



Oversight and Governance

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**Brexit, Infrastructure and Legislative Change Overview and Scrutiny
Committee**

Supplement Pack

Wednesday 6 March 2019
2.00 pm
Warspite Room, Council House

Members:

Councillor Morris, Chair
Councillor Fletcher, Vice Chair
Councillors Buchan, Carson, Churchill, Cook, Mavin, Stevens and Wheeler.

Please find attached additional information for your consideration under agenda items 5 and 7.

Tracey Lee
Chief Executive

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

5. Visitor Plan

(Pages 1 - 44)

This item will be considered at Cabinet on 5 March 2019.

7. Plan for Homes

(Pages 45 - 58)

This item will be considered at Cabinet on 5 March 2019.

PLYMOUTH CITY COUNCIL

Subject: Plymouth Visitor Plan - Refresh 2020-30
Committee: Cabinet
Date: 5 March 2019
Cabinet Member: Cllr. Tudor Evans
CMT Member: Anthony Payne (Strategic Director for Place)
Author: Amanda Lumley (Executive Director, Destination Plymouth)
and Patrick Knight (Economy, Partnerships and Regeneration Manager)
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Ref:
Key Decision: Yes
Part: I

Purpose of the report:

This report follows on from the paper which was brought to Cabinet on 20th November 2018 to seek approval for the refresh of the Plymouth Visitor Plan from 2020 to 2030. Following extensive consultation from a wide range of stakeholders and development of initial concepts, we are now seeking approval for adoption of the strategic principles that will underpin the business planning process as we move the strategy refresh forwards.

In 2011 we set out our tourism vision, approach and 'star projects' in our first Visitor Plan. We've delivered that Plan and more. This refreshed Plan describes our focus and priorities for the next decade, designed to build on our progress so far. It is a Visitor Plan for the city and everyone with an interest in the visitor economy needs to get behind it and work together to make it happen.

Tourism is one of the big success stories in Plymouth. Over the last decade tourism has seen visitor numbers and visitor spend each grow by over 20%. Around 5.1 million visitors make a trip to the city every year spending £347m*. Today tourism employs over 8,000 people* and delivers £258 m* GVA.

There is a need to refresh the Visitor Plan in the light of an evolving marketplace, the significant progress against the existing plan, and new opportunities arising, including how best to capitalise on the Mayflower 400 legacy, and the proposal to establish the UK's first Marine National Park. Consequently, it is important to put in place new ambitions, objectives and projects for the city to progress towards 2030.

Furthermore, the new Visitor Plan will aim to enable Plymouth's residents to benefit from the visitor economy, supporting job retention and creation; whilst also seeking to enable Plymothians to take full advantage of the city's rich history, heritage and unique environment, by promoting opportunities for education, health and wellbeing, and pride.

*Cambridge model 2017 data, South West Tourism Research.

Corporate Plan:

Plymouth is Britain's Ocean City and the visitor economy is a major contributor to our economy, local community and vibrant waterfront city. The refreshed Visitor Plan aims to address Growing Plymouth priorities, in particular economic growth, jobs, skills and sustainability.

**Implications for Medium Term Financial Plan and Resource Implications:
Including finance, human, IT and land:**

Destination Plymouth Ltd currently receives revenue funding from PCC per annum up to the financial year-end Mar 2021. This forms part of the City Council's £2.25 million commitment to Mayflower 400 up to end March 2021 and is included within existing revenue budgets.

In addition to this, PCC supports city marketing and advertising within the existing economic development team and revenue budget, coupled with support for and from the Business Improvement Districts.

Over the past three years Destination Plymouth Ltd has helped to leverage over £6.5 million income, through grants for specific projects related to the existing Visitor Plan for 2010-20 and Mayflower 400 programme.

To ensure that the Plymouth Visitor Plan can continue to be delivered, it is proposed that the City Council continues its commitment to core fund Destination Plymouth from within the Economic Development Department's existing revenue budgets. Destination Plymouth will also continue to identify core funding from external sources including BIDs and commercial income generating activity.

No implications are anticipated for the MTFP at this stage, resource implications are limited to member and officer time.

Other Implications: e.g. Child Poverty, Community Safety, Health and Safety and Risk Management:

Consultation work on the Visitor Plan to date includes a vision, high-level ambitions and enabling priorities designed to create new jobs and opportunities for local people. A detailed Business Plan and Marketing Plan are due to be prepared later in 2019, which may contain specific recommendations that relate to the above.

Equality and Diversity:

Has an Equality Impact Assessment been undertaken? Yes

Recommendations and Reasons for recommended action:

The report requests that Cabinet:

- 1) Recognises the progress and work to date on the refresh of the Plymouth Visitor plan;
- 2) Adopts the strategic principles and direction of travel that are recommended in the report subject to any recommendations from Scrutiny;
- 3) Supports the process to now develop a detailed operational Business Plan and Marketing Plan for the three years beyond 2020 and on a rolling basis thereafter, to clarify specific delivery

priorities. The detailed business and marketing plans will be brought back to Cabinet for ratification and formal adoption in December 2019;

Reasons:

- 1) To ensure the city has a robust, credible and effective plan to grow the city’s visitor economy to 2030;
- 2) To ensure Destination Plymouth can continue to support delivery of the city’s visitor plan.

Alternative options considered and rejected:

The alternative option is not to refresh the Visitor Plan, which could affect the city’s ability to position itself as a destination not just for visits but also for inward investment and living. This could have significant negative impacts on the city’s overarching growth strategy, the Plymouth Plan, to 2032 and would limit the contribution that growing the visitor economy can make to productivity and job growth at a time of considerable economic uncertainty.

Published work / information:

Plymouth Visitor Plan Framework 2020-2030 Blue Sail report

Plymouth Visitor Plan Framework 2020-2030 Plan on a page

Appendix – list of stakeholders consulted on the Plymouth Visitor Plan Framework 2020-2030

Background papers:

Title	Part I	Part II	Exemption Paragraph Number							
			1	2	3	4	5	6	7	

Sign off:

Fin	SA. 18.1 9.22 6- 21.0 2.19	Leg	ALT /305 08/2 1	Mon Off	ALT /305 08/2 1	HR		Assets		IT		Strat Proc	
Originating SMT Member													
Has the Cabinet Member(s) agreed the content of the report? Yes													

1.0 Background

To help drive the city's visitor economy, Destination Plymouth Ltd. was formed in 2008 and incorporated in June 2010 as a public-private sector partnership and arm's length company of Plymouth City Council, which owns the major shareholding. In 2010 the partnership commissioned a Visitor Plan for the city with the aim of growing the visitor economy and the jobs it supports over the 10 years from 2010 to 2020. Shared leadership and delivery of the existing Visitor Plan has secured significant results and leverage on the City Council's and wider stakeholder contributions. (For details please refer to Cabinet Report dated 20 November 2018, entitled Plymouth Visitor Plan – Refresh 2020-30)

2.0 Introduction

This report seeks Cabinet recognition of work to date on the refresh and seeks approval to adopt the strategic principles and direction of travel that are recommended including the vision, high-level ambitions and enabling priorities for the refreshed Visitor Plan. It is also requested that Cabinet supports the process to now develop a detailed operational Business Plan and Marketing Plan for the three years beyond 2020 and on a rolling basis thereafter, to clarify specific delivery priorities. The detailed business and marketing plans will be brought back to Cabinet for ratification and formal adoption in December 2019.

The refreshed Visitor Plan aims to enable Plymouth's residents to benefit from the visitor economy, supporting job retention and creation; whilst also seeking to enable Plymothians to take full advantage of the city's rich history, heritage and unique environment, by promoting opportunities for education, health and wellbeing, and pride.

The Plymouth Plan and the existing Visitor Plan (2010-20) all highlight the importance of Plymouth's visitor economy, which currently represents £347 million economic impact annually, supporting 8,000 jobs, 7% of the city's employment.

Supported by the City Council, Destination Plymouth has worked with Blue Sail, specialist destination consultants, to help diagnose and address the opportunities/issues facing growth in the visitor sector, wider 'place marketing' challenges and to establish a clear direction for the future development of Plymouth as a destination.

To help define priorities, projects and assets that would help drive visitor growth, the refreshed Visitor Plan (see details below) has also been developed through a robust process of consultation. This has involved engaging over 50 stakeholders and businesses across the visitor economy. This has included the following organisations:

Plymouth Waterfront Partnership BID
Plymouth City Centre Company BID
Plymouth Growth Board
Hoe Neighbourhood Forum
Plymouth Culture
Real Ideas Organisation
Royal Navy
Plymouth University
Visit England
Heart of the South West LEP

For full list see appendix.

The refreshed Visitor Plan aims to:

- Set strategic high level ambitions for the city and our visitor economy
- Be clear about why people should visit Plymouth, and the experiences they will encounter
- Focus single-mindedly on those actions that will deliver the best return on investment
- Highlight enabling activities that reflect our strategic aims and focus our priorities

The Visitor Plan process has been endorsed by the Destination Plymouth Board, Plymouth Growth Board, Plymouth Waterfront Partnership and the Plymouth City Centre Company.

The Plymouth Visitor Plan 2020 to 2030 will provide a coherent, high-level framework for Destination Plymouth's detailed operational delivery plans, which will be developed later in 2019. This will include a business plan and a marketing and events plan. This will be about wisely committing resources - people, time, skills and budgets - to deliver the plan and importantly to seize opportunity, help nurture partnerships and lever in additional partner funding and sponsorship. The funding structure will involve aligning existing City Council resources behind the Visitor Plan; working closely with the private sector, whilst also securing grants, sponsorship and revenue.

Destination Plymouth, supported by the City Council, will ask everyone involved in the visitor economy to get behind this Plan support it and take a role in making it happen.

3.0 Our Current Position

The benchmark data for the Visitor Plan was initiated in 2008 and nearly 10 years later progress has been significant against the original objectives, with visitor numbers and spend targets achieved and many of the projects originally envisioned having been delivered or are in the process of delivery prior to Mayflower 400 in 2020 which has acted as a significant catalyst for the city.

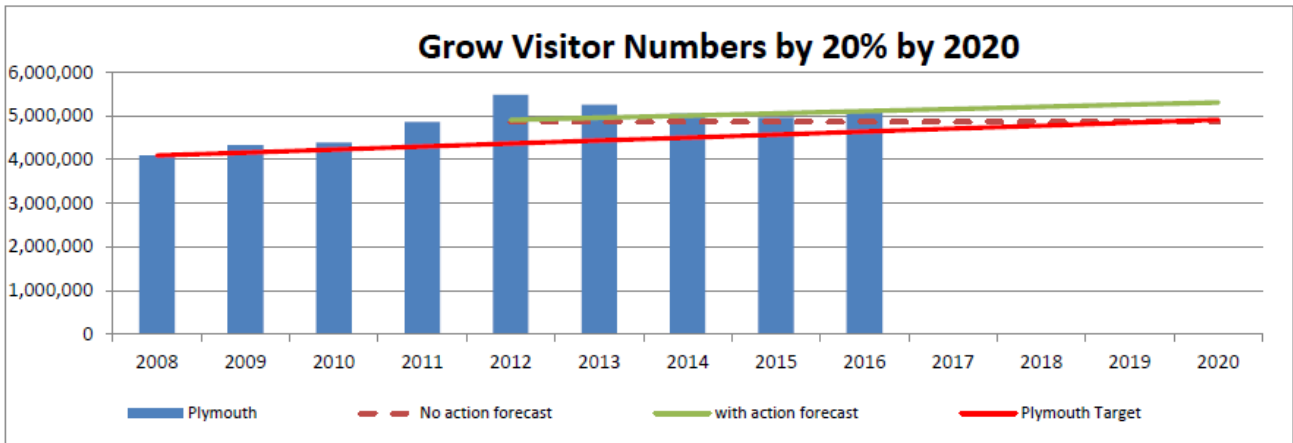
3.1 The key strategic objectives within the existing Visitor Plan are:

- To grow visitor numbers by 20% by 2020 and visitor spend by 25% - that means 800,000 additional visitors and that visitor spend will rise by £63m from nearly £252m to £315m
- To create and sustain 4,000 new jobs in the visitor economy by 2026 – a 33% increase on current numbers
- To increase GVA by £84.4 million
- To strengthen Plymouth's position as the regional centre for Devon & Cornwall – by creating a great day out and evening destination
- To raise the profile of Plymouth and its positioning as a place to visit and invest - particularly focusing on its outstanding marine credentials
- To generate demand for more places to eat and drink, distinctive independent shops, quality places to stay and an exceptional cultural offer that local people and visitors can enjoy

3.2 The achievements as a city compared to targets are significant, including:

Grow visitor numbers by 20%

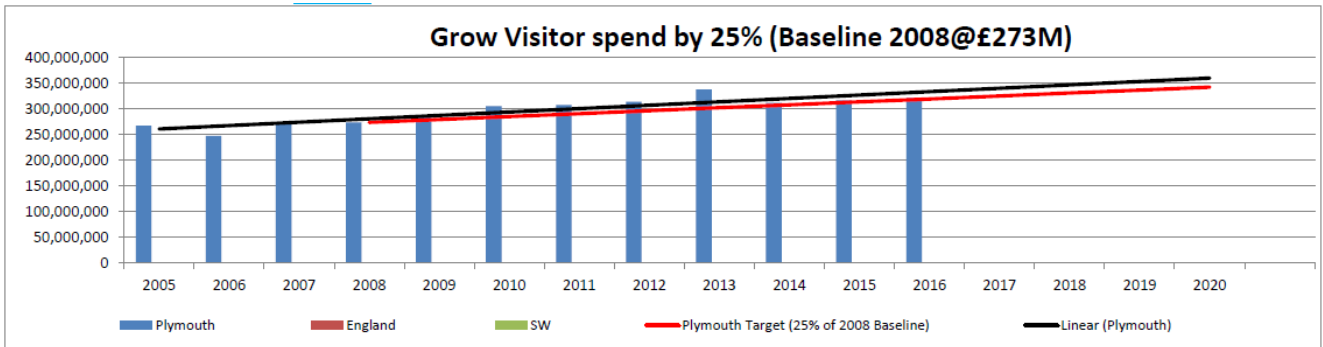
- Baseline (2008) = 4.093 million. Actual to 2016 = 5.116 million
- Plymouth has grown its visitor numbers by 24.9%



Grow visitor spend by 25%

- Baseline (2008) = £273,731,000. Actual to 2016 = £321,767,000
- Plymouth has grown its visitor spend by 17.5%

Key: 'Actual' figures are graphically represented by the blue coloured bars in above graph.



