



Oversight and Governance

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Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee Supplement Pack

Wednesday 15 January 2020
2.00 pm
Warspite Room, Council House

Members:

Councillor Winter, Chair

Councillor Churchill, Vice Chair

Councillors Sam Davey, Dreaan, Jordan, Mavin, Stevens, Ms Watkin and Wheeler.

Please find attached for your consideration, additional information relating to agenda item 7.

For further information on attending Council meetings and how to engage in the democratic process please follow this link - [Get Involved](#)

Tracey Lee

Chief Executive

Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee

7. Plymouth Visitor Plan - Refresh 2020-2030:

(Pages 1 - 26)

PLYMOUTH VISITOR PLAN 2020-30**ENVIRONMENTAL IMPACT****SCRUTINY REPORT - ADDENDUM****Background**

This report outlines how delivery of the Plymouth Visitor Plan 2020-30 will help address the City Council's commitment to improve Plymouth's environment and its pledge to establish a carbon neutral city by 2030.

In error, the Scrutiny Report omitted to include a section on the environment, so this addendum has been produced to address this omission.

Introduction

It is important to recognise that our Visitor Plan (in common with cities located around the world) aims to increase the number of visitors that travel to, visit and consume within Plymouth. People are free to choose where to holiday, study or conduct their business and - if Plymouth is to deliver growth and increase productivity in line with the Plymouth Plan - then it must successfully attract visitor and business tourists in the context of an exceptionally competitive global marketplace.

Notwithstanding the above, the Visitor Plan has been designed to improve Plymouth's environmental performance as outlined below.

Existing strategic context / linkages

The Visitor Plan's vision, ambitions and objectives are all aligned or supportive of the Plymouth Plan's strategic objectives, in particular Implementing Britain's Ocean City (INT1), Positioning Plymouth as a major UK destination (INT3) and Delivering a distinctive, dynamic cultural centre (INT4). However, delivery of the plan will also help residents Optimise health and wellbeing (HEA7) and Deliver skills and talent development (GRO2).

The Visitor Plan's targets adopt a wise, sustainable approach to tourism growth based on the VICE (visitors, industry, community, and environment) model. The balance between these four elements has been considered in the production of the plan and should synergize with a view to ensure sustainability.

The Visitor Plan's marketing plan will promote more sustainable transport, aligned to the Transforming Cities Fund objectives to deliver better cycling, pedestrian and public transport routes in Plymouth and the installation of more charging points for electric vehicles around the city. At the heart of the proposals is upgrading Plymouth train station, creating a connected hub that enables seamless interchange between rail, bus, cycle, and walking journeys, complementing £50m of investment already committed to regenerating the station environs. It therefore helps to achieve the Government's ambitions of accurate, accessible and reliable information about transport options, the most affordable tickets and onward connections, as well as making walking and cycling the natural choices for shorter journeys, or as part of a longer journey.

Current credentials of proposed plan

The Visitor Plan's 'Blue-green' theme aims to reconnect people to the ocean, leading to increased understanding, respect and care for Britain's Ocean City and its associated blue and green environment.

The Visitor Plan's Brilliant Cultural and Premier Destination themes both aim to build on our existing offer, for example by leveraging the impact of The Box to promote

Plymouth's wider cultural, heritage and sporting offer, thus minimising the need for additional infrastructure and its associated environmental impact.

The Visitor Plan's 'Star Projects' focus on meeting the needs of local residents and will encourage staycations in the UK, potentially reducing package holidays / foreign travel which is generally associated with a relatively high carbon footprint.

The Visitor Plan will encourage day and overnight visitors to visit throughout the year and thereby grow value at a faster rate than volume. This will ensure a more consistent level of demand, so services and infrastructure can be provided through economies of scale.

The Visitor Plan's marketing of its events programme will promote travel by walking, cycling and public transport for all visitors.

The Visitor Plan will support delivery the Plan for Plastics, to reduce plastic use and thereby help protect and preserve our ocean and green spaces. This could include, for example, the introduction of recycling bins in the public realm.

The Visitor Plan has already influenced the protection and preservation of our natural and historic environment to ensure it remains accessible for our communities as well as visitors and future generations to enjoy.

The Visitor Plan's marketing plan will promote lower carbon activities e.g. walking, cycling, public transport to explore Plymouth and beyond.

Future opportunities

The Visitor Plan creates future opportunities which could be explored:

Industry – business support work with hotels/accommodation providers, retailers and other businesses to maximise their environmental performance e.g. reducing heat wastage, increasing use of renewable energy sources, local / ethical procurement, thereby also reducing their overall carbon footprint, environmental credentials and business costs.

Transport – encourage travel too and about the city by walking, cycling and public transport, aligned too/building on the Transforming Cities Fund.

Incentives – lower carbon activities e.g. if using public transport. Also encourage offsetting.

Consumption – promoting sustainable consumption through green tourism initiatives that promote behaviour change in line with the Council's carbon emergency plan.

DRAFT
VISITOR ECONOMY BUSINESS PLAN FOR PLYMOUTH
2021 TO 2024

FOR DESTINATION PLYMOUTH

DECEMBER 2019

Contents:

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1. Overview of Business Plan

This Business Plan builds on the success of the previous Visitor Plan for Plymouth 2011 to 2020. It supports the high level 'Visitor Plan' framework for Plymouth that describes what needs to happen to develop and grow the city's visitor economy over the coming decade. It explains how the city led by Destination Plymouth and its partners will deliver the approach required and focuses on the financial and staff implications for the plan.

