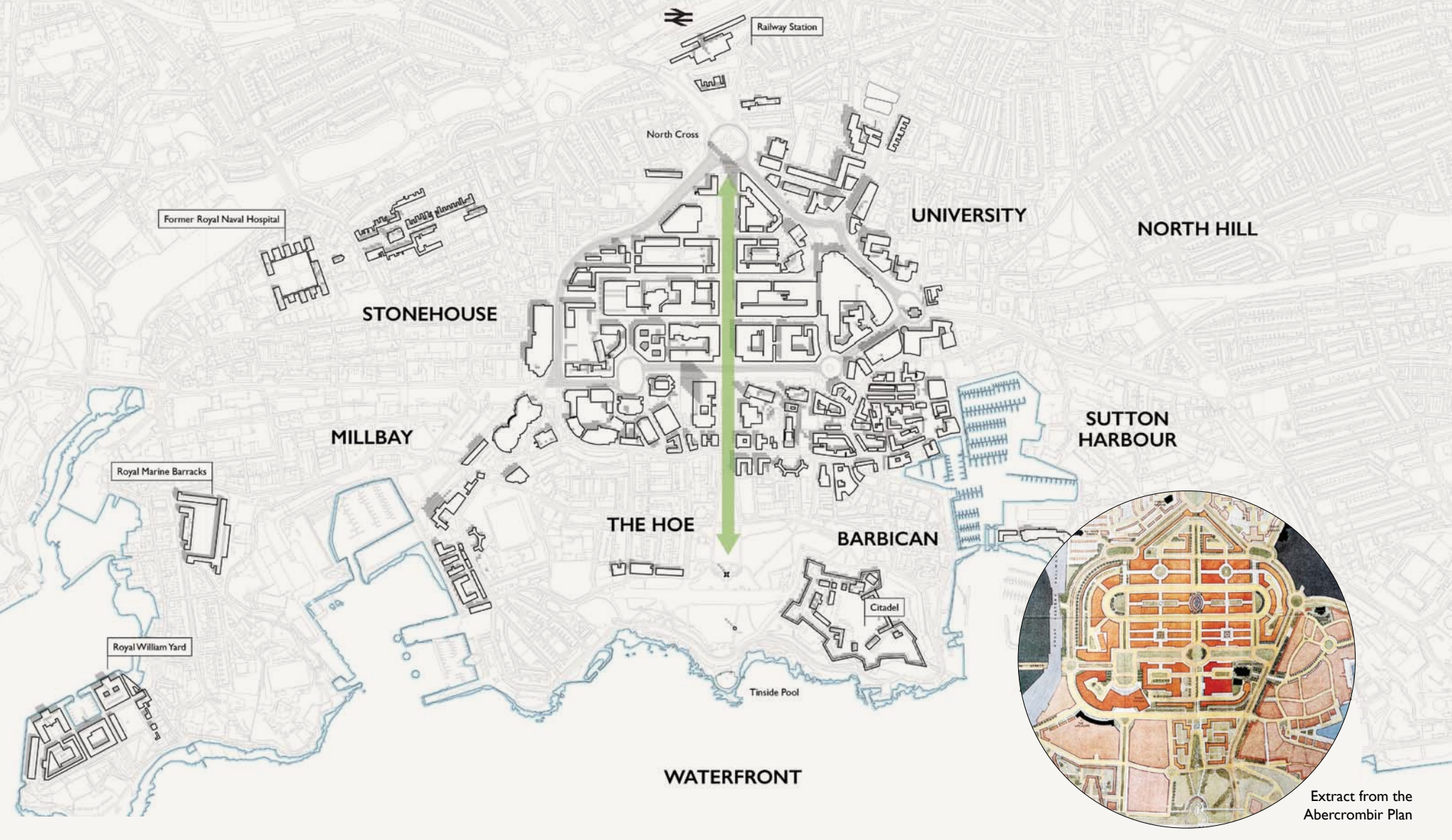
Royal William Yard is now a buzzing mixed-use neighbourhood in Plymouth, situated on a 15-

acre site with its own marina and views across Plymouth Sound. Built in 1825-1831 Royal William Yard has been transformed from an unused Naval Yard by Urban Splash and Plymouth City Council into a beautiful, award-winning destination, with 215 homes and a mix of restaurants, bars, offices and hotels in a collection of Grade I listed buildings. Royal William Yard has taken 15 years of regeneration and is now included in the Lonely Planet's guide to the UK's top unmissable experiences.



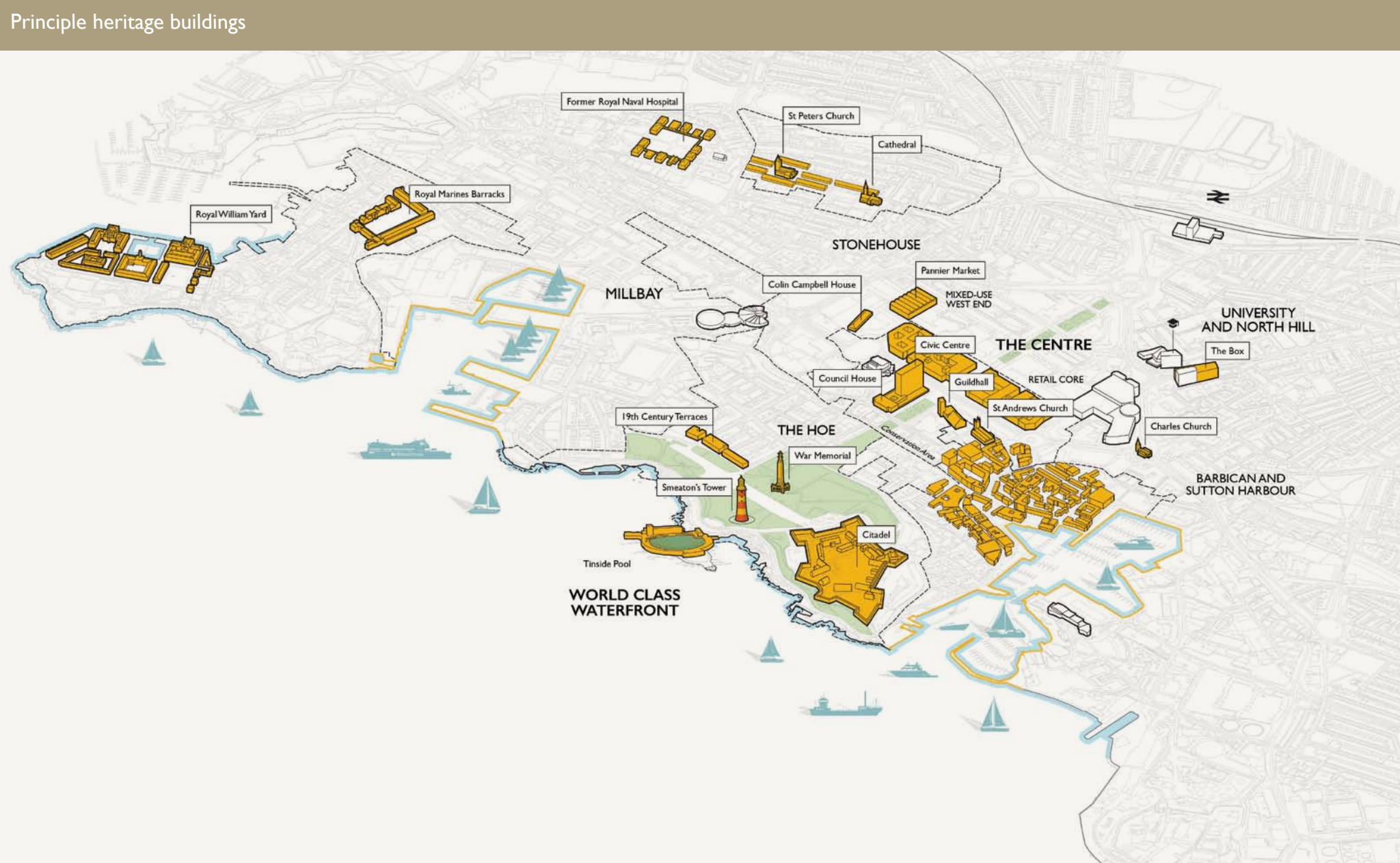


Illustrating the link with the Abercrombie Plan



Key buildings





6 RECENT AND FUTURE INVESTMENT: LEVERAGING THE OPPORTUNITIES.

Plymouth is a place where public and private sector investment have unlocked some significant successes with huge government-backed investment still to follow. These successes are shifting the dial across all sectors, from traditional manufacturing to future innovation in new sectors such as clean energy and the blue economy.