Grow jobs by 2,800

- Baseline (2008) = 4,495. Actual to 2016 = 7,649
- Plymouth has grown the number of jobs by 3,154

Grow GVA by £84 million

- Baseline (2008) = £208m. Actual = 248m (2016 latest figures)
- Plymouth has grown its GVA by £40m
- Anticipate future increase - as 4 years to go, including impact of projected new hotel capacity

Key: 'Actual' figures are graphically represented by the blue coloured bars in above graphs.

3.3 In addition, the original visitor plan included a five-year rolling business plan and marketing plan with the following headline actions and 'star projects'.

Star projects:

- A signature and major events programme to draw in day visitors from across the region
- Development of Commercial Wharf into a used public space
- Royal William Yard to be developed as a visitor destination
- 'Telling Stories' a project to develop and promote our heritage assets, public realm, gateways and city walking trails.

High-level headline actions:

- Destination marketing
- Accommodation development
- Visitor welcome
- Business tourism
- Skills development
- Evaluation and monitoring

3.4 Star projects have been particularly successful and have been largely delivered already or will be delivered by 2020:

Events – Plymouth now has a very strong events programme punctuated by nationally significant events including MTV Presents, British Fireworks, Armed Forces Day, FlavourFest, and key sporting events including Transat, La Solitaire du Figaro, British Diving Championships and British Swimming Masters. Plymouth Culture has grown from strength to strength over the past five years and in 2017 helped to enable NPO's across the city to bid for Arts Council Funding of over £18 million for four years to develop the underpinning cultural infrastructure of the city as we move towards 2020.

Commercial Wharf and Royal William Yard have both been successfully re-developed with the Commercial Wharf area now a thriving café and boat trips attraction led by private sector investment. Royal William Yard has been developed by Urban Splash and has become a chic mini-destination of offices, restaurants, cafes and bars in its own right, coupled with a quirky programme of artisan food markets, open air theatre and cinema amongst some of its regular activities and café culture.

The TIC and associated Mayflower Visitor Centre on the Barbican continue with a 3-storey museum with interactive displays about merchant life, the fishing industry and the harbour. There was a c. £15,000 refurbishment by the City Council in 2015. There has been a strong increase in visitor numbers over the last few years, potentially due to the current temporary closure of the city museum (ahead of the opening of The Box).

The 'Telling Stories' project has many facets and is currently in delivery with the aim of being completed by 2020. The project comprises three heritage trails, refurbishment of the Elizabethan House and reimagining of the public realm in the Mayflower Steps area through both physical and digital attributes. Linked into this will be the impressive 'The Box' project which will provide a step change in the visitor offer in the city and long overdue revitalisation of the former city museum, galleries and records offices.

3.5 The headline actions for marketing activities included targeting local and regional day trippers, developing staying and overnight visits, and focusing on the East coast of the USA as part of the build up to Mayflower 400 in 2020. As part of the initial work the Britain's Ocean City branding was developed and there has been significant success in growing the reach of the city's marketing activities helped by £1 million of Visit England and government grant funding over the past two years for Mayflower 400. This has resulted in the following improvements:

Website visits: 2013 - Unique visitors 616k; Page views 4.2m
2017 - Unique visitors 968k; Page views 5.3m

Social media:

Visit Plymouth - 2014 - Facebook 5.4k, Twitter 6.6k
2018 - Facebook 10.6k, Twitter 13.5k

What's On - 2014 - Facebook 31.7k, Twitter 1.4k
2018 - Facebook 60.4k, Twitter 6.1k

Impact:

AVE / Reach - 2013 – AVE - £2.1m; Reach: 118k
2017 – AVE - £2.7m; Reach 156k

US marketing activity – Audience reach £728 million (trade), £17 million (AVE) PR reach

In addition, work commenced in 2017 to develop the cruise market driven by long term aspiration to become a key cruise port in the South West and to grow cruise visits which had declined to zero over the years. Early activities in 2017 and 2018 have been successful with 4 cruise liners booked in 2018, 5 to date in 2019 and 6 to date in 2020.

3.6 A key area of activity in the original plan was to grow better quality and a wider range of accommodation bed stock to support growth in the staying and international visitor markets and to encourage visits from higher spending visitor groups.

A hotel demand study was commissioned in 2014 and demonstrated demand in the market; this was subsequently taken to market by the City Council later that year. Currently there are two hotels being built (Derry's Premier Inn (110 rooms), Coxsides Premier Inn) and a 14-bed boutique hotel has recently opened in Royal William Yard. A number of other hotel developments are in the pipeline and are in the process of being brought forward.

3.7 Visitor welcome activities have been predominantly driven by PCC and include continuing to support the tourist information centre in the Barbican, improving key gateways such as Bretonside coach station being moved to Mayflower Street, the railway station which is currently being brought forward as a major hub regeneration project, cruise terminal and key city gateways such as Exeter Street.

Tourism is one of the big success stories in Plymouth. Over the last decade tourism has seen visitor numbers and visitor spend each grow by over 20%. Around 5.1 million visitors make a trip to the city every year spending £347m. Today tourism employs over 8,000 people, 7% of the city's employment.

3.8 Funding

Destination Plymouth Ltd. currently receives £150,000 per annum from PCC, which is already within existing revenue budgets, as part of the overall Mayflower 400 contribution of £2.25 million from 2017 to March 2021.

Other income based on last year's figures is broken down as follows;

City Centre Company £50,000 per annum
Plymouth Waterfront Partnership £10,000 per annum
University of Plymouth £50,000 per annum
Memberships £17,000 per annum (net)
Marketing £20,182 per annum
Mayflower 400 £330,315
Discover England £343,000

Cruise £25,000
Total: c. £845,000

This income supports the executive team and delivery of key projects linked into specific grant funding including Discover England Fund and Mayflower 400.

3.9 Leverage:

As part of the overall partnership approach, PCC also contributes event and non-event specific income (totalling c. £0.93m in 2017/18) towards marketing and events activities via the economic development events and marketing team. This supports events such as Lord Mayors Day, Bonfire Night, Armed Forces Day, Ocean City Sounds, Fireworks, and the Blues n' Jazz Festival. The Destination Plymouth team is also hosted at City Council offices in Ballard House.

Grants funding has also successfully been secured over the past three years including:

2016	£500,000	Treasury funding via Visit England for MF400 International marketing
2017	£500,000	Discover England Grant funding for international marketing (+ £200,000 in kind)
2017	£88,000	Discover England Grant funding for cruise marketing
2018	£250,000	DCMS funding for MF400 international marketing
2018	£10,000	General Society of Mayflower descendants for MF400 trails/monument
2018	£60,000	Community Rail Partnership for MF400 trails
2018	£10,000	Pilgrim Trust for Elizabethan House
2018	£50,000	from Heritage England for Elizabethan House
2018	£140,000	from HLF for Elizabethan House (part of 2 stage grant of £650,000)
2018	£200,000	Founders Club for MF400 marketing activity
2018	£51,000	Plymouth Argyll Trust for MF400 sporting programme (in kind)
2018	£70,000	Arts Council for Cultural producer
2018	£68,000	Arts Council for Illuminate and misc. projects (in kind)
2019	£3.4 million	Cultural Development Fund
2019	£58,000	HLF for heritage trails

Total grant funding leveraged - 2016 to 2019 (to date) - £5.5 million.

It is worth highlighting that this represents significant leverage on City Council funding.

Behind these high-profile projects and activities, partners continue to work together to support investment to ensure that visitor facilities, service and experiences are in place to make Plymouth a successful destination. But there is more to do and more opportunities to deliver for our city and for our community.

Plymouth needs more high quality, distinctive and 'only here' products and experiences that provide a reason for visitors to choose our city for a short break or a business trip, and we need more visitor accommodation to make that possible. In a highly competitive marketplace we must be confident about our unique strengths and their potential. We must take our offer to market in standout and engaging ways, using the latest digital technology. Visitors need to be able to get here easily and find their way around the city with confidence. Over the next decade we need to invest in new product and experiences, in our infrastructure and in our marketing and promotion. All we do must be underpinned by sound sustainability credentials.

4.0 Our Vision

We've re-invigorated and refreshed our vision to take advantage of new opportunities and to reflect the marketplace.

Our refreshed vision is:

'Plymouth is Britain's Ocean City, famous for its Waterfront. We will be one of Europe's finest waterfront cities, celebrated for our unique and diverse marine life, heritage, culture and experiences. We will continue to be recognised as unique among UK cities for our natural drama and 500-year history as a place of embarkation and exploration.'

5.0 Our Ambitions:

Our previous plan set our ambition based on a ten-year trajectory with key milestones focused on a high point around the Mayflower 400 commemoration in 2020. This refreshed strategy sets out to maximise the legacy of Mayflower 400, the capital investments that have been delivered and to further grow the city's visitor economy sustainably up to 2030. Across the city our stakeholders have been consulted and have continued to express an appetite for continuing our growth trajectory through three high level ambitions:

- ***'We will be Devon and Cornwall's premier visitor destination'***
- ***'We will be known internationally for 'jaw dropping art', authentic cultural experiences and our urban spirit'***
- ***'Our national marine park will be globally recognised for amazing experiences by, on, in and under the ocean'***

Our ambitions are reflected in three key themes, which will lead our city narrative:

5.1 Our Blue-Green City

Plymouth is Britain's Ocean City, home to the UK's first national marine park and uniquely offers the opportunity for visitors to explore the ocean in exciting ways and to enjoy a city with a breath-taking open green waterfront edge that stretches for miles.

Plymouth is an ocean waterfront, a port and a harbour. The city has very strong marine credentials and a proud naval heritage. That is a unique suite of assets for a UK waterfront city. We need to do much more to deliver its visitor potential. That means delivering excellent waterfront experiences and making further investments to create new vibrant quarters along the waterfront, presenting our blue and green environment as a single offer and increasing the opportunities for visitors to enjoy being by, on, in and under the water.

By 2030 Plymouth will be known as the premier Marine Park in Europe, attracting visitors from across the globe to award-winning experiences that celebrate Plymouth's important marine work from research to its fishing industry.

Our sweeping open views will be instantly recognisable icons of Plymouth, the backdrop to our waterfront activity from beaches to water sports and cycling – where visitors and Plymothians enjoy the city together.

During consultation we have been testing concepts for projects which will underpin our key themes.

Emerging 'project' concepts include: the development of Plymouth's Waterfront as a great place for activities and experiences: by, on, in and under the water, including support to develop the Mount Batten Water Sports and Activities Centre. The creation of exciting new stories about being by, on, in and under the water, working with our local community as ambassadors and exploring the use of cutting edge digital and marine technology. Also, to explore how to develop the Sutton Harbour area to improve links for visitors to the proposed national marine park and the city's fishing industry.

5.2 Our Brilliant Culture

Plymouth is Britain's Ocean City – the sea defines the unique history of the city and has shaped its culture and its people over generations. Currently the cultural offer of Plymouth is not widely known or understood. That creates an opportunity to present a fresh perspective of Plymouth and to attract new visitors to the city that supports the waterfront theme as a form of 'après sea'.

Our aim is to be known as a city full of cultural surprises; the leading light in Devon & Cornwall for amazing events, creative visual contemporary arts, music, sport and for performance; known for nurturing and celebrating creative people and their ideas. Plymouth will be known for its engaging maritime heritage experiences from the Mayflower to its naval history. We will build on the success of Mayflower 400 to create more experiences and saleable products that will continue to attract international and UK visitors to Plymouth.