The Business Plan should be read in conjunction with the 'Visitor Plan' and 'Marketing Plan' and sets out the direction of travel for the future, building on the strong legacy of Mayflower 400, consolidating opportunities from significant investment over the past 9 years and moving forwards quickly to ensure momentum is continued in 2021 onwards.

The Business Plan has looked at all the good work that has happened so far, including the successful 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.

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. However many of the emerging projects in the plan also require capital funding. That means the support and interest of a wide range of private and public investors must be secured.

The current funding climate continues to be changeable and competitive so Destination Plymouth and its partners needs to be innovative in the way resources are used and projects delivered.

This Business Plan is being developed in the year prior to the Mayflower 400 commemorations in Plymouth and Nationally. In the year when Plymouth announces it will be the first National Marine Park in the UK and prior to the opening of 'The Box', the largest single cultural attraction to open in the UK in 2020. There are exciting plans for development of the creative industries, digital, art and cultural organisations alongside the significant marine credentials of the city linked to Oceansgate, 'Smart Sound' and opportunities for more access to the water. This plan will build on these opportunities and ensure that we continue to approach growing the visitor economy in an innovative and creative way to meet our targets for the future.

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2. VISION

In 2011, we set out our tourism vision, approach and star projects in our first Visitor Plan. **We have 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, our community and everyone with an interest in the visitor economy needs to get behind it and work together to make it happen, building on our successful collaboration in the tourism sector.

Tourism is one of the big success stories for Plymouth. Over the last decade the city has seen visitor numbers and spend grow by over 20%. Around 5.4 million visitors make the trip to the city every year spending £337 million. Today tourism employs nearly 8,000 people.

We have 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:

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

'We will become one of the UK's first carbon neutral destinations by 2030 supporting our city vision'..

'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 AND TARGETS

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.

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 jobs¹.

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

¹ Actual jobs, using Cambridge data and assuming c.14percentage increase in jobs between 2020 and 2030.

3. Our Themes:

i. 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. This reinforces the strength of our green spaces, our parks, which cover forty per cent of Plymouth; complemented by our two country parks and Dartmoor National Park.

Plymouth Sound is one of the world’s most important and visually stunning natural harbours with multiple designations for protected habitats and species. It is home to the largest naval base in Western Europe is an ocean waterfront, a port and a harbour. The city has very strong marine credentials and a proud naval heritage. Our substantial national fishing fleet, international fish market, marine research and leisure facilities are internationally recognised. 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. At the same time, we need **to protect and preserve our authentic natural and historic environment** to ensure it remains accessible for our communities as well as visitors and future generations to enjoy. This means encouraging everyone to **reduce plastic use, reduce their carbon footprint and act now to protect and preserve our ocean and our green spaces so wee our ambition to be one of the UK’s first carbon neutral destinations by 2030.**

Our strategic ambition is that ‘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.’

What does this mean for our visitors and our community?

- **For leisure visitors** it means that we need to provide access to experiences across the waterfront and our green spaces which are authentic to Plymouth and which provide a real distinctiveness to visitors when they are here.
- **For those visiting to study** we provide the best education, a safe and vibrant city location in which to live and access to globally cutting edge technology, opportunities and longer-term jobs
- **For those visiting on business** we provide high quality hotels, transport access, digital and meeting facilities. World class culture, food, arts and leisure facilities in which to relax or do business
- **For our community** it means providing access to the water and our green spaces
- **For everyone** it is a call to protect and preserve our blue and green spaces for the long term enjoyment of us all

Blue- Green products

Plymouth has a wealth of outdoor, marine and active experiences and products but more could be done to enable these to be accessible to a wider range of visitors as well as the local community. Developing access so that everyone has an opportunity to enjoy great experiences, bookability, a joint narrative and a cohesive way of interpreting our shared story will be a key focal point going forward.

We have mapped examples of our ‘Blue-green’ visitor products below although this is not exhaustive:

PLYMOUTH’S BLUE GREEN PRODUCTS		
BLUE (ON THE WATER)	GREEN (PARKS AND NATURAL ENVIRONMENT)	ACTIVE
Lido	Plymouth Hoe	National cycle route
Mountbatten Centre	Smeatons Tower	South West Coast path
Plymouth Boat trips	Central Park	Stand up paddle boarding – Royal William Yard
National Marine Aquarium	Devil’s point	Sea swimming
Sutton Harbour – fishing fleet	Saltram House and park	Sailing
Mountwise Lido	Newnham park	Kayaking
Bovisand beach	Mount Edgcombe	Climbing wall
Life Centre	Dartmoor Zoo	Ski slope
	Dartmoor	

ii. Our brilliant culture and heritage

‘We will be known internationally for jaw dropping art, authentic cultural and heritage 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, its heritage and its people over generations. Currently the cultural offer of Plymouth is not widely known or understood, however, is beginning to receive recognition and attract new and increased audiences. Initiatives such as Plymouth Art Weekender, Fab City, iMayflower, British Art Show and Illuminate demonstrate the innovation and leadership of the creative and cultural organisations and individuals driving cultural development within the city. Further opportunities exist to showcase the city, attracting new visitors and securing its position as an international cultural destination. There exists a timely opportunity to realise the full benefit of these cultural assets and make a statement about Plymouths cultural offer now and into the future.

Mayflower 400 and ‘The Box’ represent significant cultural development and investment in the city, which creates an opportunity to present a fresh perspective of Plymouth and to attract new visitors to explore supporting the blue-green theme as an exciting ‘après sea’ experience.

