

**Oversight and Governance**

Chief Executive's Department
Plymouth City Council
Ballard House
Plymouth PL1 3BJ

Please ask for a Democratic Advisor
T 01752 305155
E democraticsupport@plymouth.gov.uk
www.plymouth.gov.uk

Published 29 November 2022

GROWTH AND INFRASTRUCTURE OVERVIEW AND SCRUTINY COMMITTEE

Wednesday 7 December 2022
5.30 pm
Council House

Members:

Councillor Riley, Chair

Councillor Coker, Vice Chair

Councillors Finn, Goslin, Hendy, Holloway, Luggar, Partridge, Poyser, Salmon, Singh, Tippetts and Tofan.

Members are invited to attend the above meeting to consider the items of business overleaf.

This meeting will be webcast and available on-line after the meeting. By entering the Warspite Room, Councillors are consenting to being filmed during the meeting and to the use of the recording for the webcast.

The Council is a data controller under the Data Protection Act. Data collected during this webcast will be retained in accordance with authority's published policy.

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

Growth and Infrastructure Overview and Scrutiny Committee

1. Apologies

To receive apologies for non-attendance submitted by Councillors.

2. Declarations of Interest

Councillors will be asked to make any declarations of interest in respect of items on the agenda.

3. Minutes (Pages 1 - 10)

To confirm the minutes of the previous meeting held on 10 October 2022.

4. Chair's Urgent Business

To receive reports on business which in the opinion of the Chair, should be brought forward for urgent consideration.

5. Freeport Mobilisation (Appendix 2 To Follow): (Pages 11 - 24)

6. Policy Updates: (Pages 25 - 28)

7. Risk Update: (Pages 29 - 38)

8. Culture Plan Annual Update: (Pages 39 - 46)

9. Visitor Plan Annual Update: (Pages 47 - 168)

10. Horizons Fund Activity Plan Update: (Pages 169 - 194)

11. Work Programme: (Pages 195 - 198)

12. Tracking Decisions: (Pages 199 - 200)

Growth and Infrastructure Overview and Scrutiny Committee**Monday 10 October 2022****PRESENT:**

Councillor Riley, in the Chair.

Councillor Coker, Vice Chair.

Councillors Finn, Goslin, Hendy, Holloway, Laing (Substitute for Councillor Tippetts), Luggier, Partridge, Salmon and Wheeler (Substitute for Councillor Poyser).

Apologies for absence: Councillors Poyser, Tippetts and Tofan.

Also in attendance: Councillor Patel (Cabinet Member for Customer Services, Culture, Leisure and Sport), Councillor Shayer (Cabinet Member for Finance and Economy), Anthony Payne (Strategic Director for Place), Victoria Pomeroy (CEO of The Box), Martin Ivatt (City Centre Regeneration Co-ordinator), Matt Ward (Head of Strategic Development Projects), David Draffan (Service Director for Economic Development), Chloe Hughes (Engagement Programmes Manager), Ross Jago (Head of Governance, Performance and Risk), Hannah Whiting (Democratic Advisor) and Lucy Davis (Policy & Intelligence Advisor).

The meeting started at 5.32 pm and finished at 7.36 pm.

Note: At a future meeting, the Panel will consider the accuracy of these draft minutes, so they may be subject to change. Please check the minutes of that meeting to confirm whether these minutes have been amended.

57. **Declarations of Interest**

No declarations of interest were made.

58. **Minutes**

The Committee agreed that the minutes of the meeting held on 22 June 2022 were an accurate record of the meeting.

59. **Chair's Urgent Business**

There were no items of Chair's Urgent Business.

60. **Policy Updates**

Lucy Davis (Policy & Intelligence Advisor) presented the report and highlighted –

- a) The Growth Plan 2022;

- i. Investment Zones to be established across the UK;
 - ii. New legislation to be introduced through the Planning and Infrastructure Bill to accelerate and prioritise major infrastructure projects across England;
 - iii. Changes to tax.
- b) Changes had been announced since the agenda had been published on the Interventions in place to support businesses and families with rising energy costs.
 - i. The Government will not proceed with the abolition of the 45p tax rate for higher earners;
 - ii. DLUHC was inviting expressions of interest for investment zones from Freeport's with a deadline of 14 October 2022;
 - iii. The Medium Term Fiscal Plan had been moved forward to 31 October 2022 from 23 November 2022.

In response to questions it was reported that –

- c) The Council would be submitting an expression of interest for the Freeport to become an Investment Zone with a separate Investment Zone expression of interest being submitted for the City Centre and Waterfront;
- d) Relaxation of planning controls for an investment zone on the waterfront have not been confirmed by government yet, but changes would be more likely linked to speeding the process of granting planning permission. Policies like Heritage Protection, Building Safety and Flooding, would all still apply;
- e) The expression of interest for the Freeport to become an Investment Zone would not change from the full business case submission;
- f) Temporary licensing changes that were brought in during the COVID19 pandemic to allow businesses to sell food and drink on pavements and pedestrianised roads would remain in place until 2023, when the guidance would become permanent.

The Committee agreed to:

- 1) Note the report;
- 2) Receive an update on social prescribing provision in walking and cycling;
- 3) Receive an update on any Council plans relating to the capping of bus fares to £2.

61. Risk Review

Ross Jago (Head of Governance, Performance and Risk) presented the report and highlighted –

- a) The Audit and Governance Committee reviewed strategic and operational risks on a regular basis, but each scrutiny committee would have a risk report, relating to their Terms of Reference, added as a recurring item on their agendas to provide the Audit and Governance Committee with further reassurance on risks;
- b) Items could be added to the work programme from the risk register;
- c) The work programme for the Growth and Infrastructure Overview and Scrutiny Committee covered the risks at that time.

The Committee agreed to note the report.

62. Update on The Box

Councillor Patel (Cabinet Member for Customer Services, Culture, Leisure and Sport) introduced the report highlighted –

- a) The Box opened on 29 September 2020 and had just celebrated its second anniversary;
- b) Since its opening The Box had received over 350,000 visitors, during a period that saw the venue closed due to COVID19 pandemic measures between 31 December 2020 to mid-May 2021;
- c) The investment in The Box had been significant and the project was hugely ambitious supported by several funders including the Arts Council of England and the National Lottery Heritage Fund;
- d) The facilities for museum and archive materials had been improved significantly with an accessible climate changeable area;
- e) There has been a focus on achieving physical and intellectual access;
- f) The Box has changed perceptions of Plymouth, generating civic pride, and had had significant national and international media attention;
- g) A significant number of visitors were local people and engagement has been done with local schools, colleges, universities and some of the hardest to reach communities within the city;
- h) The British Art Show opened on 8 October 2022 and would run until 8 January 2023.

Victoria Pomery (Chief Executive Officer, The Box) supported the presentation and highlighted –

- i) Over 350 people attended the opening of the British Art Show on Friday 7 October 2022 with a further 2000 over the following weekend;
- j) The vision at The Box was to reimagine the future through the past;
- k) The Box had worked in partnership with partners and curators for The British Art Show;
- l) The exhibition featured the inspiring and challenging work from artists including 6 Turner Prize nominees and 3 Turner Prize winners;
- m) The importance that a wide range of ages were engaged with through the British Art Show and of the learning and engagement team, headed up by Chloe Hughes (Engagement Programmes Manager), who worked to engage as many local people as possible with The Box;
- n) 6 ambassadors had been recruited, with extensive and varying networks and backgrounds between them, to further engagement;
- o) The Tap-In app had been used to gather data on those who are attending The Box, and to inform engagement programmes with the groups of people who had not attended.

In response to questions it was reported that –

- p) The Box would be ambitious in applying for awards and would consider applying for the Art Fun Museum of the Year and had also been visited by a judge for a South West architectural prize and the archives had received two accreditations;
- q) Based on footfall at the time, The Box was on track to achieve its target of 200,000 visitors in the financial year 2022/23;
- r) Income revenue from the shop was down 30%, but changes had been made to merchandise available and research into audiences and propensity to spend, this could also be affected by the cost of living crisis;
- s) The value of the box cannot just be measured by revenue income;
- t) Venue hire figures had improved;
- u) The Box had been working with Foster's to monitor and maximise spend in the café, but the cost of living crisis had impacted the spend per head;
- v) The focus was on bid writing to fundraise for future projects;

- w) The income target of the previous museum had been £965,000 in 2013/14, and the income target for The Box in 2022/23 was £2.5 million;
- x) The net budget from the previous museum had been reduced by replacing income streams with bids;
- y) The catering had experienced inflation costs over Summer 2022 relating to cost of materials and wage inflation, whilst trying to recover from the effects of the COVID19 pandemic;
- z) Programming was key in securing higher numbers of visitors, especially new visitors, who might spend more at the gift shop;
- aa) Schools local to The Box were repeat visitors, and funding had enabled the engagement team to engage with schools in deprived areas, but schools across the city had struggled to plan visits due to travel costs;
- bb) The ambassador programme would be monitored and evaluated for its successes, and a teacher ambassador network was also utilised;
- cc) Plans for work to be shown at The Box are worked on 2-3 years in advance and at the time of the meeting there were no plans to show work from local artists such as Robert Lenkiewicz and Beryl Cook with the focus on working with up and coming living artists;

The Chair congratulated and thanked The Box team for working on such a successful cross-party project.

The Committee agreed to:

- 1) Note the report.
- 2) Recommend that they were provided with a report with up to date information on visitor numbers to The Box per ward to see which wards had lower engagement levels;
- 3) Recommend a report was to be provided on schools by ward that had been engaged with so Councillors could consider using their Community Grant funds to assist local schools that might not have engaged due to funding for transport.

63. **City Centre Update**

Councillor Mark Shayer (Cabinet Member for Finance and Economy) introduced the report and highlighted –

- a) Plymouth's City Centre, much like city centres across the UK, was facing a number of challenges, but Plymouth had been working on facing these challenges for some time and had delivered projects such as The Box and The

Barcode;

- b) There were new projects underway or about to start including the refurbishment of the city centre, The Guildhall refurbishment, work at the Railway Station, with work in the pipeline to bring in new homes and other non-retail uses to the city centre;
- c) Plymouth's City Centre, much like city centres across the UK, was facing a number of challenges., but Plymouth had been working on facing these challenges for some time and had delivered projects such as The Box and The Barcode
- e) Future Projects included Hilton Garden Inn and apartments on The Hoe, a new health and wellbeing centre and new homes at Bath Street as well as £26.5 million invested in improving the public realm across the city centre with contractor Morgan Tyndall;
- f) Works on Old Town Street and New George Street were due for completion in July 2023 and other projects at Colin Campbell Court, Civic Square and Armada Way were due to commence by the end of 2022 and to complete in 2023/24;
- g) Work was continuing on the extensive High Street Heritage Action Zone.

Martin Ivatt (City Centre Regeneration Coordinator) added to the presentation of the report and highlighted –

- h) A portion of the Transforming Cities Fund would be used to improve the public realm at Colin Campbell Court with work due to commence in January 2023 and be completed by the end of March 2023;
- i) At £12.7 million, Armada Way was the largest public realm program within the Better Places Programme with a deadline of March 2024 after a year extension to the Transforming Cities Fund deadline;
- j) Improvements would include:
 - i. Restoration of the Phoenix Fountain;
 - ii. Creation of an Amphitheatre Space near the Copthorne Hotel;
 - iii. Restoration of the 'grand vista' to the Hoe, the original aim for Armada Way which had been lost over previous years;
 - iv. A stream that ran North to South utilising granite curbs already in place;
 - v. Wildflower spaces;

- vi. Ping Pong Table and Pétanque playing areas;
- vii. A water-based play space with dancing jets;
- viii. Food and beverage outside spaces;
- ix. Restoration of the Sundial and modernisation of its setting;
- x. Replacement of broken slabs and opening up of tree pits to give trees space.

In response to questions it was explained that –

- k) Armada Way is the centrepiece of transformation and would act as a regeneration catalyst for plots either side of Armada Way more attractive as development space with development planned for the West End in relation to the Health and Wellbeing Hub;
- l) A compulsory purchase had been successfully made on some previously commercial properties on Western Approach in order to begin demolition in preparation for works at Colin Campbell Court;
- m) Department of Transport had been made aware that Senior Officers felt that the funding originally designated for Phase 2 of Frankfurt Gate funding would be better used to enhance cyclist and pedestrian movement at Colin Campbell Court, and this had been agreed;
- n) A consultation had taken place with businesses and the City Centre Company to inform them of plans around Christmas 2022 to reduce hoardings to widen pedestrian areas;
- o) Cycling links between Frankfurt Gate onto Devonport and St Budeaux Sustainable transport and cycling links had been adjusted to use the new plans for Colin Campbell Court;
- p) There was a cycle route included on the plans to run from North Cross, down Armada Way to Royal Parade with a mobility hub outside Mayflower House;
- q) The pedestrian and cycling routes would not be segregated but cycling route would be identified by a different colour;
- r) Approximately 20% of properties in the city centre were vacant and the team had been working with landlords to get vacant buildings back into use and reducing retail and diversifying uses;
- s) Analysis had not yet been completed on how the cost of living crisis could affect footfall in the city centre, but with mixed use it was hoped it would give people more reasons to visit and use the city centre, with new homes being built and the new Health and Wellbeing Hub looking to employ

approximately 250 people and have 2000 daily visitors, it was hoped there would be an increase in footfall and night-time economy;

- t) The Council was a major landlord in the city centre and was looking after small businesses and encouraging people to shop local and understand food miles;
- u) No further legal expenditure would be incurred in relation to the CPO's needed to deliver the Health and Wellbeing Hub;
- v) Technical design would look more closely at the cycle route and education would be carried out to encourage cyclists to stay on cycle paths as much as possible;
- w) Changes from retail to other uses are incremental, and the city centre area would not reduce in size, just the number of retail units within it;
- x) The works scheduled for Royal Parade were being looked at in technical design and works were due to start in early 2023 to make the area better for buses and pedestrians to use;
- y) Under Local Transport Note 120 it was stated that city centre environments were acceptable for non-segregated cycle routes providing they were appropriately delineated, but the plans were still in the technical design process;
- z) Global supply chain and inflation issues were of concern but the scheme was being closely tracked against the cost plan, which had a good degree of contingency built-in;
- aa) Different surfaces and rumble strips were being considered in the design of cycle paths along Armada Way to make it a safe shared space and the designs were at the beginning of a more detailed consultation phase which would provide an opportunity for redesign to adapt to concerns and issues;
- bb) A survey had shown that Plymouth City Centre was one of the busiest in terms of footfall in the country;
- cc) Areas such as Royal William Yard and The Barbican are fantastic for the city, but present a challenge for the city centre as it provides multiple locations for investors;
- dd) Works had been planned and funded in such a way to try and reduce the cost on local taxpayers.

The Committee recommended that -

- l) They be provided with a full report regarding the aborted start to the Old Town Street and New George Street project in due course;

- 2) They be provided with a report on the Armada Way sustainable transport solutions design process and how it would be implemented;
- 3) If any significant changes were made to the plans presented at the meeting, plans would be brought back to Committee for scrutiny.

Councillor David Salmon left the meeting at 6.42pm

64. **Work Programme**

The Committee agreed –

- 1) To the current work programme;
- 2) To add Plymouth's Plan on Investment Zones to the work programme for 7 December 2022;
- 3) That the reports for the Culture Plan Annual Update, Visitor Plan Annual Update and Heritage Fun Activity Plan Update be provided a minimum of 7 days before the next meeting to give the panel sufficient time to read the reports.

65. **Tracking Decisions (To Follow)**

The Committee noted the tracking decisions and agreed to seek a further update on the 1 outstanding item.

This page is intentionally left blank

Growth and Infrastructure Overview and Scrutiny Committee



Date of meeting:	07 December 2022
Title of Report:	Plymouth and South Devon Freeport Update
Lead Member:	Councillor Mark Shayer (Deputy Leader)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Caroline Cozens (Head of Strategic Programmes) and Richard May (Interim CEX PASD Freeport)
Contact Email:	caroline.cozens@plymouth.gov.uk
Your Reference:	Scrutiny Report – PASD Freeport Update
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The Plymouth and South Devon Freeport is the result of a successful bid submitted by Plymouth City Council, supported by public and private sector partners in February 2021. The Freeport programme is a flagship and highly ambitious programme to create thousands of high quality jobs and play a crucial part in post COVID19 recovery, helping to build back better, driving clean growth and contributing to levelling up agendas. At its core, the Freeport programme has three objectives:

1. National hubs for global trade and investment
2. Creating hotbeds of innovation
3. Promote regeneration through the creation of high skilled jobs.

We last updated scrutiny in February 2022 and this report provides members with an update on our progress including:

- Submission and approval of the Full Business Case
- Setting up the company and mobilising the Governance arrangements
- Staffing and recruitment
- Seed funding capital projects
- Trade and Investment

Recommendations and Reasons

Recommendation – Note the progress update Plymouth and South Devon Freeport (Update report attached)

Reason – Acknowledge the progress that has been made on signing off the Full Business Case (FBC), mobilisation of the new company and associated governance, recruitment to key roles and the accountable body (Plymouth City Council) responsibilities associated with our memorandum of understanding with government and associated £25m seed capital funding grant.

Recommendation – Request a further progress report on the Plymouth and South Devon Freeport in 6 months' time.

Reason – The Plymouth and South Devon Freeport will have made more progress in terms of mobilisation and seed capital project development and will have submitted its first annual reporting to government, complying with the agreed monitoring and evaluation framework. It will also be able to update further on securing key strategic investment.

Alternative options considered and rejected

Option - Officers could not return to Scrutiny to present further updates on progress of this flagship initiative. This would not give the Scrutiny members the chance to understand, check and challenge the development of the Freeport and further influence it.

Relevance to the Corporate Plan and/or the Plymouth Plan

The Plymouth and South Devon Freeport will help us to achieve strategic objectives from the Plymouth Plan:

SO2 - Strengthening Plymouth's role in the region

SO3 - Delivering the international city

SO11 – Delivering high quality development

SO12 – Delivering infrastructure and investment

And strongly supports the priorities we have set in our Corporate Plan: -

- economic growth that benefits as many people as possible
- quality jobs and valuable skills

Implications for the Medium Term Financial Plan and Resource Implications:

This update report has no direct financial implications. See previous scrutiny report regarding the approved allocations and financial impacts of the Freeport as per the approved Full Business Case.

Financial Risks

This update report has no direct financial risks.

Carbon Footprint (Environmental) Implications:

The Plymouth and South Devon Freeport Full Business Case sets out our ambitious plans to ensure that the Freeport contributes positively to our Climate Emergency Action Plan setting an overarching target that is consistent with our commitment to achieve a carbon net zero position by 2030. Our Freeport will act as a catalyst, helping us to accelerate the implementation of existing technologies (such as electric vehicles and hydrogen) as well as pioneering new solutions through our Innovation Hotbed. Similarly, our investment in port infrastructure will facilitate carbon savings from short sea shipping.

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

** When considering these proposals members have a responsibility to ensure they give due regard to the Council's duty to promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not.*

The Freeport Team actively manage risk in line with Council procedures. Risk registers are reviewed and shared for each meeting of the Board of Directors (currently every two months) with key strategic and operational risks discussed at the meetings. Risks are also part of our reporting to Department of Levelling Up, Homes and Communities in relation to the wider Freeport but also in relation to the seed capital projects.

The Freeport will contribute significantly to social regeneration by delivering a pipeline of jobs across the spectrum of employment from entry level to higher skilled/high value with upskilling opportunities. This will in turn help to alleviate child poverty. - We completed an Equality Impact Assessment to inform our Outline Business Case, which is kept under active review. Based on this assessment the Freeport Shadow Board adopted a diversity statement in July 2021, which included a commitment to an Equality Objective aimed at increasing the participation of women in STEM occupations.

- The Plymouth and South Devon Freeport Company has its own health and safety and corporate policies that have been established and are now active as part of recruiting and employing new staff.

Appendices

**Add rows as required to box below*

Ref.	Title of Appendix	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
		1	2	3	4	5	6	7
A	PASD Freeport PCC Scrutiny Update PPT							
B	PASD Freeport PCC Scrutiny Update WORD							

Background papers:

*Add rows as required to box below

Please list all unpublished, background papers relevant to the decision in the table below. Background papers are unpublished works, relied on to a material extent in preparing the report, which disclose facts or matters on which the report or an important part of the work is based.