The Council, working with Government and local partners, has invested over £900 million in economic development projects which have delivered the Southwest's only Freeport, opened one of the UK's most important cultural attractions, The Box and created the UK's first National Marine Park, a status which showcases Plymouth's innovative, sustainable approach to embracing the city's unique position and offer.

- The Council has successfully bid and been awarded:
- Future High Streets Fund
 - Levelling Up Fund (x2)
 - High Street Heritage Action Zone grant
 - Shared Prosperity Fund

Future Investment

The ambition for Plymouth for the next ten years is to build on the city's existing strengths in marine, defence, manufacturing, and health sectors, while also supporting emerging industries such as marine autonomy, digital technologies and creative sectors.

With over £4 billion of investment expected in the Devonport Naval Base between now and 2034, Plymouth expects to create at least 5,500 new recruits, many of them in higher value roles, plus 2,000 construction jobs.

This government-backed, specialist manufacturing investment will provide the foundation for further improving the city's economic performance, profile and reputation. It directly creates opportunities for delivery of residential stock in the city centre of all types, including build to rent and co-living.

In addition to the Ministry of Defence (MoD) investment, the University of Plymouth continues to expand its reputation and offer in the specialist marine sector.

The Blue Economy

The blue economy already creates over \$4 trillion of value worldwide and is expected to be worth an additional £2 billion to the Southwest by 2035. The marine sector in Plymouth is at the leading edge of several key technologies and there are numerous opportunities to increase the city's position within global markets, including offshore wind and marine autonomy which is forecast to be worth \$136 billion over the next 15 years.

Skills, education and supporting services

Whilst the direct investment in the Dockyard itself creates new employment, this in turn has the potential to create a further uptick in the supply chain services required to support this work. This will necessitate the provision of further higher education capacity to service the demand.

Ownership and Control

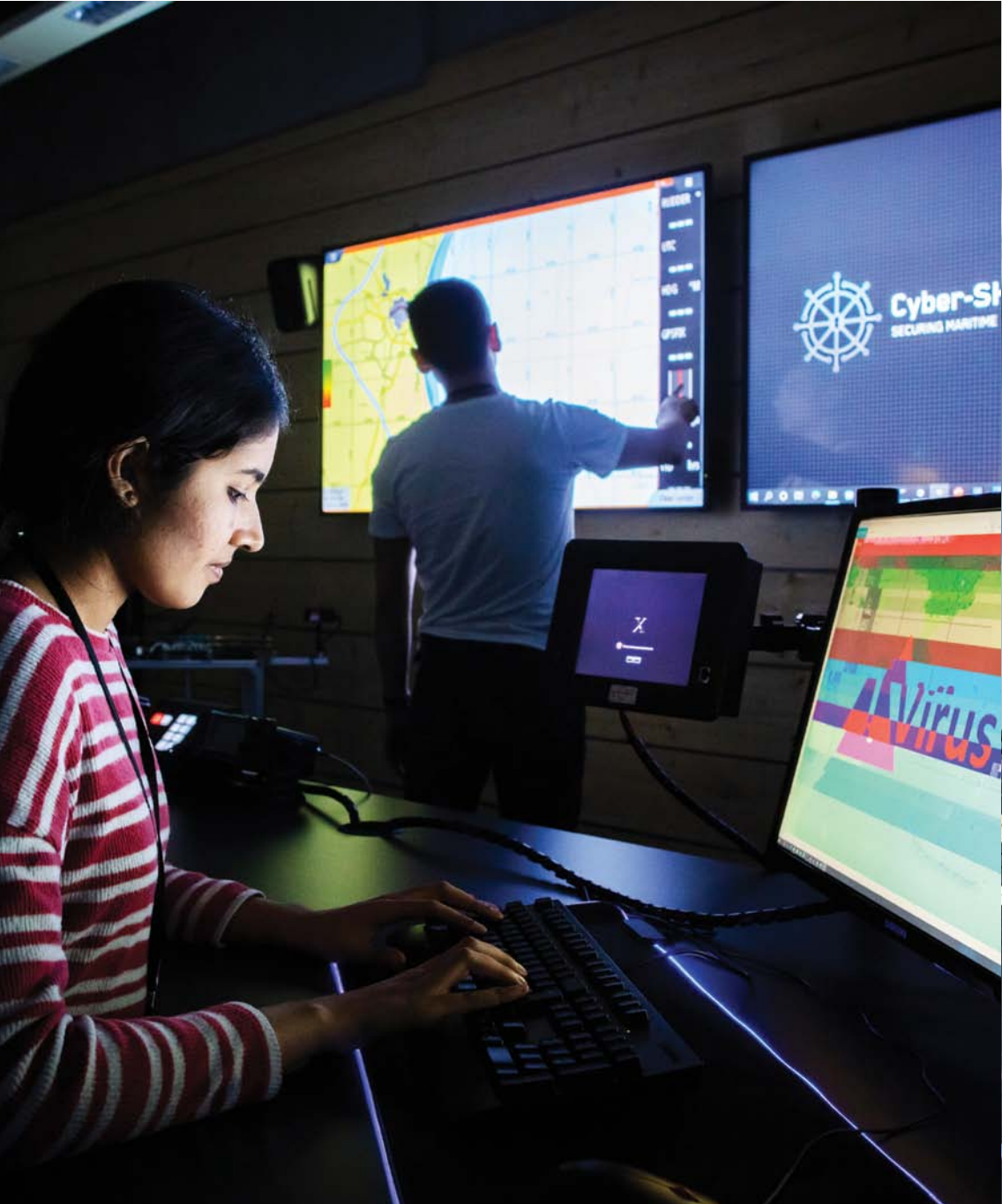
It was the Local Authority that led the reconstruction of the centre following the

devastation of World War II. As a legacy of this, the Council remains the freehold owner of the majority of the city centre. Whilst many of the existing properties are subject to long leases, the Council retains direct control of a number of key sites and buildings, it also owns and operates a number of surface level and multi storey car parks.

The Council's dominant freehold position represents an important asset in terms of intelligence on city centre property market:

- Lease duration, terms and breaks
- Intelligence on peaks and troughs of demand
- Performance of assets

This in turn offers flexibility of potential disposals, change of use in relation to strategic projects and opportunities.



7 A VISION FOR A REINVIGORATED PLYMOUTH

The unprecedented multi-year investment into the city by the MoD, the Freeport and continuing growth in NHS staff provides the stimulus to deliver on the ambitions of the city centre masterplan. It also provides a point in time to review the existing masterplan in light of a post-pandemic economy, where the services and leisure demands of the community are changed.

The city can realistically expect growth in the next 3 – 5 years (over and above the existing organic population changes) of between 4,000 – 8,000 individuals, with an additional assumed transient workforce in the order of 1,000.

The challenge for Plymouth is to provide homes for the growing workforce, alongside meeting existing demand for housing. A revitalised and reimagined city centre will play a vital role in meeting this housing demand, as well as

enhancing the profile of the city as a place to live, work and visit.

The new communities living in the regenerated Plymouth City Centre will include local people, families, students and newcomers seeking new opportunities. Attracted to Plymouth City Centre by the urban culture and enviable outdoor lifestyle offered by the incredible Southwest coastline and Dartmoor National Park.

Highly skilled workers will be drawn to Plymouth to grow careers in marine, medical, health and life sciences, green tech, defence, manufacturing and the digital and creative sectors.

The new 'Town in the City Centre' will offer access to healthcare, education and facilities. A real sense of wellbeing, a tangible connection to a place and a strong community.

Demands



Housing waiting list of
7,000
homes across a mix of
tenure types



Existing planning
policy provides
capacity for
1,500
homes in the
city centre



5,500
new roles linked
to investment
in the HM
Devonport
Naval Base



Diminishing demand within the HMO
market expected to lead to increase
demand for purpose built student
accommodation in the region of
500-1,000
units



Evidence of undersupply in the
city centre hotel market
with occupancy rates
consistently above
80%



First to market
opportunity for
build to rent in
Plymouth City Centre



8 BUILDING ON THE JOINT LOCAL PLAN

The 2017 masterplan developed concepts and ideas that still stand, including:

- Intensifying the city centre
- City centre living, with flexible tenures and mixes of accommodation
- Reconnecting the city centre with its neighbouring character areas
- Re-animating the public realm
- The smart and adaptable city centre

The masterplan highlighted the relevant character areas and strategies and proposals for each section, with specific designations for use. Since then, the Joint Local Plan has moved on with new allocations for sites and a more flexible approach to use.