Our aim is to be known as a brave city full of cultural surprises and prepared to take risks; 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 authentic heritage experiences from the Mayflower to its naval history. We will build on the success of Mayflower 400 to inspire meaningful contemporary creative and cultural interventions, create more experiences and saleable products that will continue to attract international and UK visitors to Plymouth.

By 2030, Plymouth will be recognised internationally as a cultural destination capable of curating world-class experiences, which can be enjoyed by all. Destination Plymouth will align its efforts with key stakeholders in the visitor, cultural and business community to ensure culture and heritage is a driving force for economic productivity and social prosperity. We will continue to use events, festivals, sport and significant celebration years to show case 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.’

What does this mean for our visitors and our community?

- **For leisure visitors** it means creating, curating and signposting authentic and compelling immersive cultural experiences that reflect the rich heritage and urban nature of the city and the edgy creative energy within
- **For those visiting to study** we provide a nurturing environment with access to world class art, artists and a thriving culture scene that will compel students to want to live and work in the city, and where they have the opportunity to do so
- **For those visiting on business** we provide high quality hospitality, excellent digital and transport connectivity and meeting facilities alongside a world class cultural programme, arts and leisure facilities in which to relax or do business
- **For our community** it means sustained, meaningful engagement and inclusion, where they not only participate in cultural and heritage based activities but help to co-create them leading to a positive impact on health, careers and aspirations
- **For everyone** we will be an inclusive city that works with its communities to co-create engaging art, culture, sport and heritage that is accessible to all

Cultural and heritage product:

Plymouth is known as a heritage city; however, not currently widely known for its cultural product, however, with the opening of ‘The Box’ in 2020 there is a huge opportunity to use this as a catalyst for change. Using this as ‘lead’ product for the city will provide an opportunity to then ‘add on’ and package additional cultural offerings giving critical mass for visitors and locals alike. Part of our cultural heritage is the food and drink that we produce locally and within the wider regional context. Pasties, cream teas, fish and chips are all part of our local food culture and we can celebrate this through highlighting the very best that the city has to offer. Plymouth has a long history of fishing and we will work with partners to encourage the development of a wider sustainable seafood offering across the city, which supports the national marine park concept.

We have mapped examples of our ‘Cultural and heritage’ visitor products below although this is not exhaustive:

PLYMOUTH’S CULTURAL AND HERITAGE PRODUCTS				
CULTURAL	HERITAGE	SPORTS	EVENTS	LEISURE
The Box	Smeaton’s Tower	Plymouth Argyll	Pirates weekend	Shopping
Theatre Royal	Plymouth gin	Plymouth Albion	Flavourfest	Market and West End
Market Hall – Dome	Barbican	Plymouth Raiders	British fireworks	Drake Circus
Karst	Elizabethan House	Life Centre	Major sailing events	Everyman cinema
Plymouth Art College	Citadel	Marjon	British fireworks championships	Imax/Barcode
Barbican Theatre	Saltram House and park		Plymouth Art Weekender	Vue cinema
Royal William Yard – Ocean Studios	Mount Edgcombe		History month	Bowling
Athenaeum	Royal William yard		Illuminate	Genting casino
				Food and drink

iii. Premier destination

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

A successful visitor economy is reliant on delivering a range of enabling services facilities and infrastructure to support growth and improve productivity. Our main activities here fall into four key delivery areas:

- **Partnerships**
- **People**
- **Ocean city infrastructure**
- **Our distinctive brand**

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. We are committed to equalities and diversity in everything we do. It is at the core of our work with partners to make Plymouth a vibrant waterfront city.

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 - We will support our businesses to realise their potential, increase their sustainability and develop career paths for their staff. The skills of our workforce are vital to improve our visitor welcome, our productivity and our visitor experiences. Skills and training organisations will work with the Council, Destination Plymouth and local businesses to achieve that. We will work hard to be inclusive wherever is possible encouraging our businesses to work towards access for all, eliminate discrimination and tackle prejudice, advance equality of opportunity, foster good relations and promote understanding, meet the needs of people within protected characteristics, encourage participation in public life/activities

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.

Ocean city infrastructure:

Transport - Plymouth will deliver an exciting sense of arrival and seamless connectivity for visitors arriving by car, train, coach, ferry, cruise liner or boat and make the water part of the city’s leisure transport system.

We will work with partners in the southwest to promote and secure radical improvements to the quality and resilience of Plymouth’s road, rail, air and sea connectivity while promoting opportunities to reduce the carbon footprint of our city in line with our strategic ambitions . 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, walking, cycling and an internationally renowned cruise and ferry terminal.

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

Digital - We will use innovative 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.

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

That means prioritising new hotels and conferencing facilities 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 to support business meetings, visits, conferencing and investment.

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 heritage 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 for leisure, study and business.

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.