Title of any background paper(s)	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
	1	2	3	4	5	6	7
Plymouth and South Devon Freeport Scrutiny update 23rd February 2022							
PASD Freeport EIA							

Sign off:

Fin	pl.22. 23.3 05.	Leg	MS/2 9.11. 22/3 6072	Mon Off		HR		Asset s		Strat Proc	
Originating Senior Leadership Team member: David Draffan											
Please confirm the Strategic Director(s) has agreed the report? Yes											
Date agreed: 29/11/2022											
Cabinet Member approval: Councillor Mark Shayer approved by email											
Date approved: 29/11/2022											

This page is intentionally left blank



**PLYMOUTH AND
SOUTH DEVON
FREEPORT**

Update for Growth and Infrastructure Overview and Scrutiny Committee

7th December 2022



HMG Relations

Update

- **Tax Sites** – all three sites designated
- **Custom Site** – designated and Custom Site Operator authorised
- **Full Business Case** - approved by HMG panel and signed off by minister.
- **Memorandum of Understanding** (MOU) - MOU with Freeport, Accountable Body and Billing authorities drafted with key inputs from FBC. Ready for approval December.
- **Seed Capital** - On track for first seed capital claim late Dec for January fund transfer.
- **Performance Management**, Security Audit and Assurance Framework ('the **Freeports Framework**') - PASDF baseline return made on 11th November. Next half year return – 31st May 2023.
- **PASD Freeport Pitchbook** with DIT still being drafted.
- **Investment Zones** – PASD Freeport expression of interest was submitted. HMG reviewing this policy. Lobbying being made to extend Investment Zone at least for Freeports and their Innovation Hotbeds.
- **Levelling Up Bid** – policy and outcome unsure – originally expected November timeframe.
- **Innovate UK Launchpad** – Freeport and Ocean Futures made EOI through Great South West. £7.5M grant to SME business over 2 years. Co-design with Innovate UK.
- **BEIS Regulators Pioneer Fund** – bid made with help from Freeport Regulator Engagement Network (FREN) for £830k to set up sandbox for Marine Autonomy and Clean Propulsion R&D and new regulation in partnership with Maritime and Coastguard Agency (MCA)



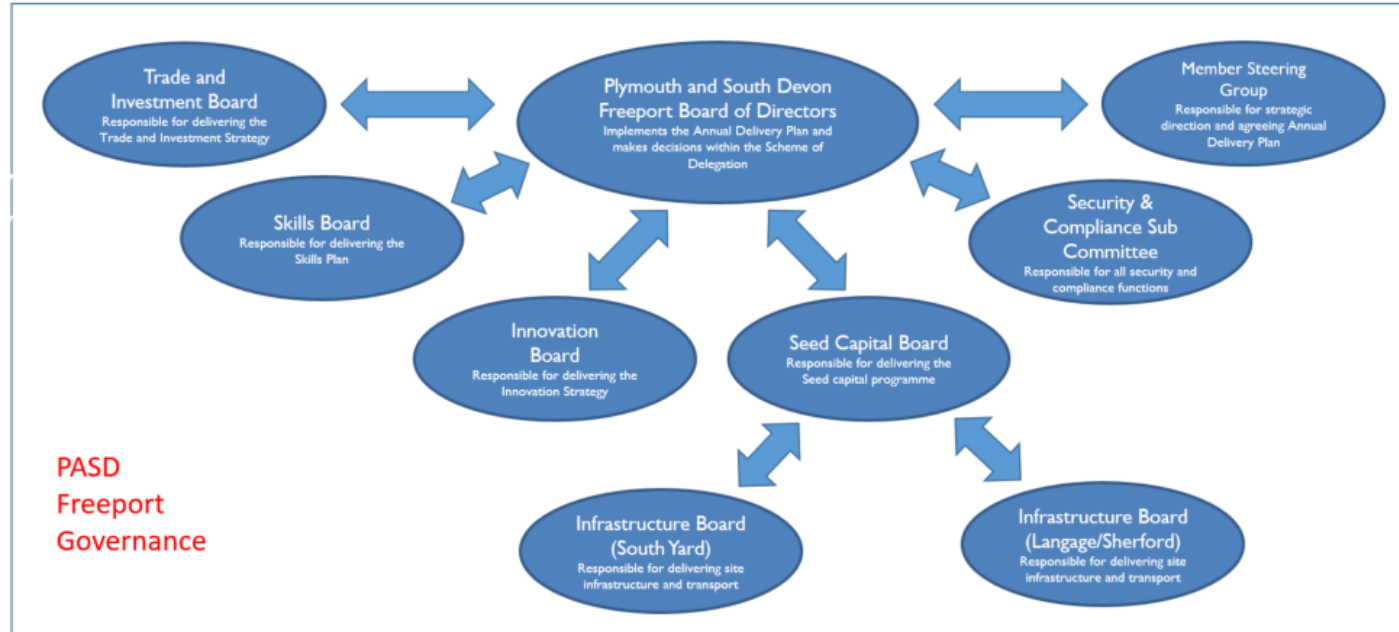
Governance and Resourcing Update

- **Company Board** - set up for interim. Landowners and LA lead officers and members – met 3 times.
 - **New Chair Recruitment** by selected agent (Penna) active – final interviews early December
- **Company Staff** - Interim CEO seconded from PCC to mobilise company.
 - **New CEO Recruitment** – national ads by Penna active – closed – interviews early January
 - **New Team Recruitment** – 3 new roles for Business Growth and Investment Director, Operations Manager and Project Co-Ordinator to start shortly – interviews Jan/ Feb – sequenced with above appointments.
- **Company essentials** - set up – Banking, Legal, Accountant, Auditor, Insurance, IT Services, HR Services – Employee Handbook and Contract drafts, Coms – Branding, Website. Company budget agreed and contributions being made Nov/ Dec.
- **Annual Plan** – initial drafting underway – for approval March 2023.
- **LA Resourcing** – SLA drafts Dec to cover aligned resourcing and support. DLUHC £1M Capacity Grant budget being reviewed. SLA to back off HMG MOU.
- **Sub-boards** for Trade & Investment; Site Delivery; Innovation; Skills initial meetings had and regularised. These will be reviewed once permanent CEO and team in position.
- **Freeport Capital Board** – established as new sub-board to govern the Seed Capital process including reporting. It is chaired by the accountable body (PCC) and meets every two months. The terms of reference and associated processes are now being finalised.



Governance

Freeport Capital Board





Site and Infrastructure Development Update

- **Compulsory Purchase Order** for Ley Farm in Langage South. South Hams started the CPO process through a Political Council decision to proceed. In addition, they are continuing to pursue a market purchase on the site to avoid a CPO. Landowners have made a counteroffer to SHDC which they are considering.
- **Site and Infrastructure Sub-Board** to be separated into two – South Yard (Chaired by James Whitelock of PCC) and Sherford and Langage (Chaired by Jamie Hulland of DCC). Multiple handover meetings held ahead of Caroline Cozens leaving PCC.
- **Key Focus** – to initiate capital works (design and delivery) ASAP on fully funded projects to reduce continuing expose to construction inflation and risk of increased LA borrowing cost.
- Freeport Capital Board looking at options for projects not yet full funded with potentially re-purposing seed capital under a project change request.



Trade and Investment Update

- **DIT Freeport Team** and wider team - regular meetings. PASD Freeport **Pitchbook** still to be created by DIT.
- **Marketing collateral** developed (branding – with trademark pending, initial website, social media active presence, communications plan).
- **Pipeline** progressing well – with proactive drive to launch in New Year
 - South Yard - two businesses looking for sizeable buildings in South Yard to start production in New Year. PY investments - active discussions.
 - Langage – LEPL Hydrogen plant bid made to HMG; first phase of speculative units progressing - interests for FDI – like: drone manufacturers, H2 engine manufacturing.
 - Sherford - still confirming Logistic Facility.
- **Account management systems** reviewing solutions as well as simple shared spreadsheet on secure SharePoint.
- RM was guest speaker on panel with Siemens, ABP and a Minister at **Green Tech and Investment Expo** in Gateshead on 1st November with global CXO, investment banks and senior government officials. There is a UK Freeport DIT stand at the event with space given to PASDF.



Next Six Months

Complete Mobilisation

- **Finish Mobilisation** (Q1 2023) – MOU with HMG - SLA with Local Authorities on Delivery Support - Recruitment of core team – Initiate sub-boards for Innovation and Skills
- **Highly Targeted Trade & Investment Campaign** (Q1 and Q2 2023) - **Secure key strategic investors** with DIT and Office for Investment (OFI) support
- **Site and Infrastructure Development - first projects initiated** (Q1 and Q2 2023) - Seed Capital Funding issued first tranche c. £9M – detailed scope, tendering and initial contracts - design and initial works. **Funding gap** for Freeport Innovation Centre resolved.

This page is intentionally left blank

Growth and Infrastructure Overview and Scrutiny Committee



Date of meeting: 07 December 2022
Title of Report: Policy Brief - December 2022
Lead Member: Councillor John Riley (Chair)
Lead Strategic Director: Anthony Payne (Strategic Director for Place)
Author: Laura Hill – Policy and Intelligence Advisor
Contact Email: laura.hill@plymouth.gov.uk
Your Reference: PB 071222
Key Decision: No
Confidentiality: Part I - Official

Purpose of Report

To provide the Growth and Infrastructure Overview and Scrutiny Committee with the latest national picture in respect of policy announcements and legislation.

Recommendations and Reasons

For Scrutiny to consider the information provided in regard to their role and future agenda items.

Alternative options considered and rejected

N/A

Relevance to the Corporate Plan and/or the Plymouth Plan

Delivery of the Corporate Plan and Plymouth Plan needs to take account of emerging policy and the legislative picture.

Implications for the Medium Term Financial Plan and Resource Implications:

N/A

Carbon Footprint (Environmental) Implications:

N/A

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

** When considering these proposals members have a responsibility to ensure they give due regard to the Council's duty to promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not.*

N/A. No EIA has been completed as no decision is being taken. The item is for noting and to inform the Growth and Infrastructure Overview and Scrutiny Committee work plan.

Appendices

*Add rows as required to box below

Ref.	Title of Appendix	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
		1	2	3	4	5	6	7
A	Growth and Infrastructure Policy Brief – December 2022							

Background papers:

*Add rows as required to box below

Please list all unpublished, background papers relevant to the decision in the table below. Background papers are unpublished works, relied on to a material extent in preparing the report, which disclose facts or matters on which the report or an important part of the work is based.

Title of any background paper(s)	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
	1	2	3	4	5	6	7

Sign off:

Fin	N/A	Leg	N/A	Mon Off	N/A	HR	N/A	Assets	N/A	Strat Proc	N/A
Approved by: Giles Perritt, Assistant Chief Executive											
Date approved: 25.11.2022											


POLICY BRIEF - DECEMBER 2022

Growth and Infrastructure Overview and Scrutiny Committee



The information within this Brief is correct at the time of approval for publication and contains relevant recent announcements made by Government and its departments and regulators.

GOVERNMENT POLICY, LEGISLATIVE ANNOUNCEMENTS AND NEWS

Date of publication	Growth and Infrastructure Overview and Scrutiny Committee	 GOV
22 November 2022	Department for Levelling Up, Housing and Communities - The Government has set out proposals for how developers would pay to fix unsafe buildings. Developers will be expected to pay levy on new residential buildings meaning they, rather than leaseholders, will pay to fix unsafe buildings. The Government has begun consulting developers and other stakeholders on the plans. Views are being sought on the delivery of the levy, including how it will work, what the rates will be, who must pay, what sanctions and enforcement will apply and who is responsible for collecting the levy. The consultation closes on the 7 February 2023.	Planning and building
17 November 2022	HM Treasury – The Chancellor announced the Autumn Statement on Thursday 17 November which aimed to restore stability to the economy, protect high-quality public services and build long-term prosperity for the United Kingdom. Key points within the Chancellor’s statement relevant to this Committee include: <ul style="list-style-type: none"> • The Government will refocus the Investment Zones programme to catalyse a limited number of high potential clusters, working with local stakeholders, to be announced in the coming months. The existing expressions of interest will therefore not be taken forward. • Confirmation that the second round of the Levelling Up Fund will allocate at least £1.7 billion to priority local infrastructure projects. Successful bids will be announced before the end of the year. • The Energy Price Guarantee (EPG) will be maintained through the winter, limiting typical energy bills to £2,500 per year. From April 2023 the EPG will rise to £3,000. • The National Living Wage will be increased from £9.50 an hour for over-23s to £10.42 from April next year. • From 1 April 2023, business rate bills in England will be updated to reflect changes in property values since the last revaluation in 2017. • The Office for Budget Responsibility (OBR) judges the UK to be in recession, meaning the economy has slowed for two quarters in a row. It predicts growth for this year overall of 4.2%, but that the size of the economy will shrink by 1.4% in 2023. It predicts growth of 1.3%, 2.6%, and 2.7% in 2024, 2025 and 2026. 	Government efficiency, transparency and accountability
01 November 2022	Department for Environment, Food & Rural Affairs – UK aims to remove plastic pollution by 2040 The Environment Secretary has engaged with businesses, environmental groups, scientists and civil society on shaping a legally-binding global treaty that aims to end plastic pollution by 2040.	Environment
25 October 2022	Forestry Commission – A UK woodland natural flood management guide has been published which includes information on how woodland creation and management can reduce flood risk.	Environment

UPDATES TO RELEVANT LEGISLATION GOING THROUGH PARLIAMENT

Levelling-up and Regeneration Bill (introduced 11.05.22) – **Report Stage, next sitting 28.11.22 HoC**

The Bill lays the foundations for delivering the Government's levelling up agenda. On 18 November 2022, the Government put forward several key amendments which aim to:

- Tackle slow build out by developers
- Enshrine in law an obligation on water companies to clean up rivers
- Provide residents with a tool to propose additional development on their street
- Pilot Community Land Auctions
- Enhance powers for mayors to support them to managing their key route networks and increase transport connectivity across their area
- Help Nationally Significant Infrastructure Projects be delivered more quickly, by enabling a small number of public bodies to charge for their statutory services.

Energy Bill (introduced 06.07.22) – **Committee Stage, next sitting TBC HoL**

The Bill aims to increase energy reliability, while supporting the UK's climate change commitments and minimising consumer costs, by leveraging investment in clean technologies and maintaining the safety, security and resilience of energy systems.

Procurement Bill (introduced 11.05.22) - **Report Stage, next sitting 30.11.22 HoL**

The Bill aims to simplify the procurement process and enshrine in law the objectives of public procurement including: delivering value for money, maximising public benefit, treating suppliers equally and without discrimination, and acting, and being seen to act, with integrity.

Northern Ireland Protocol Bill (introduced 13.06.22) – **Report Stage, TBC HoL**

The Bill aims to allow ministers to disapply parts of the Northern Ireland Protocol and relevant parts of the Withdrawal Agreement in UK law.

The Seafarers' Wages Bill (introduced 06.07.22) – **2nd Reading, TBC HoC**

The Bill aims to make provision in relation to the remuneration of seafarers who do not qualify for the national minimum wage.

Financial Services and Markets Bill (introduced 20.07.22) - **Report Stage, TBC HoC**

The Bill aims to make provision about the regulation of financial services and markets and will implement the outcomes of the Future Regulatory Framework Review.

UK Infrastructure Bank Bill (introduced 11.05.22) - **Report Stage, TBC HoC**

The Bill includes establishing the UK Infrastructure Bank in law with clear objectives to support regional and local economic growth and deliver net zero. It also provides the Bank with the necessary powers to lend directly to local authorities and the Northern Ireland Executive, enabling the Bank to play a key role in delivering public sector infrastructure projects.

Trade (Australia and New Zealand Bill) (introduced 11.05.22) - **Report Stage, TBC HoC**

The Bill is an important step in ratifying the negotiated Free Trade Agreements with Australia and New Zealand. The Bill will change the UK's rules on procurement which in turn will widen access for UK suppliers to procurement opportunities in Australia and New Zealand and allow their suppliers rights to access the benefits of the Agreements.

Retained EU Law (Revocation and Reform) Bill (introduced 22.09.22) **Committee Stage, next sitting 29.11.22 HoC**

The Bill will sunset the majority of retained EU law so that it expires on 31 December 2023. The Bill aims to enable the Government to create regulations tailor-made to the UK's own needs and support businesses to invest, stimulating economic growth across the UK economy.

Growth and Infrastructure Overview and Scrutiny Committee



Date of meeting:	07 December 2022
Title of Report:	Risk Monitoring Report
Lead Member:	Councillor Mark Shayer (Deputy Leader and Cabinet Member for Finance and Economy)
Lead Strategic Director:	Giles Perritt (Assistant Chief Executive)
Author:	Ross Jago, Head of Governance Performance and Risk
Contact Email:	Ross.jago@plymouth.gov.uk
Your Reference:	RS/RMGINov22
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The attached report provides an update on both the Strategic register for the organisation.

Strategic Risk Register

During this review of the strategic risk register there have been three risks removed and one new risk added, bringing the total strategic risks managed to 20. The new risk relates to the viability of commercial bus operators with patronage not yet back to pre-Covid levels and the ending of Government Bus Recovery Grant in October (number 15 in appendix A table two).

This amber risk has been scored as 'almost certain' to happen and a 'moderate risk' to the operation of the council.

The three risks removed from the strategic register were:

- The Council is unable to fulfil its legal obligations regarding the safety of its citizens and service recipients.
- Staff resilience to causative factors of stress variable resulting in the primary reason for short and long term absences being due to stress / psychological factors; reduced morale, loss of productivity with impact on delivery. (Moved to operational risk)
- Departure from EU single market with The Trade and Cooperation Agreement could further decreases city economic output.

Recommendations and Reasons

The Committee is recommended to note the current position with regard to the Strategic Risk Register.

Reason: As part of the Committee's responsibility for seeking assurance that the key risks of the authority have adequate controls and mitigation.

Alternative options considered and rejected

Effective risk management processes are an essential element of internal control and as such are an important element of good corporate governance. For this reason alternative options are not applicable.

Relevance to the Corporate Plan and/or the Plymouth Plan

The Strategic Risk and Opportunity Register includes links to the Corporate Plan priorities – monitoring of control action for strategic risks therefore contributes to the delivery of the council's core objectives.

Implications for the Medium Term Financial Plan and Resource Implications:

None arising specifically from this report but control measures identified in Directorate Operational Risk and Opportunity Registers could have financial or resource implications.

Financial Risks

None arising specifically from this report but control measures identified in Directorate Operational Risk and Opportunity Registers could have financial or resource implications.

Carbon Footprint (Environmental) Implications:

Failure to deliver against actions in the Climate Emergency Action Plan and Corporate Carbon Reduction Plan are included on risk registers.

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

** When considering these proposals members have a responsibility to ensure they give due regard to the Council's duty to promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not.*

The risk registers specifically supports the council's overall governance arrangements.

Appendices

**Add rows as required to box below*

Ref.	Title of Appendix	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
		1	2	3	4	5	6	7
A	Risk Monitoring Report							

Background papers:

*Add rows as required to box below

Please list all unpublished, background papers relevant to the decision in the table below. Background papers are unpublished works, relied on to a material extent in preparing the report, which disclose facts or matters on which the report or an important part of the work is based.

Title of any background paper(s)	Exemption Paragraph Number (if applicable)						
	If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.						
	1	2	3	4	5	6	7

Sign off:

Fin	DJN. 22.23 .294	Leg	EJ/38 851/1 6.11.2 2(2)	Mon Off		HR		Assets		Strat Proc	
Originating Senior Leadership Team member: Giles Perritt											
Please confirm the Strategic Director(s) has agreed the report? Yes											
Date agreed: 21/10/2022											
Cabinet Member approval: Councillor Mark Shayer (Deputy Leader and Cabinet Member for Finance and Economy)											
Date approved: 18/11/2022											

This page is intentionally left blank

RISK MANAGEMENT MONITORING REPORT

November 2022



Introduction

This report provides the position with regard to the strategic and operational risk registers.

The next formal review of the strategic risk and opportunity register will take place in December 2022, the operational risk register will also be reviewed at this time. Risk registers are however a live document and will be regularly discussed at Directorate Management Teams.

Strategic Risk Register

During this review of the strategic risk register there have been three risks removed and one new risk added, bringing the total strategic risks managed to 20. The new risk relates to the viability of commercial bus operators with patronage not yet back to pre-Covid levels and the ending of Government Bus Recovery Grant in October (number 15 in table two). This amber risk has been scored as 'almost certain' to happen and a 'moderate risk' to the operation of the council.





The three risks removed from the strategic register were:

- The Council is unable to fulfil its legal obligations regarding the safety of its citizens and service recipients.
- Staff resilience to causative factors of stress variable resulting in the primary reason for short and long term absences being due to stress / psychological factors; reduced morale, loss of productivity with impact on delivery. (Moved to operational risk)
- Departure from EU single market with The Trade and Cooperation Agreement could further decreases city economic output.

There is one red risk pertinent to the committee. **Risk number six in table one** relating to insufficient economic performance to sustain the City's economy and growth plans.

3.3 Strategic Risk update table one

Table one provides an update on strategic risks with mitigation that is influenced by Plymouth City Council but is also dependent on other outside factors, making up nine of the 22 risks on the strategic risk register.