The **Joint Local Plan** allows for a **market led, solution focussed delivery**. For example, whilst a fixed location for hotel accommodation could be defined, it is crucial that the specialist market

provides the feedback on the best site(s), allowing for flexibility in use and location.

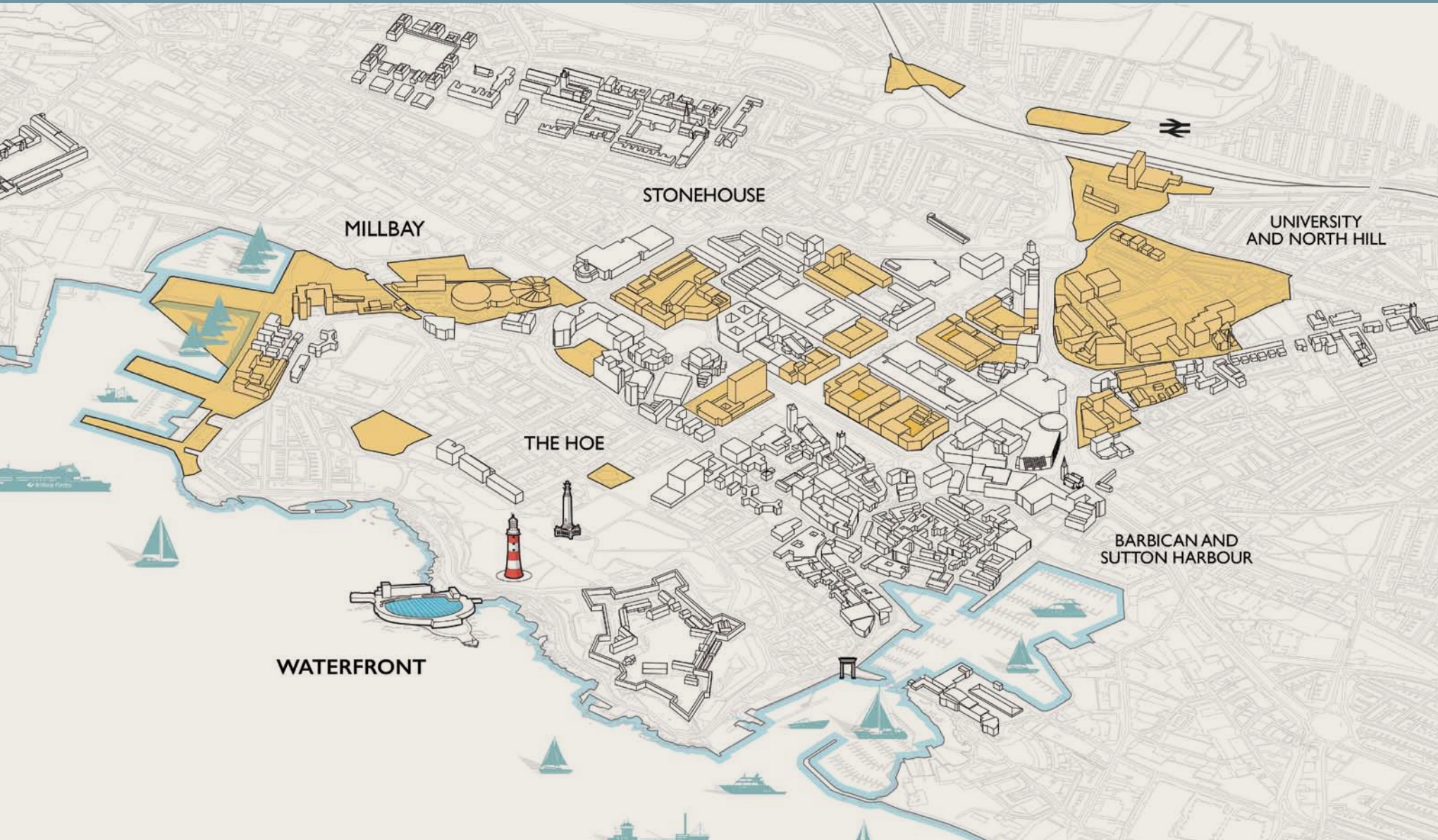
The primary uses in the city centre core are:

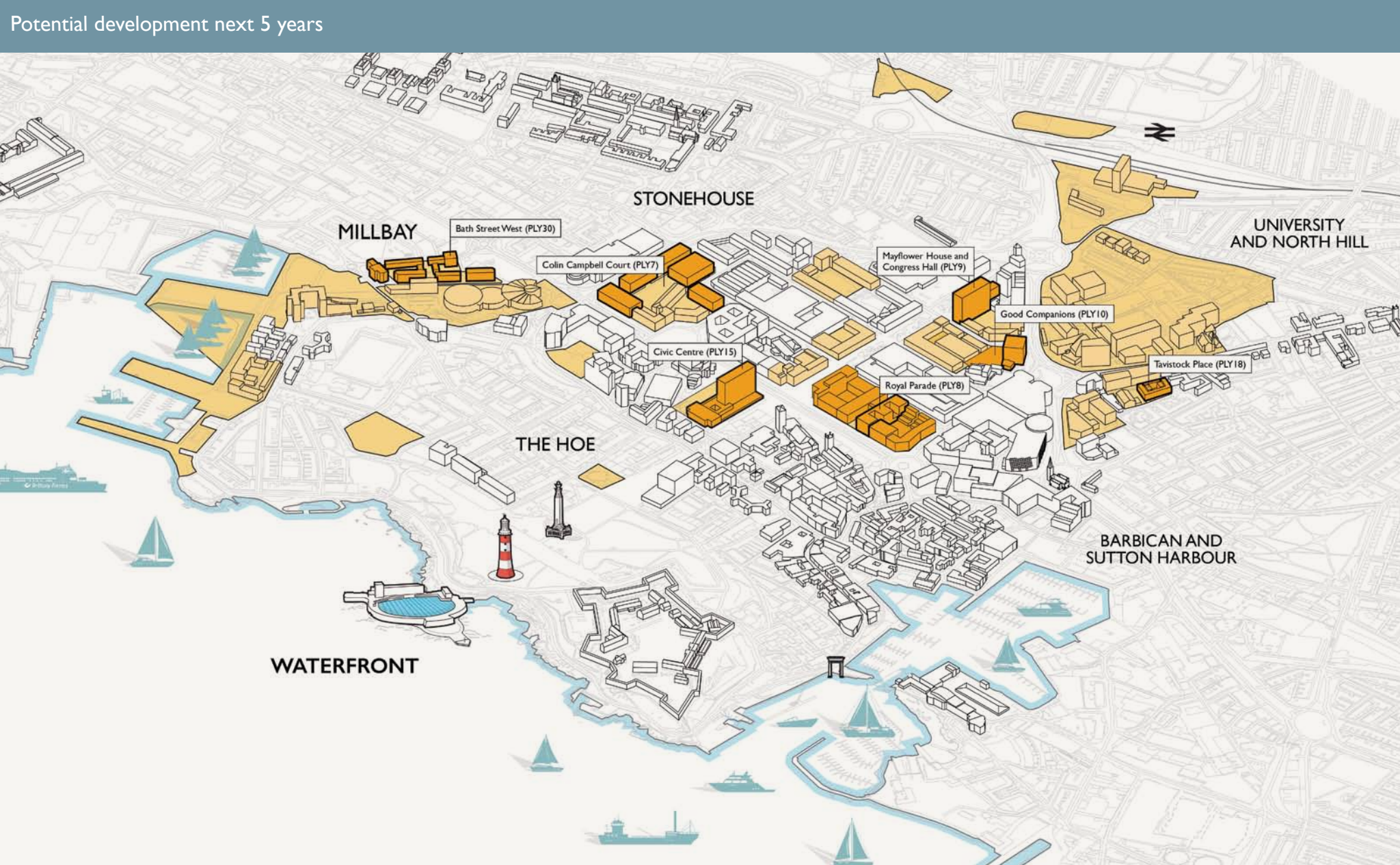
- Residential (of different types and tenure, including apartments and houses, for private sale, rent and social housing)
- Purpose built student accommodation
- Retail
- Commercial / office
- Leisure and cultural
- Visitor accommodation
- Education
- Community uses

These uses will complement and enhance the city centre's important role as a regional retail centre and economic driver.