By 2030 Plymouth will be recognised as the cultural capital of Devon & Cornwall and as a place where everyone can enjoy and take part in engaging and accessible arts. Destination Plymouth, tourism businesses and arts organisations will work productively together to deliver that. We will continue to use events, festivals and significant celebration years to showcase what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show for 2021. During consultation we have been testing concepts for projects which will underpin our key themes.

Emerging 'project' concepts include: the potential of 'The Box', our new showcase cultural and heritage venue, to realise its potential by working with local creative talent and communities: to encourage new audiences to explore other heritage, arts and leisure activities in the city - using 'The Box' as a springboard. In addition, explore how to grow our music offer, to build a new distinctive evening offer that supports a varied evening and night-time economy. Also, to develop the potential of an exciting new 'visitor quarter' at Devonport, building on emerging plans for new interpretation and the visitor potential of the Guildhall and Oceansgate. Better water and land based visitor transport could improve access and be part of the experience.

5.3 Our Premier Destination

Our ambition is that by 2030 'We will be Devon and Cornwall's premier visitor destination, a top ten UK city break and known for our 'après sea'.

During consultation we have been testing concepts for projects which will underpin our key themes.

Emerging 'project' concepts include: the development of Plymouth as an 'urban base' through which to enjoy modern City Centre shopping, leisure and evening and night-time experience e.g. Drake Leisure, Royal William Yard and Millbay. All whilst acting as a gateway to Dartmoor National Park, two country parks at Saltram and Mount Edgcombe, two estuaries at the Plym and Tamar, together with stunning beaches, coastal and countryside walks.

6.0 Enablers

A successful visitor economy is reliant on delivering a range of services and facilities. Here are the main areas for focus to 2030.

i. Our Partnership

Destination Plymouth has been key to the success of our first visitor plan by leading and co-ordinating the partnership that has delivered robust outcomes over the last eight years.

This partnership unites public and private sector interests in its Board and through its approach to delivery, secures grants and commercial income to support destination marketing and operates a successful membership which brings together all of the businesses involved in tourism.

ii. Our People

Our people are vital to the success of the visitor economy.

Our community:

The visitor sector enables Plymouth's residents to benefit by supporting quality job retention and creation; whilst also seeking to enable Plymothians to take full advantage of the city's rich history, heritage and unique environment, by promoting opportunities for education, health and wellbeing, and pride.

Our businesses:

The skills of our workforce are vital to improve our visitor welcome, our productivity and our visitor experiences. We will support our businesses to realise their potential, increase their sustainability and develop career paths for their staff. Skills and training organisations will work with the Council, Destination Plymouth and local businesses to achieve that.

Our team:

Our partnership is vital in helping us to succeed in our aims and, importantly, it is our people who will lead the way with a 'team Plymouth' approach: encouraging joint working, sharing best practice and embracing the shared narrative of our city.

iii. Our Ocean City Infrastructure

Plymouth will deliver an exciting sense of arrival for visitors arriving by sea, car, walking, cycling or by train and make the water a key part of the city's leisure transport system.

We will work with partners in the south west to promote and secure radical improvements to the quality and resilience of Plymouth's road, rail, air and sea connectivity. City partners will work together to deliver innovative and sustainable transport solutions using the water to reinforce Plymouth Britain's Ocean City, including park & float and improved ferry and small boat services that take visitors to different points along the city's coast.

'We will be recognised nationally as best in class for our digital, creative and cultural approach in everything we do...'

We will use cutting edge digital technology to showcase the experiences that we have in the city and to enable our visitors to book joined up travel and to communicate live travel information. We will ensure visitors can find their way around Plymouth with confidence, encouraging them to explore further. We will improve the

signage and environment between the city centre and the waterfront to encourage a two-way flow of visitors to support longer stays and visitor spend across the city. We will create exciting interpretation and trails beside, in and on the water that are integral to our visitor experiences and improve the legibility of our city.

iv. Our Accommodation

‘Plymouth will be known nationally as a UK top ten city break...’

We will create more hotels and support a diversified range of accommodation to enable growth in overnight trips from international and UK based leisure and business visitors. Our most recent hotel demand study, by Colliers International, demonstrates continued growth in occupancy levels (which are at 79% all year round), one of the highest of any regional city outside of London. There is ongoing demand for more capacity in the serviced sector and a particular interest in accommodation development in the four and five star categories.

That means prioritising new hotels that create world-class quality and a distinctive offer, including independent hotels and accommodation of character that become part of the Ocean City experience, for example on the waterfront or on the water. We will diversify our offer to ensure we can provide for the varied needs of our visitors from business guests to walkers, cyclists and water sports enthusiasts.

v. Our Distinctive Brand

‘By 2030 Plymouth will be renowned as the #1 must do destination in Devon & Cornwall...’

Critical to a successful visitor economy is distinctive targeted marketing, promotion and PR. We will single-mindedly focus visitor marketing and promotion on the distinctive ‘only here’ aspects of the Plymouth experience, leading with our two themes of ‘Blue-Green city’ and ‘Brilliant culture’. We will work together to communicate consistent shared messages using the latest digital marketing technology across a range of platforms. This will ensure Plymouth Britain’s Ocean City mean’s something distinctive and appealing to target visitor markets.

To achieve the ambitious growth targets in the value of tourism, our UK target markets are high value leisure segments (Free & Easy Mini-Breakers and Aspirational Family Fun¹) who will stay longer and who reside along the Great Western corridor. It also includes business visitors and key international markets in the USA (E. coast) and near Europe attracted to our heritage stories including Mayflower and who are reached via the travel trade. We will maintain our share of day visitors through a diverse and engaging events calendar, which is marketed to these nearby audiences.

Who are they		What are they looking for	Why are they a priority
Day visitors			
Resident day trippers	Day trips from home within 60 minute drive	Shopping, food and drink, theatres, entertainment	85% of current visits are day visits – need to continue to attract
Regional day visitors	Day visits from within 90 min drive	As above plus attractions	As above
UK staying visitors			
Free and easy mini breakers	Young, free and single, average household income; able to indulge in a wealth of activities when on holiday, possibly due to their lack of children. ‘the average Joe’	Shopping, city breaks, museums and galleries, entertainment, attractions	Higher spending looking for experiences and mid week/weekend breaks, love culture, heritage and art
Aspirational family fun seekers	London/SE based high earners with children at home, regularly take city	City breaks, shopping, outdoor activities, coastal/rural fun,	Higher spending, love holidaying at home, love active outdoors and

¹ VisitEngland Market Segmentation <https://www.visitbritain.org/visitor-segmentation>

	breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits.	attractions, entertainment	things to do with the kids
Visiting friends and family	Friends and family visiting University students/armed forces/family	Food and drink, entertainment, shopping	40% of visitors are VFR, need to retain this segment
International staying			
Conservative retirees (USA, NL, Ger.)	A more mature segment best defined by their attitude, 'young at heart'. Greater freedom, money to spend and time to enjoy themselves, travel key pastime, desire new experiences and learning.	Time outdoors - walking Learning about local heritage & culture Trying a new activity / learning a skill Sampling local food	Very pro UK, higher spending, key interests, building on Mayflower activity
Mature experience seekers (USA, NL, Ger.)	Retired, financially secure travellers quest for new experiences. Seek laid back trips that allow them to relax, meet new people and see new parts of the world safely	Sightseeing Sampling local food Meeting new people Relaxing – not being rushed Nothing strenuous or physical	Pro UK, large segment, above average spend but like value for money
Business visitors			
Regional businesses (within 2 hour drive time)	Businesses wanting larger meeting, smaller conferences or events or incentive venues within a day or max 1 night stay	Value for money, easy access, good quality food, Wi-Fi, parking	Plymouth should be getting more market share in this sector
UK/International trade associations (USA, NL, Ger.,)	Specialist trade bodies and organisations looking for international standard meetings and small to medium conference venues or incentive travel	Link to vertical market sectors where possible e.g. marine, medical, manufacturing using 'word of mouth' or reputation as hook	High spending business visitors, key to drive off peak business and provides opportunities in leisure and inward investment

The messages from Plymouth should lead with the 'Britain's Ocean City' promise – it is unique to Plymouth – and the development of the National Marine Park needs to sit within this. Marketing should highlight experiences and show what visitors can do and how it makes them feel. It should elevate products and experiences that are unique and can't be found elsewhere and it should show real people – passionate about Plymouth that highlight the hidden experiences that only those 'in the know' can find.

A 'team Plymouth' approach is required where all stakeholders understand their role in destination marketing and embrace the shared narrative when they are communicating with their own audiences.

There needs to be a shift in media used to reach our markets and we must develop the very best social media platforms and websites that inspire visitors. We must identify and develop a relationship with the main influencers for our target markets including social media bloggers, vloggers and instagrammers as well as mainstream media and journalists. We need to turn visitors into our City Ambassadors by encouraging sharing of their visits online.

vi. Our Business and Conference Tourism

Plymouth is recognised for its strengths in marine science, defence, medical expertise and conservation; it has an outstanding University and academic institutions with creativity and high-quality research; it is on the mainline to London. These factors present opportunities for Plymouth to grow business and conference tourism. It is an important high spend market, concentrated at times of year when there are fewer leisure visits. It will deliver business to our hotels and places to eat and support the nighttime economy at times of year when there is capacity.

Our aim is to be a meetings hub for Devon and Cornwall businesses and to make Plymouth a competitive destination choice for national associations and specialist international conferences.

By 2030 we will have delivered further quality venues and accommodation to be a competitive business destination and, in particular, be a national leader in hosting marine conferences with a new flexi conferencing venue planned to grow into the next phase of growth.

To get there we need a proactive conference desk service that can attract new meetings and conference business into the city. More meetings and conferences will create demand for more hotels and venues, creating a confident environment for investment. It will ensure we fully deliver our potential as a marine city and support the status and growth of businesses. Business visitors to our city will be encouraged to come back again to enjoy some leisure time here and to bring their families and friends.

To fully realise potential we will explore the potential to create a new conference centre, a flexible space that can also be used for exhibitions and large music concerts.

7.0 How will we measure success?

Our targets are grounded in **wise growth of the value of the visitor economy and quality year round jobs for our local community**. We will focus on high value markets to drive GVA and productivity in the sector that can translate into quality, year-round jobs for Plymothians. That means increasing international and overnight leisure and business visitors who will visit throughout the year and manifests in our targets which grow value at a faster rate than volume of visits.

Our Targets

Our new targets are:

- To grow visitor spend by 30% from £328 million to £450 million
- To increase the total visitor numbers by 15% to 6 million by 2030

In order to deliver that growth we need to focus on three key market segments:

- **Make international tourism worth £60 million a year** spend in the city, that's 65% growth in a decade;
- **Grow UK staying visits by 25%** to achieve £150 million spend, focusing on leisure short breaks;
- **Make business meetings and conference tourism worth £25 million a year** in spend to the city, a 55% increase in a decade, using Plymouth's industry strengths to create a strong positioning.

What we do to attract and retain these markets will appeal to day visitors too and enrich the lives of local people by creating more quality leisure and cultural facilities and experiences. We will create an exciting dynamic environment for the visitor economy, which will create confidence in businesses to invest, providing jobs and driving up productivity. Delivering our refreshed Visitor Plan will generate a further 1,000 new jobs in the city, bringing employment in tourism to just under 9,000 jobs.**

**

Actual jobs, using Cambridge data and assuming c.14% increase in jobs between 2020 and 2030.

11.0 Visitor Plan – Marketing and Business Plan

Destination Plymouth plans to continue to work with the City Council and Blue Sail to produce detailed operational marketing and business plans from 2021 to 2024, which will be reviewed, on a rolling annual basis. This work will be completed and brought back to Cabinet in December 2019. Given the wide-ranging and extensive nature of ongoing consultation and approvals it is anticipated that this work will take the rest of 2019 to complete. An outline timetable with proposed milestones is provided below.

Cabinet approval of high level aims – March 5th 2019

Scrutiny feedback on high level aims – March 6th 2019

Feedback high level aims to consultees w/c March 11th 2019

Feedback received and collated – end March 2019

First draft Marketing Plan – end June 2019

First draft Business Plan – end July 2019

Feedback to consultees – August 2019

Feedback received and collated – Sept 2019

Final drafts – Oct 2019

Present back to Cabinet – Dec 2019

12.0 Risk Assessment

There is a risk that Destination Plymouth will not secure sufficient resources to fully deliver the Visitor Plan. Should this occur there would be a need to review, reduce and prioritise activities within the Visitor Plan. For example, if income targets for marketing purposes from partners and commercial activity were not achieved, there would be a need to review and prioritise the marketing activity to maximise impact on the most important markets.