No.	Description	Mitigation	Risk Score	Previous risk rating	Current risk rating	Risk Owner
6	<p>Insufficient economic performance to sustain the City's economy and growth plans.</p> <p>The risk to economic performance is a combination of the ongoing impacts of the long term impacts of Covid 19, inflation (including materials), the war in Ukraine, cost of living crisis on both individuals and businesses and general uncertainty in many sectors.</p> <p>Some of the long-term effects (especially without effective policy instruments) are likely to carry on later into 2022 and beyond.</p>	<ul style="list-style-type: none"> The impact of COVID-19 on the economy has been sharp and has affected different sectors of the economy in different ways. Our strong emergency action plan response "Resurgam" has now transitioned to Business As Usual (BAU) activity. Alongside this we are seeking to maximise all opportunities to secure additional funding for economic initiatives including focussing on creating new jobs in the Blue and green economy. The initiatives include: The Plymouth and South Devon Freeport, National Marine Park, Levelling up bids and City Centre Investment Zones. We will continue to maximise all funding opportunities for our city region. 	20	<p>Amber</p> 	<p>Red</p> 	Anthony Payne
15	<p>Risk of failing to meet carbon reduction targets to reach net zero by 2030.</p>	<ul style="list-style-type: none"> Year 1, 2 and 3 CCRPs and CEAPs have been prepared to date, covering the period 2020-2022. The focus of the CCRP is on the things in the direct control of the City Council; the focus of the CEAP is on the wider things the Council is able to influence as well as some of the climate actions of City partners. 	12	<p>Amber</p> 	<p>Amber</p> 	Anthony Payne

No.	Description	Mitigation	Risk Score	Previous risk rating	Current risk rating	Risk Owner
		<ul style="list-style-type: none"> The Climate Emergency strategy and action plan process is currently under review, with a view to making revisions from 2023, providing a more strategic approach. Growth and Infrastructure Overview and Scrutiny Committee receive 6 monthly performance updates 				
17	Risk of failing to deliver the range of housing to meet Plymouth's need.	<ul style="list-style-type: none"> Strategic Land Review completed and released 50 housing sites to the market. Established Housing Investment Fund in Plan for Homes 3 to support interventions to unlock housing delivery. Working with Homes England to develop a Placed Based Strategic Partnership to unlock and deliver a pipeline of housing sites, support City Centre renaissance and to help align Government funding with housing site opportunities. Proposal to establish a tripartite partnership between DLUHC, HE and PCC/S&WD with the vision to transform the pace and quality of housing provision to fully meet housing need including the 35% urban uplift. Work with Homes England has led to agreed solutions and Deeds of Variations on four legacy sites to unlock delivery. Launched the Plymouth Eco-Homes Programme to support building a pipeline of over 250 low-carbon and net-zero homes across Plymouth. Embarking on our Direct Delivery of new homes to drive up good design, quality and sustainable living, and identifying a pipeline of future sites to support our direct delivery ambitions. Developed two Housing Partnership Agreements with key Housing Association Partners to maximise their investment and delivery in the city. 	9	Green ■	Green ■	Anthony Payne

No.	Description	Mitigation	Risk Score	Previous risk rating	Current risk rating	Risk Owner
		<ul style="list-style-type: none"> Considering site acquisitions and provided funding to help unlock stalled JLP sites. Reviews of JLP sites completed and monitored, with delivery strategies being implemented. Secured £2.2m Brownfield Land Release Funding to help unlock 325 affordable homes on PCC owned land. Ongoing innovation to improve the proactive and fast track approach to planning to deliver housing. Monitoring development activity in the construction sector to understand the effect of COVID-19 on housebuilding. We will manage the 5 year land supply position to ensure that decisions on sites are taken using a balanced and objective assessment of market conditions. We will work with DLUHC and Homes England. Continuing to bring long term empty homes back into use. 				
19	Viability of commercial bus operators with patronage not yet back to pre-Covid levels, the ending of Government Bus Recovery Grant in October, failure to secure any funding through our Bus Service Improvement Plan and increasing operating costs means that a number of unviable bus services are being reduced in frequency, re-routed or cut altogether from 4th September 2022.	<p>Monitor patronage levels locally both fare paying and concession pass holders.</p> <p>Frequent liaison meetings with bus operators.</p> <p>The Council continues to pay concession fare reimbursement above actual level of travel, although this is reducing in line with Government guidance by 5% every 2 months until such time it is less than reimbursement based on actual trips.</p> <p>To address loss of commercial services from 4th September, virements from concession fares reimbursement budget to non-commercial services budget of £557K in 23/24 to pay for non-commercial services secured through competitive tender and enable all areas of Plymouth to continue to have a bus service, at least on Mondays to Fridays.</p> <p>To make the budget go as far as possible, routes have been redesigned where possible to be able to use developer</p>		N/A	Amber New Risk	Anthony Payne

No.	Description	Mitigation	Risk Score	Previous risk rating	Current risk rating	Risk Owner
		<p>contributions to part or wholly fund some non-commercial routes. Enhanced cleaning regime of buses to continue.</p> <p>Ensure clear messaging by transport providers about maximising messages about maintaining safe travel.</p> <p>In March 2021, the Government announced its new National Bus Strategy "Bus Back Better" making a further £3bn of funding available for the 3 years from April 2022 to significantly improve bus services across the country. In the end only £1bn was available and although PCC has not received any additional BSIP funding from the £1bn released, PCC has confirmed that it will introduce an Enhanced Partnership from the 31st October 2022.</p> <p>At the moment it is not possible to deliver Plymotion to encourage the take up of bus services. Schemes continue to delivered through the Transport Capital Programme to encourage patronage returning to pre-Pandemic levels as soon as possible.</p> <p>Increased commitment to non-commercial services is up until March 2024. Tenders will be sought late in 2023 when it is envisaged that commercial viability on a number of routes will have improved.</p>				

This page is intentionally left blank

Growth and Infrastructure Overview and Scrutiny Committee



Date of meeting:	07 December 2022
Title of Report:	Culture Plan Update
Lead Member:	Councillor Pat Patel (Cabinet Member for Customer Services, Culture, Leisure & Sport)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Hannah Harris
Contact Email:	Hannah@plymouthculture.co.uk
Your Reference:	HH071222
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The Culture Plan was formally adopted by Plymouth City Council in March 2021 and we are now at a point where we can reflect on the past 12-18 months of the plan's implementation. This report provides a snapshot of cultural activity in the city over this period of time, how this aligns with the objectives set out in the Culture Plan and what the priorities are for the coming 12 months.

Recommendations and Reasons

Reason - to ensure that the committee is kept up to date with progress on the Culture Plan and contributes to setting annual priorities

Recommendation – to note the report and discuss the suggested priority programmes of work

Alternative options considered and rejected

Update report only, no alternatives required.

Relevance to the Corporate Plan and/or the Plymouth Plan

This supports the City Vision to be one of Europe's most vibrant waterfront cities and the City Council priority of a vibrant cultural offer.

The Plymouth Plan remains the City's overarching strategic plan, looking ahead to 2034. The Plan sets out a shared direction of travel for its long-term future bringing together a number of strategic planning processes into one place. The Plan sets out the aspiration to be a healthy and prosperous city with a rich arts and cultural environment and we see the Culture Plan sitting alongside this as a mechanism for achieving the strategic objectives.

Policy INT4 is of particular relevance as it seeks to delivering a distinctive, dynamic, cultural centre of regional, national and international renown and sets out how the city will support a thriving arts and cultural sector.

The arts and cultural sector have the ability to have a positive impact across a wide range of topic areas ensuring this Culture Plan also contributes to the following policies:

- Policy HEA1 Addressing health inequalities, improving health literacy;
- Policy HEA2 Delivering the best outcomes for children, young people and families;
- Policy HEA4 Playing an active role in the community;
- Policy HEA7 Optimising the health and wellbeing benefits of the natural environment;
- Policy GRO1 Creating the conditions for economic growth;
- Policy GRO2 Delivering skills and talent development;
- Policy INT3 Positioning Plymouth as a major UK destination;
- Policy INT6 Enhancing Plymouth's 'green city' credentials;
- Policy INT8 Celebrating diverse communities.

Implications for the Medium Term Financial Plan and Resource Implications:

None identified

Financial Risks

None identified

Carbon Footprint (Environmental) Implications:

Whilst this report has no identifiable environmental implications, being produced in digital format only, the Culture Plan has the environment as a key driver stating, 'We will be a city of culture with green credentials, using culture and creativity to tackle the climate emergency'. As such this will be a key criteria for decision-making as projects develop, to ensure the sector acts responsibly and facilitates others to do the same.

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

** When considering these proposals members have a responsibility to ensure they give due regard to the Council's duty to promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not.*

None identified

Appendices

**Add rows as required to box below*

Ref.	Title of Appendix	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
		1	2	3	4	5	6	7
A	Culture Plan Update							

Background papers:

*Add rows as required to box below

Please list all unpublished, background papers relevant to the decision in the table below. Background papers are unpublished works, relied on to a material extent in preparing the report, which disclose facts or matters on which the report or an important part of the work is based.

Title of any background paper(s)	Exemption Paragraph Number (if applicable)						
	If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.						
	1	2	3	4	5	6	7

Sign off:

Fin	pl.22. 23.3 00	Leg	MS/3 9510	Mon Off	N/A	HR	N/A	Assets	N/A	Strat Proc	N/A
Originating Senior Leadership Team member: David Draffan (Service Director Economic Development)											
Please confirm the Strategic Director(s) has agreed the report? Yes Date agreed: 25/11/2022											
Cabinet Member approval: Pat Patel approved by email Date approved: 27/11/2022											

This page is intentionally left blank

Growth and Infrastructure Overview and Scrutiny Committee



Culture Plan Update

Executive Summary

Cultural activity is abundant across the city and remains a key component in driving the city destination agenda as a desirable place to live, work, visit and study.

- There are 380 creative and cultural enterprises in Plymouth, which has remained relatively stable despite the impact of the pandemic.
- The sector employs 3,064 FTE who have an output of £44,050 GVA per FTE, which is above the city average, and contributes £130m GVA to the economy.
- Despite curriculum cuts to the arts the city has maintained student numbers with 7,715 students studying arts & humanities within the city.
- Against a backdrop of funding cuts the city has retained its annual Arts Council investment in the recent National Portfolio Organisation round, with 8 organisations offered a share of £4.11 million (£12.34 million over three years).
- A cultural mapping tool has been developed to enable us to better understand the growth and development of the sector, including geographical reach. This will be further enhanced by the development of the audience data capture system Tap-In, showing audience numbers and flows across the city.
- Despite the challenges presented by Covid and changing post-Covid audience behaviours, the sector has delivered more than 50 cultural events and audiences for culture are in excess of 850,000.
- British Art Show 9 is now open and has already attracted over 47,000 visitors.

The priority moving forward will be the development of an investment strategy to drive new and increased funding into the sector, and to broaden and deepen our engagement with local residents and communities. In order to do these two key actions we need to continue to build a robust data collection and analysis system so that we understand current engagement levels and can explore the barriers to engagement for others, putting appropriate strategies in place.

Background

The Culture Plan (https://plymouthculture.co.uk/wp-content/uploads/2021/07/Plymouth-Culture-Strategy_REV_P08_fulldraft.pdf) was adopted by PCC in March 2021 and published in May 2021. The Plan is the culmination of extensive consultation with stakeholders and part of a robust process to co-design the ten-year strategy for Culture. The Culture Plan has at its core a focus on people, place and planet and is a direct response to the Arts Council Let's Create Strategy (<https://www.artscouncil.org.uk/lets-create/strategy-2020-2030>) and is aligned with the Plymouth Plan.

In order to support the implementation of the Culture Plan and ensure alignment across the city, Plymouth Culture established the Cultural Partnership in October 2021. This partnership includes cross-city, cross-sector representation and meets on a quarterly basis. The partnership has initially focused on mapping cultural activity and identifying the real issues and priorities, which is reflected in the report below.

The Creative Industries

The Creative Industries are a high value, high growth sector. Prior to the Pandemic the Creative Industries contributed £116bn in GVA in 2019, growing twice as fast between 2011 and 2019 than the rate of the UK economy as a whole (DCMS 2021). In the year from October 2019 to September 2020 the Creative Industries accounted for 2.2 million jobs (DCMS 2021) and 3.2 million were employed in the wider creative economy (DCMS 2019).

The sector has been heavily impacted by the pandemic but the report by Creative UK, *The UK Creative Industries: unleashing the power and potential of creativity*, states that “*with the right investment, the sector could recover faster than the UK economy as a whole, growing by over 26% by 2025 and contributing £132.1 billion to the economy in GVA – over £28 billion more than in 2020, and more than the financial services, insurance and pension industries combined*” (Creative UK, 2021).

The Creative Industries in Plymouth reflects the national picture as a high value sector. The sector employs 3,064 FTE who have an output of £44,050 GVA per FTE and contributes £130m GVA to the economy. It is important to note that we have 7,715 students studying arts & humanities within the city, making it a hive of creativity.

(<https://www.visitplymouth.co.uk/invest/why-plymouth/key-sectors/creative-industries>)

Culture Plan & Cultural Mapping

The Culture Plan sets out a 10-year vision to build and sustain this thriving cultural economy, which enhances the city as a destination and contributes to the social prosperity for residents and visitors alike. The following quantitative objectives are outlined within the Plan, to:

1. Unlock 5 new spaces for culture annually.
2. Increase jobs in the creative and cultural sector by 30% by 2030.
3. Introduce 10 new cultural initiatives in neighbourhoods annually.
4. Increase our core arts audiences by 20% by 2030.
5. Increase our non-arts audiences by 30% by 2030.
6. Reduce environmental impact of our sector helping to reach the city's ambition for net-zero carbon emissions by 2030.
7. Secure £0.5m annually in non-arts funding by 2030.
8. Increase out-of-Plymouth visitor numbers to cultural venues and programmes by 40% by 2030.

In order for us to fully understand our progress with these objectives we felt it was important to know our current position. As a result, the Cultural Partnership, supported by Plymouth Culture, has undertaken a mapping exercise. This seeks to identify the cultural activity on offer, where it is located and who is engaging. We appreciate this work is a snapshot and in no way exhaustive but it is extensive and provides a baseline from which to work from.

The maps plot the location of venues that host cultural activity, cultural organisations, events and projects between March 2021 – August 2022. They indicate a good spread of activity across all wards in Plymouth but, importantly, provide a visual aid to understanding where there are gaps in activity and engagement. This will be a tool to support decision-making across the sector and city, using the data to better understand the real barriers to engagement.

It is our intention to convert the goggle maps into a public facing map hosted on the Plymouth Culture website. We will create a function where people can add or suggest other venues, events and projects which need to be included so that the map becomes a living record of cultural activity across the city. On an annual basis we can take a snapshot to illustrate changes as part of our reporting process. Information will be added to each 'pin' as case studies.

<https://www.google.com/maps/d/u/0/viewer?mid=1aKwAU0XJElfrgQiEhH6CdSD4CSHfOIM&ll=50.38664475616322%2C-4.136463450000014&z=13>

21/22 Highlights/overview

(Please note the video link to a short film summarising the cultural activity and engagement in the last year - <https://vimeo.com/770690103/75004ed775>)

With reference to the maps, 132 venues have been identified as hosting cultural activity. This ranges from purpose built cultural centres like The Box, to community hubs in pubs and village halls. In spite of

the challenges presented by Covid seven of these venues opened in the last year – Market Hall, The Depo, Grow Plymouth, Stock Village Hub, Borrowed Parts Brewery, Snap Dragons and Block. Importantly cultural activity has also been possible in outdoor and alternative locations including – Community Climate Centre (and the wider meanwhile use programme), Tinside Lido, Royal Corinthian, Central Park Events Space and Millbay Boulevard. This corresponds to objective one in the Culture Plan (to Unlock 5 new spaces for culture annually) and these alternative spaces are essential for making our cultural offer more visible and accessible to new audiences.

There have been over 50 cultural events in the last year that have taken place across the city, more than half have been free to attend attracting audiences of over 220,000. Some of these are large scale such as SailGP attracting audiences of over 30,000 but others are more pop-up in nature such as Above Bounds Silly Squirrel family show, Petrol Headz on the Piazza and Back Alley Giant Puppets. Collectively the events over this period attract audiences of over 350,000 but we know that across the venues, projects and events there have been audiences of over 850,000. Whilst this is lower than the approx. 1 million audience figure for previous years this is exceptional given that Covid restrictions were still in place for a significant period of the time frame we are considering.

The organisations involved in making these works are working hard to reach new audiences so that we have a growing, diverse and sustainable audience for Culture. Barbican Theatre, Theatre Royal Plymouth, The Box and Real Ideas are just a small sample of the organisations working beyond the confines of their venues to reach into communities and build new audiences. The data shows us that audiences to The Box, Illuminate and Theatre Royal Plymouth alone include residents from every ward in Plymouth (contributing to objectives 3, 4 & 5 of the Culture Plan).

The cultural activity across the organisations and events has secured external funding in excess of £1.5m, working with 28 different funding bodies and sponsors. These funders are within and beyond the cultural sector achieving objective seven within the culture plan (Secure £0.5m annually in non-arts funding by 2030). The projects and events have provided over 2,000 job opportunities for creatives which helps to sustain the creative economy within the city and work towards objective two within the plan (Increase jobs in the creative and cultural sector by 30% by 2030). The events programme has offered over 675 volunteer opportunities.

We are acutely aware that visitor numbers and audience behaviours will continue to be impacted by Covid and the cost of living crisis. Therefore, we anticipate that objectives 4, 5 & 8, which refer to audience and visitor growth, will need to be reviewed and potentially revised. This will be done in partnership with Destination Plymouth in relation to the Visitor Plan following careful consideration of the research available and future trend predictions.

Impact

It is important to note that the numbers show only half of the picture, it is the impact of this activity that is the critical point. The Culture Plan states that we want the collective impact of the plan to result in:

- Plymouth building a reputation as a fun, playful city.
- Residents feeling a sense of pride in Plymouth borne out of a strong cultural identity.
- The cultural offer reaching across the city to every visitor, resident, neighbourhood and community.
- The cultural sector attracting and retaining a diverse audience who are actively involved in making culture.
- People talking about culture and engaging in conversation because it is fun, challenging and visible.

The amount and variety of cultural activity across the city is not only impressive but impactful. It is improving the lives of residents; whether it is through the Barbican Theatre Rebels Music Programme giving a stage to young performers at the Tinside Lido to start their career, or The Box schools programme inspiring the 5,600 young people it has reached or the Coxside Echoes newspaper led by Take A Part empowering the community through creative inputs, this work is creating opportunities with positive economic and social value.

Priorities

As we move into the second year of the Culture Plan implementation we feel it is essential that we continue to focus on impact, making the case for culture in both economic and social terms. For this we take inspiration from the research of the Cultural Learning Alliance and the ten key findings:

1. Participation in structured arts activities can increase cognitive abilities by 17%
2. Learning through arts and culture can improve attainment in Maths & English
3. Learning through arts and culture develops skills and behaviour that lead children to do better in school.
4. Students from low-income families who take part in arts activities at school are three times more likely to get a degree
5. Employability of students who study arts subjects is higher and they are more likely to stay in employment
6. Students from low-income families who engage in the arts at school are twice as likely to volunteer
7. Students from low-income families who engage in the arts at school are 20% more likely to vote as young adults
8. Young offenders who take part in arts activities are 18% less likely to re-offend
9. Children who take part in arts activities in the home during their early years are ahead in reading and Maths at age nine
10. People who take part in the arts are 38% more likely to report good health

<https://www.culturallearningalliance.org.uk/evidence/key-research-findings-the-case-for-cultural-learning/>

As evidenced above, the role of culture goes far beyond events and entertainment, it is fundamental to the way we live and has a critical role to play in supporting a resilient, healthy, happy, prosperous and just society. Therefore, the Cultural Partnership are prioritising three programmes of work over the coming year:

1. **Investment strategy** – The Culture Plan sets out the need to develop an investment strategy for culture and this is needed now more than ever. Whilst we have achieved the objective set out in the Culture Plan to retain our overall level of Arts Council investment through the National Portfolio round not all organisations have been offered renewed funding and a standstill funding offer means a cut in real terms. With venue based organisations experiencing exponential increases in utility costs and ticket sales or visitor numbers not yet back to pre-Covid levels in some cases, it is essential that more funding for culture is secured. This must come from funders and sponsors beyond the cultural sector and needs a collaborative, city wide approach to identify and secure alternative funding options.
2. **Data collation and analysis** – In order for us to build a robust case for investment it is essential that we continue to work on our data collection and analysis systems. We have recently launched a pilot initiative, Tap-In, which seeks to capture simple but standardised audience data across the sector. By making this system available to formal and informal, large and small cultural organisations we can better understand engagement levels and barriers to engagement so that robust audience development strategies can be developed. (www.tapinplymouth.co.uk)
3. **Alignment and Integration** – A core thread running through the Culture Plan is the ambition to embed culture and for us to harness its potential as a mechanism for achieving positive outcomes for people and planet. Much like with the Cultural Learning Alliance research, we want to be able to articulate the role and impact of culture in other sectors to support outcomes such as better educational attainment, reduced crime and improved health and wellbeing. This is about place-shaping in collaboration with other sectors.

All three programmes of work are clearly connected and we will take a holistic approach to developing and implementing this activity through a diverse cross-sector, cross-city partnership.

Growth and Infrastructure Overview and Scrutiny Committee



Date of meeting:	07 December 2022
Title of Report:	Destination Plymouth progress report on Visitor Plan 2030
Lead Member:	Councillor Pat Patel (Cabinet Member for Customer Services, Culture, Leisure & Sport)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Amanda Lumley, Chief Executive Destination Plymouth Ltd.
Contact Email:	Amanda.lumley@plymouth.gov.uk
Your Reference:	DP21.11.2022
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The purpose of this report is to provide an update to the committee on progress in relation to the ambitious objectives set in the Visitor Plan 2030 and recovery post the Covid 19 pandemic of the past two years. The report will also set out a refreshed strategic approach from Destination Plymouth to strengthening and positioning the city's brand going forwards building on the positive work over the last ten years.

The Visitor Plan 2030 will enable Plymouth's residents to benefit from the visitor economy, supporting quality job retention and creation; whilst also enabling 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.

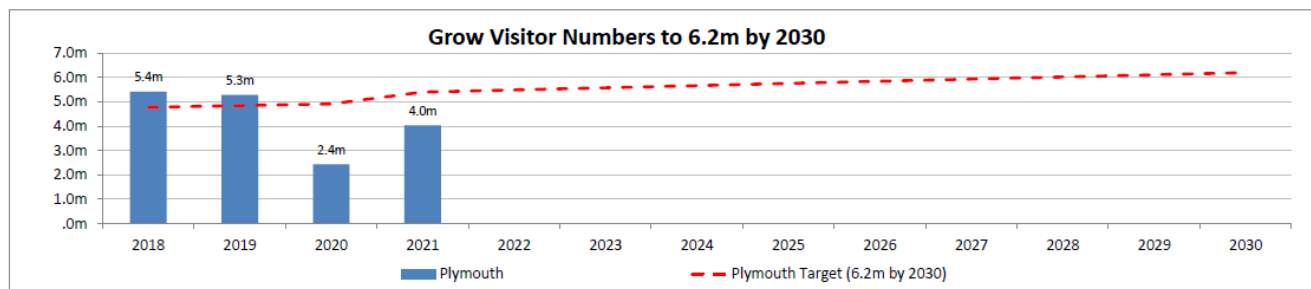
Oversight of the Visitor Plan 2030 is led by Destination Plymouth. The new plan was formally adopted in March 2020 just one week prior to the first Covid19 lockdown.