Joint Local Plan sites







9 DRAWING QUALITY AND VALUE FROM THE WATERFRONT INTO THE CITY CENTRE

Plymouth waterfront is the “jewel in the crown”, offering world class vistas and a long, storied history which links it to people, places and events across the globe.

However, even though the waterfront and city centre are geographically close to each other, without knowledge of the city, the waterfront can feel remote, hidden and inaccessible.

Residential values in the waterfront area are comfortably in excess of £300+ per square foot. Typically, values fall to below £300 per square foot within a few hundred metres of those locations. Although, in the limited instances where new high-quality apartments have been delivered away from the waterfront areas, and on the fringes of the city centre in recent years, these have been able to achieve sale and rental values similar to those in the waterfront areas.



Delivering a new residential core that can harness the proximity to the waterfront whilst offering value and choice where there currently is none represents a significant commercial opportunity.

Bringing the City closer to the Waterfront

Legibility and connectivity between the different character areas can and should be improved, bringing the city core and waterfront closer together.

This can be achieved by:

- Redeveloping the Colin Campbell Court car park, creating a mixed-use character area that will act as the link between the market, the Communal Diagnostic Centre, Bath Street and then onto Millbay.

- The “re-centring” of the city at the Civic Centre and Guildhall - ensuring that direct or indirect routes to all character areas are clearly indicated from the Civic Plaza.

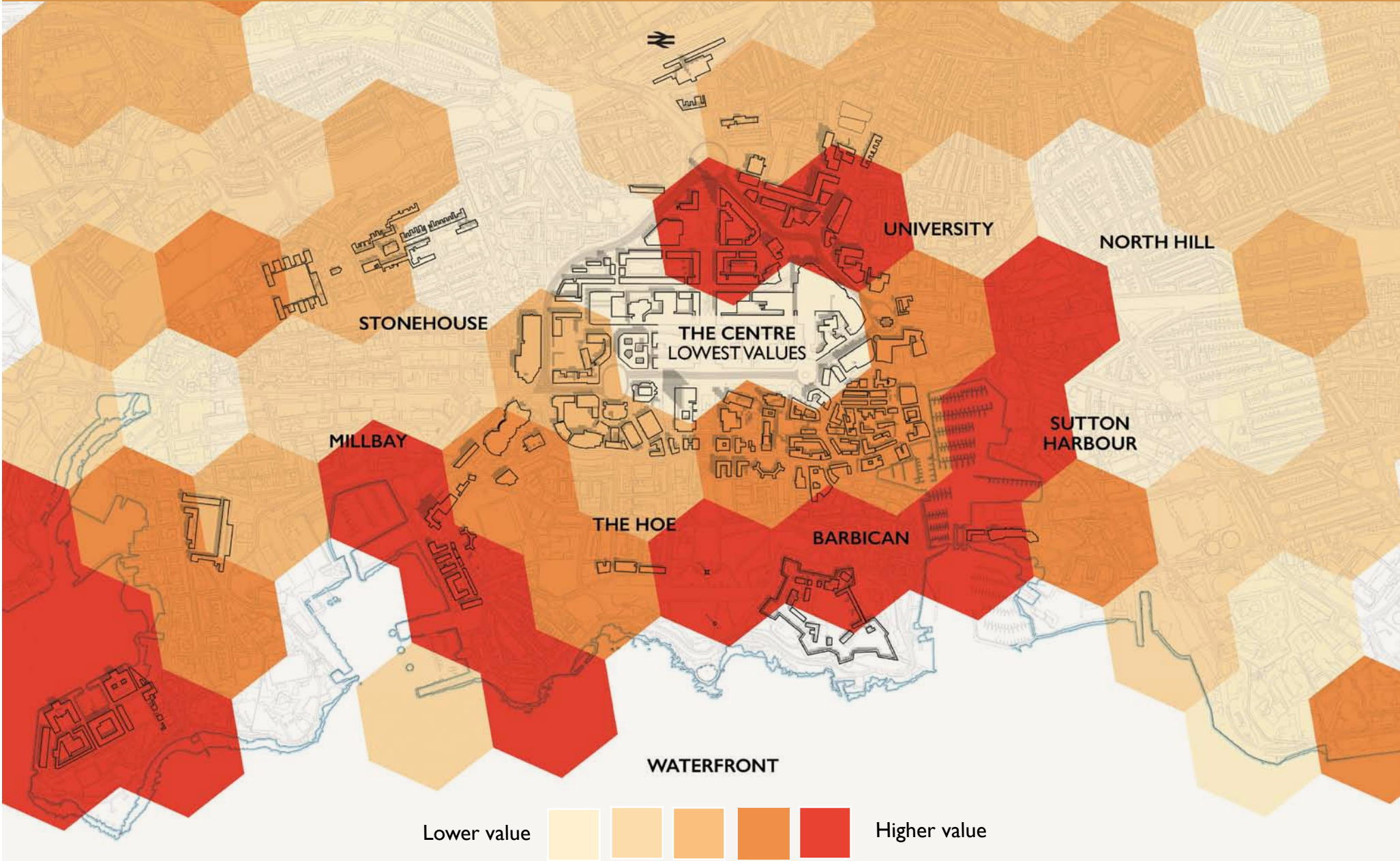
Re-centring the City on the Civic Centre

The Vision includes the Civic Centre as the renewed physical and symbolic centre of the city, with legible and directed interfaces to both the inner retail core and waterfront.

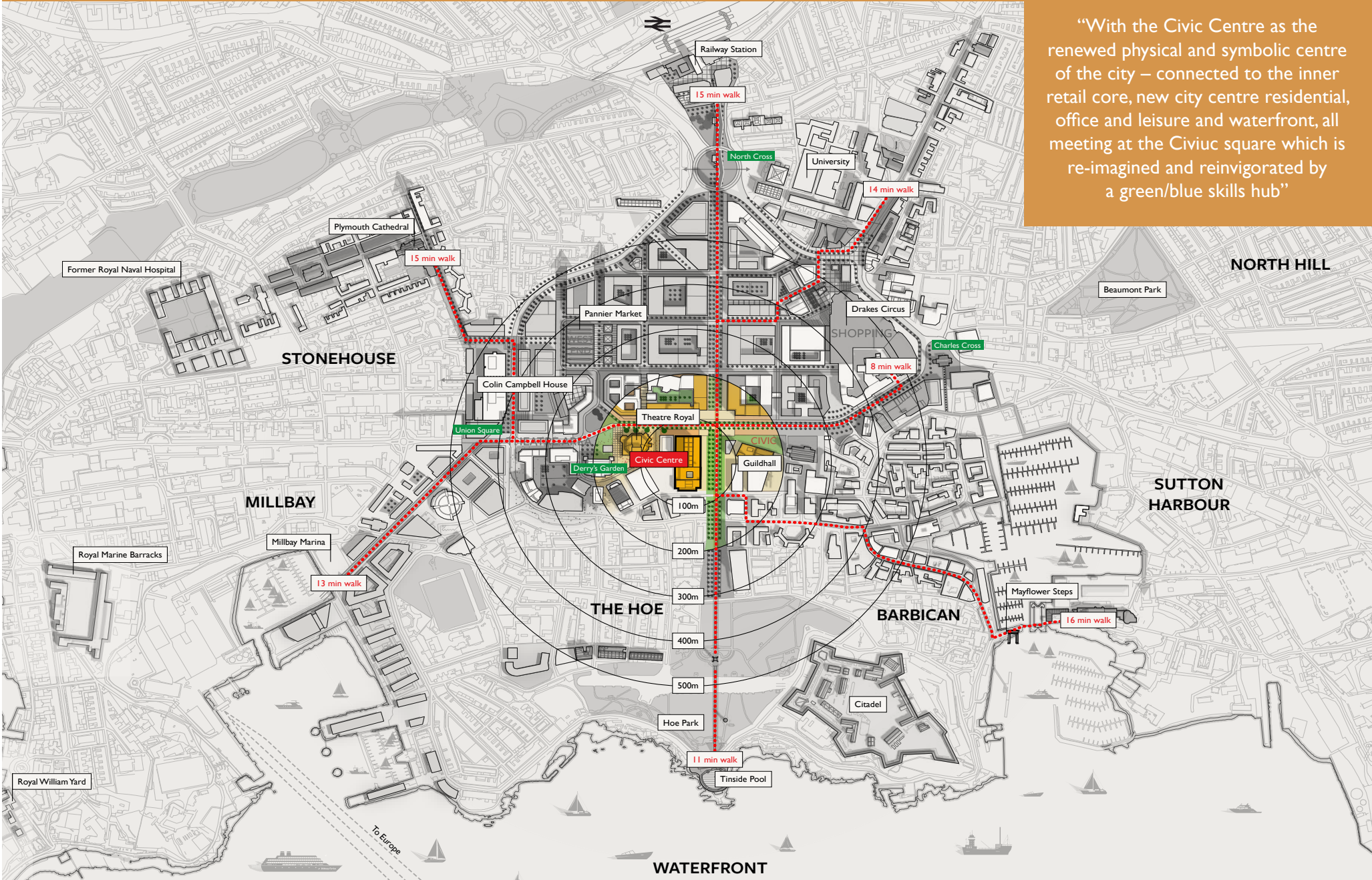
Much of the groundwork for this has already been set out in the 2017 Masterplan. However, it could have been more ambitious in challenging the dominance of the ring road. Whilst strategic junctions were mentioned, the permeability of the city needs to be addressed to allow the benefits of the transformation of the city to be felt by the character areas beyond.