4. THE BUSINESS PLAN

This Business Plan sets out where we are as an organisation currently and in relation to our original targets set within the 2011 visitor plan. Tourism has been a great success story for Plymouth and we have more than achieved our original goals:

- To grow visitor numbers by 20% by 2020 and visitor spend by 25%. This means numbers of visitors will increase by 800,000 from 4m to 4.8m and visitor spend will rise by £63m from nearly £252m to £315m
We currently have 5.4 million visitors annually and visitor spend is £337 million

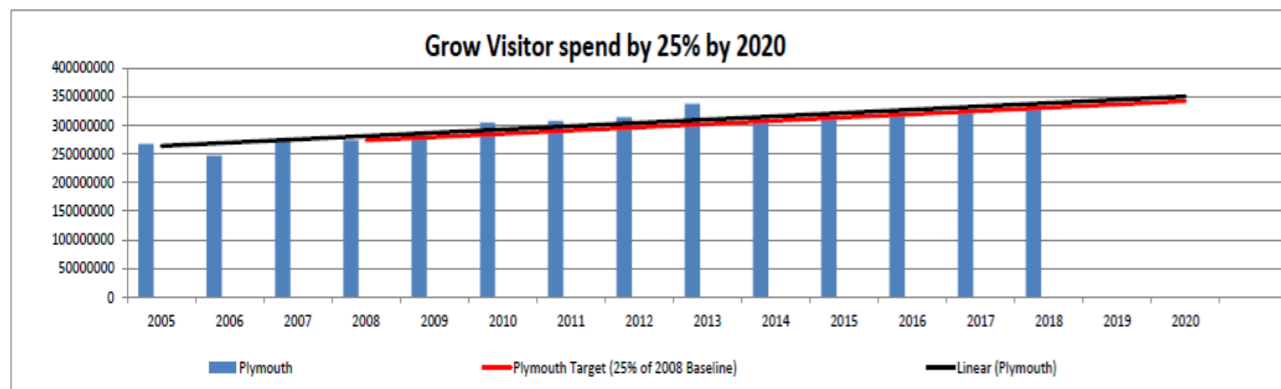
- To create and sustain a 33% growth in jobs in the visitor economy. That means 4,000 new jobs in the city by 2026, with an objective to achieve 2,800 of these by 2020
Employment within the sector in 2019 is currently 7,985 employees in total 10% growth

- To increase GVA by £84.4m
GVA has increased by £53.2 million in 2019

- To strengthen Plymouth’s position as the regional centre for Devon & Cornwall – by creating a great day out and evening destination
Perception research undertaken in 2017* shows Plymouth as the number 1 destination in Devon and Cornwall for shopping, heritage, evening and visitor attractions

- To raise the profile of Plymouth and its positioning as a place to visit and invest - particularly focusing on its outstanding marine credentials
78% of visitors surveyed in 2017 said Plymouth appealed to them because it is a waterfront destination with 81% of visitors associating Plymouth with the waterfront
In 2019 Plymouth was rated by Conde Nast magazine as the third best place in the world to visit in 2020

- 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
In 2019 British Land opened a £53 million new leisure complex ‘The Barcode’ with a 12 screen cinema and ten bars and restaurants
A major ‘Star project’ at Royal William yard is nearing completion with the refurbished ‘Melville building’ opening in 2020



Our new objectives are grounded in wise growth of the value of the visitor economy.

We will focus on higher value markets to drive productivity in the sector that can translate into quality year round jobs for Plymothians. That means a focus on overnight domestic and international leisure and business visitors who will visit throughout the year and manifest in our targets which aim to grow value faster than volumes of visits. Our new plan covers activity which will help drive these higher spending visitors and which is related to our key themes and the enabling priorities. These key areas of activity, which are the bedrock of any destination management organisation, are all inter related and crucial to successful, sustainable destinations.

Destination development

Destination development is investment in the city and its infrastructure that creates the main attractors including specific capital projects, which create a step change in achieving our overarching objectives. Through our Visitor Plan refresh process we have identified a number of 'Star projects' and 'Enabling projects' which will encourage private and public sector investment, support entrepreneurship and provide outlets and resources for creative industries, local businesses and our community. Our ambition is to be known nationally as a UK top ten-city break with transport, hotel accommodation and infrastructure to match our ambitions providing seamless connectivity to international arrival hubs through our modern welcoming gateways

Destination management

The visitor experience has always been fundamental to the success of any destination and in an increasingly digital world where information is shared instantly quality has never been more important. Good management of the physical environment, visitor welcome, content and information provision are key functions of successful destinations. With developing digital infrastructure, 5G and emerging new creative digital technologies, sector skills development and accessibility for multiple users is increasingly a key part of ensuring the overall perception and experience is the best it can be. Our ambition is to best in class for our digital and creative approach in everything we do and renowned as the number 1 must do destination in Devon and Cornwall.

Destination marketing

Marketing is not only just about the promotion of the end product to the relevant consumer or business but involves research to explore and test target opportunities, product development to ensure that what we are offering is fit for purpose, bookable and ready to market, and promotion in line with the management and narrative of the 'Britain's Ocean City' brand. Destination Plymouth will continue to target volume markets for day visitors but will develop new audiences linked to the key themes of 'Blue-Green' and 'Brilliant Culture and heritage' as part of our new marketing plan.

- We will continue to target the USA, Netherlands and closer European markets short term building on the legacy of our Mayflower 400 activities
- We will seek synergies with key city organisations to target new, emerging overseas markets e.g. China for the long term which can derive mutual benefits
- Will develop an effective business meetings and events plan to grow meetings, conferences and business links in key vertical sectors including marine, medical and creative digital which support city wide partner activity

*Arkenford perception research 2017

5. STAR PROJECTS 2020 TO 2030

Delivery of our visitor plan will be focused through a series of star projects. Star projects are important because they represent the best opportunities for alignment across strategic partners as well as return on investment for the city. During consultation with our partners, nine star projects were identified as being a priority. These projects are grouped into three key themes of:

- Blue-green city
- Brilliant culture
- Premier destination - enablers

Although at the very early stages of conception we have set out below the guiding principles of these star projects, what we aim to achieve through delivering them and some potential next steps. Next steps include headline indications of scale of project, budget indications, likely funding sources and timelines along with likely lead partners.