Since the start of the Covid19, pandemic things have changed significantly with the tourism, leisure and hospitality sector being one of the hardest hit nationally and internationally. This has led to significant economic shock and there will now be longer term challenges due to the energy and economic factors impacting the UK. Up to 2019, the growth of tourism and the visitor economy has been a great success story for the city with over 25% growth since 2010. From just under 4 million visitors to 5.2 million in 2019 spending over £327 million annually and supporting nearly 8,000 jobs, over 7% of the city's employment.

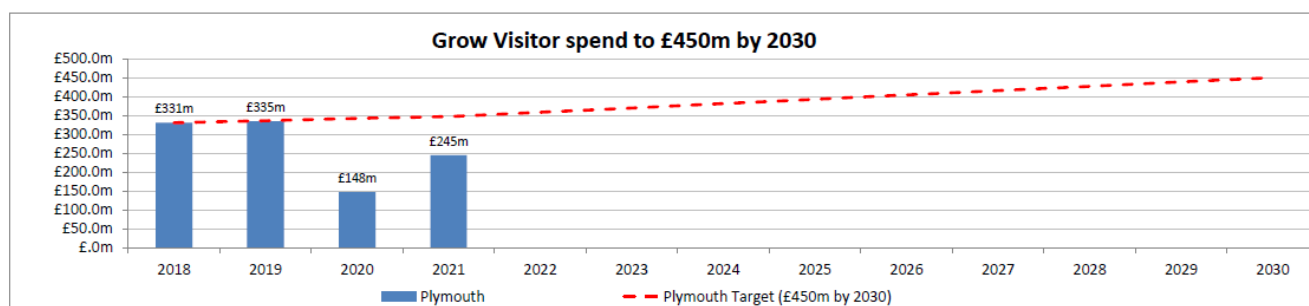
2021 Cambridge model data shows that there has been good recovery with visitor numbers growing from the Covid affected low of 2.4 million in 2020 to 4.03 million in 2021 and spend increasing from £148 million in 2020 to £244 million in 2021 which is in line with the trend nationally.

Grow Visitor Numbers to 6.2m by 2030

Year	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Plymouth	5.4m	5.3m	2.4m	4.0m									
Plymouth Target (6.2m by 2030)	4.8m	4.8m	4.9m	5.4m	5.5m	5.6m	5.7m	5.8m	5.8m	5.9m	6.0m	6.1m	6.2m

**Grow Visitor SPEND by £450m by 2030**

Year	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Plymouth	£330.7m	£334.8m	£148.0m	£244.7m									
Plymouth Target (£450m by 2030)	£330.8m	£336.5m	£342.2m	£347.0m	£358.4m	£369.9m	£381.3m	£392.8m	£404.2m	£415.7m	£427.1m	£438.6m	£450.0m

**Recommendations and Reasons**

That the Committee:

- 1) Continues to support Destination Plymouth through grant and other external funding to lead delivery of the plan working with wider City stakeholders and partners.
- 2) Supports the transition to a broader remit growing and positioning the city's 'place' brand going forwards.
- 3) Recognises the continued significant achievements of the Destination Plymouth, Plymouth City Council and BID teams in supporting the sector to recover post Covid19
- 4) Supports the sector 'ask' to government to retain the energy price cap for businesses post April 2023 through the local MP's

Alternative options considered and rejected

Delivery of the Visitor Plan 2020 has significantly grown the city's visitor economy, up to 2019 which represented 8,000 jobs, 7% of employment in the city*. The 2020 plan has acted as a key catalyst however, given changes to the marketplace, the importance of maximising the Mayflower 400 legacy

and emerging aspirations for the first national marine park, it was considered essential that a new Visitor Plan was commissioned, consulted on and delivered.

Not having the Visitor Plan could potentially affect the city's ability to position itself as a destination not just to visit but also as a desirable place to work, live and invest in. This could have significant impacts on the city's overarching growth strategy, the Plymouth Plan, to 2032. The Visitor Plan has been a strong factor in enabling recovery post Covid19 and will act as a key strategy in growing and positioning the city's 'place' brand going forwards.

*2019 data.

Relevance to the Corporate Plan and/or the Plymouth Plan

Plymouth is Britain's Ocean City and the visitor economy is a major contributor to our economic growth, local community and vibrant waterfront city. The Visitor Plan aims to address growing city priorities, in particular economic growth, jobs, skills and sustainability. The Scrutiny review approach embeds our values; it is democratic, responsible, fair and collaborative.

Implications for the Medium Term Financial Plan and Resource Implications:

Destination Plymouth Ltd. was formed in 2008 and incorporated in June 2010 as a private/public sector partnership and arm's length company of Plymouth City council. Destination Plymouth Ltd received £150,000 of revenue funding from PCC per annum up to the financial year-end Mar 2021 as part of the £2.25 million commitment to Mayflower 400 up to end March 2021 included within existing revenue budgets. A further £100,000 was provided to Destination Plymouth in the financial year to end March 2023.

There is currently no further provision for Destination Plymouth in revenue budgets going forwards which will leave a funding gap. A bid has been made into UK Shared Prosperity Funding by Destination Plymouth and it is hoped that this will help to reduce the funding gap in the short term. Longer term a strategy is being developed over the next 12 months to consider the future funding options.

In addition to this PCC supports city marketing and advertising within the existing Economic Development team and revenue budget. A commitment has also been made to maintain this support going forwards at reduced levels to reflect current local authority budget pressures.

Over the past three years, Destination Plymouth Ltd has helped to leverage over £7.7 million income through grants alone for specific projects related to the visitor plan. This includes £1.62 million from Visit England for product development and international marketing activity and most recently £132k for delivery of a 'Green Tourism' scheme from the Community Recovery Fund.

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

Financial Risks

Current financial risks to delivery of the Visitor Plan are as follows:

- Post 2023 funding for Destination Plymouth is not secure
- The 'DMO' review may impacting upon longer term funding options
- Opportunities to secure and leverage grant funding are restrictive due to limited resources
- City Centre Bid renewal due in 2023
- Waterfront Bid renewal due in 2021

Carbon Footprint (Environmental) Implications:

The new Visitor Plan 2030 has ten strategic ambitions one of which is *'We will become one of the UK's first carbon neutral destinations by 2030 supporting our city vision'*.

A key area of activity is working closely with Plymouth City Council and businesses in the tourism, retail and hospitality sector to identify what the current carbon footprint is for the visitor sector as well as developing solutions to reduce it over the next ten years. The aim will be to become best in class delivering sustainable solutions that not only reduce carbon emissions but also drive down costs and provide wider benefits to our visitor sector businesses.

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 too, 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. The Visitor Plan's targets adopt a wise, sustainable approach to tourism growth based on the World Tourism Organisation's 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. Destination Plymouth has already started delivering a 'Green Tourism' scheme in the city from January 2022. The successful scheme includes the development and launch of the National Marine Park Experience Collection in late summer. Funding was secured from the Community Renewal Fund £137k and Climate Emergency Fund £91.2k to run this programme. So far 36 businesses have had 'Green Edge' training which is NVQ level, and over 70 people from local businesses have been trained on green tourism and low carbon. 40 businesses have signed up to the 'Green Tourism scheme' and more than 10 new products have been developed and are on the market. The current scheme funding ends March 2023.

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

** When considering these proposals members have a responsibility to ensure they give due regard to the Council's duty to promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not.*

An equalities impact assessment was completed in 2020 when the 2030 Visitor Plan was submitted to Council for ratification.

The 2030 Visitor Plan includes some activities that relate to the following:

Health and safety - Destination Plymouth as a limited company operates to health and safety guidelines as set out in UK Corporate law. Where projects are not led by Destination Plymouth, the Board will seek reassurance that the organisation delivering is compliant through their project governance procedure.

Risk management – Destination Plymouth runs its own organisational risk process alongside a higher-level strategic risk register for the overarching Visitor Plan strategy. Where projects are not directly delivered by Destination Plymouth the Board will seek evidence that they are being risk managed through a formal project governance process.

Fin	pl.22. 23.3 04.	Leg	MS/3 9510	Mon Off		HR		Asset s		Strat Proc	
Originating Senior Leadership Team member: Anthony Payne											

Please confirm the Strategic Director(s) has agreed the report? Yes

Date agreed: 29/11/2022

Cabinet Member approval:

Councillor Pat Patel

A handwritten signature in black ink, appearing to be 'Pat Patel', written over a horizontal line.

Date approved: 29/11/2022

APPENDIX A.**1.0 Visitor Plan 2030 progress to date****i. Overview**

In early 2022 and following discussions with key partners Plymouth City Council, Plymouth Culture the two Business Improvement Districts and the National Marine Park it was agreed that DP should more actively 'lead' on city branding and marketing working closely with all partners and the city's inward investment team.

Over the past 10 years there has been significant change in the city, good growth and fantastic investment. However, post the pandemic was considered to be the right time to consider future opportunities and enact change.

Plymouth's Britain's Ocean City branding was developed in 2013 and now nearly ten years later it has been a great success and helped to change perceptions of the city as a visitor destination regionally, nationally and globally.

It is seen that the successful city brands market their history, quality of place, lifestyle, culture, diversity, and proactively formed partnerships between city and government in order to enhance their infrastructure and opportunities. Equally important is the role of positioning in the branding process, i.e. creating a distinct place in the market for the city to occupy. This is becoming increasingly important in relation to the government's 'levelling up' agenda and ensuring a strong 'place' brand for the city as part of this transition process.

It has become apparent that there are aspects of the brand that need further development in order to continue to grow a strong 'place' identity for the city and that the original brand strategy needs to be reviewed to build on the good work to date.

The DP Board has set out clearly that it wishes DP to lead on the following:

- To be the custodian of the City's place-based Brand narrative (Britain's Ocean City) improving perceptions of the City in the eyes of residents, visitors, workforce, students and potential investors
- To co-ordinate and amplify place-based activities (marketing, events, projects, fundraising, lobbying, digital) undertaken by Destination Plymouth, Plymouth Culture, National Marine Park, Plymouth Waterfront Partnership, City Centre Company and the City Council into a single and coherent programme

Currently DP has an existing mission which is set out below:

The role of Destination Plymouth is to provide strategic direction and high-level expertise to support delivery of the city's new 10-year Visitor and Destination Strategy to 2030. Destination Plymouth will successfully promote Plymouth as 'Britain's Ocean City' on a national and international basis working closely with key city partners to deliver destination marketing and economic impact for the city and drive time region

Building on the solid foundations of Mayflower 400 activity over the past four years we will be working towards our new destination targets:

Our city 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 5.4 to 6.8 million by 2030***

Given this proposed broader remit the organisation has adopted a renewed mission which not only supports the existing Visitor Plan to 2030 but also provides overarching support for a wider range of businesses and organisations within the city.

An example of the new mission is set out below:

To promote nationally and internationally Plymouth's position and reputation as 'Britain's Ocean City' and work with key city partners and companies to market Plymouth in support of sustainable economic growth for the city and its travel to work area.

In order to support the broader mission it is proposed that Destination Plymouth focuses on four priority work streams which include the Visitor Plan 2030 and which are set out below:

NEW MISSION		WHO WE ARE	
To promote nationally and internationally Plymouth's position and reputation as 'Britain's Ocean City' and work with key city partners and companies to market Plymouth in support of sustainable economic growth for the city and its travel to work area.		Public private sector partnership and Destination marketing agency for Plymouth???	
		Not for profit organisation	
		Funded by grants, strategic partners and commercial ventures and memberships	
WHAT WE DO			
BRAND	VISITOR ECONOMY	HIGH GROWTH SECTORS	STRATEGIC PARTNERSHIPS
Custodian of the brand and place based narrative improving perceptions and reputation, nationally and globally	Attract leisure, business and student visitors, events Develop destination product working with key city partners e.g. Plymouth Culture, National Marine Park. Support the local community through jobs and enhancing the local visitor offering.	Delivering broader city marketing and positive positioning in key vertical sectors: <ul style="list-style-type: none">• Marine, Engineering, High tech manufacturing• Defence and Autonomy• Culture, Creative and digital• Health and health tech	Creating profit making and commercial partnerships to leverage maximum impact for the city

Over the next 12 months key partners and city stakeholders will be asked to engage with further development of the brand strategy and support to deliver some of the high level aims and objectives which will strengthen the city's 'place' brand for the future.

ii. The Visitor Plan 2030

The strategy has three key themes:

- Blue-green city
- Brilliant Culture and heritage
- Premier Destination

And is underpinned by a series of enabling activities including:

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

These strategic interventions will make a 'step change' in how we deliver versus our targets and our ambitions. The strategy also sets out ambitious new targets for the next 10 years:

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 and opportunities 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.

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

The 'RAG' rated activity plan below shows current delivery status against the Visitor plan 2030 areas of activity. This includes setting out the key partners who are delivering on the various elements of the plan.

ACTIVITY AREA	ACTIVITIES and milestones	ACTIVITY LEAD	LEAD OFFICER	RAG RATING
1) GOVERNANCE AND FUNDING	a) Secure core funding from 2021 to 2024 a. Confirm by Jan 2021 b) Review longer term structure post 2021 a. Confirm by Nov 2022 c) Identify longer term funding opportunities a. Confirm by Nov 2022	DP Board	Amanda Lumley	
STAR PROJECTS				
2) Ocean Playground – National Marine Park	a) Complete development studies/costings to establish four NMP 'strategic hubs': - NMP 'participation hub' - Mount Batten Watersports Centre/Peninsula - Sept 2020. - NMP 'ocean/fishing quarter hub' (link modernised fish market and fish quay with new visitor offer and the NMA) - March 2021. - NMP 'wellbeing hub' - Hoe Foreshore/ 'Tinside Cove' improvements to establish inclusive destination. - NMP 'heritage hub' - Mount Edgcombe visitor experience, probably located in Garden Battery. b) Complete costings for new NMP visitor 'orientation centre' (probably located at the TIC) and other physical regeneration elements of the NMP e.g. signage and interpretation. c) Identify and assemble funding packages	PCC/University/NMA/Sutton Harbour/Mount Batten Trust/Mount Edgcombe	Caroline Cozens	

	d) Delivery of developments/projects			
3) Stories of the Ocean- National Marine Park	a) NMP grant application b) Develop digital product c) Engage community with Ambassador programme	PCC	Kat Deeney/ Caroline Cozens	
4) National Marine Park Gateway	a) Feasibility and re-imagination of National Marine Aquarium b) RE-development of fish market c) Identify and assemble funding options	PCC/NMA/Sutton Harbour	Caroline Cozens/ Amanda Ratsey	
5) The Box effect	a) Develop 3 year rolling exhibition/cultural programme b) Maximise British Art show 2022 c) Identify wider cross city linked product offer d) Source funding to support programme	The Box/PCC/Plymouth Culture	Victoria Pomeroy/ Hannah Harris	
6) Après sea – developing our night time economy	a) Work with Plymouth Culture to identify music opportunities for city b) Map and develop existing product, gaps and opportunities c) Develop marketing plan and campaigns to promote	Plymouth Culture/BIDS	Hannah Harris	
7) Celebrating our maritime and military heritage	a) Work with NMRN and RN to vision and agree future for Naval heritage centre b) Identify suitable building c) Clarify 'Courageous' timeline d) Assemble feasibility funding/resources	National Museum of Royal Navy/Naval	Ian Shipperley/Naval base Commodore	
8) City Conference campus and accommodation	a) Demand study for conference meetings and events b) Bid for Future high streets fund c) Project feasibility d) Assemble funding	PCC/Urban Splash	Matt Ward	
9) Brunel Plaza	a) Partnership agreement signed b) Funding assembled c) Planning permission d) Demolish parking e) Refurbish intercity house	PCC/University/Network Rail/GWR	Matt Ward	
10) Plymouth cruise and ferry port	a) Meeting with ABP and key partners to agree scope	ABP/PCC/Brittany Ferries	David Draffan	

	b) Assemble funding			
ENABLING PRIORITIES				
11) Partnerships	<ul style="list-style-type: none"> Feeding into strategies at high level regionally/nationally Establishing and attending meetings and events/ lobbying for the sector on key issues at government/regional level Partnership working nationally/regionally/locally Assembling funding and resources 	Destination Plymouth	Amanda Lumley	
12) People Businesses	<p>a) Skills and employment:</p> <ul style="list-style-type: none"> Identify – establish relationships with businesses, employers and training providers to identify need and training opportunities/resources for project delivery Promote – develop the concept of a regional tourism and retail centre of excellence, raise the sector profile, within schools/community and support national 10-year campaign to recruit more employees Recruit – Encourage businesses to recruit trainees and apprentices now for 2020 onwards/raise awareness of 't' levels and apprentice levy Retain – provide signposting for employee/employers to further training and development opportunities Evaluate – Set targets for recruitment, training and retention and evaluate through regular monitoring and reporting 	PCC skills team/marketing team	Tina Brinkworth	
	<p>b) Product development:</p> <ul style="list-style-type: none"> Encourage businesses to sign up to quality schemes for example 'Green tourism' which include auditing for accessibility and sustainability 	Destination Plymouth	Amanda Lumley	

	<ul style="list-style-type: none"> – Signpost businesses, local community and visitors to areas of best practice and adopt local charters including 'plan for plastic' and 'zero carbon' – Secure funding to provide training, share best practice and work one to one with businesses on product development 			
Community and team	<p>a) People</p> <ul style="list-style-type: none"> – Explore opportunities to continue 'Mayflower Maker' programme post 2020 and develop longer term approach to volunteering and community engagement linked to national marine park – Encourage participation and engagement across capital programmes and cultural/event programme – Approach our daily activities with a 'team Plymouth' culture encouraging inclusivity, diversity and accessibility 	DP/PCC/Our Plymouth	Neil Minion	
13) Ocean City Infrastructure a. Transport and public realm	<ul style="list-style-type: none"> – Work with the city council and key transport partners to support the strategic plan for the future security and sustainability of key transport routes including rail, air and sea – Support development of star projects through facilitation and cross partner working – Develop relationships with major carriers to secure a planned programme of marketing initiatives to encourage visits off peak and extend the season – Encourage carriers and tour operators to work together to take advantage of inclusive tour fares – Actively promote cycling, walking and 'getting on the water' through targeted campaign activity and development of new digital trails 	PCC	Philip Heseltine Head of Transport	
b. Digital	<ul style="list-style-type: none"> – Developing a new digital marketing strategy 	Destination Plymouth	Amanda Lumley/ Hannah Harris	

	<ul style="list-style-type: none"> – Growing the reach of online and digital in line with marketing plan targets – Developing digital signposting and wayfinding solutions including exploring augmented and virtual reality – Working with key city partners to develop compelling content/creative digital approaches connected to our core themes – Ensuring our team has the specialist skills to develop compelling content and innovative approaches to digital activity – Exploring opportunities around 5G 			
c. Accommodation	<ul style="list-style-type: none"> – Produce a conference demand and feasibility study – Market Plymouth internationally for accommodation investment – Continue to benchmark accommodation supply and demand – Work with existing hotel and accommodation providers to raise quality – Lobby for improved legislation around Air BnB 	PCC/DP	Matt Ward	
14. Our Ocean City brand a) Positioning	<ul style="list-style-type: none"> – Developing a more sophisticated creative approach for the city, building on the good work to date and positioning the city as a great place to live, work, study and visit – Mapping key products and experiences that the city can confidently lead on – Exploring new market opportunities to support the city's growth and investment ambitions – Developing a compelling narrative to position the city internationally 	Destination Plymouth	Amanda Lumley	
b) Marketing plan	<ul style="list-style-type: none"> – Identifying opportunities for a campaign based approach into new target markets – Developing short term detailed delivery plan – up to 3 years – Assembling target funding and resources to deliver activity across the different target markets 	Destination Plymouth	Amanda Lumley	

	<ul style="list-style-type: none"> – Develop 3 year action plan to grow conferencing in city 			
c) City events and cultural programme	<ul style="list-style-type: none"> – Setting up a city wide events and cultural programming group – Auditing key city locations and agreeing what they are best used for – Promoting the city as a stage/venue through our marketing activities – Targeting specific events connected to our key themes and products 	DP/PCC/Plym Culture	Victoria Allen/ Hannah Harris	
d) City welcome and visitor information	<ul style="list-style-type: none"> – Review existing information provision and explore future opportunities connected to digital and new technologies and passport style schemes – Re-inforce Britain's Ocean City branding and emerging new creative concepts at all key gateways – Continue with volunteer 'Ambassadors' and develop guiding offer post Mayflower 400 	DP/PCC	Amanda Lumley/ Amanda Ratsey	

iii. City Brand development

A brand perception study was undertaken in late summer 2022 to enable an understanding of how stakeholders, businesses, residents and students perceive the city. The results were very positive (see 'Brand perception report' in background papers) and provided a series of next steps to enable successful 'evolution' and growth of the brand going forwards over the next ten years. Next steps for this process will be agreed in the November Board meeting.

iv. Marketing and events activity

– Events

2022 has been a busy year for events across the city for the Plymouth City Council and BID teams who have achieved fantastic results and are to be congratulated on their hard work and success for the city.

In the last 'normal' operating spring and summer of 2019 we had around **290,000** visitors to events.

2020 and the first half of 2021 were heavily impacted by Covid, however we did manage to keep the brand alive and a good number of events continued, against the odds!

In the spring and summer of 2022 we have had approximately **365,000** people attending events and following the huge success of Bonfire Night and the Christmas Lights events, if all goes well with the Christmas Market our total event attendance for the year will be **over half a million**. See list of events and attendance below.