KEY RISKS				
Include up to 5 depending on scale of project, copy and paste additional tables as required				
Potential Risk Identified				
Description:	Lack of funding for Destination Plymouth Ltd. post March 2021			
Mitigation:	Agree core funding from PCC, BIDS and key city partners by end 2019			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	4	2	4	20
Impact To be scored 1 (low) – 5 (high)	5	2	5	
Trend	Decreasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	
Potential Risk Identified				
Description:	Reputation impact following Mayflower 400			
Mitigation:	Secure delivery and messaging for Mayflower 400 programme to key stakeholders			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	4	2	4	20
Impact To be scored 1 (low) – 5 (high)	5	2	5	
Trend	Increasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	

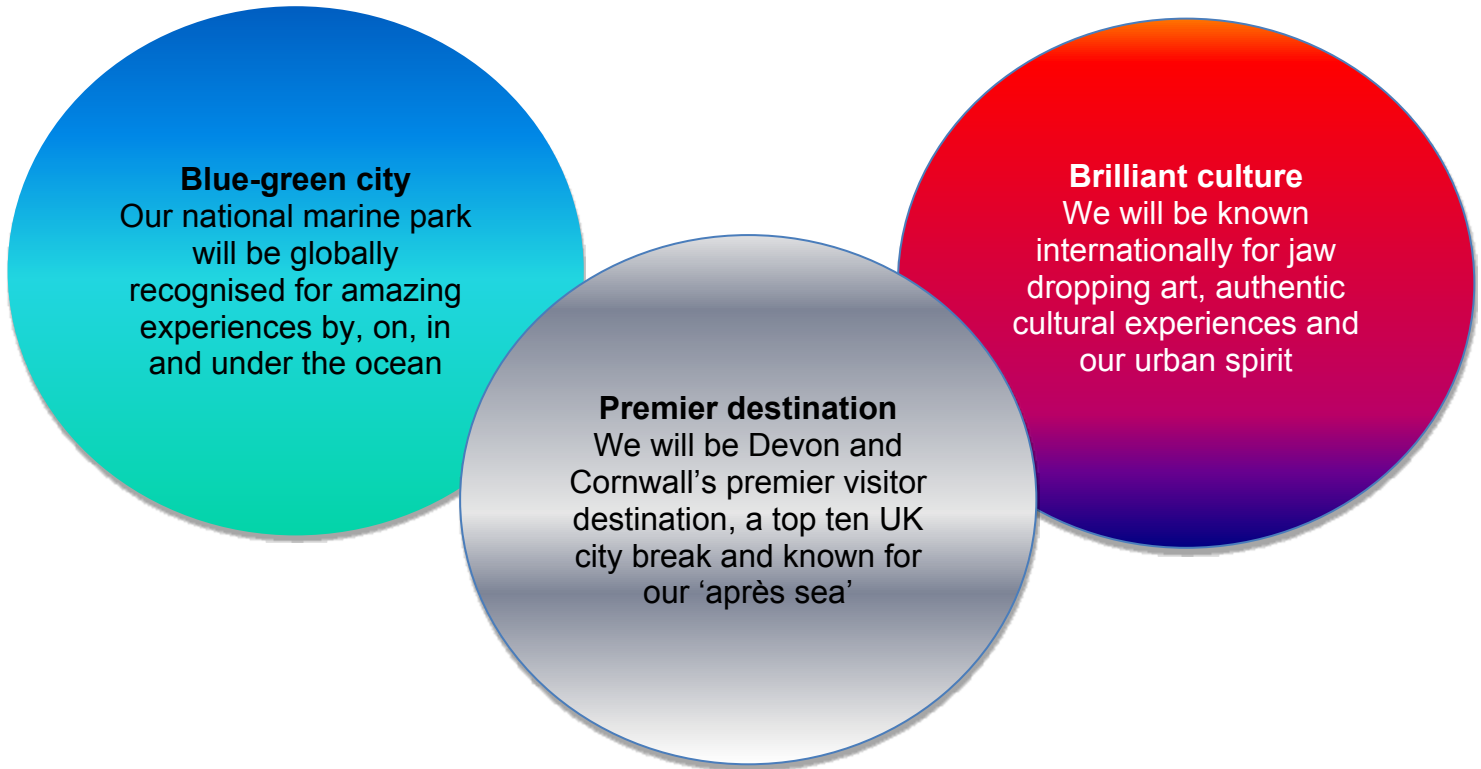
Potential Risk Identified				
Description:	Political support reduced due to change of administration			
Mitigation:	Cross party briefing and engagement through Visitor plan renewal process			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	4	2	4	20
Impact To be scored 1 (low) – 5 (high)	5	2	5	
Trend	Decreasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	
Potential Risk Identified				
Description:	Insufficient partner funds to implement Visitor Plan activities			
Mitigation:	High level of stakeholder engagement through initial consultation and Visitor plan development process			
Risk assessment	Initial	Post mitigation	Current	Total rating
Likelihood To be scored 1 (low) – 5 (high)	5	2	4	16
Impact To be scored 1 (low) – 5 (high)	5	2	4	
Trend	Decreasing	Lead Officer:	Amanda Lumley	
		Risk Champion:	David Draffan	

This visitor plan celebrates the strong foundations of our previous strategy and builds on the ambition and legacy of Mayflower 400 in 2020.

Vision:

Plymouth is Britain's Ocean City and famous for its Waterfront. We will be one Europe's finest waterfront cities, celebrated for our unique and diverse marine life, culture and authentic experiences. We will continue to be recognised as unique among UK cities for our natural drama and 500-year old history as a place of embarkation and exploration.

High level ambitions – by 2030 we will be a:



Our high level ambitions will be supported by four key enabling priorities:

Partnership	Brand
People	Infrastructure

We will measure success through the wise growth and increase in value of our visitor economy, designed to drive local prosperity and create better jobs:

Grow visitor spend from £328 to £450 million (an increase of 30%)	Grow visitor numbers from 5 million to 6 million (an increase of 15%)
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To maximise our growth opportunities we will target key markets:

Increase international tourism by 65% (worth £60m a year)	Grow UK staying visits by 25% (worth £150m a year)	Up business meetings and conference tourism by 55% (worth £25m a year)
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BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

PLYMOUTH VISITOR PLAN - 2020-2030

REPORT FOR DESTINATION PLYMOUTH AND PLYMOUTH CITY COUNCIL

FEBRUARY, 2019

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1 INTRODUCTION

This Visitor Plan is a framework for Plymouth that describes at high-level what needs to happen to develop the city's visitor economy over the coming decade.

It will be underpinned by a detailed business plan and marketing plan which, combined with this Visitor Plan Framework, will provide the refreshed Plymouth Visitor Plan for 2020-30.

The direction of travel set out here has been built up over several months through a process of detailed analysis of available data and research, extensive engagement with stakeholders through workshops and meetings and guidance from the Destination Plymouth Board.

The Plan has looked at all the good work that has happened so far including the delivery of the original Visitor Plan for the city. It takes account of the market opportunities and trends affecting destinations. Much of that good work delivered through the previous plan has been a result of the strong partnership that exists between the private and public sector in Plymouth.

This Plan has been commissioned by Destination Plymouth but is a Visitor Plan is for all stakeholders with an interest and role to play in supporting the development of this vital part of the economy.

Destination Plymouth has a clear role in facilitating and co-ordinating many of the objectives and projects set out here. The organisation is well placed to secure funding to support projects having helped lever in over £2m of additional funding in the last few years to support destination marketing. But many of the projects in this plan also require capital funding. That means the support and interest of a wide range of private and public investors must also be secured.

In the pages that follow you will find a vision, headline ambitions and objectives. The Plan is built around two main development themes and for each we set out 'Star Projects' – projects that will make a very significant difference to tourism in Plymouth. We also set out a 'Enabling Actions' to strengthen the foundations for the ongoing success of tourism.

2 WHERE WE ARE NOW

In 2011 we set out our tourism vision, approach and star projects in our first Visitor Plan. We’ve delivered that Plan and more. This refreshed Plan is our focus and priorities for the next decade, designed to build on our progress so far. It is a Visitor Plan for the city and everyone with an interest in the visitor economy needs to get behind it and work together to make it happen, building on the success of our successful collaboration in the tourism sector.

Tourism is one of the big success stories in Plymouth. Over the last decade tourism has seen visitor numbers and visitor spend each grow by over 20%. Over 5 million visitors make a trip to the city every year spending £347m. Today tourism employs over 8,000 people¹.

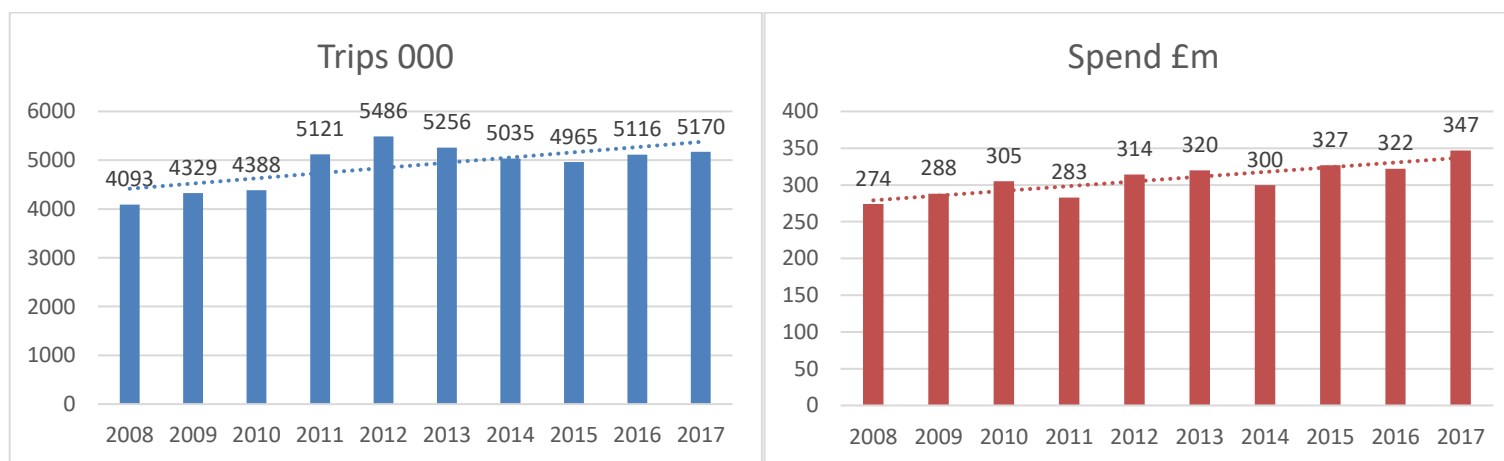


Figure 1 2008-2017 Day & Overnight Trips and Visitor Spend in Plymouth

¹ Cambridge Model actuals 2017

Our achievements have been marked by some high-profile tourism projects. Mayflower 400 has put Plymouth firmly on the global stage, targeting US visitors and working with national and regional partners to ensure that our city benefits from the high value spend of international visitors and that we celebrate our spectacular waterfront and its history. We've made big investments in culture leading with The Box, the city's new cultural centrepiece, and by delivering exciting major events from the America's Cup coming to Plymouth in 2011 to the British Art Show coming to Plymouth in 2021. Together all these projects are ensuring that tourism delivers profile, economic benefit and new, quality facilities for local people.

Behind these high-profile projects, partners continue to work together to support investment to ensure that visitor facilities, service and experiences are in place to make Plymouth a successful destination. But there is more to do and more opportunities to deliver for our city and for our community.

85% of visitors to Plymouth are on a day trip. To significantly improve the productivity of tourism and deliver a sustainable tourism sector for the future, we need to focus on growing the higher value markets. That means UK short breaks, international leisure visitors (building on the profile created through Mayflower 400), and business and conference tourism.

Plymouth needs more high quality, distinctive 'only here' products and experiences that provide a reason for visitors to choose our city for a short break or a business trip, and we need more visitor accommodation to make that possible. In a highly competitive marketplace we must be confident about our unique strengths and their potential. We must take our offer to market in stand-out and engaging ways, using the latest digital technology. Visitors need to be able to get here easily and find their way around the city with confidence. Over the next decade we need to invest in new product and experiences, in our infrastructure and in our marketing and promotion. All we do must be underpinned by sound sustainability credentials.

3 WHERE WE WANT TO BE

We've refreshed our vision to take advantage of new opportunities and the current marketplace.

Plymouth is Britain's Ocean City, famous for its Waterfront. We will be one of Europe's finest waterfront cities, celebrated for our unique and diverse marine life, culture and experiences. We will continue to be recognised as unique among UK cities for our natural drama and 500-year history as a place of embarkation and exploration.