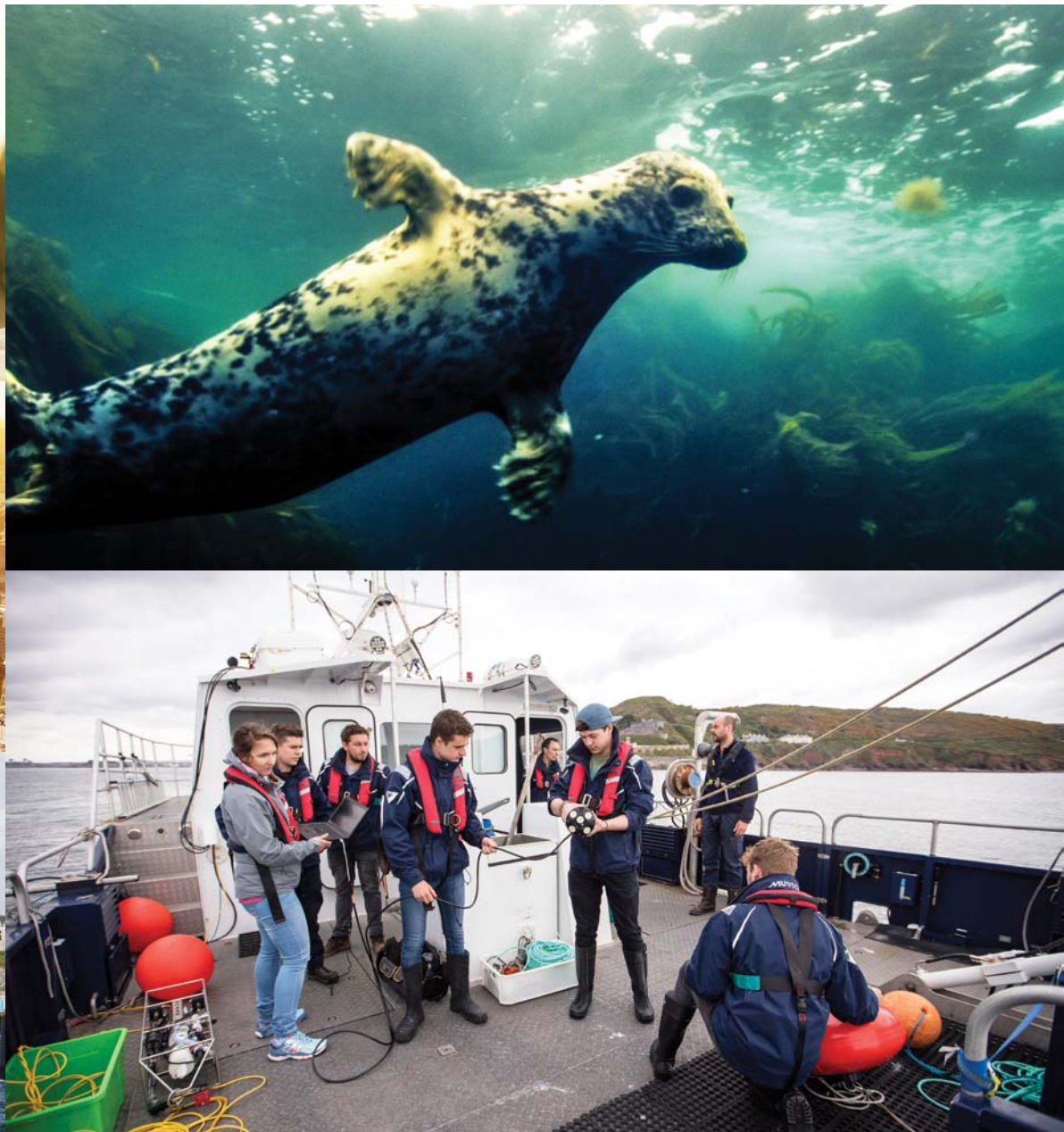
Average sale valuation/sqm



Re-centring the city centre on the Civic Centre



“With the Civic Centre as the renewed physical and symbolic centre of the city – connected to the inner retail core, new city centre residential, office and leisure and waterfront, all meeting at the Civic square which is re-imagined and reinvigorated by a green/blue skills hub”



10 INVESTMENT MASTERPLAN

Previous masterplan documents have captured the need for physical change, but despite significant project delivery outside of the city centre core, projects within the ring road have not come forward. This plan seeks to address the aspirations set out in documents like the City Centre Masterplan and the Joint Local Plan to drive forward a programme of change and growth. The steps include:

- Testing and improving the Vision by engagement with the market
- Ensuring all key strategic stakeholders are bought into the Vision
- Seeking private sector investment / developer partners
- Early delivery of priority projects to give confidence to the investor market
- A commitment and focus by the public sector partners and key stakeholders to the delivery of this Vision.
- 10,000 new homes in the city centre and surrounding area, plus a further 2,000 in wider Plymouth.



11 PRIORITY OPPORTUNITY SITES

The following opportunity sites have been identified as those with the potential to fundamentally change perceptions, demonstrate the potential of the city centre and catalyse a 15-20 year programme of regeneration and renewal.



Priority Opportunity Sites



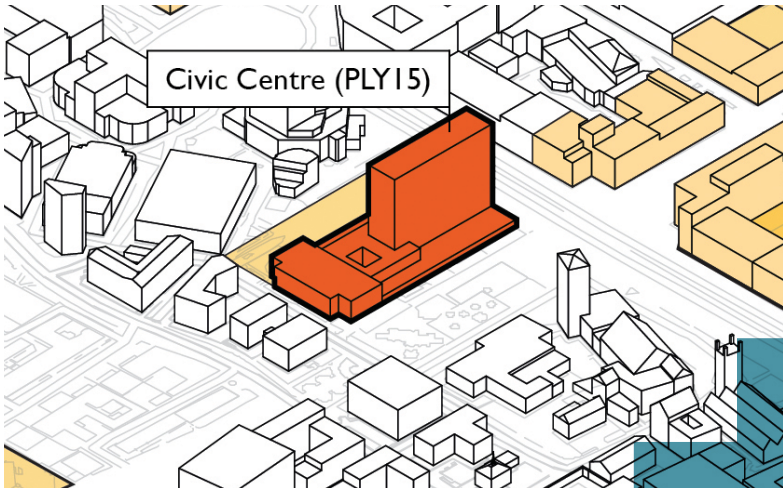
CIVIC CENTRE

The Grade 2 listed Civic Centre, Civic Square and Guildhall area is central to the transformative changes in the city centre, connecting the north and south areas of the city and linking leisure, retail, residential, culture and wide-open spaces together. Plymouth City Council is working with City College Plymouth to create a new 45,000 sq ft training and skills centre, located on the ground and first floors of the Civic Centre. This will breathe new life into the building, as well as the city centre. The next phase of the project will involve the redevelopment of the tower to provide 144 apartments, the upper floor benefitting from far reaching views of the city and the coastline.