Pirates Weekend	25,000	Sunset Live in Central Park (Boe & Ball, Paloma Faith, Simply Red)	11,000	Oktoberfest	3500
Commando Gunners 60th Anniversary Parade	3,500	Sail GP	37000	Bonfire Night	27000
Lord Mayors Festival	4,000	The Big Tribute Festival	8000	Remembrance Sunday	7000
Flavour Fest	90,000	British Firework Championships	90000	City Centre Light Switch On	6000
One Big Summer (Ibiza Orchestra, Years & Years, Supergrass, The Libertines)	22,000	West End Carnival	3000	Barbican Light Switch On	3000
Half Marathon	4,500	Seafood & Harbour Market	20000	Christmas Market	
Royal Marines Rehab Triathlon	2,000				
Armed Forces Day	40,000				

– **General marketing activity**

The team has had a busy summer supporting the events team and driving the destination marketing as well as supporting the National Marine Park activity. Digital numbers have generally increased with details set out below. NB: This does not include the support given for BID channels or NMP channels.

Visit Plymouth website, social and newsletter stats

Visit Plymouth Website	31 Oct 2020-2021	31 Oct 2021-2022	Increase
Users	673,720	862,069	27.96%
New Users	673,332	852,044	26.54%
Page views	1,765,201	1,138,223	29.28%
Sessions	880,432	2,208,088	25.09%

What's On Plymouth Facebook	31 Oct 2020-2021	31 Oct 2021-2022	Increase
Posts	769	923	20.02%
Post engagements	85,135	92,432	8.5%
Reach	6,599,182	9,079,002	37.5%
Engagement rate	2.21%	2.12%	-4%
Fans	65,386	68,263	4.4%

What's On Plymouth Twitter	31 Oct 2020-2021	31 Oct 2021-2022	Increase
Posts	532	767	44.2%
Post engagements	3,543	4,129	16.53%
Impressions	248,908	490,772	97.17%
Engagement rate	2.33%	2.91%	24.89%
Fans	8,558	9,311	8.79%

Visit Plymouth Facebook	31 Oct 2020-2021	31 Oct 2021-2022	Increase
Posts	515	527	2.33%
Post engagements	58,294	17,300	-70.32%
Reach	2,490,626	4,081,863	63.88%
Engagement rate	2.66%	1.44%	-45%
Fans	13,652	14,600	6.94%

Whilst we have continued to post regularly on Facebook and have increased post reach as well as an increase in new followers, the engagement rate has dropped within the most recent year. With further

investigation this seems to be attributed this to a period during Covid (lockdown) where the social posts on this channel were predominantly quality scenic photos of Plymouth which had high comments and reactions. There is opportunity here to reintroduce this content for social channels going forwards. Comparing engagement on normal Visit Plymouth posts, i.e. business posts, news etc. the engagements levels are relatively the same year-on-year.

Visit Plymouth Twitter	31 Oct 2020-2021	31 Oct 2021-2022	Increase
Posts	407	587	44.22%
Post engagements	2,961	11,848	300.13%
Impressions	108,003	326,352	202.179%
Engagement rate	1.39%	2.54%	82.73%
Fans	16,223	17,124	5.55%

Visit Plymouth Instagram	31 Oct 2020-2021	31 Oct 2021-2022	Increase
Posts	<i>Stats unavailable</i>	48	
Post engagements	<i>Stats unavailable</i>	13,775	
Reach	<i>Stats unavailable</i>	173,452	
Engagement rate	<i>Stats unavailable</i>	7.74%	
Fans	<i>Stats unavailable</i>	9,036	

Visit Plymouth Newsletter	28 Oct 2021	30 Oct 2022	Increase
Subscribers	6,903	10,191	47.63%
Open rate	29.21%		
Click rate	2.71%		

– PR coverage

‘Earned media’ coverage through PR has continued to be successful during 2021/22 post Mayflower 400 (see table below and separate highlights report in background documents). Coverage has focused on building the concept of Plymouth as a waterfront destination and including developing content around the National Marine Park and waterfront activities as well as supporting ‘The Box’ and cultural activities across the city. The highlights report shows some of the coverage which has been achieved.

	TO OCTOBER 2021 (Including both Destination PR and Mayflower400)	TO OCTOBER 2022 (Destination PR only)
PR Audience Overall Reach	843,498,308	647,744,275
PR AVE Overall in GBP	20,827,406	17,816,248

– **Cruise marketing activity**

2022 has been a good year for cruise in Plymouth as calls start to build up post pandemic. Numbers are in the table below.

2022 (estimated):

Total cruise ship calls: 7

Total passengers: 3,370

Total crew: 2,411

Total on board: 5,781

The cruise volunteers who now number over 20 have all had 'Welcome Host and 'Green edge' training as well as new uniforms sponsored by Plymouth Citybus were all there to meet and greet and received excellent feedback from cruise passenger surveys.

A highlight of the cruise year was the visit of the MS Rotterdam the largest ship to anchor in the sound on the 150th anniversary of the first sailing of the Holland America Line and the historic first ship in Plymouth. An on board event was attended by the Lord Mayor for a formal plaque exchange along with key partners and volunteer representatives. There was extensive media coverage locally and a great buzz in the Barbican with over 1000 passengers visiting the city on the day.

Marketing activity was focused around 'Sea Trade Global in Miami and Sea Trade Med in Malaga. Both of which were attended by our Cruise business development manager. Ongoing activity has include familiarisation trips with cruise buyers and shore excursion companies as well as e-mails to the trade database and direct phone and e-mail follow up. Bookings for 2023 are also looking positive so far with 12 in the diary to date.

	CRUISE SHIP NAME	CRUISE LINE	ETA	BERTH	ETD
1	ROTTERDAM	Holland America Line (HAL)	Sun 16th April	Anchorage	16th April
				Plymouth Sound	
2	OCEAN NOVA	Noble Caledonia	Fri 28th April	TBC	28th April
				Millbay Docks	1900hrs
3	SPIRIT OF DISCOVERY	Saga Cruises	Fri 5th May	Anchorage	5th May
				Plymouth Sound	
4	SILVER DAWN	Silversea Cruises	Thur 18th May	TBC	18th May
6	LUXURY CRUISE SHIP	LUXURY CRUISE LINE	Wed 23rd Aug	Anchorage	23rd Aug
				Plymouth Sound	
7	OCEAN MAJESTY	Majestic International Cruises	Fri 25th Aug	West Wharf	25th Aug
		(Hansa Touristik)		Millbay Docks	
8	BRAEMAR	Fred Olsen Cruise Lines	Mon 28th Aug	TBC	28th Aug
9	SILVER DAWN	Silversea Cruises	Mon 28th Aug	TBC	28th Aug
10	AMERA	Pheonix Reisen Cruises	Sat 23rd Sept	West Wharf	23rd Sept
				Millbay Docks	
11	SCENIC ECLIPSE 2	Scenic Cruises	Sun 24th Sept	Anchorage	24th Sept
				Plymouth Sound	
12	SEABOURN OVATION	Seabourne Cruises	Tue 26th Sept	TBC	26th Sept
	TOTAL:				

- Conference, meetings and travel trade activity

The team has been busy promoting the city and key partners at travel trade events nationally and internationally including World Travel Market, Britain and Ireland marketplace, Meeting's Industry Association and Destination Britain North America. Over 400 separate meetings have taken place across the year highlighting Plymouth specific attractions and tourism products. Feedback has been very positive especially in the US market and conference sector which is now starting to pick back up. A separate report with full details is in the background documents.

4.0 Factors affecting Destination Plymouth and Visitor Plan delivery:

i. Reduced capacity of Destination Plymouth executive post Mayflower 400

Destination Plymouth has levered and secured funding in excess of £7.7 million to enable delivery of Mayflower 400 related projects and activities since 2016. Post March 2022 much of this funding has ceased and staff resources reduced accordingly. The Senior Executive has reduced to x 1 FTE with x 0.4 FTE Project Management support and x 1 FTE membership and Marketing officer. Post March 2023 it has been advised that Plymouth City Council will no longer be able to support the current £100,000 revenue funding commitment to Destination Plymouth Ltd. although a short term funding solution to this has been sourced using UK Shared Prosperity funding, a longer term funding solution will be required to enable the organisation to achieve all the objectives set out. A funding strategy will be developed alongside the city brand strategy during 2023.

ii. DMO Review

In 2020, many of the Destination Marketing organisations nationally and regionally were significantly affected by loss of income at a time when businesses most needed their support. Many good 'commercially based' DMO's closed during 2020 after their income streams disappeared overnight and were not eligible for government grant funding save in only a few cases. Plymouth is fortunate to have Destination Plymouth, which has been providing support, advice and guidance along with the Business Improvement Districts to businesses one to one. In addition Destination Plymouth has worked closely with PCC's marketing and events teams to deliver regular local communications, regional and national marketing campaigns and has led lobbying into government the with Great South West Tourism partners. The **DMO funding** model in many places has **effectively broken** and because of this in early 2021, the government asked Nick du Bois to lead a review of Destination Management Organisations nationally.

The 'Du Bois' report and recommendations from this were presented to government at the end of July 2021 and the government has responded by agreeing to implement the changes in the report, however, with only £4 million funding not the £51 million requested. Consultation with DMO's across the country has ensued and it is anticipated that calls for 'expressions of interest' in accreditation will be in December with the 'accreditation' process starting in early January. The Board of Destination Plymouth has confirmed that it wishes to become accredited in line with the national process and this may have implications for delivery as well as longer term funding opportunities which may become more available through this process.

iii. 'The Great South West Tourism Partnership' – Tourism Data Hub project

The Destination Plymouth executive has also played a key role as Co-Chair in the emerging Great South West Tourism Partnership and development of a regional Recovery Plan with partners. The Great South West Tourism Partnership (GSWTP) is an inclusive, equitable alliance that brings together

the strength, knowledge and expertise of the leading DMO and tourism organisations in the Greater South West Area. These include:

Devon	Isles of Scilly	Exmoor
Dorset	Exeter	Dartmoor
Somerset	Plymouth	Bournemouth, Christchurch,
Cornwall	Torbay	Poole

The group has recently secured £500,000 funding from the HOSWLEP for work to develop a regional data hub. The project will be led by Destination Plymouth and will run over three years. The aim is to provide robust data on consumer behaviours as well as business data to more effectively enable decision making for the regions tourism businesses. This would potentially have a positive impact on the Visitor economy in Plymouth and across the region enabling better marketing decisions and more efficient targeting of resources. The project will start in November 2022.

iv. Skills and employment

A key challenge to delivering the targets set out in the Visitor Plan is enabling enough people to work in the sector or to develop the skills required to do so. Along with many other sectors including health, adult social care and transport the tourism and hospitality sector is having a problem recruiting staff. This has led to many businesses running at lower capacity levels, reduced service capability and issues including lack of taxi drivers as well as supply and logistics. It is fair to say that this is not just a Plymouth problem it is a national issue. Vacancies in the industry are now double (up 102%) what they were before the pandemic, and there has been a fundamental shift in the labour market. The acute shortfall comes despite employment being close to pre-pandemic levels (minus 4%). There are multiple reasons why this has happened including:

- People getting new jobs due to closure or furlough through Covid
- Lifestyle changes due to Covid
- People retiring early due to Covid
- Reduced number of international workers in the city post Brexit
- Perception of the sector as low paid and unsociable hours
- High volume of demand due to very busy post Covid period over summer

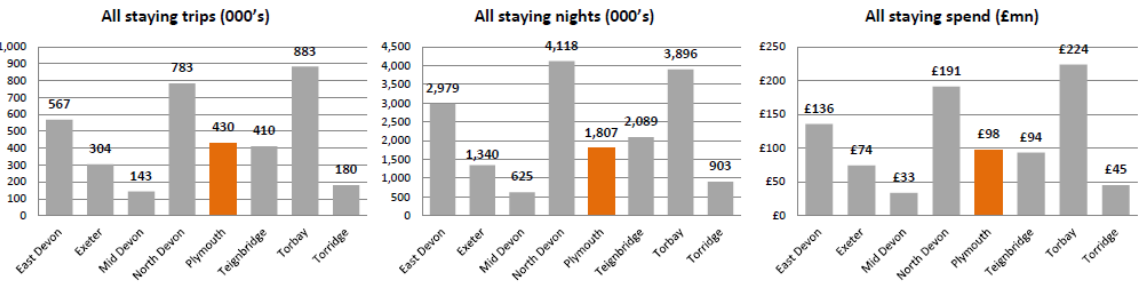
The Employment and Skills team at PCC have been exploring the challenges further along with a sector based task group and have been developing a longer-term plan over the last 6 months to try to address the issues. In the short term a funding application is to be submitted to DWP for resource as a development manager to support the sector. This is anticipated to be in early spring. This role is expected to significantly increase engagement among young people and the local community to support people into jobs in the sector in a similar way to the 'Building Plymouth' model.

v. Accommodation capacity in the city

Although there have been some developments going 'live' in the city during the past three years and there has been great success with the opening of Premier Inn, Oyo and soon to be 'Moxy' in 2023 Plymouth is still underperforming in relation to its nearby competitors and as a city nationally. The chart below shows how we compare to other destinations in the county and particularly noticeable is that Torbay and North Devon have significantly more overnight stays and therefore spend. This is due to the high volume of self-catering and holiday park capacity in North Devon and the much higher level

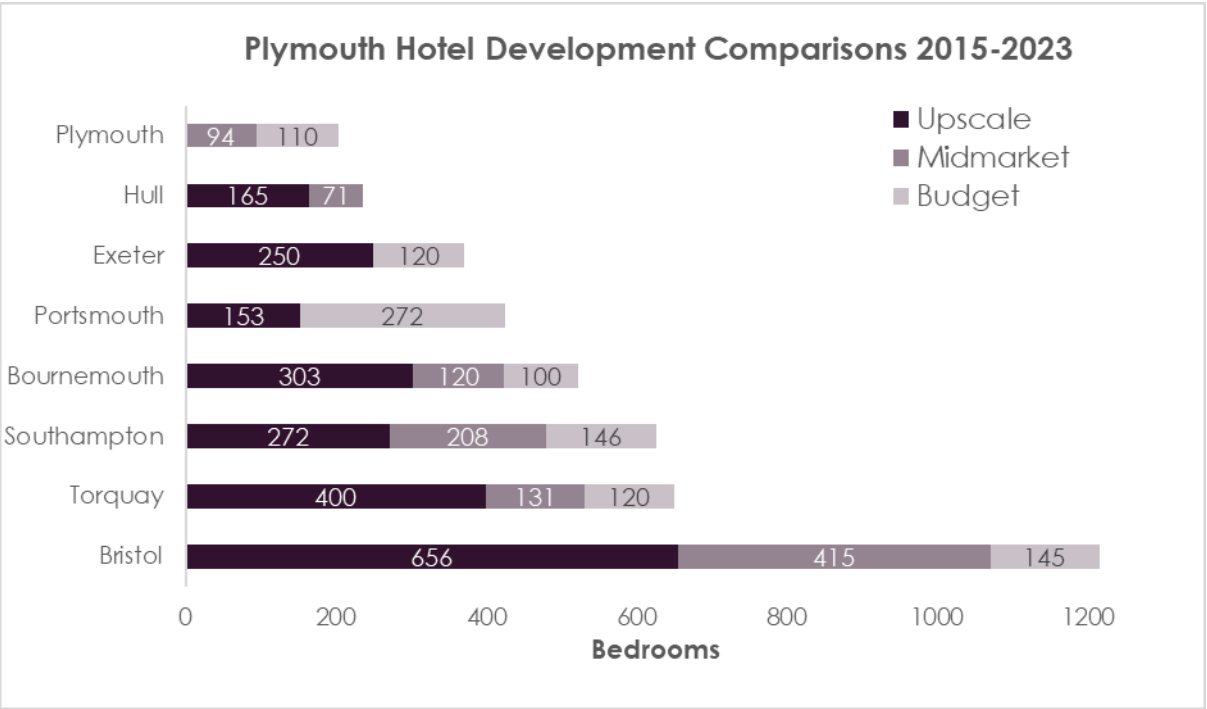
of serviced accommodation for Torbay which has over 6,000 serviced rooms compared to Plymouth at just over 2,000.

Plymouth - Staying visits in the county context



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
East Devon	558	9	2,859	120	£132	£4
Exeter	295	9	1,165	175	£69	£6
Mid-Devon	139	4	572	53	£32	£2
North Devon	773	10	4,013	105	£187	£4
Plymouth	416	14	1,579	228	£91	£7
Teignbridge	402	8	1,996	93	£91	£3
Torbay	868	15	3,735	161	£217	£7
Torridge	176	4	854	49	£43	£2

The chart below shows openings of new hotel since 2017 and also demonstrates under investment in the Plymouth area.



A hotel demand study has been commissioned due for completion in December 2022 which will explore the current position post Covid of the hotel sector in the city, look at current and future demand and what the barriers may be to investment. It will also identify opportunities to connect developers and operators with the city to determine what investment potential there is.

Without further accommodation capacity there is a high risk that growth targets will not be met by 2030. Currently 85% of the visitor economy is low spending day visitors (average spend approx. £40 per visit) compared with much higher spending UK and International overnight staying visitors (average spend £218 and £502 per visit respectively.) Clearly there is a great opportunity here to significantly grow the visitor economy as well as increase GVA through higher spending staying visitors. A focus on hotel development will also support businesses across the city who are increasingly voicing concerns that they are not able to accommodate business people for training, business meetings and events and detracting from the overall investment potential of the city.

vi. Energy and supply chain costs

There is currently much pressure on the visitor sector due to high energy and supply chain costs and the impact of the current economic climate on consumer spending. A recent report in July 2022 (see background paper B) showed that many of Plymouth's larger attractions are suffering significantly at the moment and cost pressures are reducing their ability to make profits. Of particular worry is the latest budget which stated that the government would remove the household energy cap in April 2023. A key ask to government is for this to be retained for businesses many of which will find survival increasingly difficult over the quieter winter period. Loss of some of these key businesses will impact the product offer of the city which has been successfully and extensively grown over the last 10 years.

Plymouth

Britain's Ocean City

PERFORMANCE REVIEW SUMMARY

OCTOBER 2021 TO OCTOBER 2022



MEDIA GROUP

Coverage achieved

	TO OCTOBER 2021 (Including both Destination PR and Mayflower400)	TO OCTOBER 2022 (Destination PR only)
PR Audience Overall Reach	843,498,308	647,744,275
PR AVE Overall in GBP	20,827,406	17,816,248

Green and Ethical checklist ☒

Give yourself – and the planet – a break

More Brits are looking to travel sustainably than ever before – but what's the best way to do it?

Now that trips abroad have been given the green light again, thousands of Brits are unapologetically packing their bags and jet setting. However, awareness of how we're travelling, and the subsequent impact it has, is continuing to grow with the 'pandemic effect' further encouraging travellers to opt for more sustainable measures.

In fact, *Booking.com's* Sustainable Travel Report 2021 has found that 43% of UK travellers say the pandemic has made them want to travel more sustainably in the future, whilst 64% say they want to stay in a sustainable accommodation in the upcoming year. The latter has seen a notable increase from previous years, from 44% in 2016, and 50% in 2020, prior to the pandemic.

Marianne Gybels, director of sustainability for *Booking.com* adds: "*The good intentions are there on all sides, but there is still a lot of*

work to be done to make sustainable travel an easy choice for everyone."

With there still being some uncertainty surrounding travelling, some Brits are still naturally drawn to a staycation. For those with an environmental conscience, the perfect trip could be Plymouth, Britain's Ocean City, where sustainability is a watchword.

Although best known for its impressive maritime heritage, the city is now a community with plastic-free status and offers the chance to enjoy a sustainable adventure, celebrate nature and learn about conservation initiatives while helping to reduce harm – litter pick with Plymouth Gin anyone?

Fiona Whitty feasts her eyes on an Ocean City full of surprises

EXPLORE Where in the world is this? Plymouth grin

It's not every day you get a stunning coastal view at your local public swimming baths. But not every pool is in a place dubbed Britain's Ocean City that also has the grand title of National Marine Park.

Tinside Lido in Plymouth, recognised as one of the best in Europe, teeters off a cliff overlooking the Sound, its crescent-shaped pool filled with beautifully clear water.

The Grade II-listed building's Art Deco design is fabulous but it's the views that really take your breath away.

From its vast sun deck we watched sailing boats, fishing vessels, paddle boarders and even Royal Navy ships cutting across the bay.

Built in 1935 amid the golden era of lidos, Tinside later fell into disrepair and eventually closed in 1992 before a public outcry – and more than 70,000 signatures – forced a reopening 11 years later. We're glad it did (open from Spring 2022, adult £5, child £4, everyoneactive.com).

Later my husband Tim and I, plus our children Freddie, 12, and 15-year-old Rosie, jumped on a Summer Sundowner Cruise with Plymouth Boat Trips, which takes you on a soothing 90-minute amble around the bay we'd been admiring.

The tour wound past Mount Batten Peninsula, Drake's Island and Mount

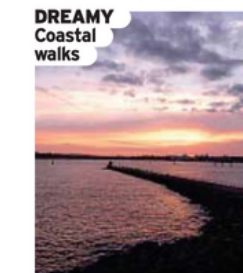
Edgcumbe House and Country Park, the start of neighbouring Cornwall, and gave us picture-perfect views of some of Plymouth's

famous landmarks. Smeaton's Tower – its red-and-white lighthouse – stood proud and Royal William Yard, a former naval victualling yard, showed off its Grade I-listed buildings, repurposed into galleries, artist workshops and brasseries (running from April 2022, adult £11, child £6, families £30, plymouthboattrips.co.uk).

We headed back there another time to Hook & Line restaurant. We loved its seafood menu and chose a variety of small plates such as scallops – caught by its fisherman co-owner Ben's scallop boat Sidney Rose – honey and soy glazed octopus, grilled sardines and teriyaki prawn and scallop skewers.

The Barbican Botanic and Devon rums from the Rum Bar – with a nod to the naval history – went down well too (thehookandlineplymouth.co.uk).

Plymouth is a beautiful city to



CATCH OF THE DAY



1 THIS CUSHION

Update your home with homewares celebrating everyone's favourite seabird. This orange-tasselled cushion features a puffin screen-printed on a smart navy background (£40,

joules.com).