AMBITIONS

Our strategic ambition statements are:

- ▶ *'Our national marine park will be globally recognised for amazing experiences, by, on, in and under the ocean...'*
- ▶ *'We will be known internationally for jaw dropping art, authentic cultural experiences and our urban spirit..'*
- ▶ *'We will have transport infrastructure to match our ambition, with seamless connectivity to international arrival hubs and be known for our water transport services...'*
- ▶ *'We will be recognised nationally as best in class for our digital, creative and cultural approach in everything we do...'*
- ▶ *'Plymouth will be known nationally as a UK top ten city break...'*
- ▶ *'We will be renowned as the #1 must do destination in Devon & Cornwall...'*
- ▶ *'We will be known as the destination of choice for meetings, events and conferences in Devon and Cornwall....'*

OBJECTIVES

Our objectives are grounded in **wise growth of the value of the visitor economy**. We will focus on high value markets to drive productivity in the sector that can translate into quality, year-round jobs for Plymothians. That means international and overnight leisure and business visitors who will visit throughout the year and manifests in our targets which grow value at a faster rate than volumes of visits.

We will continue to **focus on three themes: our blue-green city, our brilliant culture and our premier destination** (a cultural base to explore the world class natural environment on our doorstep) to attract these leisure markets because these themes are special to Plymouth. Our waterfront and our culture are part of the DNA and ‘urban spirit’ of the city and have shaped our place and our people over generations and continue to do so today. That means we will deliver original experiences that visitors and local people alike will want to enjoy. This focus builds on the success of the original Visitor Plan and the investment made to date.

Delivering our refreshed Visitor Plan will generate a further **1,000 new jobs in the city**, bringing employment in tourism to just over 9,000 jobs².

What we do to attract and retain these markets will appeal to day visitors too and enrich the lives of our local communities by creating more quality leisure and cultural facilities and experiences. We will create an exciting dynamic environment for the visitor economy which will create confidence in businesses to invest, providing jobs and driving up productivity.

Our targets are:

- ▶ To grow visitor spend by 30% from £347 million to £450 million in a decade
- ▶ To increase the total visitor numbers by 15% from 5.1 to 6 million by 2030

Here is the market focus for delivering that growth.

- ▶ **Make international tourism worth £60 million** a year spend in the city, that’s 65% growth by 2030
- ▶ **Grow UK staying visits by 25%** to achieve £150 million spend, focusing on leisure short breaks
- ▶ **Make business meetings and conference tourism worth £25 million a year** in spend to the city, a 55% increase in a decade, using Plymouth’s industry strengths to create a strong positioning

² Actual jobs, using Cambridge data and assuming c.14% increase in jobs between 2020 and 2030.

4 OUR THEMES

OUR BLUE-GREEN CITY

'Our national marine park will be globally recognised for amazing experiences, by, on, in and under the ocean...'

Plymouth is Britain's Ocean City, home to the UK's first national marine park uniquely offering the opportunity for visitors to explore the ocean in exciting ways and to enjoy a city with a breath-taking open green waterfront edge that stretches for miles.

Plymouth is an ocean waterfront, a port and a harbour. The city has very strong marine credentials and a proud naval heritage. That is a unique suite of assets for a UK waterfront city. We need to do much more to deliver its visitor potential. That means delivering excellent water-based experiences and making further investments to create new vibrant quarters along the waterfront, presenting our blue and green environment as a single offer and increasing the opportunities for visitors to enjoy being by, on, in and under the water.

By 2030 Plymouth will be known as the premier marine park in Europe, attracting visitors from across the globe to award-winning experiences that celebrate Plymouth's important marine work from research to its fishing industry.

Emerging project concepts include:

- ▶ Development of Plymouth's Waterfront as a great place for activities and experiences: by, on, in and under the water including support to develop the Mount Batten Water Sports and Activities Centre
- ▶ The creation of exciting new stories about being by, on, in and under the water; working with our local community as ambassadors and exploring the use of cutting edge digital and marine technology
- ▶ Exploring how to develop the Sutton Harbour area to improve links for visitors to the proposed national marine park and to the city's fishing industry.

OUR BRILLIANT CULTURE

‘We will be known internationally for jaw dropping art, authentic cultural experiences and our urban spirit..’

Plymouth is Britain’s Ocean City – the sea defines the unique history of the city and has shaped its culture and its people over generations. Currently the cultural offer of Plymouth is not widely known or understood. Mayflower 400 and ‘The Box’ project creates an opportunity to present a fresh perspective of Plymouth and to attract new visitors to the city that supports the blue-green theme as an exciting ‘après sea’ experience.

Our aim is to be known as a city full of cultural surprises; a leading light nationally for creative visual contemporary arts and for performance; known for nurturing and celebrating creative people and their ideas. Plymouth will be known for its engaging maritime heritage experiences from the Mayflower to its naval history. We will build on the success of Mayflower 400 to create more experiences and saleable products that will continue to attract international and UK visitors to Plymouth.

By 2030 Plymouth will be recognised nationally as the cultural capital of Devon & Cornwall and as a place where everyone can enjoy and take part in engaging and accessible arts. Destination Plymouth, tourism businesses, and creative and arts organisations will work productively together to deliver that. We will continue to use events, festivals, sport and significant celebration years to showcase what is distinctive about our city, project strong positive images to our target markets, attract new visitors and leverage further benefits for our city. We have already secured the British Art Show for 2021. **We will be recognised nationally as best in class for our digital, creative and cultural approach in everything we do.**

Emerging ‘project’ concepts include:

- ▶ Realising the potential of ‘The Box’, our new showcase cultural and heritage venue, by working with local creative talent and communities; to encourage new audiences to explore other heritage, arts and leisure activities in the city - using ‘The Box’ as a springboard
- ▶ Exploring how to grow our music, to build a new distinctive evening offer that supports a varied evening and night-time economy
- ▶ Developing the potential of an exciting new ‘visitor quarter’ at Devonport, building on emerging plans for new interpretation and the visitor potential of the Guildhall and Oceansgate. Better water and land-based visitor transport could improve access and be part of the experience.

OUR PREMIER DESTINATION

Our ambition is that by 2030 ***'We will be Devon and Cornwall's premier visitor destination and a top ten UK city break.'***

During consultation we have been testing concepts for projects which will underpin our key themes.

Emerging 'project' concepts include:

- ▶ Positioning Plymouth as an 'urban base' through which to enjoy modern city centre shopping, leisure and evening and night-time experiences e.g. Drake Leisure, Royal William Yard and Millbay
- ▶ Developing and promoting Plymouth as a gateway to our national parks, rivers, beaches, and coastal and countryside walks makes Plymouth a strong base to stay to combine activity and culture.

5 ENABLERS

A successful visitor economy is reliant on delivering a range of enabling services and facilities. Here are the main areas for our focus to 2030.

OUR PARTNERSHIP

Destination Plymouth has been key to the success of our first Visitor Plan by leading and co-ordinating the partnership that has delivered robust outcomes over the last eight years.

This partnership unites public and private sector interests in its Board and through its approach to delivery, secures grants and commercial income to support destination marketing and operates a successful membership which brings together all of the businesses involved in tourism.

OUR PEOPLE

Our community

The visitor sector enables Plymouth's residents to benefit supporting quality job retention and creation; whilst also seeking to enable Plymothians to take full advantage of the city's rich history, heritage and unique environment, by promoting opportunities for education, health and wellbeing, and pride.

Our businesses

The skills of our workforce are vital to improve our visitor welcome, our productivity and our visitor experiences. We will support our businesses to realise their potential, increase their sustainability and develop career paths for their staff. Skills and training organisations will work with the Council, Destination Plymouth and local businesses to achieve that.

Our team

Our partnership is vital in helping us to succeed in our aims and importantly it is our people who will lead the way with a 'team Plymouth' approach. Encouraging joint working, sharing best practice and embracing the shared narrative of our city.

OUR INFRASTRUCTURE

'We will have transport infrastructure to match our ambition, with seamless connectivity to international arrival hubs and be known for our water transport services...'

Plymouth will deliver an exciting sense of arrival for visitors arriving by sea, car, walking or by train and make the water part of the city's leisure transport system.

We will work with partners in the south west to promote and secure radical improvements to the quality and resilience of Plymouth's road, rail and sea connectivity. City partners will work together to deliver innovative and sustainable transport solutions using the water to reinforce Plymouth Britain's Ocean City, including park & float and improved ferry and small boat services that take visitors to different points along the city's coast.

'We will be recognised nationally as best in class for our digital, creative and cultural approach in everything we do...'

We will use cutting edge digital technology to showcase the experiences that we have in the city and to enable our visitors to book joined up travel and to communicate live travel information. We will ensure visitors can find their way around Plymouth with confidence, encouraging them to explore further. We will improve the signing and environment between the city centre and the waterfront to encourage a two-way flow of visitors to support longer stays and visitor spend across the city. We will create exciting interpretation and trails along the waterfront and on the water that are integral to our visitor experiences and improve the legibility of our city.

OUR ACCOMMODATION

'Plymouth will be known nationally as a UK top ten city break...'

We will create more hotels and a diversified range of accommodation to enable growth in overnight trips from leisure and business visitors.

That means prioritising new hotels that create world-class quality and a distinctive offer including independent hotels and accommodation of character that become part of the Ocean City experience, for example on the waterfront or on the water. We will diversify our offer to ensure we can provide for the varied needs of our visitors from business guests to walkers, cyclists and watersports enthusiasts.

Our most recent hotel demand study by Colliers International demonstrates continued growth in occupancy levels (which are at 79% all year round), one of the highest of any regional city outside of London. There is ongoing demand for more capacity in the serviced sector and a particular interest in accommodation development in the four and five-star categories.

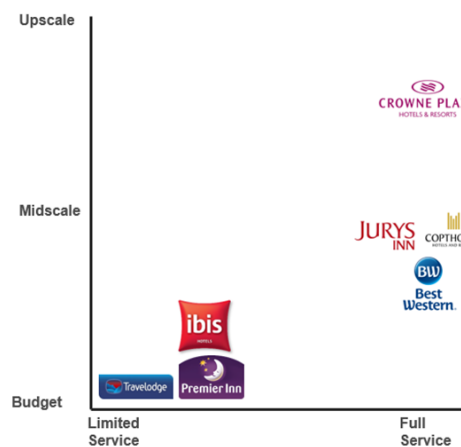


Figure 2 Existing Hotel Supply Brands. Source: Colliers International

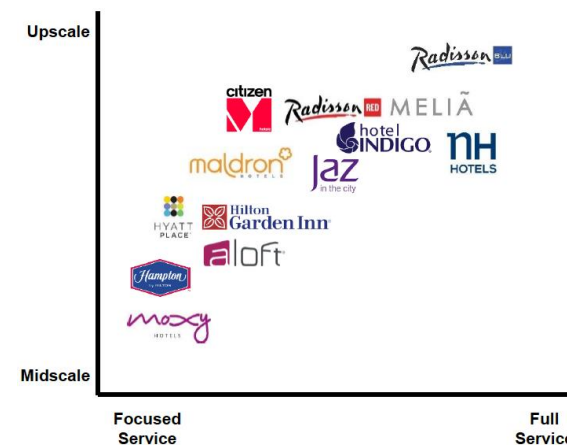


Figure 3 Potential Hotel Brands. Source: Colliers International

OUR DISTINCTIVE BRAND

'We will be renowned as the #1 must do destination in Devon & Cornwall....'

Critical to a successful visitor economy is distinctive targeted marketing, promotion and PR. We will single-mindedly focus visitor marketing and promotion on the distinctive 'only here' aspects of the Plymouth experience, leading with our three themes of blue-green city, brilliant culture and premier destination. We will work together to communicate consistent shared messages using the latest digital marketing technology across a range of platforms. This will ensure Plymouth Britain's Ocean City mean's something distinctive and appealing to target visitor markets.

The messages from Plymouth should lead with the 'Britain's Ocean City' promise – it is unique to Plymouth – and the development of the National Marine Park needs to sit within this. Marketing should highlight experiences and show what visitors can do and how it makes them feel about the city. It should elevate products and experiences that are unique and that can't be found elsewhere. It should feature real people who are passionate about Plymouth which highlight the hidden experiences that only those 'in the know' can find.

A 'team Plymouth' approach is required where all stakeholders understand their role in destination marketing and embrace the shared narrative when they are communicating with their own audiences.

There needs to be a shift in media to reach our markets more effectively and we must develop the very best social media platforms and websites to inspire visitors. We must identify and develop a relationship with the main influencers for our target markets including social media bloggers, vloggers and instagrammers as well as mainstream media and journalists. We need to turn visitors into our City Ambassadors by encouraging them to share their experiences online.

OUR TARGET MARKETS

We recognise that the viability of our city centre, in particular our shopping experiences, rely on us continuing to deliver for our local and regional visitors. However, if we want to grow the value of the visitor economy in a sustainable way and improve the productivity of the sector, we need to focus on attracting higher spending segments who are likely to enjoy what the city has to offer, in particular people who have previously visited the city and are therefore warm prospects.

To achieve the ambitious growth targets in the value of tourism, our target markets are high value leisure segments (Free & Easy Mini-Breakers and Aspirational Family Fun³) who want the water activity, cultural and heritage experience that Plymouth offers. They are segments that will stay here longer and who live along the Great Western rail corridor.