1. THEME: BLUE- GREEN CITY
a) PROJECT NAME: OCEAN PLAYGROUND
<p>SUMMARY OF PROJECT: Our aims is to build on our waterfront assets by providing access all year round for activities by, on, in and under the water. Specific projects include Mountbatten centre and Hoe foreshore</p>
<p>PROJECT RATIONALE/OBJECTIVES: Links to strategic ambition: Our national marine park will be recognised for amazing experiences by, on, in and under the ocean This project will help support visitor plan objectives by providing:</p> <ul style="list-style-type: none"> • New and more waterfront experienced based activities for visitors, day staying and international • Better access to the water and improved facilities • Extended dwell time and therefore increased spend • Delivers to the brand promise of Britain’s Ocean City • Supports theme 1 – blue green city • Supports the national marine park concept through improved access for all <p>Our waterfront is the jewel in the crown and is famous internationally, however, over a period of time has become tired and does not provide sufficient recreational opportunities for visitors currently to maximise its potential. Feedback from consultees has demonstrated that there is appetite for visitors to be able to enjoy activities more easily on the water e.g. paddle boarding, sailing, diving, kayaking, open water swimming etc. and then take their ‘après-sea’ activities close by the water. Research indicates that the target audiences for water-based activities are higher spending with longer dwell times. Ability to secure major on water events going forwards – e.g. national sailing championships is limited and requires long-term infrastructure to achieve the city’s ambitions.</p>
<p>KEY LOCATIONS: Key access areas to the water including: Mountbatten Centre, Hoe Waterfront, Millbay, Royal William Yard, Devonport and Tamar areas, Drakes Island</p>
<p>APPROACH: We will take the lead on development of visitor led site opportunities to help encourage inward investment through promoting and packaging key locations, which can provide commercial opportunities for access to the water, recreational opportunities beside the water and on the water. Develop regeneration opportunities through exploring freehold or long leasehold land deals and working with developers to seek solutions. We will work closely with local businesses to encourage them to take advantage of opportunities where possible and to enable them to be ready to go to market with new products aimed at specific target audiences.</p>
<p>PARTNERS: Mountbatten Centre, Waterfront Partnership, PPML, Urban Splash, Royal Navy</p>
<p>TIMESCALE: 3 to 5 years</p>
<p>RESOURCES REQUIRED: Capital and revenue TBC</p>

2. THEME: BLUE- GREEN CITY
b) PROJECT NAME: STORIES OF THE OCEAN – PLYMOUTH SOUND NATIONAL MARINE PARK
<p>SUMMARY OF PROJECT: Key ambition: Our national marine park will be recognised for amazing experiences by, on, in and under the ocean Using innovative digital technology, marine science and our local people to tell our story. Integrating culture into city centre and waterfront developments to expand The use of digital technologies to animate the city and its heritage assets (for example illuminate). Links to ‘smart sounds’ and ‘M’ subs autonomous vessel technology</p>
<p>PROJECT RATIONALE/OBJECTIVES: Plymouth is aiming to be the first UK national marine park providing education, access and recreation for all visitors to the city to interpret the marine environment and motivate them to act to help preserve the environment for the long term. Objectives of this project include:</p> <ul style="list-style-type: none"> • Increasing visitor numbers • Encourage new audiences to visit • Provide higher levels of accessibility for all audiences through technological solutions • Showcase the city’s credentials as a cutting edge marine technology centre globally
<p>KEY LOCATIONS: City wide but particularly linked to ‘sound’ and waterfront, Oceansgate and Devonport working with key partners including NMA, PML, Drakes Island, Plymouth Boat trips etc.</p>
<p>APPROACH: Identify specific narrative connected to Plymouth and its maritime vision Create trails and points of interest which highlight key aspects and areas of the city Development of immersive technologies linked to Market Hall dome project/‘Smart sound’ Engage with community to develop ‘ambassadors’ who will show and tell the stories Create ‘bookable’ visitor product</p>
<p>PARTNERS: RIO, Oceansgate, Navy, NMRN, University, Plymouth Culture</p>
<p>TIMESCALE: 3 to 5 years</p>
<p>RESOURCES REQUIRED: Revenue: Grant funding required to develop immersive technology projects and community engagement approach ‘Ambassadors on the water’ – could be self-financing linked to water based tours Capital – possibly some linked to development of technology - TBC</p>
<p>NOTES: Stakeholder consultation brought out the desire to engage more and connect the sea and waterfront with visitors and the local community. Make the visit a more engaging visitor experience and make the most of the fantastic views by connecting the restaurants with a view and creating themed trails on and off the water, which explain why Plymouth is a National Marine Park in a way that is engaging and encourages visitors to find out more. Suggestions included using local volunteers as ambassadors on and off the water as well as using STEM technology to provide information above and below the water linked to the ‘smart sound’ project.</p>