2 THIS BIKE

Hop on an eco-friendly, hand-crafted bike made from sustainably sourced wood. The range includes kids' balance bikes, adult cycles and e-bikes (Penelope two-speed 28in bike, £1,990, coco-matbike.uk).



3 THIS BUCKET

Building sandcastles? Swap plastic buckets for durable and recyclable silicone versions. Best of all, Scrunch Buckets can simply be rolled or folded into your beach bag at the end of the day (£10.99, scrunchkids.com).



4 THESE TINS

For nostalgic seaside style, keep your pens and pencils in these colourful coastal storage tins, which are decorated with retro typography and fish images (£8.95 for a set of two, rexlondon.com).

WHAT'S FLOATING YOUR BOAT? Let us know on our Facebook page, facebook.com/coastmagazine, or email us at coast.ed@kelsey.co.uk



A UK FIRST FOR PLYMOUTH

Plymouth has been named the UK's first National Marine Park, a reflection of its maritime heritage, natural riches and vibrant community. A £9.5m National Lottery Heritage Horizons Fund award will encourage people to protect the ocean, tackle climate change and support new green marine job opportunities. A host of activities will take place in 2022, including saltwater swimming at Tinside Lido (left), town trails and beach cleans (plymouthsoundnationalmarinepark.com).

Shifting sands

The sand dunes known as the Sandhills at Formby, Merseyside, are being turned into a refuge for native plants and animals including the natterjack toad, one of the UK's rarest amphibians. A dumping ground for thousands of tonnes of tobacco waste in the 1950s and 1960s, the two-hectare site is being transformed by the National Trust, which is clearing invasive plants, re-establishing the natural shape of the dunes and adding 12 breeding pools as a lifeline for the toads. More information at nationaltrust.org.uk.

DUNES PHOTOGRAPH NATIONAL TRUST IMAGES/ANNAPURNA MELLOR



BOOK
KINDLE
of the
MON
TH

The inside track

Much more than a standard travel guide to the South West Coast Path, this fascinating book goes the extra mile and highlights 1,000 mini adventures that you can enjoy along the entire 630-mile length of Britain's longest waymarked path. Author Stephen Neale scours the route from Minehead to Poole Harbour, unearthing hidden beaches, foraging spots, secret swims, magical wells and wild woods, all of which will allow you to connect more deeply with nature. *The South West Coast Path* by Stephen Neale (£20, paperback, Bloomsbury).

OTV - 35,000

Mirror



THE  TIMES

COMBINED OTV -
93,662,823



The
Guardian



Woman's Weekly



Woman's Weekly (UK)
12 Jul 2022 (3)

Woman's Weekly (UK)

Travel: What the seafaring city of Plymouth has to offer

Best known as an historic seafaring city, Plymouth is adding culture and an exciting food scene to its attractions



Enjoy fresh seafood at The Boathouse Cafe

Climbing the 93 steps of Plymouth's iconic lighthouse Smeaton's Tower may sound like hard work, but spare a thought for the builders who had to construct it originally. In the 1750s, they worked stone by stone nine miles out at sea on

the dangerous Eddystone rocks.

Later, workmen took it down again and rebuilt it on Plymouth

Hoe as a memorial to John Smeaton, its brilliant designer. Today it stands in pride of place as one of the south-west coast's most recognised landmarks.

The views from the top are well worth the climb: Plymouth Sound shimmers in the sea breeze and there are stunning views towards the Cornish coastline. Bordered by a wide beach, this coastal gem nestles between hills that reach down to the adjoining bays, surrounded by woodlands, meadows and the foothills of Dartmoor National Park.

Natural beauty

Plymouth is a real joy to explore. Take a jaunt along the famous Plymouth Hoe, a verdant expanse of coastline with



Ancient quays where merchants traded

huge skies and bobbing sailboats, or brave a refreshing saltwater dip at Tinside Lido, an art deco masterpiece.

The beautifully restored Royal William Yard – a massive Georgian complex on the waterfront

that used to supply Royal Navy ships – is also well worth a visit, with its shops and restaurants. Nature lovers can follow the City Centre Wildlife

Trail, which meanders from the heart of the city to the water-

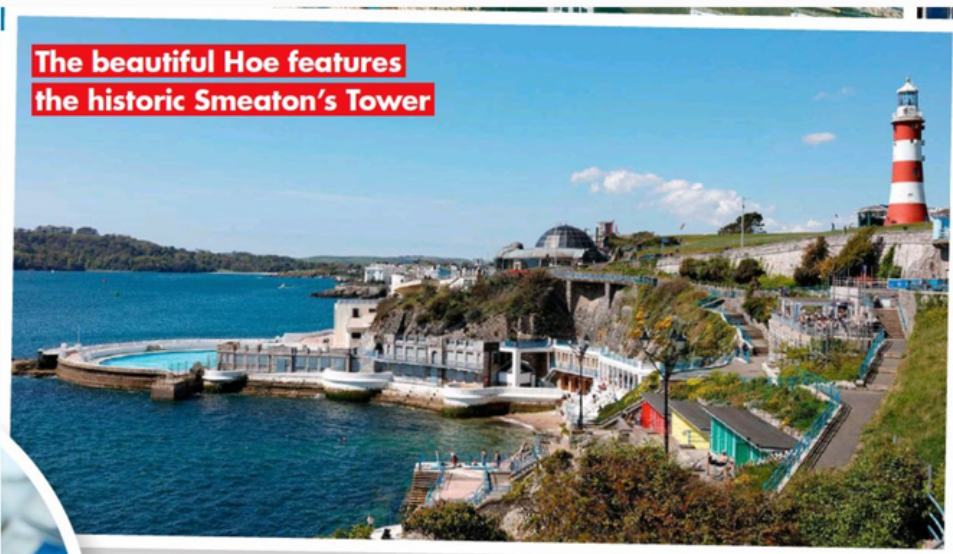
front and shines a light on Plymouth's natural beauty, from the winking wildflower meadows beneath the walls of the 17th-century Royal Citadel, to the views out to the fortress on Drake's Island. Here, the rare lesser horseshoe bats hibernate in winter.

Seafaring history

Plymouth's fortunes were built on its seagoing adventures. It was from here that the pilgrims sailed on the merchant ship

Mayflower on the epic journey to the New World in 1620.

A lot of Plymouth was badly bombed in World War Two, but much of the Barbican area survived surprisingly well. It's a warren of narrow, cobbled



The beautiful Hoe features the historic Smeaton's Tower

streets lined with Elizabethan warehouses, shops, galleries, eateries and the ancient quays.

For a break from the bustle, tour the famous Plymouth Gin distillery or enjoy the peace of the

New Street's herb-filled Elizabethan Gardens.



For more on the city's history, take a guided walking tour or download the free Plymouth Trails app. Go to visitplymouth.co.uk for details.

Culture calls

While its past is fascinating, Plymouth is busy looking to the future. Thanks to a massive regeneration project, it has reinvented itself as Britain's 'Ocean City', with an emphasis

On culture and food. One of the most exciting developments is The Box (theboxplymouth.com), which houses a museum, several galleries and exhibition spaces, plus a new town square.

This year's exhibition includes a Family Fun Marine Park experience, to celebrate Plymouth's status as a national marine park, and the British Art Show 9 (October-December), which will showcase recent work from some of the country's top artists.

Food stars

From high-end dining to street eats, Plymouth has a buzzing food scene. Fresh seafood is the star, and both The Boathouse and The Hook



New Street dates back to Tudor times

& Line cafe-bars have their own fishing boats, and offer catches of the day, from seabass to scallops and more. Or enjoy food with a view at Mitch Tonks' Rockfish overlooking Sutton Harbour.

For a special treat, try Scott Paton's signature four-course

seasonal menu at his new Àclèaf Restaurant at Boringdon Hall (boringdonhall.co.uk). Or for something less formal, Supha's Street Food Emporium (suphas.co.uk), right on the waterfront, offers delectable Southeast Asian delights.

The annual Plymouth Seafood and Harbour Festival, on

17-18 September, provides all sorts of opportunities to sample the fruits of the sea. See visit-plymouth.co.uk for more.

Write a comment...

Page View Share Saved More

Upvote Downvote

This page is intentionally left blank

Britain's Ocean City brand perception research

Final report

3 October 2022

Contents

Introduction	Page 3
What we learned	Page 3
What we do next	Page 5
Conclusion	Page 9
Appendix 1	Page 10
Appendix 2	Page 12
Appendix 3	Page 14
Appendix 4	Page 18

Introduction

The aim of the project was to understand current perceptions of the Britain's Ocean City (BOC) brand. To do this we interviewed 33 stakeholders, ran four focus groups and distributed two email surveys. The information gathered through this activity is summarised in this report.

This report is divided into two sections:

- What we learned
- What to do next

Additional information has been included in the appendices.

What we learned

Our research identified three significant themes, which are influencing perceptions of the BOC brand.

- Visibility
- Experience
- Narrative

Visibility

Where and how people see the brand is influencing their perception. These are the three key elements influencing the visibility of the BOC brand:

- Hierarchy
- Ownership
- Brand identity

Key points to note

• *Hierarchy*

The brands below are considered most prominent in the city. To be more visible, the BOC brand will need to compete with them.



- **Ownership**

The BOC brand is considered an asset of Plymouth City Council, so the majority of organisations outside the Council don't consider using it. As one stakeholder commented, "We wouldn't use somebody else's brand."

For some organisations, an association with the BOC brand would undermine perceptions of their own brand, so they wouldn't use it.

Experience

The experience people have of the brand is influencing their perception. These are the three key elements influencing the experience of the BOC brand.

- Impact
- Meaning
- Physical experience

Key points to note

- **Impact**

To be considered "relevant", the BOC brand needs to make an impact. What this impact needs to be, will vary for each audience category identified in the project brief: residents, businesses, visitors, students.

To create a "positive experience" of the BOC brand, you need to understand what that impact is.

- **Meaning**

The BOC brand lacks meaning. Stakeholders questioned what it stood for. One described it as "just a strapline". Where it has meaning is in the tourism sector. One stakeholder commented, "When you stand on the Hoe, it all makes sense".

But this statement raises the question: Does the BOC brand still make sense if you're living in a lower income area of the city, with no access to the waterfront?

Narrative

People are unsure what the message is behind the brand. These are the three key elements influencing the narrative of the BOC brand.

- The past
- The present
- The future

Key points to note

- **The past**

Stakeholders felt that there are many cities in the UK that have a maritime heritage. What makes Plymouth THE ocean city? This was a view reflected by the resident and student focus groups.

- **The present**

For the BOC brand to be relevant, it needs to articulate the opportunities it can create for each audience category.

- **The future**

Plymouth is home to world class research, engineering and innovation. But this is more often recognised outside the city, than by the people who live in it. Raising awareness of the city's world class credentials will change perceptions. Residents and students didn't feel Plymouth competes on a "global scale".

When developing the narrative, there are three perspectives that need to be considered:

City = How does the city see itself?

This is built around civic pride and the opportunities available to residents, students and businesses based in the city.

National = How does the UK see the city?

This is built around giving the city credibility on a national scale: "Why is Plymouth Britain's Ocean City? Because..."

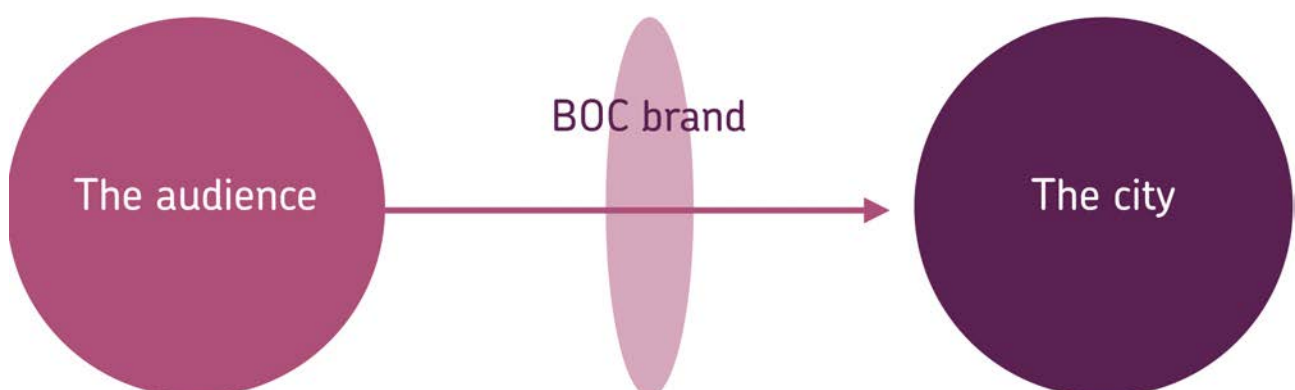
International = How does the world see the city?

Plymouth has world-class assets. There is recognition that, in some aspects, it could be compared to California or Sydney, but currently it isn't.

What we do next

With the brand research complete, it is possible to begin to develop the brand strategy. The role of the brand strategy is to influence what people think about Plymouth.

To do this, the BOC brand needs to act as a "lens", influencing how people see the city - and the opportunities it offers them. The brand strategy will allow the BOC brand to bring a clear, consistent narrative to the city.



Brand strategy: the process

The development of the brand strategy is divided into three stages:

- Engage
- Create
- Deliver

Engage

There are two objectives for the engagement activity: Deliver feedback and gather insight. To do this we will run a series of workshops, with organisations that participated in the research.

We will provide feedback on the research, explaining what people think of the BOC brand. Gathering insight will help us to understand what the BOC brand needs to deliver to organisations, in order to be considered relevant.

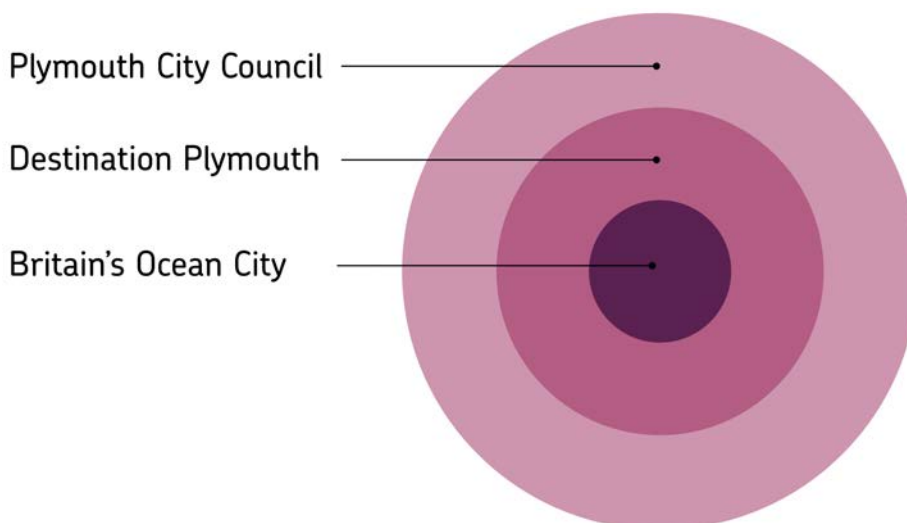
Create

The aim at this stage is to tackle the issues identified in the research: **visibility, experience, narrative.**

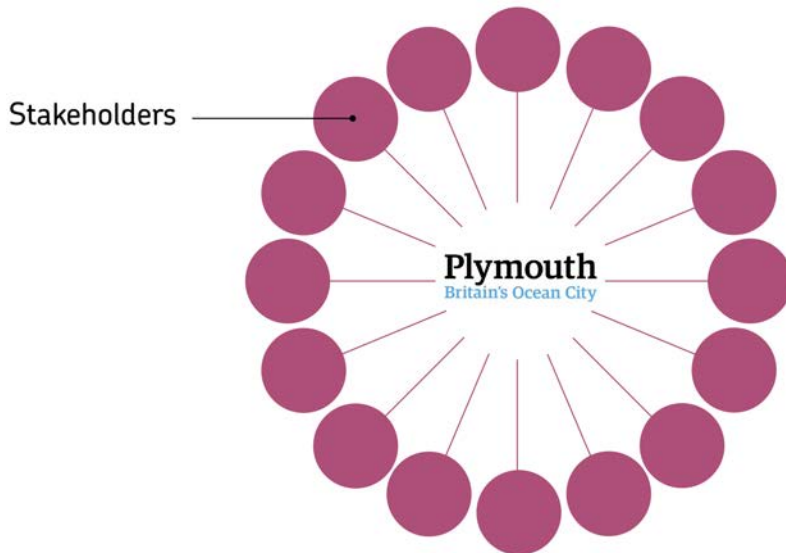
• Visibility

When considering how to improve visibility of the BOC brand, there are two issues to address: ownership and hierarchy. I believe there are three steps to take, in order to achieve this.

1. Make Destination Plymouth board membership more diverse, to represent wider group of stakeholders.
2. Reduce the connection to PCC, to present a more “independent” image. The BOC brand is contained within two existing brands: Destination Plymouth and Plymouth City Council (see below). This dictates the hierarchy and influences perceptions of ownership.



3. Involve stakeholders in the creation process, giving them a direct connection, to nurture a sense of ownership for them.



Visibility: An example

The “I heart NY” logo is an interesting example of brand ownership. It is a registered trade mark, owned by the New York Department of Economic Development (NYDED), who license its use. It is a well-recognised and well-used brand, and each year NYDED prosecute hundreds of cases of unlicensed usage.

By contrast, the BOC brand is not a registered trade mark, and available for any organisation to use. However, usage and recognition, is low. One option to address this could be to register the BOC logo under a Creative Commons license. A Creative Commons license is a public copyright license that enables the free distribution and use of an otherwise copyrighted “work”. This license will make a statement about ownership of the BOC brand, and has the potential to act as an invitation to organisations to use it.

• Experience

To improve the experience of the BOC brand, there are two issues to address: the role of the BOC brand and the impact of the BOC brand.

Role:

It's important to define why the BOC brand exists. Is it just to promote tourism in the city? Or is it to promote everything the city offers - something that will impact residents, businesses, students and visitors?

Impact:

In order to increase use the BOC brand, organisations have to believe it will help them to achieve something they can't do on their own. Or, it will help them to achieve something more efficiently or effectively, than they can on their own. It needs to make an impact.

Therefore it is necessary to understand what will make BOC brand relevant to each audience. Our engagement activity will identify the answer.

Experience: An example

The Birmingham 2022 Commonwealth Games are an example of how to deliver an impact. From the outset, key areas were identified, outside it's primary area of focus (sport), where Birmingham 2022 wanted to make a long-term impact and leave a legacy. These were:

- *Community cohesion, inclusion & pride*
- *Jobs & skills*
- *Business & tourism programme*
- *Youth programme*
- *Venues & infrastructure*
- *Creative & cultural participation*
- *Physical activity & wellbeing*
- *Volunteering*
- *Social value*
- *Sustainability*

The breadth of this programme ensured that Birmingham 2022 will make a positive difference across the community, for years after the event.

• **Narrative**

To improve the narrative of the brand, it needs to talk about the past, the present and the future:

- What the city has done
- What the city is doing
- What the city will do

But the narrative needs a theme to bring consistency e.g. "World class". Then the narrative becomes:

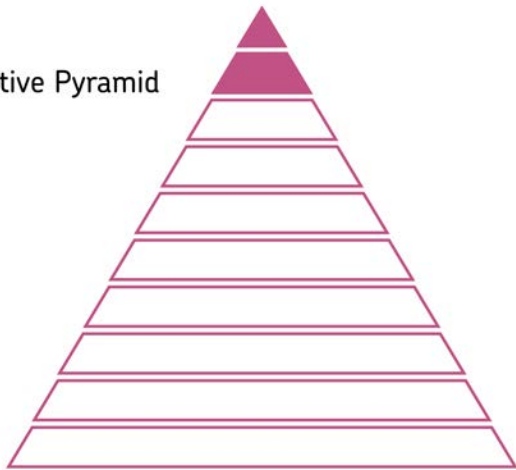
- What the city **has done** that was **world class**
- What the city **is doing** that is **world class**
- What the city **could do** that will be **world class**.

To develop that narrative, we suggest actively working with a select group of stakeholders - a Brand Development Group - to co-create proposals for the narrative. This approach to developing the narrative will:

- *Give it authenticity*
- *Demonstrate "ownership"*
- *Create something that is practical for stakeholders*
- *Create BOC brand "community" - invested in its success*

To meet the needs of the BOC brand, we would recommend creating a “narrative pyramid”. This would have multiple layers of messages, becoming more detailed and complex, to meet the differing needs of a wide range of stakeholders and communication channels. The initial focus, at this stage, would be the development of high-level messages.

Narrative Pyramid



Narrative: An example

The “Glasgow’s Miles Better” is a good example of creating a successful narrative around a city. The narrative changed perceptions of Glasgow, both internally and externally, in a relatively short period of time.

1983: Launched

1988: International Garden Festival

1990: European City of Culture

“The legacy was a permanent change in attitude towards Glasgow, exposing the reality rather than the rather distorted image people had.”

Dr Michael Kelly, Lord Provost of Glasgow

Conclusion

Although the feedback gathered through this exercise didn’t contain any surprises, it has provided valuable insight into the themes that shape these perceptions. As a result, there is the opportunity to develop a robust brand strategy for the BOC brand, giving it the strength and clarity it needs to change perceptions of Plymouth and the opportunities the city offers.