Our international markets are visitors from the East Coast of USA and Near Europe attracted to our heritage stories, including Mayflower. We will reach them via the travel trade. Some of them may be visiting as part of a UK/European cruise ship experience.

We will maintain our share of day visitors and use targeted promotion, for example our diverse and engaging events calendar to continue to attract them.

OUR BUSINESS AND CONFERENCE TOURISM

'We will be known as the destination of choice for meetings, events and conferences in Devon and Cornwall....'

Plymouth is recognised internationally for its role in marine science, defence, medical and conservation; it has an outstanding University and academic institutions with creativity and high-quality research; it is on the mainline to London. These factors present opportunities for Plymouth to grow business and conference tourism. It is an important high spend market, concentrated at times of year when there are fewer leisure visits. It will deliver business to our hotels and places to eat and support the night time economy at times of year when there is capacity.

Our aim is to be a meetings hub for Devon and Cornwall businesses and to make Plymouth a competitive destination choice for national associations and specialist international conferences.

By 2030 we will have delivered quality venues and accommodation to be a competitive business destination and be a national leader in hosting marine conferences with a new flexi conferencing venue planned to grow into the next phase of growth.

³ VisitEngland Market Segmentation <https://www.visitbritain.org/visitor-segmentation>

To get there we need a proactive conference desk service that can attract new meetings and conference business into the city. More meetings and conferences will create demand for more hotels and venues, creating a confident environment for investment. It will ensure we fully deliver our potential as a marine city and support the status and growth of businesses. Business visitors to our city will be encouraged to come back again to enjoy some leisure time here and to bring their families and friends.

To fully realise the potential we will explore the long term potential to create a new conference centre, a flexible space that can also be used for exhibitions, indoor sports events and large music concerts.

Disclaimer: All information and analysis supplied by Blue Sail Consulting Ltd and our sub-contractors is delivered in good faith and represents our professional judgement based on the information obtained from the client and elsewhere. The achievement of recommendations, forecasts and valuations depend on factors beyond our control. Any projections, financial or otherwise, in this report are only intended to illustrate particular points of argument and do not constitute forecasts of actual performance

EQUALITY IMPACT ASSESSMENT

Plymouth Visitor Plan Refresh - February 2019

STAGE I: What is being assessed and by whom?

What is being assessed - including a brief description of aims and objectives?

Cabinet approval is being sought (on 5/3/19) for a refreshed Plymouth Visitor Plan, which has been designed to inform how best to grow Plymouth's visitor economy over the years from 2020-30.

There is a need to refresh the Visitor Plan in the light of an evolving marketplace, the significant progress against the existing plan, and new opportunities arising, including how best to capitalise on the Mayflower 400 legacy, and the proposal to establish the UK's first Marine National Park. Consequently, it is important to put in place new ambitions, objectives and projects for the city to progress towards 2030.

Furthermore, the new Visitor Plan will aim to enable Plymouth's residents to benefit from the visitor economy, supporting job retention and creation; whilst also seeking to enable Plymothians to take full advantage of the city's rich history, heritage and unique environment, by promoting opportunities for education, health and wellbeing, and pride.

We've refreshed our vision to take advantage of new opportunities and to reflect the marketplace.

Our refreshed vision is:

Plymouth is Britain's Ocean City, famous for its Waterfront. We will be one of Europe's finest waterfront cities, celebrated for our unique and diverse marine life, culture and experiences. We will continue to be recognised as unique among UK cities for our natural drama and 500-year history as a place of embarkation and exploration.

Our objectives are grounded in **wise growth of the value of the visitor economy**. We will focus on high value markets to drive productivity in the sector that can translate into quality, year-round jobs for Plymothians. That means international and overnight leisure and business visitors who will visit throughout the year and manifests in our targets which grow value at a faster rate than volume of visits.

We will continue to **focus on three themes: our blue & green city, our brilliant culture and our premier destination** to attract these leisure markets because these themes are special to Plymouth. Our waterfront and our culture are part of the DNA of the city and have shaped our place and our people over generations and continue to do so today. That means we will deliver original

STAGE I: What is being assessed and by whom?

experiences that visitors and local people alike will want to enjoy. This focus builds on the success of the original Visitor Plan and the investment made to date.

Our new targets are:

- To increase the total visitor numbers by 15% to 6 million by 2030
- To grow visitor spend by 30% from £328 million to £450 million

Here is the market focus for delivering that growth.

- **Make international tourism worth £60 million a year** spend in the city, that's 65% growth in a decade
- **Grow UK staying visits by 25%** to achieve £150 million spend, focusing on leisure short breaks
- **Make business meetings and conference tourism worth £25 million a year** in spend to the city, a 55% increase in a decade, using Plymouth's industry strengths to create a strong positioning

Delivering our refreshed Visitor Plan will generate a further **1,000 new jobs in the city**, bringing employment in tourism to just under 9,000 jobs ³.

What we do to attract and retain these markets will appeal to day visitors too and enrich the lives of local people by creating more quality leisure and cultural facilities and experiences. We will create an exciting dynamic environment for the visitor economy which will create confidence in businesses to invest, providing jobs and driving up productivity.

Key:

³ = Actual jobs, using Cambridge data and assuming c.14% increase in jobs between 2020 and 2030.

STAGE 1: What is being assessed and by whom?	
Author	Patrick Knight
Department and Service	Economy, Partnerships and Regeneration Economic Development Place
Date of Assessment	11 02 2019

STAGE 2: Evidence and Impact										
Protected Characteristics (Equality Act)	Evidence and information (e.g. data and feedback)						Any adverse impact? <small>See the guidance on how to make this judgement.</small>	Actions	Timescale and who is responsible?	
Age	Plymouth Population	Male		Female		Total		No adverse impacts anticipated. The projects will be open to all with no barriers on the basis of age	End of project monitoring will include a Equality Impact Assessment question	Individual Projects will be responsible. Timescales will be dependent on individual applicants.
		number	%	number	%	number	%			
	Total	128,500	100.0	130,600	100.0	259,200	100.0			
	Aged 0 - 15	23,200	18.1	22,200	17.0	45,400	17.5			
	Aged 16 - 64	85,300	66.4	84,000	64.3	169,300	65.3			
	Aged 65 and over	20,000	15.6	24,500	18.7	44,500	17.2			
	Aged 18 - 24	18,100	14.1	16,100	12.4	34,200	13.2			
Disability	Adults not in employment and dependent children and persons with long term health problems or disability						No adverse impacts are anticipated. There are no	End of project	Individual Projects will	

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STAGE 2: Evidence and Impact				
Protected Characteristics (Equality Act)	Evidence and information (e.g. data and feedback)	Any adverse impact? <small>See the guidance on how to make this judgement.</small>	Actions	Timescale and who is responsible?
	<p>Plymouth households 5% (dependent children) and 23% (no dependent children)</p> <p>ENGLAND households 4.6% (dependent children) and 21% (no dependent children) In Small Business Survey (SBS 2012) 13 per cent of both the very good fit social enterprises, and 12 per cent of the good fit social enterprises were disabled-led, higher than the proportion for all SME employers. (Social Enterprise: Market Trends (Based upon the 2012 Small Business Survey))</p>	barriers and we are open to all disabilities.	monitoring will include a Equality Impact Assessment question	be responsible. Timescales will be dependent on individual applicants.
Faith/Religion or Belief	<p>32.9% of Plymouth's population stated that they had no religion</p> <p>58.1% of Plymouth's population stated they were Christian</p> <p>0.8% of Plymouth's population (2,078 people) stated their faith as Islam</p> <p>0.3% of Plymouth's population (861 people) stated their faith as Buddhism</p> <p>0.2% of Plymouth's population (567 people) stated their faith as Hinduism</p>	No adverse impacts anticipated. The projects will be open to all with no barriers on the basis of faith, religion or beliefs	End of project monitoring will include a Equality Impact Assessment question	Individual Projects will be responsible. Timescales will be dependent on individual applicants.
Gender - including marriage, pregnancy and maternity	<p>Overall 50.6% of Plymouth's population are women; this reflects the national figure of 50.8%</p> <p>Of those aged 16 or over, 90,765 (42.9%) people are married.</p> <p>5,190 (2.5%) are separated and still legally married or legally in a same sex civil partnership.</p>	No adverse impacts anticipated. The projects will be open to all with no barriers on the basis of gender	End of project monitoring will include a Equality Impact	Individual Projects will be responsible. Timescales will be

STAGE 2: Evidence and Impact				
Protected Characteristics (Equality Act)	Evidence and information (e.g. data and feedback)	Any adverse impact? <small>See the guidance on how to make this judgement.</small>	Actions	Timescale and who is responsible?
	<i>Women are around ten percent more likely than men to see finance as their only barrier to entrepreneurship. Education and training reduce the difference. (Kwang, Jones-Evans and Thompson. 2012)</i>		Assessment question	dependent on individual applicants.
Gender Reassignment	<p>There were 26 referrals from Plymouth made to the Newton Abbot clinic, the nearest clinic, in 2013/14 to February</p> <p>The average age for presentation for reassignment of male to females is 40 – 49. For female to male, the age group is 20 – 29.</p> <p>23 transgender people belong to the Plymouth Pride Forum</p>	No adverse impacts anticipated. The projects will be open to all with no barriers on the basis of gender reassignment	End of project monitoring will include a Equality Impact Assessment question	Individual Projects will be responsible. Timescales will be dependent on individual applicants.
Race	<p>92% of Plymouth’s population identify themselves as white British</p> <p>7.1% of Plymouth’s population define themselves as Black Minority and Ethnic</p>	No adverse impacts anticipated. The projects will be open to all with no barriers on the basis of race	End of project monitoring will include a Equality Impact Assessment question	Individual Projects will be responsible. Timescales will be dependent on individual

STAGE 2: Evidence and Impact

Protected Characteristics (Equality Act)	Evidence and information (e.g. data and feedback)	Any adverse impact? <small>See the guidance on how to make this judgement.</small>	Actions	Timescale and who is responsible?
				applicants.
Sexual Orientation - including Civil Partnership	It is estimated that between 12,500 and 17,500 of Plymothians aged over 16 are Lesbian, Gay Bi-sexual and Transgender. There are 34 Civil partnership Formations in Plymouth in 2013	No adverse impacts anticipated. The projects will be open to all with no barriers on the basis of sexual orientation.	End of project monitoring will include a Equality Impact Assessment question	Individual Projects will be responsible. Timescales will be dependent on individual applicants.

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STAGE 3: Are there any implications for the following? If so, please record 'Actions' to be taken

Local Priorities	Implications	Timescale and who is responsible?
Reduce the inequality gap, particularly in health between communities.	Through blue health improvements this priority will be addressed	Over timescale of plan 2020 - 2030
Good relations between different communities (community cohesion).	Through the projects, pathways to cooperation for local businesses, organisations and communities will be promoted and supported	Over timescale of plan 2020 - 2030

STAGE 3: Are there any implications for the following? If so, please record 'Actions' to be taken

Local Priorities	Implications	Timescale and who is responsible?
Human Rights Please refer to guidance	All projects will be expected to comply with the Human Rights Act 1998	Individual Projects will be responsible. Timescales will be dependent on individual projects
Principles of Fairness Please refer to guidance	The way things are done in the city matters just as much as what is done. People should be able to access opportunity whatever their circumstances.	Individual Projects will be responsible. Timescales will be dependent on individual projects

STAGE 4: Publication

Responsible Officer; Director, Assistant Director or Head of Service.	Anthony Payne	Date	12/02/2019
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PLYMOUTH CITY COUNCIL

Subject:	Plan for Homes 3
Committee:	Cabinet
Date:	5 March 2019
Cabinet Member:	Councillor Chris Penberthy Cabinet Member for Housing and Co-operative Development
CMT Member:	Anthony Payne (Director for Place)
Author:	Nick Carter Head of Housing and Infrastructure
Contact details:	Tel: 01752 307583 Email: nick.carter@plymouth.gov.uk
Ref:	PFH3/Cab
Key Decision:	Yes
Part:	I

Purpose of the report:

This report seeks to launch Plan for Homes 3 with the ambition to support the delivery of at least 1,000 new homes each year over the next five years. It builds upon 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 £15.845m 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 report sets out three strategic housing themes of: improving housing conditions and broadening choice; supporting the delivery of the Joint Local Plan housing numbers; establishing a Housing Investment Fund.

The report identifies nine priority objectives and a range of interventions that will support the delivery of at least 1,000 new homes per year through a range of housing, planning and service initiatives, meet identified housing needs and tackle homelessness and poor housing conditions.

Corporate Plan:

The provision of new and decent housing is central to the delivery of the city's Vision to be 'One of Europe's most vibrant waterfront cities, where an outstanding quality of life is enjoyed by everyone'.

The Plymouth City Council Corporate Plan 2018-2022 was approved by Council in June 2018 and sets out our ambition of 'making Plymouth a fairer city, where everyone does their bit'. The Corporate Plan's priority of A Growing City contains a specific commitment to deliver 'a broad range of homes'. This is central to continuing to meet identified housing needs, supporting economic growth and helping to build a city of quality sustainable neighbourhoods.