There is also potential for development on the car park for further residential or hotel space.

The 1870's Guildhall, with its dramatic architectural features, is also benefitting from significant investment to create a commercial standard events space, bringing it up to the high level needed for today's artists, with outstanding acoustics and facilities.

Planning Status	Civic Centre: detailed planning consent granted for residential units Guildhall: Planning Approved
Land Ownership	Urban Splash, transfer planned to the City Council
Uses	Further Education, Blue/Green Economy Skills Centre, Residential, Leisure and Events.
Residential Units	144



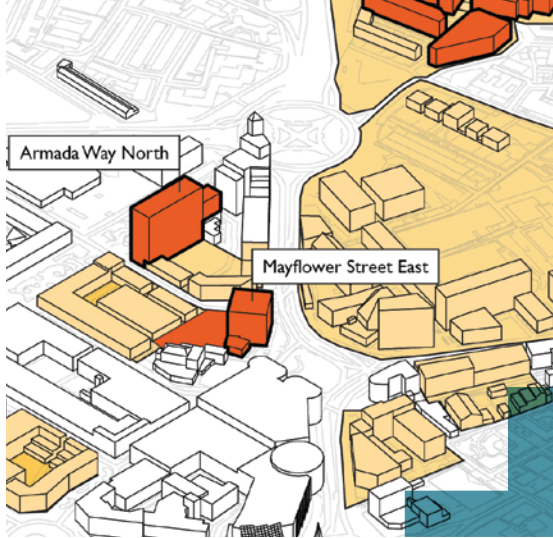
ARMADA WAY

Armada Way is the spine of the city centre, starting just below the Railway Station in the north and stretching straight down the hill to the sea. The fully pedestrianised walkway passes through the main culture, retail and leisure districts of the city centre and will benefit from a major programme of improvements.

A significant Council led investment to transform the public realm in Armada Way, along with the concentration of Plymouth's finest mid-century architecture along Royal Parade, provide the perfect setting for sensitively refurbished and imaginatively repurposed buildings, and a number of high-profile sites are allocated for mixed use redevelopment in the Joint Local Plan.

The first phase will focus on the northern areas of Armada Way around Mayflower Street which includes a number of derelict and vacant buildings/plots.

Planning Status	Join Local Plan Policies PLY11, PY12, PLY13, PLY8, PLY9, PLY10
Land Ownership	The freehold of the majority of the sites are owned by the Council, subject to various long leases.
Uses	Residential, Office, Leisure
Residential Units	1,300+



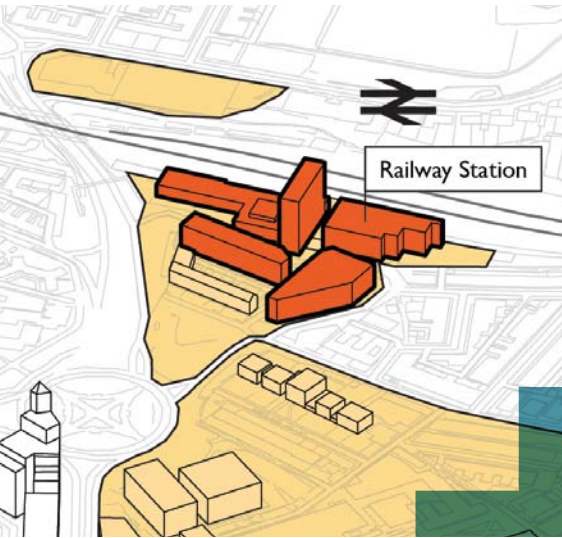
STATION

The £100 million+ transformation of Plymouth's main railway station will create a modern transport hub offering a much-improved arrival experience for visitors, and increasing the capacity of the station to accommodate rising passenger numbers. High quality public realm will link the station to the main University campus and the city centre, creating development opportunities for a new hotel, leisure uses, housing and new university facilities.

The first phases have already been completed including improvements within the station concourse, a new university teaching facility (delivering medical courses in an 11-storey refurbished office block above the station) and junction and infrastructure improvements.

Subsequent phases will involve the delivery of new offices for railway staff, a new multi-storey car park, new public realm and the demolition of the existing multi-storey car park creating high-profile plots for hotel, residential and educational developments.

Planning Status	Consultation has been undertaken on the Masterplan. Planning has been secured for the Multi-storey car park. The public realm and station forecourt fall within Permitted Development rights
Land Ownership	Plymouth City Council
Uses	Residential, Higher Education, Hotel, Car Parking
Residential Units	100+

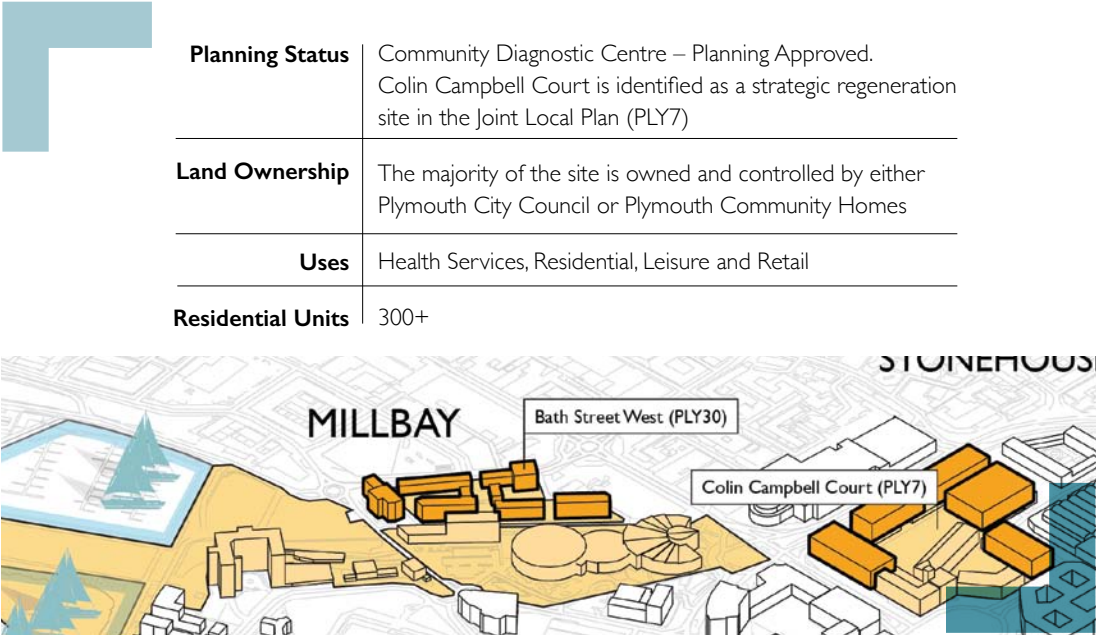


THE WEST END

The regeneration of the West End will deliver a new mixed-use quarter incorporating sustainable homes, new health facilities, shops, cafes and public realm improvements. This will enhance the connection from the city centre to the sea, via Millbay Boulevard.

The first phase is already underway, with the construction of a new Community Diagnostic Centre in Colin Campbell Court providing critical health services in the heart of the city centre, greatly increasing footfall in the area.

The principal landowners are Plymouth City Council and Plymouth Community Homes, working in association with Homes England who have jointly commissioned an option study to consider design and delivery options. The area has capacity to deliver in excess of 300 homes alongside the new health and community facilities. An enhanced leisure and retail offer will complement the existing, thriving community of independent traders centred around Plymouth Market, which has the potential to become a draw to new and existing residents and visitors alike, with a traditional fish market sitting alongside a diverse and multinational street food offer.



Priority Projects	Short Term Next 5 Years	Medium Term 5-10
Civic Centre		
Phase 1 Works - Stabilisation		
Phase 2 Works - Recladding, Shell & Core		
City College Plymouth Campus Opens		
Phase 3 Works - Residential Development		
West End		
Delivery of Community Diagnostic Centre		
West End Business Plan Approved		
Acquisition, Demolition & Infrastructure Delivery		
Housing Delivery		
Station		
GWR Staff Accommodation		
Construction of new Multi-Storey Car Park		
Demolition of existing Multi-Storey Car Park		
Commercial and Residential Development		
Armada Way		
Public Realm Works		
Armada North Acquisitions		
Armada North Masterplanning		
Commercial and Residential Development		
Activity Underpinning Long Term Growth		
Joint Local Plan Refresh		
Identify Private Partners and Investors		

12 PLYMOUTH CITY CENTRE IN 2040

This Vision is based upon the existing Joint Local Plan which covers the period to 2034. However, the reality is that unlocking the full potential of the city centre represents a 15 to 20 year programme of transformation which could deliver 10,000 new homes in the city centre and surrounding area (plus a further 2,000 in wider Plymouth), making this one of the most exciting, new investment and development markets in the UK.