Appendix 1

Summary of student focus groups

- Overall, they view Plymouth and its environment very positively and intend to stay and work there in the future if they can.
- “A city and the seaside – it’s a great combination”
- “It’s got a good balance between outdoor space and city centre living”
- The waterfront and the immediate environment – Hoe / Barbican were particularly important to them and were visited frequently.
- History and culture don’t have much cut through and are generally not top of mind / important to them
- Claim to be “Britain’s” ocean city lacked credibility – since it wasn’t unique – “What about Southampton, Portsmouth or Belfast?” and as such wasn’t viewed as a strong call to action.
- Don’t feel Plymouth competes on “Global scale” - “National” more realistic.
- They also associated “rich past” (Positioning) with previously dark episodes of the cities past (Slavery / colonialisation / Nazi sympathiser). They recognised social attitudes needed to change, so felt the positioning should be more forward looking.
- Uni group perceive there were limited opportunities for graduates in the city who were looking for their first position / job.
- Many University students had considered other locations, usually based on the grades they achieved, but after visiting Plymouth they particularly liked its location by the sea, and this set it apart from other locations they had considered and clearly engaged them the most.
- Value the fact that Plymouth was not “too busy” and by contrast they didn’t want “quite and boring” – but continued to feel that Plymouth provided a good balance of a good environment and things to do.
- Their decision to stay or go would be heavily influenced by the job opportunities.
- Felt that some areas outside the centre of the city were badly neglected and potentially damaged the perception of Plymouth.
- The only negative issues related to Plymouth geography and the time taken to travel to other places in the UK.
- Plymouth has polar opposites – with the beauty of the harbour and green spaces at one end and the markets at Mutley at the other. “Concrete” city centre’s ageing retail environment.
- Uni group very interested in the cities green credentials and felt it could be doing more to recycle (viewed as poor compared to other cities), protect the environment and use more green energy.

Appendix 2

Summary of resident focus groups

- The location by the sea was the key motivator for the majority of residents to live in Plymouth.
- Family ties were important and had kept many close to / or returning to their original communities in the city
- They all intend to stay and believe there are opportunities for them / their children.
- The water front (The Hoe - visited frequently) green spaces (Central Park) and access to the countryside were particularly liked.
- They value and have a pride in the history of Plymouth – but its too distant / not a strong enough link (particularly with younger residents) to make it part of them “belonging to the city” – it has limited relevance to them as Plymothians now. (Less pride from those "new" to the city)
- There was good awareness of the Mayflower (Pilgrim fathers), Drake and Plymouth’s naval history, as well as the current size and importance of the Naval Dockyard.
- They are proud to be part of the city – but recognised some of this was what they’d know and remembered when growing up, rather than the city now, with many parts being run down and dirty, and little regeneration of the city centre.
- They also valued the friendly community spirt - this sentiment was also mirrored by students, but the older generation felt it had declined in some areas of the city.
- The waterfront was also an area which they visited regularly (not just for tourists) often everyday / every other day (Stonehouse group)
- The majority were aware of the logo, but only on road signs.
- They felt the claim to be “Britain’s” ocean city lacked credibility – since it wasn't unique.
- Don't feel Plymouth competes on "Global scale" - "National" more realistic.

Appendix 3

Summary of email survey of businesses

Email survey of businesses

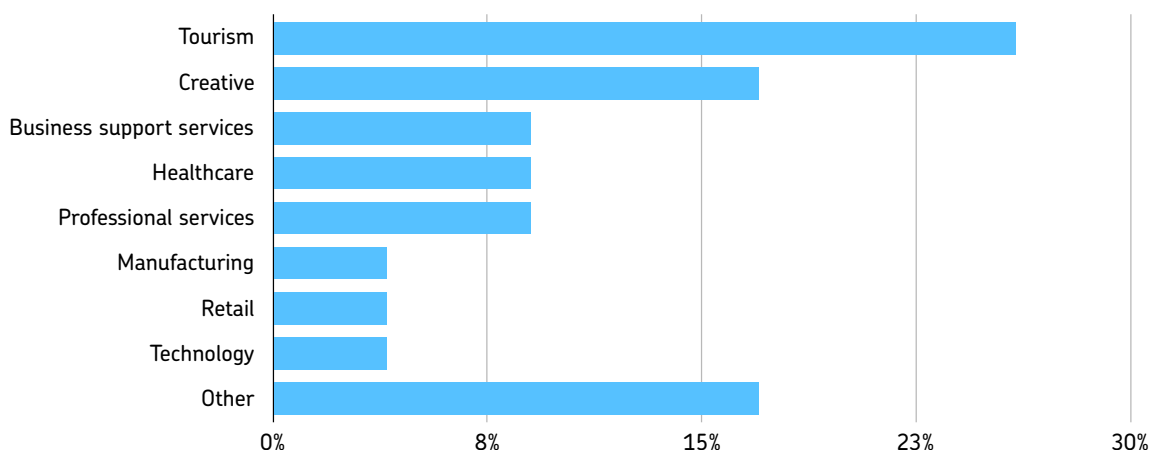
The response rate was low (23 responses), so these results need to be considered in that context. (This response rate reflects the well-recognised challenge of getting engagement from businesses with email surveys. It may also reflect the attitude of the wider Plymouth business community to the Britain's Ocean City brand.)

However, although the group was small, it represented a range of sectors and company sizes.

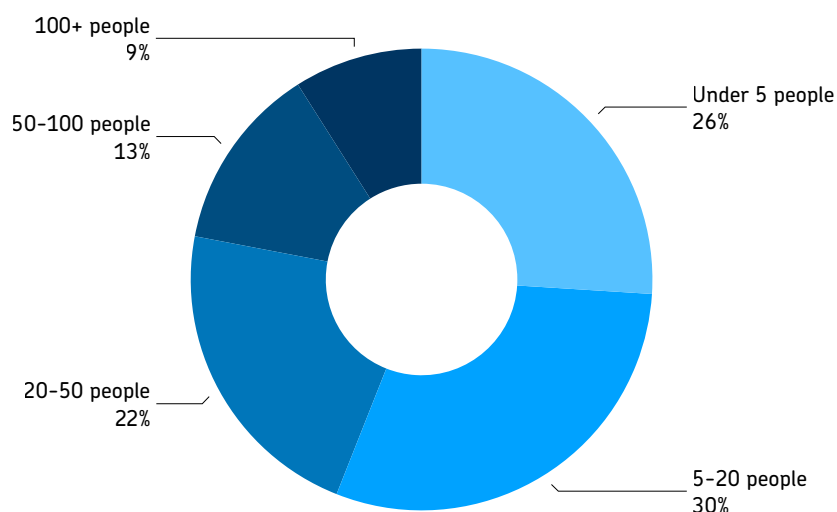
The most significant finding was that, despite high recognition of the BOC brand (100%), only 11% of the businesses used some element of it. This reflects the feedback that was gathered from the telephone interviews with stakeholders.

These are the questions that were asked, and their responses:

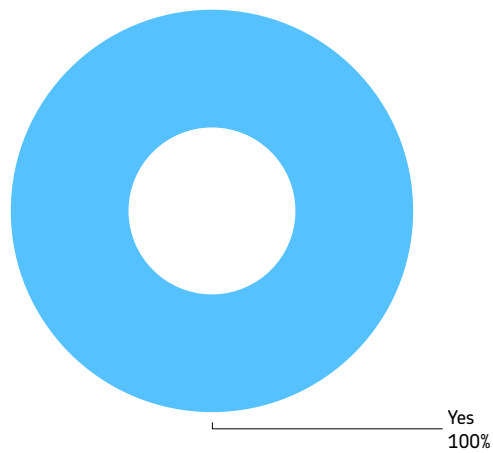
1. Which sector do you operate in?



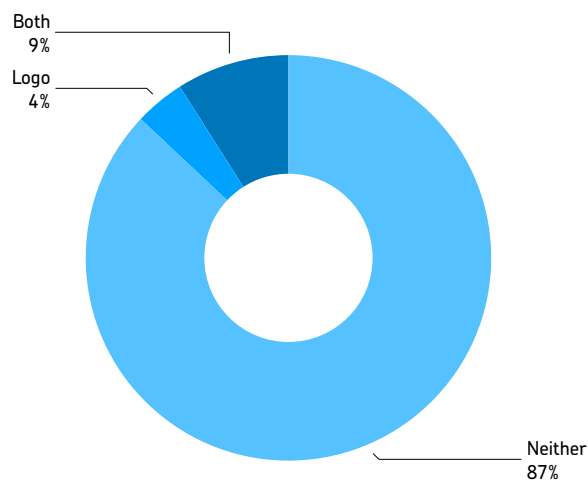
2. How big is your team?



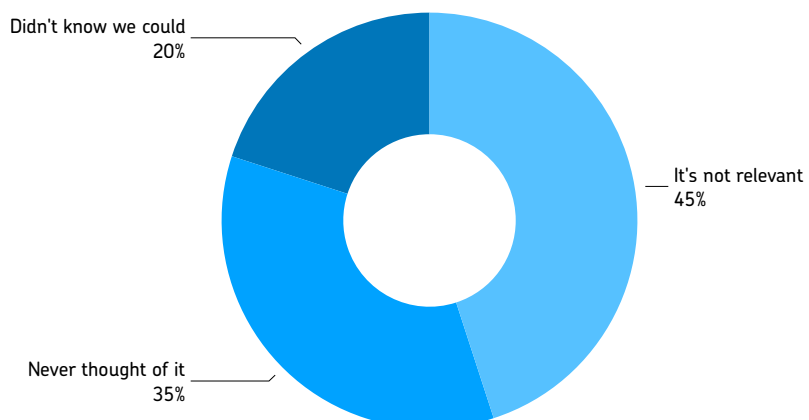
3. Are you aware of the Plymouth: Britain's Ocean City brand?



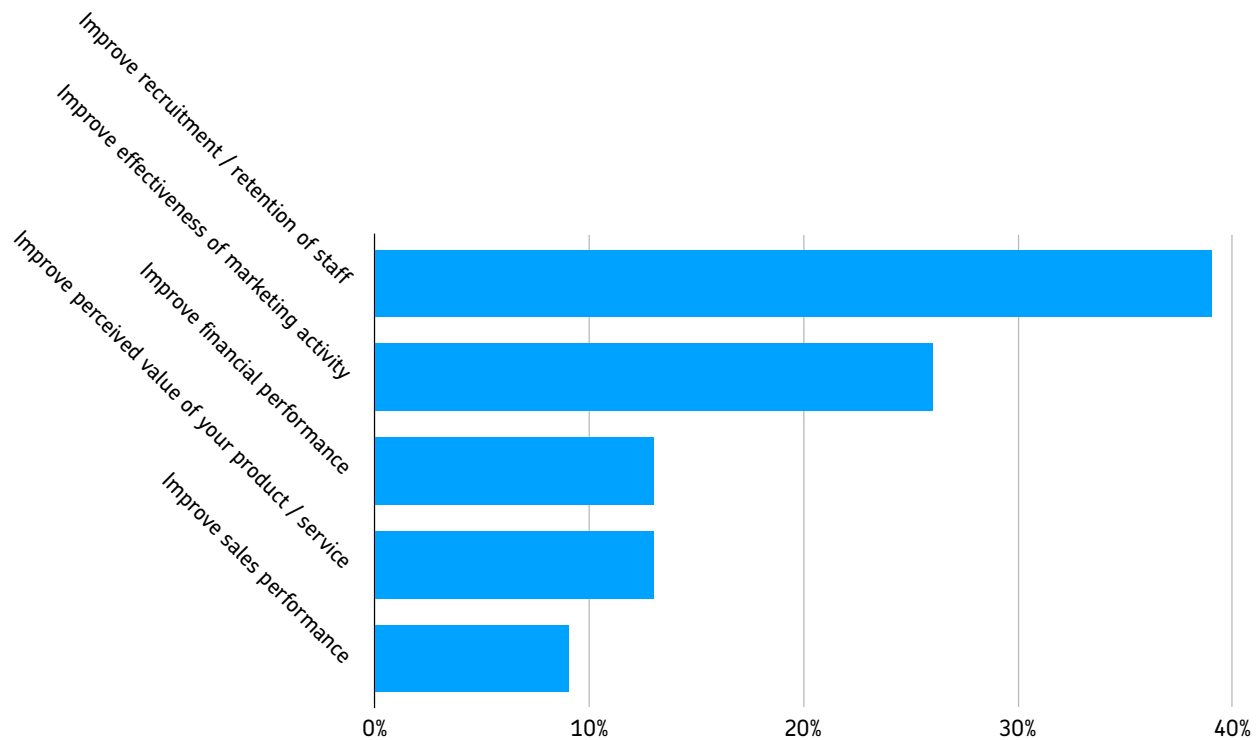
4. Do you use the logo or statement on your marketing material / website?



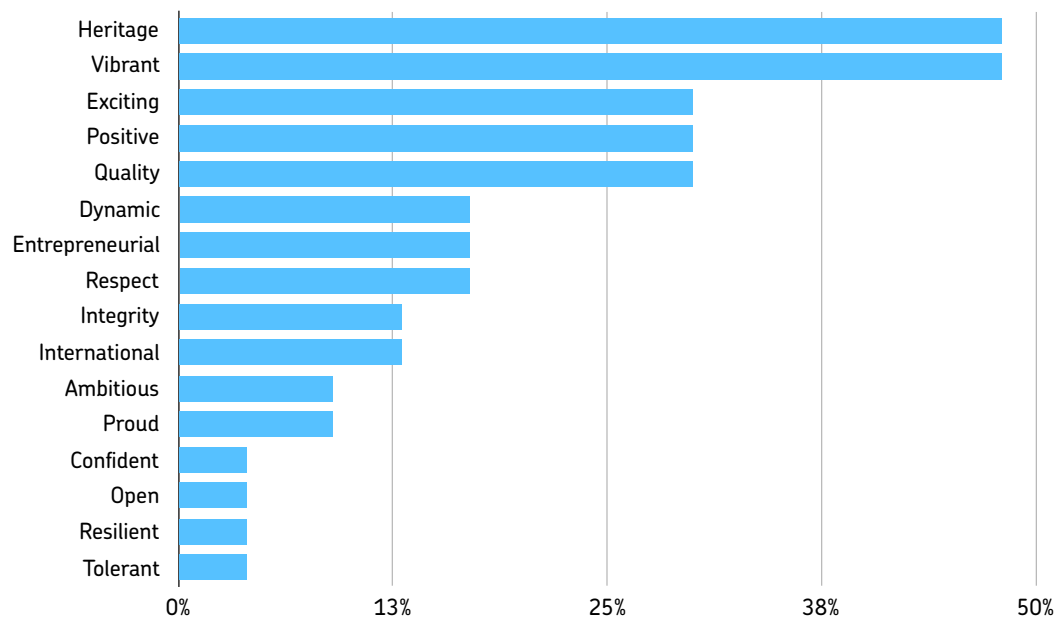
5. If you don't use it, what's your reason?



6. If the Plymouth: Britain's Ocean City brand could bring one benefit to your business, which of the following would be most valuable?



7. Which of the following words would you like customers / clients to associate with Plymouth?



Appendix 4

Summary of email survey of visitors

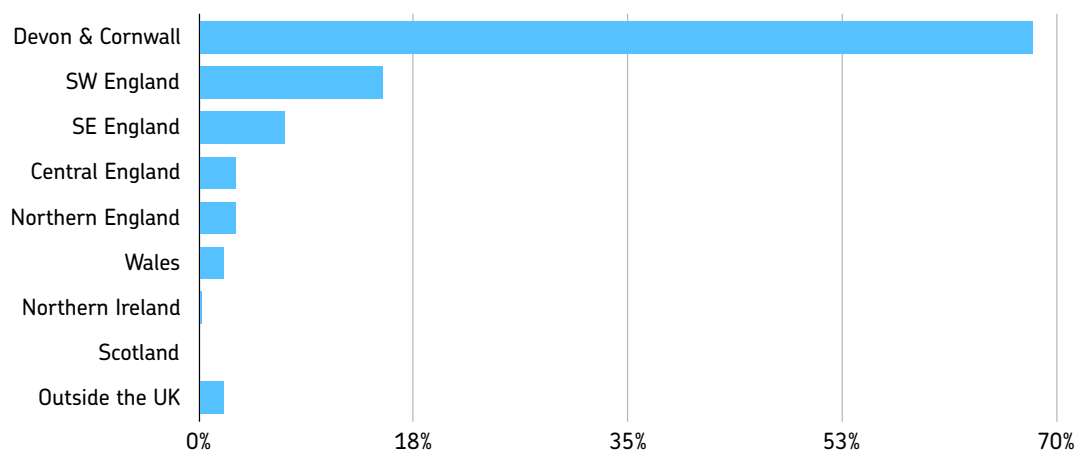
Email survey of visitors

The majority of the respondents were local (Devon & Cornwall), and frequent visitors (50+ visits). Therefore the information gathered is, perhaps, not surprising. However, it does reinforce the more anecdotal feedback we had from the telephone interviews: within the tourism / visitor sector the BOC brand is well recognised.

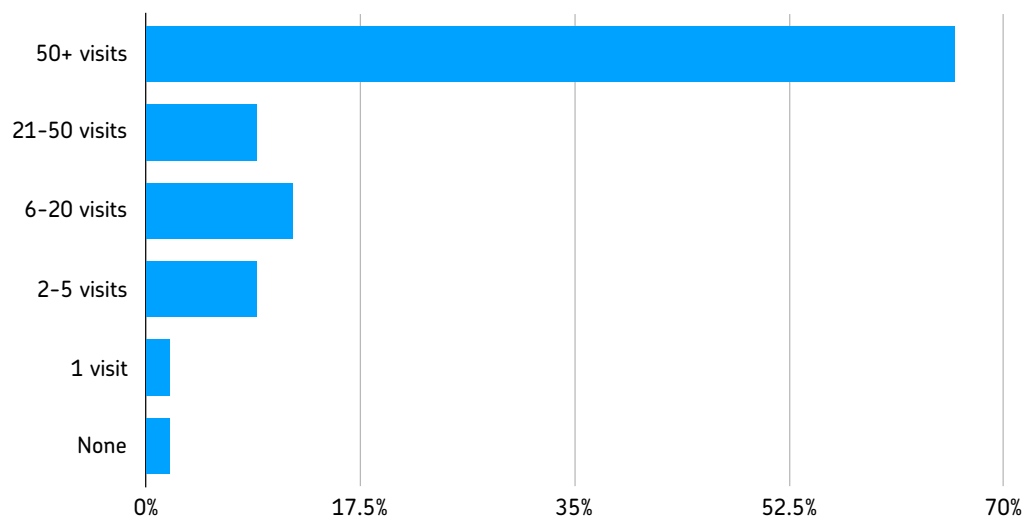
It is interesting to note that, the majority of visitors to the city do visit the waterfront and that “heritage” is the word most frequently used to describe the experience of visiting Plymouth.

These are the questions that were asked, and their responses:

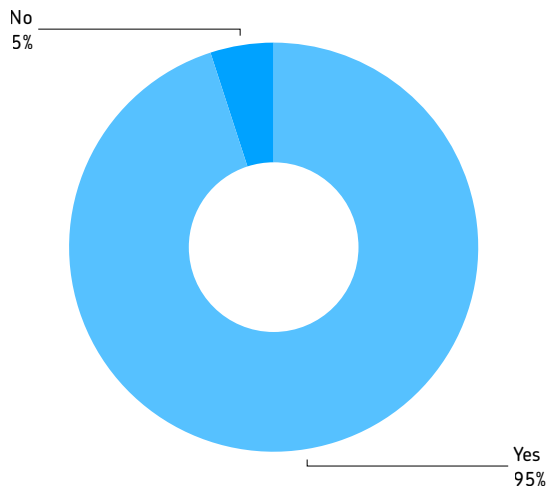
1. Where do you live?



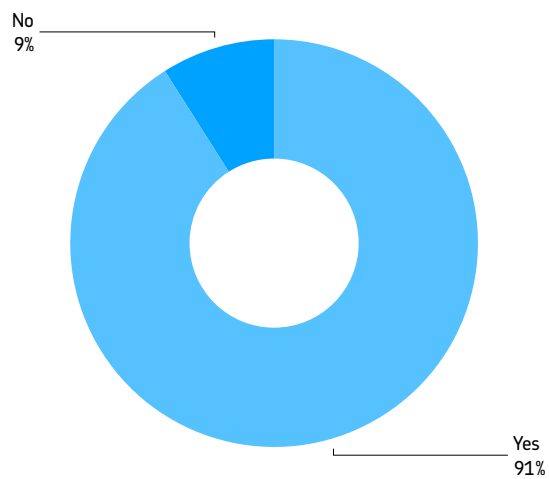
2. How many times have you visited Plymouth?



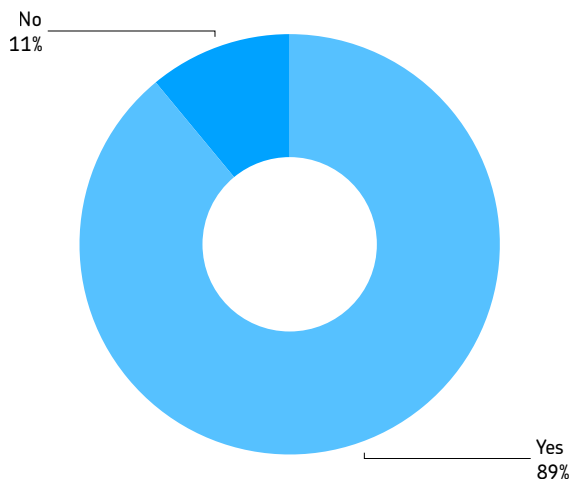
3. Did you visit the waterfront or see the sea?