The Plan for Homes will also support the priorities of A Caring Council, for example supporting the provision of accommodation for older people including bungalows and Extra Care homes, specialist, accessible and wheelchair housing as part of delivering a broad mix of quality homes to

support families with children, and homes built to improved sustainable and energy efficient standards, helping to tackle fuel poverty and improving affordability.

**Implications for Medium Term Financial Plan and Resource Implications:
Including finance, human, IT and land:**

Plan for Homes 3 is being launched with a Housing Investment Fund, the first delivery programme of £15.845m identified from within existing resources, included in the Capital Programme to support the direct delivery of homes as part of the overall ambition of 5,000 new homes over five years.

The Housing Investment Fund will support existing commitments as well as retaining the flexibility to respond to market failure interventions and investments to generate a positive return to the Council. The Plan retains flexibility on what interventions to support to best deliver the required outcomes. All investment decisions will be made through CCIB.

There is no additional borrowing required to support this first programme of interventions. Further Council funding options for Plan for Homes 3 will be developed during the implementation of this Plan.

The funding for the first Delivery Programme of £15.845m is set out below;

Committed Capital Budget;

Housing Capital Programme 2019-2021 - £3,845,000

This comprises a range of schemes with funding from S106, Homes England, Community Infrastructure Levy, Right to Buy capital receipts and One Public Estate programme grant. Some of the schemes in the Housing Capital programme 2019-2021 are Plan for Homes 2 projects and are in the process of being delivered.

Uncommitted Capital Budget;

Right to Buy Receipts - £8,000,000

Of the Right to Buy receipts held by the council £2m has already been approved and is being used to fund schemes under Plan for homes 2 and £3.5m set aside to meet the asbestos liabilities in connection with the stock transfer to Plymouth Community Homes.

The remaining £8m is available to fund Plan for Homes 3

Other corporate funding;

S106 commuted sums for affordable housing - £2,000,000 (expected to be received over Plan period)

Disabled Facilities Grant - £2,000,000.

The Disabled Facilities Grant allocation is only for the provision of adaptations to disabled people's homes to help them live independently for longer, thereby helping to contain the potential increase in costs to Social Care Services.

Some indicative spend interventions and outputs are listed below, they are initial proposals and are not defined until the initiatives are fully developed;

1. Social Rent - £20 per unit. A £1m grant fund could support 50 units.
2. Bungalows - £20k per unit. A £1m grant fund could support 50 units.
3. Specialist Homes - £40k per unit. A £1m grant fund could support 25 units.
4. Older persons - £20k per unit. A £2m grant fund could support 100 units.
5. Homelessness Fund – £20k per unit. A £1m grant fund to support 50 units
6. Private Sector – £40k per unit. A £1m grant and loan fund to support 25 units
7. Infrastructure Funding – £20k per unit. A £2m grant fund to unlock 100 homes
8. North Prospect Regeneration – A £1m fund to support 195 homes

Other Implications: e.g. Child Poverty, Community Safety, Health and Safety and Risk Management:

Decent housing is recognised as a key determinant of health and wellbeing. The provision of a range of safe, warm and affordable homes will address issues of child poverty and fuel poverty and, alongside better designed homes, support higher educational attainment and improve children's health and well-being. High quality and energy efficient homes help reduce household running costs that contribute to overall housing costs helping improve affordability.

There are risks associated with failure to provide the range of housing to meet Plymouth's need. This includes skills gaps and skills shortages in the construction industry, maintaining a skilled house building workforce, concerns over materials and build cost inflation and the timing and appetite of future investment decisions. Developing capacity with partner housing association, relations with developers and SME's, delivery strategies on JLP sites and supporting Building Plymouth will help mitigate these risks.

Equality and Diversity:

Has an Equality Impact Assessment been undertaken? Yes

Recommendations and Reasons for recommended action:

It is recommended Cabinet:

1. Approve the Plan for Homes 3 as set out in this report.

Reason: To meet the Corporate Plan commitment to provide a broad range of homes.

2. To note the overall Housing Delivery Framework's objectives and interventions that will form the basis of a future overall Housing Delivery Plan for Plymouth.

Reason: To identify priority objectives and interventions to deliver quality homes in sustainable neighbourhoods for everyone.

3. To delegate the development of a Housing Delivery Plan for Plymouth to the Service Director for Strategic Planning and Infrastructure, Service Director for Community Connections and the relevant Portfolio Holders.

Reason: To ensure an up to date Housing Delivery Plan that responds to changes in the housing market, housing needs, service initiatives and funding opportunities.

4. Instruct the Service Director for Strategic Planning and Infrastructure and Service Director for Community Connections to report on progress on the delivery of the Plan for Homes 3 to the relevant scrutiny board every 6 months.

Reason: To ensure members are appraised of progress and monitor delivery of initiatives.

Alternative options considered and rejected:

Option 1: Continue with the existing Plan for Homes Programme. The current Plan for Homes is primarily aimed at increasing and accelerating housing delivery in the city. It does not bring together the wider aspects of housing that include tackling homelessness and improving conditions in the private rented sector. As the Planning and Housing policy and funding landscape continues to change it is considered that a more comprehensive set of objectives across the wider housing agenda is required to better respond to these changes and to build upon our achievements to address the full housing needs of the city.

Option 2: Leave the private sector to deliver more homes. Past experience of the general failure to of the market to build at sufficient delivery rates indicates that this would be insufficient to meet the city’s needs and the increasing focus on homeownership will not provide the range and mix of new and affordable homes required. Therefore a more direct and transformational approach is required. In the four years prior to the launch of Plan for Homes an average of 653 new homes per year were completed. In the four years post Plan for Homes that has increased to an average of 1,115 new homes per year.

Published work / information:

South and West Joint Local Plan

<https://www.plymouth.gov.uk/planningandbuildingcontrol/plymouthandsouthwestdevonjointlocalplan>

Plan for Homes

https://www.plymouth.gov.uk/sites/default/files/PlanForHomes_0.pdf

Background papers:

Title	Part I	Part II	Exemption Paragraph Number							
			1	2	3	4	5	6	7	

Sign off:

Fin	akh. 18.1 9.22 5	Leg	3214 7/25 /2/1 9/A C	Mon Off		HR		Assets		IT		Strat Proc	
Originating SMT Member Anthony Payne													
Has the Cabinet Member(s) agreed the content of the report? Yes													

1.0 Background

1.1 Housing is a top priority for Plymouth. Britain needs more homes and Plymouth is no exception. 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, and support growing the population of Plymouth to nearly 300,000 people by 2034. Without a new and improved supply of the right homes, the economic and physical regeneration of the city will be constrained.

1.2 The Joint Local Plan (JLP) for Plymouth and South West Devon seeks to deliver 26,700 new homes 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 new homes) are to be built in the Plymouth Policy Area, including 4,550 new affordable homes. We are planning to meet our housing needs in full, and Plan for Homes 3 will be a key delivery plan to help achieve that.

1.3 Plymouth has many local housing pressures;

- 12,794 households on housing waiting list of which 8,560 are in priority need
- Increases in homelessness and families in temporary accommodation
- Average house price £184,665. Average earnings £23,369 (Home Truths 2017/18)
- Housing Affordability ratio of 7.9 (Home Truths 2017/18)
- Growing and ageing population; demands for extra care and age related housing
- 20.4% of population with a long term health or disability (SHMNA 2017)
- 330 households requiring wheelchair accessible housing (PCC report)
- 550 DFG applications each year
- Over a third of all private rented housing is non-decent – occupied by over 7,500 households
- 715 Long Term Empty Homes (Oct 2018)

1.4 Our housing challenges require a credible response. Part of that response has been our Plan for Homes, launched in November 2013 and refreshed in March 2016. It contains an ambitious set of proposals to deliver 5,000 new homes over five years, setting out how the City Council will lead, partner, engage, innovate and directly provide resources and assets to plan and deliver a step change in housing delivery.

1.5 It provides a delivery framework for partnership working to increase and accelerate housing delivery of well-designed homes to meet a range of housing needs from a range of market homes to buy and rent through to affordable and supported housing. It has been the focus of attention for the city and partners, with Executive and Cabinet led political leadership, to deliver our ambitious plans for homes the city needs.

1.6 We are on track to exceed the ambition of 5,000 new homes over five years (2014-2019). We have delivered 4,462 homes (gross) in the first four years of the Plan. This figure coupled with the number of homes under construction as at April 2018 of over 1,400 suggests we are on track to achieving 5,000 homes in five years (by March 2019).

1.7 Since its launch the Plan for Homes has delivered some notable achievements in terms of housing outcomes and meeting a wide range of housing needs, which include;

- Extra Care housing for older people and people with learning disability,
- Flagship service veterans self build project at Nelson Project
- Wheelchair and accessible homes
- Overall above policy levels of affordable housing (51%) on Plan for Homes Council sites.
- Larger family homes, rent to buy models,

- High proportion of rented homes
- Largest affordable Passivhaus scheme in the country
- Supported delivery of 4,462 new homes (gross) of which 1,108 are affordable (24.8%)
- We are projecting the delivery of over 450 affordable homes in 2018/19, many on Plan for Homes sites.

We are now launching Plan for Homes 3 that represents a further set of interventions that will continue to be developed to deliver our commitment for at least 1,000 new homes each year.

2.0 Plan for Homes 3

2.1 This report launches Plan for Homes 3 with the ambition to support the delivery of at least 1,000 new homes each year over the next five years. It builds upon the successful Plan for Homes programme launched in 2013, updating and extending it to 2024 with a first delivery programme of £15.845m to directly support increased and accelerated delivery of new homes to help address identified housing needs and to support the growth agenda.

2.2 The Council has committed £15,845m within the Capital Programme from 2019 / 2024 to support delivery of Plan for Homes 3. Current austerity and financial pressures are impacting on many partner organisations and people, but we need to carry on supporting service delivery, including the provision of new homes. Despite the tough financial circumstances with associated constraints on the Council's capital and revenue funding programmes we are planning the best use of our own resources whilst minimising the impact on our revenue budget.

2.3 The Plan sets out three strategic housing themes of: improving housing conditions and broadening choice; supporting the delivery of the Joint Local Plan housing numbers; establishing a Housing Investment Fund. To continue the increase and accelerated delivery of new homes to help address identified housing and to support the growth agenda.

2.4 The Plan identifies nine priority objectives and a delivery framework for a range of interventions that will support the delivery of at least 1,000 new homes per year through a range of housing, planning and service initiatives, to meet identified housing needs and tackle homelessness and poor housing conditions.

2.5 The delivery framework's objectives and interventions will form the basis of a future overall Housing Delivery Plan for Plymouth, to be developed to respond to changes in the housing market, housing needs, service initiatives and funding opportunities.

2.6 Indicative spend interventions and outputs are listed below, they are initial proposals and are not defined until the initiatives are fully developed;

1. Social Rent - £20 per unit. A £1m grant fund could support 50 units.
2. Bungalows - £20k per unit. A £1m grant fund could support 50 units.
3. Specialist Homes - £40k per unit. A £1m grant fund could support 25 units.
4. Older persons - £20k per unit. A £2m grant fund could support 100 units.
5. Homelessness Fund – £20k per unit. A £1m grant fund to support 50 units
6. Private Sector – £40k per unit. A £1m grant and loan fund to support 25 units
7. Infrastructure Funding – £20k per unit. A £2m grant fund to unlock 100 homes
8. North Prospect Regeneration – A £1m fund to support 195 homes