3. THEME: BLUE- GREEN CITY
c) PROJECT NAME: NATIONAL MARINE PARK GATEWAY
<p>SUMMARY OF PROJECT: Key ambition: Our national marine park will be recognised for amazing experiences by, on, in and under the ocean The National Marine Aquarium is a much loved and nationally significant visitor attraction. This project will ensure that the attraction is sustainable for the long term in its role as Ocean conservation trust and develop the site as a gateway to the National Marine Park. Connected projects will explore the opportunity to develop the fish market to make it more accessible for the local community as well as visitors.</p>
<p>PROJECT RATIONALE/OBJECTIVES:</p> <ul style="list-style-type: none"> • Improve visitor experience • Develop visitor product • Support positioning and brand promise for BOC • Increase dwell time • Encourage exploration of other parts of city • Improve accessibility •
<p>KEY LOCATIONS: National Marine Aquarium, Fish market, Sutton Harbour</p>
<p>APPROACH: Work with key strategic partners to develop a vision and shared narrative for the 'Gateway' Identify priority projects and help facilitate feasibility and resource assembly Support grant funding opportunities Develop visitor product connected to the site</p>
<p>PARTNERS: Sutton Harbour Holdings, National Marine Aquarium, Plymouth Marine Laboratories, Plymouth University – other?</p>
<p>TIMESCALE: 5 to 10 years</p>
<p>RESOURCES REQUIRED: Capital – ? Revenue – will be supported through executive team and project based grant funding</p>
<p>NOTES:</p> <p>Stakeholder consultation revealed a strong appetite for projects connected to the development of this area of the city linked to the emerging concept of a National Marine Park. In particular a strong desire to make the fish market a visitor friendly attraction showcasing the importance of fishing and telling the story of sustainable fishing linked to the oceans. Interpretation could include bringing the market to life as in 'Seattle' where the market is 'theatre' with traders openly 'performing' with their catch to tell their stories daily. This is a way to create a new dimension on the waterfront and bring to life the whole marine eco system with key messages connected to the National Marine Park and its sustainability. The National Marine Aquarium also featured heavily here as a way to interpret and amplify this messaging and introduce educational elements linked to additional tours on the water. There is an associated desire to work with local restaurants and chefs to promote seafood through using locally caught fish and activities to support Plymouth as one of the best places in the UK for fresh fish.</p>

4. THEME: BRILLIANT CULTURE AND HERITAGE
a) PROJECT NAME: 'THE BOX' EFFECT
<p>SUMMARY OF PROJECT: Key ambition: We will be known internationally for jaw dropping art, authentic cultural experiences and our urban spirit Build on the legacy potential of the Box by working with creative talent and communities to encourage new audiences to explore other heritage, leisure and arts activities in the city. Maximise the potential impact of Mayflower 400 as a means of solidifying Plymouth's reputation as a cultural destination by: Supporting initiatives that seamlessly connect the Mayflower thematics to the ambitions for a National Marine Park (for example iMayflower and Fab City). Building on initiatives that use arts and culture to create a sustained annual/biennial programme of culture for residents and visitors (for example British Art Show, Plymouth Art Weekender, contemporary art festival).</p>
<p>PROJECT RATIONALE/OBJECTIVES:</p> <ul style="list-style-type: none"> • Make more of our heritage and culture through improved presentation in the Box and city cultural organisations • Increase number of visitors to the city • Extend dwell time • Target new audiences • Animate public spaces in the city to provide points of interest • Engage with local community through outreach programmes and educational opportunities • Develop bookable visitor experiences
KEY LOCATIONS: City wide but particularly focusing on the 'cultural quarter' of the city including The Box, Plymouth College of Art, Plymouth University, Karst, Drakes Leisure
<p>APPROACH: TBC with Box/Plymouth culture</p>
<p>PARTNERS: RIO, The Box, Plymouth College of Art, Plymouth University, Plymouth Culture, Karst - Plus others</p>
TIMESCALE: up to 5 years
<p>RESOURCES REQUIRED: Revenue – part of existing Box, Plymouth Culture and partner budgets Capital – nothing identified at this stage</p>
<p>NOTES: The Box is one of the single largest investments in the city into a heritage, cultural and museum attraction for decades at circa £40 million. During consultation with partners it came through repeatedly as something, which can drive visits along with a wider community, cultural and arts agenda for the city. Further work needs to be undertaken with Plymouth Culture and The Box team to understand potential projects and future aspirations.</p> <p>Realising the potential of 'The Box', by developing sustained, meaningful community engagement initiatives that bring arts and heritage to new audiences; ensure that access to our heritage, archive and collections results in contemporary works that are visible across the city, using The Box as a springboard.</p> <p>A key short-term focal point will be The British Art Show in 2021, which will provide a significant platform for visual arts in a 'Biennale' style approach, which would be repeated every two years with growing impact and significance both nationally and internationally.</p>

5. THEME: BRILLIANT CULTURE AND HERITAGE
b) PROJECT NAME: Après SEA – DEVELOPING PLYMOUTH’S NIGHT TIME ECONOMY
<p>SUMMARY OF PROJECT: Key ambition: We will be renowned as the number 1 must do destination in Devon and Cornwall Grow our evening, musical and cultural community events and assets from grass roots to larger venues to build a distinctive day and night time offer which reflects the ‘Britain’s Ocean City’ ‘Après-sea’ experience and culture of the city</p>
<p>PROJECT RATIONALE/OBJECTIVES:</p> <ul style="list-style-type: none"> • Develop music and night time product • Attract new audiences • Provide ‘après sea’ experience • Extend dwell time and encourage overnight stays • Encourage spread of visitors across wider city locations • Engage local communities
KEY LOCATIONS: City centre, Barbican, Royal William Yard
PARTNERS: Theatre Royal, Drakes Circus, BIDS, GWR, Plymouth Culture, Music Venue Trust
APPROACH: We will work with key city partner organisations to encourage development of the evening offer in Plymouth. Packaging multiple products where possible and working with strategic regional partners to promote Plymouth as a leading destination for nightlife and après-sea activities.
TIMESCALE: up to 5 years
<p>RESOURCES REQUIRED: Revenue: Project manager – approx. 0.5 FTE Potential longer-term capital project linked to venue. (not yet mandated)</p>
<p>NOTES: Build a distinctive music offer for the city, considering both programming and venue development, to contribute to a buoyant evening and night-time economy where music is complementary to other art forms.</p> <p>New developments in the city have provided greater critical mass from a consumer perspective which needs packaging and promoting to specific target audiences to maximise the opportunities for the city for evening visitors locally and regionally. In addition, there is a parallel project at the very early stages, which has evolved from the loss of ‘The Hub’ as a music venue. Feedback from stakeholders is that grass roots music needs to be enabled to develop grow and thrive in the city to provide a vibrant music scene supporting the evening and night-time economy as well as ambitions for a home-grown festival style music event over the long term.</p>