Plymouth City Centre 2040

- Additional sites providing more new homes
- New distinctive neighbourhoods
- Increased permeability
- Enhanced connections to the surrounding areas
- Enhanced connections to the waterfront
- Reduce the dominance and impact of major roads



Strategic Vision



1. Make Plymouth City Centre an important European destination.
Plymouth in Europe



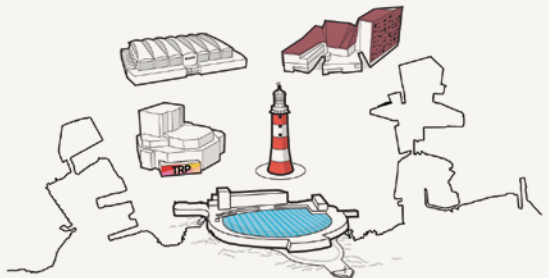
2. Deliver a new residential community, with 1,000s of new homes, connected to the surrounding communities and the world class waterfront



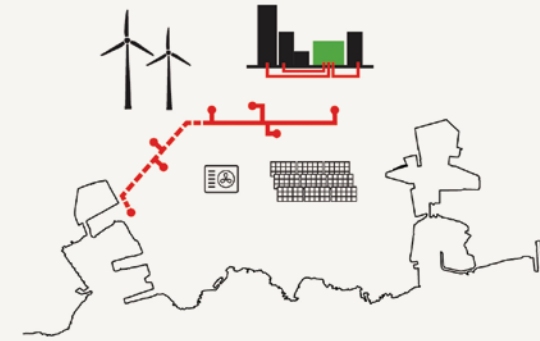
3. Establish civic quality and sustainable transport network in centre that competes with the best



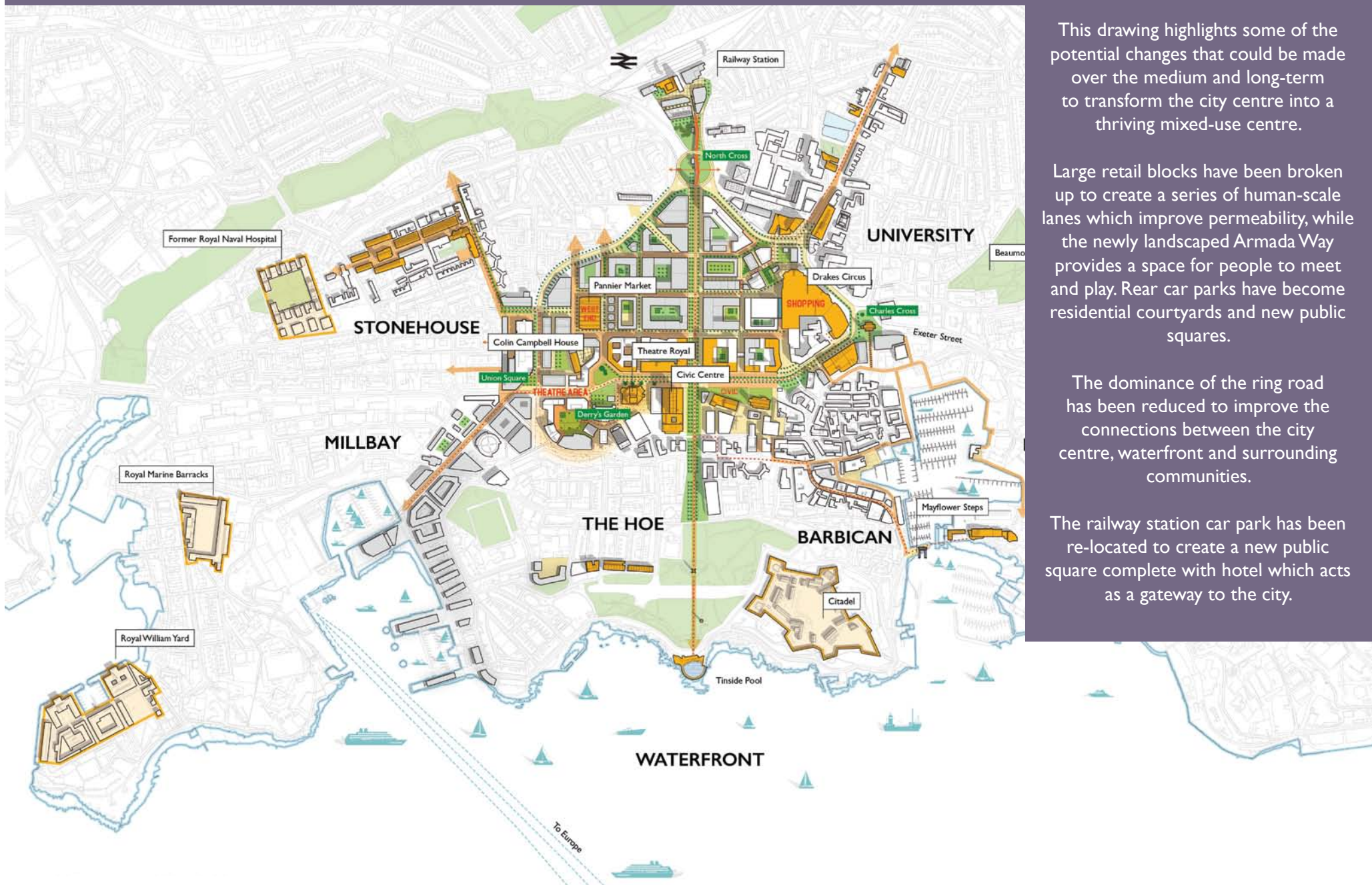
4. Create a dynamic mixed-use centre – a great place to live and to experience during the day and evening



5. Make more of unique city centre assets including such as the Theatre, University, Pannier Market, and the waterfront



6. A City Centre targeting Net Zero energy use



This drawing highlights some of the potential changes that could be made over the medium and long-term to transform the city centre into a thriving mixed-use centre.

Large retail blocks have been broken up to create a series of human-scale lanes which improve permeability, while the newly landscaped Armada Way provides a space for people to meet and play. Rear car parks have become residential courtyards and new public squares.

The dominance of the ring road has been reduced to improve the connections between the city centre, waterfront and surrounding communities.

The railway station car park has been re-located to create a new public square complete with hotel which acts as a gateway to the city.

13 RESIDENTIAL OPPORTUNITIES: OUTSIDE OF THE CITY CENTRE

Millbay and Bath Street

Building on the existing completion of 600 homes, this area, which is close to the city centre, allows for a further 800, with potential for a hotel, mixed use and a food and beverage offer facing the water:

West Park Hill

A landscape-led residential site within a suburb of Plympton. Scope for 500 homes of different types and sizes.

Woolwell sustainable urban extension and community park

Land at Woolwell is allocated for comprehensive residential led mixed use development to provide a sustainable urban extension and a defined edge to the north of the city, including a new community park. Provision is made for in the order of 2,000 new homes (about 1,560 of which are anticipated to come forward within the plan period).



14 NON-RESIDENTIAL OPPORTUNITIES

The Visitor Economy, Cultural and Leisure

Around 4.1 million visitors make the trip to the city every year spending £292 million locally and supporting the employment of just under 6,200 people in the visitor and hospitality sector.

The visitor base is 85% day visitors, 14% UK staying visitors and 1% international visitors. It is estimated that around 93,000 staying visitors visit the city for business, every year. This provides an all-year-round visitor economy, where occupancy is still relatively high off peak, as well as in the peak summer months.

The Visitor Plan 2020-2030 provides a framework to grow visitor spend and visitor numbers by positioning Plymouth as Devon and Cornwall's premier visitor destination and a top ten UK City Break.

The city already boasts successful cultural and leisure opportunities, a testament to both the demand and delivery of the increased economic significance of the sector.

Plymouth is the West Country's cultural and entertainment capital with a dazzling year-round variety of performance, music and art venues, festivals and events.

The Theatre Royal Plymouth is the UK's largest regional producing theatre, featuring a diverse programme of stage shows in its two auditoria.