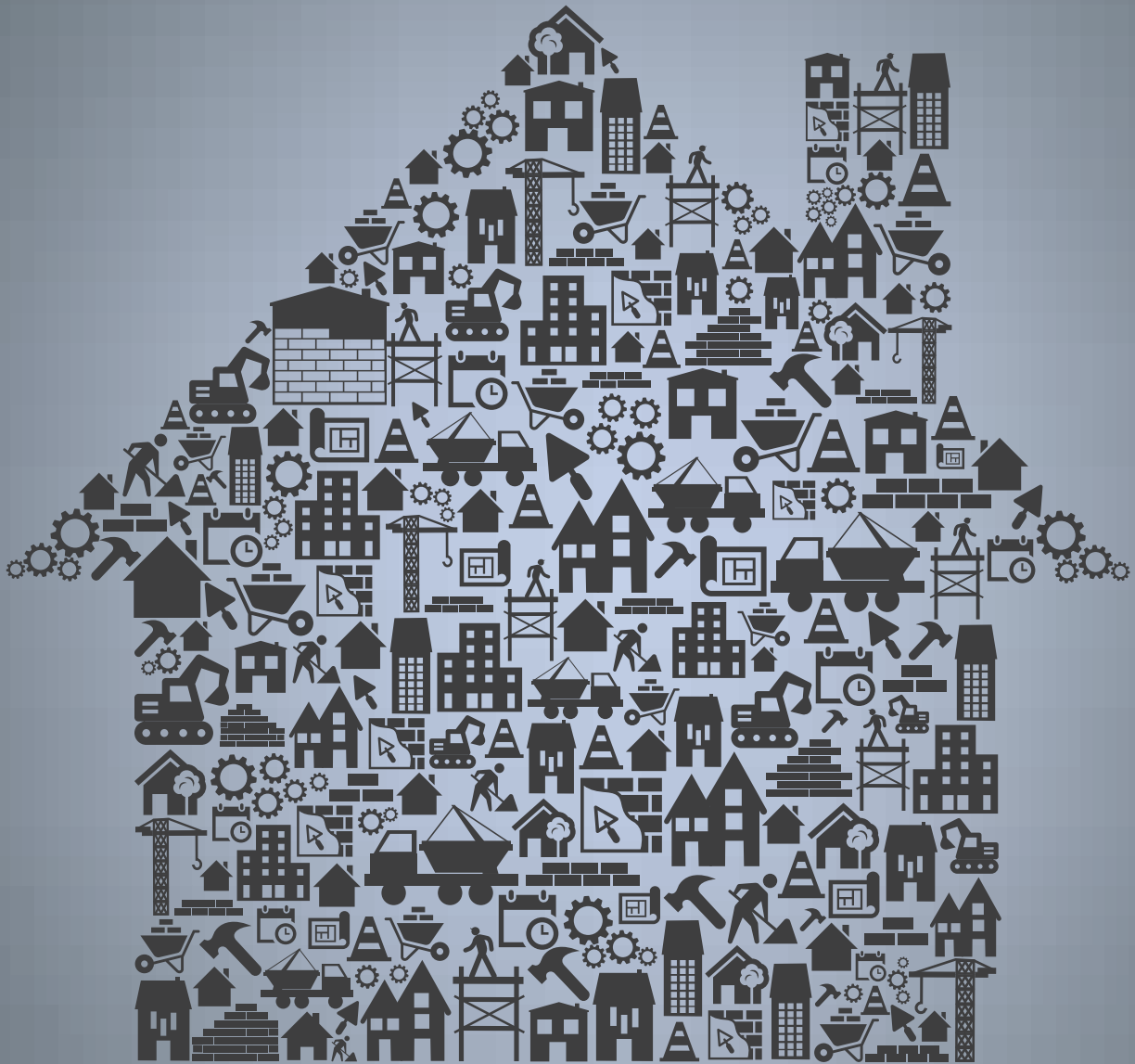
3.0 Appendices

Strategic Housing Themes and Priority Objectives – appendix one
Delivery Framework – appendix two

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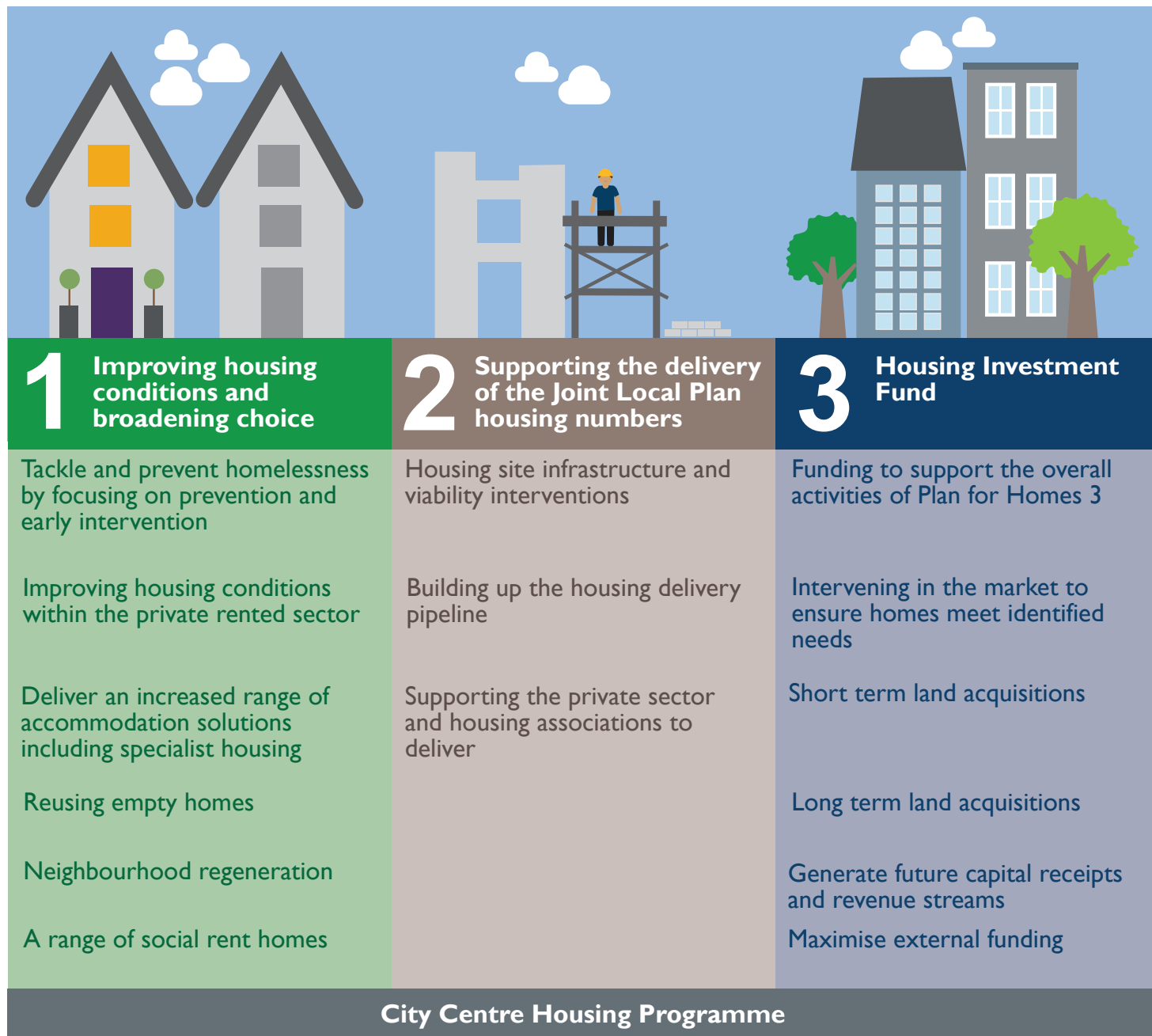
PLYMOUTH'S PLAN FOR HOMES 3



PLAN FOR HOMES 3

OUR VISION to deliver quality homes in sustainable neighbourhoods for everyone. Plan for Homes 3 sets out our priority objectives across three themes that will directly support the delivery of 1,000 new homes per year over the next five years, supporting a range of housing delivery and service initiatives, tackle housing needs, homelessness and poor housing conditions.

STRATEGIC HOUSING THEMES



OUR PRIORITY OBJECTIVES

1. Deliver the right homes in the right places
2. Deliver more truly affordable housing
3. Tackle and prevent homelessness by focusing on prevention and early intervention
4. Improve housing conditions for those in private rented housing
5. Deliver an increased range of housing solutions including specialist homes to those in greatest need
6. Improve communities through regeneration
7. Encourage the development of more homes for everyone in the city centre
8. Explore and promote innovation in housing delivery
9. Work in partnership to deliver this Plan

Plan For Homes 3 – delivery framework

objectives	interventions	priority outcomes
<p>1. We will deliver the right homes in the right places</p>	<p>To support the delivery of the Joint Local Plan housing numbers</p> <p>To identify, acquire and where necessary secure planning on sites for new homes</p> <p>To prepare and add value to sites to sell to the market or develop through either Joint Venture or other delivery models, which could include a housing company</p> <p>To invest in the infrastructure required to unlock developable and stalled sites</p> <p>To make viability assessments publically available to improve transparency</p> <p>To develop a Small Sites initiative recognising the role small sites and SME’s have in delivering new homes in communities</p>	<p>The delivery of 1,000 new homes a year over five years</p> <p>Meeting identified housing needs for a range of homes, recognising the high need for smaller homes as well as larger family homes</p> <p>Seeking to achieve a stretch of an additional 1,000 affordable homes over five years</p> <p>Accelerated new homes delivery and meeting targets faster</p> <p>Diversification in housing partners and products</p>
<p>2. We will deliver more truly affordable housing</p>	<p>To deliver more social rented homes and provide financial support to housing associations to improve viability</p> <p>To develop Housing Deals with partner housing associations to maximise investment and activity in the city</p> <p>To explore the concept of a ‘Plymouth Affordable Rent’ with housing association partners to link affordable housing costs to local incomes</p> <p>To purchase market homes to convert into increase levels of affordable housing for rent and sale</p>	<p>A programme of Social Rent homes with partner housing associations</p> <p>Local Housing Deals established to support increased delivery</p> <p>Improved affordability of homes for rent and sale to meet a range of housing needs</p>
<p>3. We will tackle and prevent homelessness by focusing on prevention and early intervention</p>	<p>To support the implementation plan of the Plymouth Alliance and support them to deliver their accommodation strategy</p> <p>To deliver a broad range of accommodation solutions to avoid the use of emergency accommodation</p> <p>To monitor and adapt to impact and changes under Homelessness Reduction Act Work with the Plymouth Alliance and partners to identify emerging trends and develop plans to</p>	<p>Stop the use of B&B for families with children</p> <p>Fewer people sleeping rough</p> <p>Fewer people in Emergency accommodation</p> <p>Provide increased ‘move-on’ accommodation</p>

4. We will improve housing conditions for those in private rented housing

reduce rough sleeping

To improve Early Intervention pathways to prevent homelessness

To improve Young Person's Homelessness and Support pathway

To carry out our own direct development

To continue to proactively reduce the numbers of long term empty homes

To support landlords to convert shared housing into family homes

To develop new and innovative plans to improve the quality and provision of Private Rented Sector homes.

To take robust enforcement action to improve the condition and management of existing rented properties

To work with tenants to help them sustain tenancies in the private rented sector and to help them understand their rights and responsibilities

To develop HMO licensing in line with legislation to support our work in raising standards in the private rented sector

To work with the Health and Well Being Board and external partners to ensure that the quality of existing homes across all tenures is recognised as a key determinant of health and well-being

5. We will deliver an increased range of housing solutions including specialist homes to those in greatest need

To provide age related housing including bungalows and extra care facilities

To provide more accessible and specialist homes for those that need them

To support people to maintain independence by delivering adaptations to enable them to remain in their own homes

To develop a programme of veterans housing projects / veterans village

To focus on prevention and early intervention to deliver and support independent living

Fewer empty homes and vacant buildings

Number of properties improved

Number of Cat 1's and Cat 2's hazards removed

Increased number of trained and accredited landlords and agents

Improving the mix of homes to meet a range of identified housing needs

Providing downsizing opportunities and making better use of the existing stock

Better housing choices for the most vulnerable households

Veterans Housing Steering Group established to oversee the provision of

6. We will improve communities through regeneration

To support people to access decent, safe and affordable homes that are suited to their needs

appropriate housing choices to help meet identified housing needs of our veterans

To provide housing delivery, planning and financial support to complete the regeneration of North Prospect

The programme of estate regeneration at North Prospect completed

To work with housing association partners to support the regeneration of homes at Barne Barton

A programme of Estate regeneration at Barne Barton commenced

Decent homes, improved housing choices and wider social and economic benefits to communities

7. We will encourage the development of more homes for everyone in the city centre

To develop a City Centre Programme to encourage and support homes for everyone

Improve the vibrancy of the heart of our city

To encourage and support the provision of purpose built Private Rented Sector homes at scale in the city centre

A better understanding of housing demand and needs for city centre living.

To lead and pilot projects to help create the market for city centre living

Demonstrate delivery and viability of city centre living and act as a catalyst to other residential schemes

To support Living Over The Shop opportunities

8. We will explore and promote innovation in housing delivery

To improve the quality and design of new homes including modular and modern methods of construction

Increased innovation and use of modern methods of construction and modular to provide quality and sustainable homes

To encourage custom and self build opportunities

Meet the identified demand for custom and self-build homes

To improve the energy efficiency and sustainability of new and existing homes

Tackling fuel poverty

To encourage new delivery models including Community Led & Co-operative housing, rent to buy homes and new partnerships

Improved diversification of types of homes and mix of partners to increase and accelerate housing delivery

9. We will work in partnership to deliver this Plan

To work in partnership with Homes England, housing associations and institutional funders to maximise funding and capacity into new affordable homes

Proactive engagement and partnership working to ensure capacity and funding to help make this happen

To improve engagement with SMEs and support them to deliver more on small sites

To engage with land owners and house builders to improve policy compliant delivery on JLP allocated sites

To work with Building Plymouth to help tackle skills gaps and skills shortages in the construction industry

To encourage and engage with communities to deliver co-operative housing / community land trust models of delivery

A growing skilled construction workforce