6. THEME: BRILLIANT CULTURE AND HERITAGE
c) PROJECT NAME: Celebrating our maritime and naval heritage
<p>SUMMARY OF PROJECT: Key ambitions: We will be known internationally for jaw dropping art, authentic cultural experiences and our urban spirit/We will be recognised nationally as ‘best in class’ for our digital, creative and cultural approach in everything we do An emerging opportunity to tell the story of the Navy in Plymouth working with the National Museum of the Royal Navy and celebrating our naval heritage. Develop the potential of an emerging new visitor attraction at Devonport building on emerging plans for the Naval Heritage centre, Guildhall and Market Hall. Use the opportunity to showcase our digital innovation and creativity alongside our naval maritime heritage.</p>
<p>PROJECT RATIONALE/OBJECTIVES: The National Museum of the Royal Navy has recently acquired the Naval heritage Centre in Devonport situated adjacent to the Oceansgate enterprise zone and five minutes’ walk from Devonport market hall and Guildhall. The NMRN plans to develop this site as a regionally significant location to tell the story of the Navy/Marines and the cold war. This emerging cluster of potential visitor attractions has potential to be developed over the long term along with Mount Wise Lido and Devonport Park to encourage visitors to explore this area as part of their wider city experience.</p> <ul style="list-style-type: none"> • Attract new audiences • Increase city dwell time • Showcase creative, digital industries globally • Develop new experiences for visitors and community • Highlight importance of naval and maritime heritage juxtaposed with cutting edge marine technology
<p>KEY LOCATIONS: Naval Heritage Centre, HMS Devonport, Devonport Guildhall, Market Hall</p>
<p>APPROACH: Partners will be encouraged to work together to explore opportunities, a narrative and a vision for how this area may function as a shared destination and visitor attraction over an extended period of time – 5 to 10 years potentially. Funding opportunities will be explored for feasibility work to develop the concepts and support partners to acquire funding to move their respective project forwards.</p>
<p>PARTNERS: National Museum of the Royal Navy, HM Royal Navy, Real Ideas Organisation (RIO), PCC – Oceansgate</p>
<p>TIMESCALE: 5 to 10 years</p>
<p>RESOURCES REQUIRED: Revenue – existing executive capacity or project management linked to creative industries/Oceansgate. Capital – ?</p>
<p>NOTES: Devonport emerged as a key city location for visitor development on the back of current projects linked to the Guildhall, Market hall and Naval heritage Centre. The lead partners in these projects ‘RIO’, HM Royal Navy and National Museum of the Royal Navy are keen to develop these projects and connect them in a visitor cluster, which showcases Devonport’s significance to the City of Plymouth but also uses cutting edge creative and digital technologies to provide innovative new approaches and immersive experience.</p> <p>Development of this area would require short, medium and long term phasing.</p>

7. THEME: PREMIER DESTINATION
a) PROJECT NAME: CITY CONFERENCE CAMPUS
<p>SUMMARY OF PROJECT: Key ambitions: Plymouth to be known as the destination of choice for meetings, events and conferences in Devon and Cornwall/ Plymouth will be known nationally as a UK top ten city break This project will aim to realise the potential of the city centre by developing a city centre conferencing campus to attract small and medium sized conferences, meetings and events to the city. Develop supporting 4 star hotel accommodation and banqueting provision to support growth of business tourism off peak. Provide indoor facilities for meetings, events, sports and community facilities. Key ambition: Plymouth needs to grow its accommodation stock to enable it to benefit from more UK domestic and overseas staying visitors. Hotel development sites have been identified across the city and these need to be brought to fruition to enable the sector to grow to its full capacity. In particular, there is market failure in the 4-star accommodation sector and this is a key area to address.</p>
<p>PROJECT RATIONALE/OBJECTIVES: Plymouth currently has limited capacity to provide a conferencing offer for events, meetings and activities of over 300 people within the city. The current 4 star accommodation capacity is limited and running at around 80% capacity annually restricting opportunities to grow this areas of the market.</p> <ul style="list-style-type: none"> – Increased capacity in accommodation sector – Opportunity to market to conference and meetings sector and grow off peak/improve productivity – Convert day visitors to staying visitors will grow spend – Perception of Plymouth as a place to do business/invest and education not just visit for leisure
<p>KEY LOCATIONS: City centre Other accommodation sites: Hoe, Millbay, Derriford</p>
<p>APPROACH: Key partners to explore feasibility of regional city centre conference, meetings and education campus. Feasibility to be funded via Future High Streets Fund bid. Bid to be submitted Nov 2019.</p> <p>A hotel demand study was undertaken in 2014 and repeated in 2019, which demonstrates demand in the market for hotels. Operators continue to express an interest in the city and strategic sites have been allocated, however, developers are slow to come forwards. Plymouth City Council is leading this process and has had success with three star hotels with two in the pipeline to be completed before 2021 however there is a big gap in the provision of 4-star rated accommodation, which the business and international traveller demands.</p>
PARTNERS: Urban splash, Plymouth University, Plymouth City Council
TIMESCALE: 0 to 5 years
<p>RESOURCES REQUIRED: Revenue – Project management, feasibility Capital – ?</p>
<p>NOTES: During consultation with partner, organisations across the city it was highlighted that Plymouth lacks the high quality city centre conference, meetings, business and education facility that a key regional city requires. In particular, the city is not able to facilitate conferences currently of more than 300 delegates and this is a significant disadvantage over neighbouring destinations including Torbay and Exeter. Crucial to any facility of this nature will be flexibility of use for not just meetings and conferencing but also for possible smaller indoor events and activities as well as exhibitions and training. Rapid digital and even 5G connectivity will also be a key factor for a facility such as this. Currently growth in the staying visitor market is relatively static. Between 2013 and 2014, the city lost over 200 hotel beds, which has affected staying visitor nights, and spend. Every 100 beds built will increase staying nights by 29,200 and visitor spend by approximately £4.65 million annually.</p>