The opening of The Box was one of the most significant cultural events in the UK in 2020. Plymouth invested £46 million in the new museum, art gallery and cultural centre, where you can discover more about Plymouth's rich and colourful history. Nine permanent galleries showcase incredible collections including 14 monumental ships' figureheads and original art.



Film fans can enjoy the latest independent films at Plymouth Arts Cinema, based at Arts University Plymouth, the Everyman Cinema in Royal William Yard, or the world's most immersive cinema experience with IMAX and 4DX at Cineworld in Drake Circus Barcode.

The city centre is animated by a programme of cultural events which in recent years has included the British Firework Championship, Sail GP, Flavour Fest (the Southwest's largest food and drink festival), Seafest and Christmas markets.

Plymouth is also the home of the National Marine Aquarium, sited on the historic Barbican area of the city which provides a focal point for city's leisure and tourism sector in an incredible water side setting. This area is also home to the Mayflower Steps, from where the Pilgrims are believed to have left England aboard the Mayflower, before crossing the Atlantic Ocean to settle in North America on 6 September 1620.

Hotel Sector

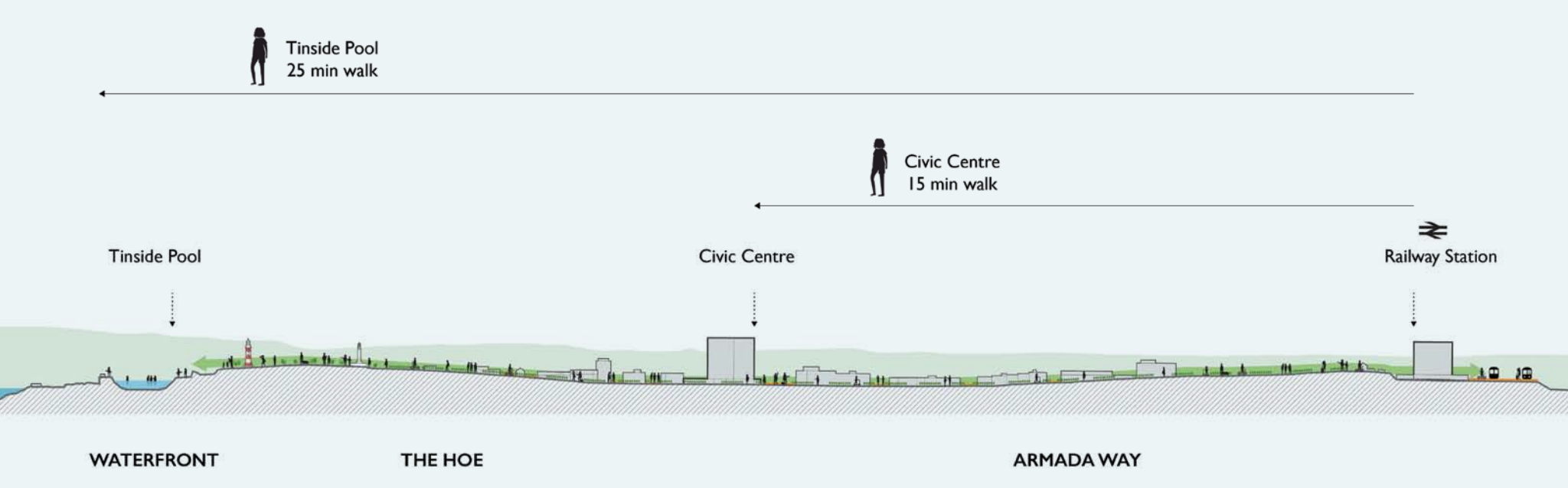
A 2022 study has shown that Plymouth consistently achieves a demand of 80% +, both seasonally and in the working week. It also found supply gaps for branded hotels, midscale with some service, upscale limited service, and upper upscale with some or full service. There is also a lack of high-quality dedicated conference facilities that could complement an expanded hotel offer in the city centre increasing opportunities for business, conferences and events in the city which is increasingly driven by the business sector.

15 KNOWN BARRIERS AND CONSTRAINTS

Topography

The city centre is low lying and flat, the highest point is Plymouth Hoe, which sits between the city centre and waterfront. As a result, the city centre can feel disconnected from the waterfront. However, well designed city centre development will provide new views to the park, city, ocean and the moors.

Topography barriers



Urban Form

The ring road, roundabouts and crossings create physical and psychological barriers between the city centre core and adjacent areas have long been identified as constraints on the connectivity. The Council has a long-term strategy for transport within the Plymouth and Southwest Devon JLP which considers the diverse transport priorities as they relate to

different spatial settings, including the city centre. This strategy aims to deliver an integrated approach to transport and planning and achieve a balanced strategy for growth and healthy and sustainable communities.

A plan for improvement to crossings, particularly to the West End and nearby junctions was identified in the 2017 Strategic Masterplan as well as in more recent work.

Although improvements may be gradual, if linked together through an overarching strategy the benefits will be brought forward in the incremental delivery of projects, creating a place that is both regenerative and delivers benefits beyond the built environment.

In the short term there is an opportunity for projects that incorporate virtual / augmented reality into the city centre signage. This approach

alongside a plan for active travel routes and connectivity can deliver improvements to overall legibility and navigation to the character areas.

Financial

High build costs and low sales values are a known issue in the Southwest as a whole, and in Plymouth City Centre in particular. The average house price in Plymouth was £232,600 in 2023,

which is 29% lower than the national average of £328,600. Part of this difference is explained by the fact that Plymouth has a higher proportion of smaller, terraced homes than the UK average.

Between 2019 and 2023, house prices have risen 18% in Plymouth, compared to an increase of 23% in the UK and 24% in the South-West over the same period.

The absence of a city centre residential market and the associated lack of market data is clearly a challenge for investors but also represents a significant opportunity if the correct partners can come together to contribute:

- Land and property
- Construction and development expertise
- Supply chain connections
- Financial models predicated on longer term returns
- Availability of development capital
- Subsidy / gap funding
- Access to investor markets
- Routes to government departments and ministers
- Strong relationships with key local, regional and national stakeholders.



Economic

Due to the scarcity of residential development in the city centre, it is difficult to find a like for like basis for producing an accurate market-led view on cost and value.

However, the Council has excellent links with the local supply chain and property sector that can help provide up to date, market led information on proposed developments. The Council also holds significant amounts of data on demographics, skills, and demand across the city and region.

Supply Chain and Build Costs

Build costs are an issue throughout the Southwest region, not just in Plymouth. With the development of this Vision and the bringing together of strategic partners backed by Government investment, there are opportunities to aggregate the pipeline of projects in the city and immediate vicinity to provide certainty and quantum.

This has the potential to drive economies of scale and simultaneously drive down build costs and increase values.



16 DELIVERY MODELS

The role of Homes England in Plymouth

Homes England is the UK Government’s housing and regeneration agency. Its objectives are set by a five-year strategic plan.

The mission of the Agency aligns with the ambitions of Plymouth:

- Accelerating the pace of house building
- Bridging local places with the private sector
- Bring investment to communities
- Build long term relationships with places and partners.

To support the Council in accelerating the opportunities in the city centre and maximise the potential of investment, Homes England are providing support with capacity and expertise.

Homes England are operating in towns and cities across the country developing and deploying different delivery models designed to meet the local circumstances. As a result of Homes England’s support, housing and regeneration schemes are progressing at scale, across the country.

These models include:

- Strategic Partnerships
- Corporate Joint Ventures
- Local Authority Sponsored Company

- Public Sector Sponsored Company
- Separate Development Company
- Urban Development Company
- New Town Development Company

Following publication of this Vision, an analysis of potential delivery models will be undertaken in detail, to produce a shortlist of the optimal vehicles, based on the specific physical, economic and political context of Plymouth. This will accelerate and deliver transformational change for the city.

Given the scale and extent of the opportunity strong partnerships will be key in delivering the full ambition of the city. Therefore, leveraging

existing partnerships and forming new strategic relationships will be a key early aim of the delivery programme.

Procurement and Engagement

In addition to delivery models, the Council and Homes England will be working together to explore optimal routes to procure and contract. Reducing the delay and increased risk of elongated procurement processes.





Plymouth
Britain's Ocean City



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investplymouth.co.uk
invest@plymouth.gov.uk

Lower Hous
gress Hall (F
al Parade (P