8. THEME: PREMIER DESTINATION
b) PROJECT NAME: BRUNEL PLAZA (at Plymouth station)
<p>SUMMARY OF PROJECT: Key ambition: We will have transport infrastructure to match our ambitions with seamless connectivity to our international arrival hubs. The previous visitor plan 2011 to 2020 highlighted the significance of major gateways and hubs in determining people’s first impression and sense of arrival to a destination. Although work on this project has commenced it is a long-term project and will have a major impact on the visitor economy providing a significant step change in the experience and efficiency for both locals, commuters and visitors arriving in Plymouth. It will also act as a major regional gateway for thousands of passengers travelling to the South West annually.</p>
<p>PROJECT RATIONALE/OBJECTIVES: Plymouth station has long outlived its original life span and is tired and ineffective in terms of providing a contemporary welcome experience to the city as a major gateway. Plymouth station is one of the busiest stations in Devon ad Cornwall regularly receiving thousands of passengers annually. Improvements to the station will provide the following:</p> <ul style="list-style-type: none"> – Improved experience for passengers including parking, public transport and information provision – Increased capacity at peak times – Increased dwell time and spend – Opportunities for BOC branding and improved visitor perception on arrival
<p>KEY LOCATIONS: Plymouth railway station and Intercity House</p>
<p>APPROACH: Key partners have completed feasibility and developed a vision and plan for the site. Initial funding has been secured and further funding is now being sought to start development during 2020.</p>
<p>PARTNERS: Plymouth University, Plymouth City Council, Great Western Railway, Network rail</p>
<p>TIMESCALE: 0 to 5 years</p>
<p>RESOURCES REQUIRED: Revenue – Project management Capital – £?</p>
<p>NOTES: As part of the Visitor Plan development process, many stakeholders cited the poor quality of the railway station as a key gateway to the city as something that required a step change and strategic intervention. In fact, the railway station was the single biggest intervention that organisations felt required change. First impressions, signage, improved parking, ‘Instagram’ opportunities and connectivity to major international hubs e.g. Exeter, Newquay, Bristol and London airports were all cited as extremely important to the growth and development of the city as a major destination.</p>

9. THEME: PREMIER DESTINATION
c) PROJECT NAME: PLYMOUTH CRUISE AND FERRY PORT
<p>SUMMARY OF PROJECT: Key ambition: We will have transport infrastructure to match our ambition with seamless connectivity to international arrival hubs</p> <p>There has long been an ambition to improve the sense of arrival and cruise/ferry services available to passengers at Millbay port. This project will see improved capacity for traffic and transport, more streamlined border controls, better accessibility and visitor welcome service for cruise and ferry passengers off both the berth and tendering in. Higher volumes of ships will be achievable through a second smaller berth facility at Trinity Pier which will also improve the access and ambience of the waterside for visitors and local residents</p>
<p>PROJECT RATIONALE/OBJECTIVES:</p> <ul style="list-style-type: none"> – Increased capacity for cruise ships – Opportunity to grow the cruise market particularly for specialist embarkations/small vessels and superyachts sub 150m – Increased day visitor to the city – Improved port welcome and perception/branding of Plymouth as a place to do business/invest and education not just visit for leisure
<p>KEY LOCATIONS: Millbay port/Trinity pier</p>
<p>APPROACH: A hotel demand study was undertaken in 2014 and repeated in 2019, which demonstrates demand in the market. Operators continue to express an interest in the city and strategic sites have been allocated, however, developers are slow to come forwards. Plymouth City Council is leading this process and has had success with three star hotels with two in the pipeline to be completed before 2021 however there is a big gap in the provision of 4-star rated accommodation, which the business and international traveller demands.</p>
<p>PARTNERS: Plymouth City Council, AB Ports, Brittany Ferries</p>
<p>TIMESCALE: 0 to 5 years</p>
<p>RESOURCES REQUIRED: Revenue – Project management Capital – Circa £??</p>
<p>NOTES: AB Ports are currently exploring the options to develop the port to improve traffic, passenger and ship access for the long term. Working with Destination Plymouth has been very successful in marketing the city as a cruise destination and the ambition is to have at least 30 ships calling annually in the long term. There are opportunities alongside for vessels up to 210 m and 150m on Trinity Pier berth.</p>