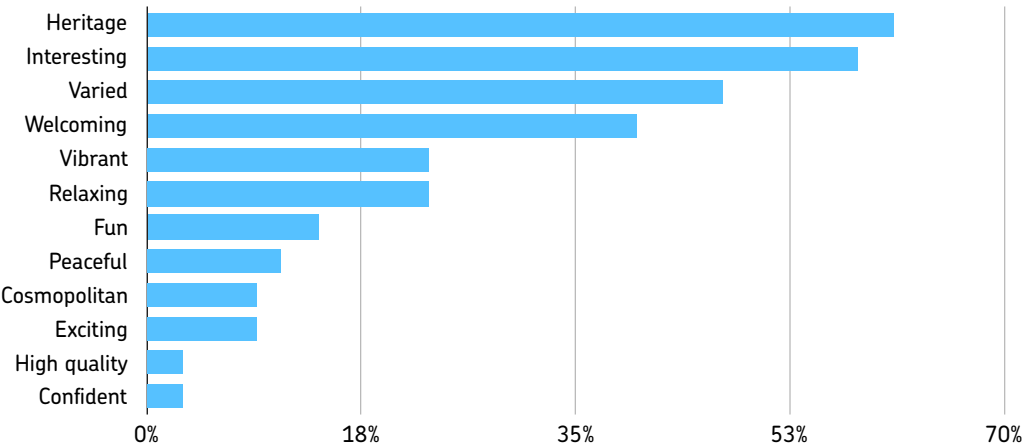
4. Do you recognise the BOC logo?



5. Are you familiar with the phrase "Britain's Ocean City"?



6. Which of the following words describe your experience of visiting Plymouth?



This page is intentionally left blank



Plymouth Visitor Plan 2020 to 2030

Destination management and business plan

Plymouth
Britain's Ocean City

Plymouth Visitor Plan 2020 to 2030



Cllr. Tudor Evans OBE

Leader of Plymouth City Council,
Director HOSWLEP

I have been a passionate advocate of the tourism, hospitality and retail sector my whole career and I am thrilled by what has been achieved working with Destination Plymouth over the past ten years. We have grown the visitor economy beyond recognition into one of the top destinations within the South West region.

Britain's Ocean City has one of the finest heritage pedigrees, unrivalled natural assets and a vibrant, thriving culture, which distinguishes us from any other city in the region. Our top priorities have been to restore, re-imagine and promote these hidden treasures regionally, nationally and internationally for the benefit of our businesses and local community.

Over the last 10 years, the City Council has given significant support towards developing Plymouth as a leading visitor destination. A personal highlight being investment of £12m in 'The Box', which opened in September 2020. 'The Box' is the most significant cultural

initiative in the UK in 2020. The galleries, collections and archives will bring the world to Plymouth and Plymouth to the world. The project has transformed the original City Museum and Art Gallery and extended to combine the Edwardian building with the former City Library and St Luke's church. The Box also features a striking elevated 'archive in the sky' with research and learning facilities, along with a major new public square for gigs, performance, theatre and events. A truly transformational project 'The Box' has become a 'must see' destination for not just Plymouth but the entire South West region.

We have also invested £5 million on capital projects for the international Mayflower 400 commemorations year commencing in 2020. This includes the restoration of the Elizabethan House (due to open in 2021), a city wide series of Heritage Trails, refurbishment of Mayflower Steps and associated public realm works at Southside Street, Prysten House and West Pier.

These investments have helped enable us to attract £141m in further investment in some fantastic schemes to enhance our city such as The Barcode, The Box and Derry's redevelopment which includes a new Premier Inn hotel to support much needed growth in our accommodation sector.

Over the next 5 years the City Council plans to further invest in key projects which will see the re-development of the rail station into Brunel Plaza and the Civic Centre re-imagined into an innovative city

centre conference and education campus as well as further hotel and accommodation developments within the City.

Working closely with our partners in Destination Plymouth, we have developed an exciting vision and ambition for the next ten years up to 2030. This includes Plymouth becoming a globally significant National Marine Park and one of the first carbon neutral destinations in the country. Plymouth Sound is one of the world's most important and visually stunning natural harbours. It has multiple designations for protected habitats and supports over 1000 species of fish and other marine animal life. It is home to the largest naval base in Western Europe, commercial ports, a substantial national fishing fleet, international fish market, commercial diver training, a global hub for marine leisure industries and an internationally important marine research cluster. Nowhere could be more deserving of special recognition at a local or national level. I am incredibly proud to be part of this vision and to help enable this city to continue to grow as the premier destination within the South West and home to the UK's first national marine park.

Contents

1.	Vision	4-5
2.	Themes Our Blue-Green City Our Brilliant Cultural and Heritage Premier Destination	6-11
3.	The Business Plan	12-17
4.	Star Projects 2020 to 2030	18-23
5.	Enabling Priorities Partnerships People Ocean City Infrastructure Our Distinctive Brand	24-53
6.	Destination Plymouth and Partners	54-55
7.	The Way We Work	56-57
8.	Financial	58-59
9.	Risk Assessments	60-62
10.	Key Performance Indicators	64-67



Adrian Vinken OBE

Chairman of Destination Plymouth Ltd.,
Mayflower 400 and Chief Executive of
Theatre Royal Plymouth

Destination Plymouth was formally incorporated in 2010 and the following year launched the city's first strategic Visitor Plan. Now in our 10th anniversary year we are pleased to share our vision for the next period of growth for Plymouth's tourism economy in the new Visitor Plan for 2030.

This plan was consulted upon and formally adopted prior to March 2020 and the COVID19 global pandemic. Since then the whole world has changed and, in the short term, we will need to adapt to this new landscape and explore the opportunities that it affords. Nevertheless, our vision and long-term trajectory remain unchanged and, although the visitor economy has been particularly hard hit, we remain confident that because of the solid groundwork undertaken to date, the sector will bounce back in the long term more successful than ever.

The growth of the visitor economy in Plymouth has been a demonstrable success with annual visitor numbers and spending both exceeding their 10-year growth targets of 20% and 25% respectively whilst supporting nearly 8000 jobs in the city.

Mayflower 400 has left us a tremendous legacy of major capital interventions including our world class new cultural attraction The Box, restorations to the Mayflower Steps and Elizabethan House and a compelling series of well-interpreted heritage trails for locals and visitors to explore. The city now has a wealth of marketable and bookable tourism product that was sadly lacking in the past. Additionally, the anniversary has transformed national and international perceptions of Plymouth as a major destination through media coverage over the past four years valued in excess of £70 million and the accolade of being named a Condé Nast top ten global visitor destination in 2020 and 2021.

The new 2030 Plan involved a review of the work programme that led to the successful delivery of the original 2020 Visitor Plan. It also took account of current and likely future market opportunities and trends affecting destinations. Much of that good work delivered through the previous plan has been a consequence of the strong partnership that has developed between the private and public sectors in Plymouth.

Destination Plymouth has a clear role in facilitating and co-ordinating many of the

objectives and projects set out here. The organisation also is well placed to secure external funding to support projects as demonstrated by the > £2m secured over the last four years for destination marketing. Many of the emerging projects in the plan will, however, also require capital funding. It is essential, therefore, that the support and interest of a wide range of private and public investors must continue to be secured.

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

Despite the pandemic, Plymouth in 2020 saw the start of Mayflower 400 commemorations across the city, the announcement that the city will be the location of Britain's first National Marine Park and the opening of The Box, the UK's largest new cultural attraction of recent years.

Looking forward, there are exciting developments planned in our creative industries and cultural sectors alongside Plymouth's growing marine credentials such as Oceansgate, 'Smart Sound' and opportunities for more leisure access to the water. The city has the ambition to be carbon neutral by 2030 and to eliminate, as far as possible, single use plastics. Our overarching approach to the development and management of our destination needs to be sustainable for the long term if it is to support our communities, our businesses as well as the millions of visitors that will come

each year to enjoy 'Britain's Ocean City'.

This plan will build on these opportunities and ensure that we approach growing our visitor economy innovatively and creatively to meet our future targets.

1.0 Vision

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.

"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 25%."

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 document describes our focus and priorities for the next decade, designed to build on our progress so far and take advantage of the market opportunities.

It is a Visitor Plan for the city, for our community and everyone with an interest in the visitor economy needs to get behind it and work collaboratively together to make it happen.

Around 5.4 million visitors make the trip to the city every year spending **£337 million** locally and supporting the employment of just under 8,000 people in the visitor and hospitality sector.*

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 and heritage 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...'

*South West Tourism Research Cambridge model data 2019

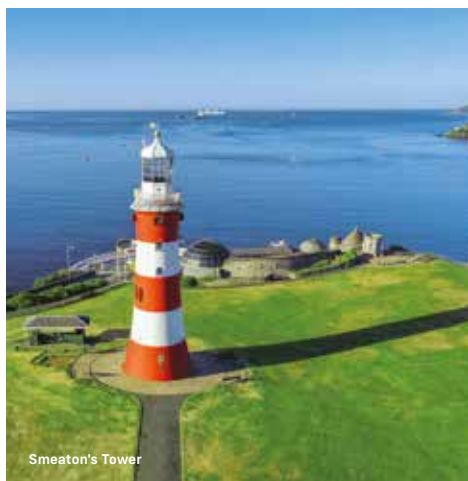
Objectives and Targets

Objectives

The visitor economy is a more inclusive concept than tourism, involving a wider range of activities and embracing the total visitor experience including the 'sense of place'. It depends upon public bodies and voluntary groups as well as private sector businesses. The visitor economy has an interdependent relationship with a range of sectors including transport, retailing, catering, culture, heritage and entertainment, amongst others.

The visitor economy is large and diverse including not only hotels and traditional tourist attractions but a range of local services and providers from transport to toilets, cafes to florists. Tourism and the wider visitor economy can – and does – contribute significantly to local prosperity and the quality of life in the city. Our objectives are grounded in wise growth of the value of the visitor economy and a clean, sustainable approach to destination development.

We will focus on high value markets to drive productivity in the sector that can translate into quality, year-round jobs for Plymouthians. 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 over the next 10 years.¹



Smeaton's Tower



Theatre Royal Plymouth

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

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 5.4 to 6.2 million** by 2030
- 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



Plymouth Sound

2.0 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. It offers visitors a unique opportunity 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 and 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 we achieve 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, and the UK's first 'ocean literate city' attracting visitors from across the globe to award-winning experiences that celebrate Plymouth's

important marine work from research to its fishing industry with an ocean friendly conservation ethos.'

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 with 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 where they are able to participate in activities supporting health, wellbeing and pride
- For everyone it is a call to protect and preserve our blue and green spaces for the long term enjoyment of us all

Plymouth's Blue-Green Products

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.



2.0 Themes: 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, it is now 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. This will be further enhanced by the opening of the UK's first 'immersive dome' at the Market Hall in Devonport in 2021. 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 Plymouth's cultural offer now and into the future.

Mayflower 400 and The Box represent significant cultural development and investment in the city, which create 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.

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 and will open the UK's first 'immersive dome' in Devonport in 2021.

For our visitors and communities this means:

- 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

Plymouth's Cultural and Heritage Products

Cultural and Heritage Product:

Plymouth is known as a heritage city; however, it is not currently widely known for its cultural product. With the opening of The Box in 2020 and using this as 'lead' product for the city will provide an opportunity to then 'add on' and package additional cultural offerings. Working with our partners across the city we will develop compelling, experience based opportunities in visual, performance, music and creative arts. Our cultural heritage includes food and drink that we produce locally; pasties, cream teas, fish and chips are all part of our food culture which we will celebrate. Plymouth has a long history of fishing and we will work with partners to develop a wider sustainable seafood offering across the city, which supports the National Marine Park concept.

"By 2030, Plymouth will be recognised internationally as a cultural destination capable of curating world-class experiences, which can be enjoyed by all."



2.0 Themes: Premier Destination

A successful visitor economy is reliant on delivering a range of 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**

Partnerships:

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 the ethos of equality 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 from 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 Plymouth City 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. We will work hard to be inclusive wherever is possible, encouraging everyone to work towards access for all, eliminate discrimination, advance equality of opportunity, foster good relations and promote understanding.

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 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. Including park and float, improved ferry and small boat services and an internationally renowned cruise and ferry terminal.

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.

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



Boringdon Hall Hotel & Spa

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. 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 'Britain's Ocean City' brand:

Our distinctive brand:

Critical to a successful visitor economy is distinctive targeted marketing, promotion, world class events 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' means 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. Our events and cultural activities should reflect our themes and our world-class ambitions while at the same time encouraging participation, engagement and pride within our community.

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 as well as mainstream media and journalists. We need to turn our local community and visitors into City Ambassadors by encouraging them to share their experiences online and connect globally.

3.0 The Business Plan

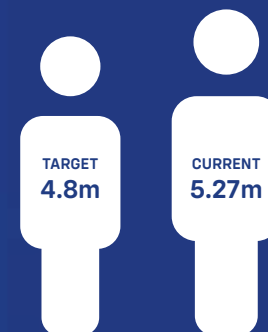
Tourism has been a great success story for Plymouth and it is anticipated that by 2020 we will have more than achieved our original 2011 goals which are set out below:

Grow visitor spend by **25%** by **2020**



Grow visitor numbers by **20%** by **2020**

Grow GVA by **£84.4** million by **2020**



✓ 2019 Current total £334m **↑22.3%**

✓ 2019 Current total 5.27m **↑28.8%**

✓ 2019 GVA has grown by £53.2 million

✓ Rating compared to competitors (Bristol, Exeter, Portsmouth, Truro and Southampton)



History & Heritage



Restaurants,
Pubs & bars



Night Time Offer



Retail & Shopping



Visitor Attractions



Arts & Culture

Source: Arkenford Visitor Research 2017

Grow employment
by **2,800** by **2020**



- ✓ Current total 7,985 **↑10%**

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



- ✓ 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 2021

3.0 The Business Plan

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

We will focus on a sustainable long term approach to growing our visitor economy, targeting 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

Sustainable destination development is a key aim of this Visitor Plan. 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. At the same time we will implement a low carbon approach to everything we do to reduce the carbon footprint of the visitor sector within the city.

Destination Management

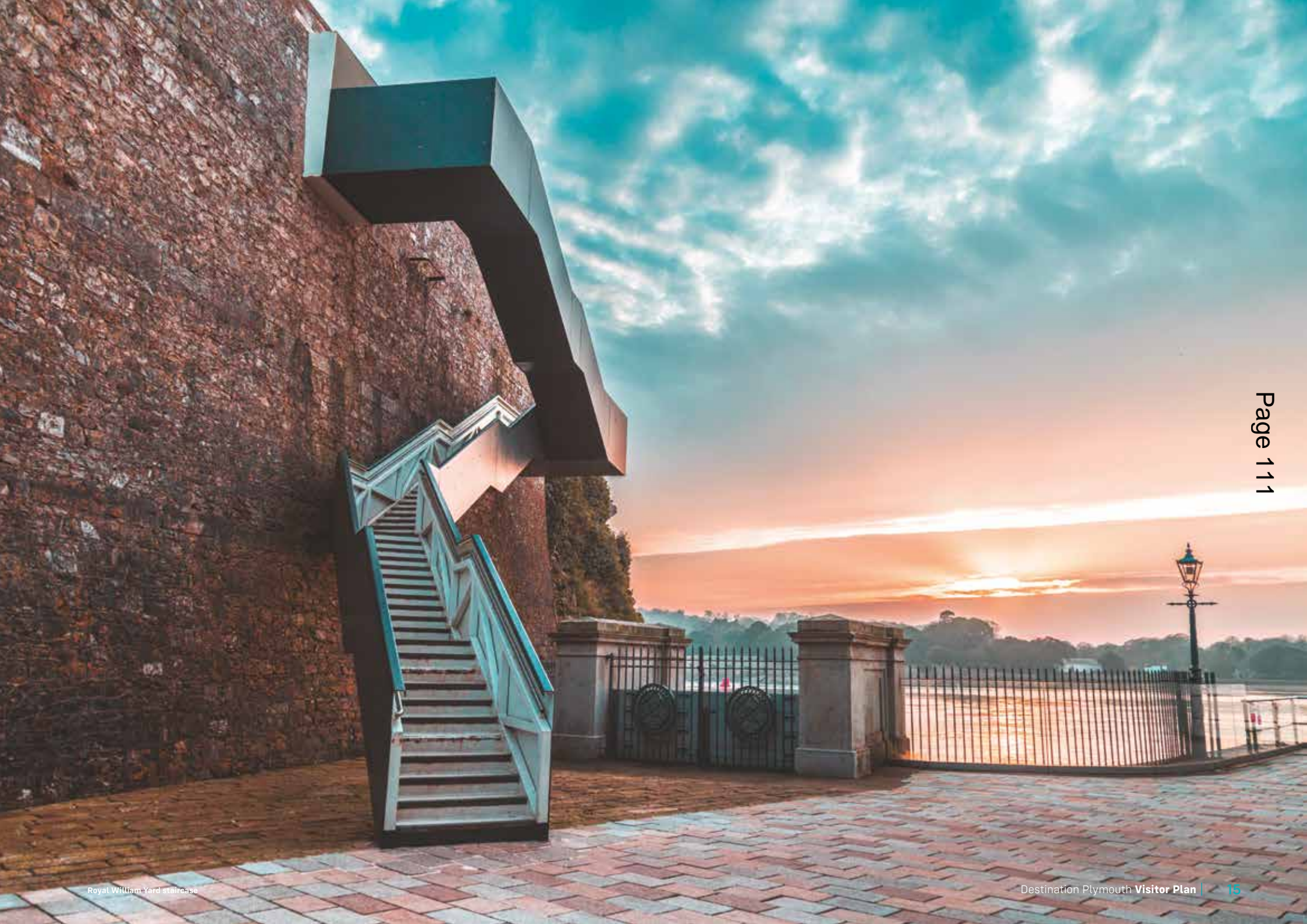
The visitor experience has always been fundamental to the success of any destination and in an increasingly digital world where information is shared instantly quality has never

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 be best in class for our digital and creative approach in everything we do and renowned as the number one 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 it 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, Canada, 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.



Challenges and Opportunities

A number of issues and opportunities have been identified as part of the process of developing our Visitor Plan. These are broken into roughly 13 different categories, which are as follows:

CHALLENGES

Funding

- Diminishing public funding threatens continued capital infrastructure and revenue programming investment
- Private sector funding is still difficult to secure
- Further work to integrate Visitor Economy into other grant funding bids is required e.g. Future High Streets, Transforming Cities fund, NLHF Horizons fund

Governance

- The Destination Plymouth Board will need a longer term strategic horizon and more diversity
- Private sector support needed to unlock the potential of the city to grow market share

Partnerships

- Greater engagement of a wide range of city and private sector stakeholders is required to support growth/share resources
- Waterfront BID due for renewal in 2022
- Plymouth Culture re-structuring

Brand

- Low awareness of broader product offering, ease of access and reasons to travel here among key UK segments
- Brand coherence and visual identity for Plymouth as Britain's Ocean City needs strengthening
- Low awareness of Plymouth as a city for business investment
- Insufficient funding for strong place brand approach
- Specialist skills in marketing team need strengthening

Investment

Product gaps

- 5 star city centre hotel
- Backpacker /youth group accommodation
- Touring Camping and Caravan site close to Plymouth
- More quirky 'boutique' city centre townhouse and B&B accommodation
- More animated water spaces, access to water facilities
- More high end restaurant brands as well as quality independents
- Family orientated commercial leisure operations

Events and Cultural Programming

- Finding new ways of funding innovative events, including via Business Improvement Districts (BIDS), ACE and other
- The attraction of major world-class events requires significant funding
- Lack of European funding for events post 2020
- Events strategy for 2021 onwards still to be developed

Business Tourism

- The conference, meetings and exhibition marketplace is highly competitive with new facilities opening all the time – only sustained and substantial marketing and PR investment will guarantee success over the next five years

OPPORTUNITIES

Funding

- Development of Tourism Zone for Great South West region
- Tourism sector deal grant funding
- Continuation of 'Founder' funding model

Governance

- Visitor Economy continues to be a recognised growth sector by the city and is represented within the Local Economic strategy and Local Industrial Strategy
- The alignment of resources between key city partners could benefit the city's strategic aims further

Partnerships

- Renewal of City Centre BID will secure support and visitor activity for next 5 years
- Plymouth Culture is able to 'drive through' strong supporting cultural development for product and programming in the city

Brand

- Plymouth's brand is getting stronger and better known amongst some key visitor markets
- National Marine Park concept supports Britain's Ocean City brand
- Making more of organisations or partners that 'export' the Plymouth brand such as Plymouth Gin, Princess Yachts
- Continue to lever off Mayflower 400 into US market
- Brand 'evolution' to more experiential, thematic creative approach

Investment

- Interest in hotel and hospitality investment in the city remains buoyant due to strong evidence of weekend leisure business and improving midweek business
- Opportunities for at least 11 further hotels by 2030
- City has rich heritage assets capable of delivering authentic and distinctive experience to visitors linked to The Box /Devonport
- Potential for enhancing National Marine Aquarium as gateway to National Marine Park
- New attractions that keep Plymouth at the forefront of consumer, media and travel trade interest

Events and Cultural Programming

- Mayflower 400 planned events in 2021 as well as British Art Show
- Making more use of key city locations including the Hoe, the waterfront, Central Park etc
- Working closely with Emerging new Cultural Strategy organisations to develop 'programming' rather than events in key city spaces

Business Tourism

- The corporate business market is starting to grow again and can help fill off-peak leisure accommodation capacity
- Strong defence, marine, manufacturing, medical and creative industries sectors
- Emerging hybrid events market place
- Civic Centre re-development
- Emerging hybrid events market place

CHALLENGES

Leisure Tourism

- Domestic staying demand on peak still cannot be met by current hotel stock
- International leisure visits are still growing slowly and impacted by lack of 4 star accommodation
- Day visitors markets are growing very slowly
- Critical mass of visitor attractions in the city needs increasing
- Packaging and 'bookable' product still minimal
- Tourism highly competitive regionally

Skills and Employment

- Low productivity driven by seasonality and high staff churn
- Developing and retaining sufficient high quality talent in key skills areas e.g. cheffing and future sector leaders/managers
- Skills are improving within the sector but more people need to view the sector as a first choice career
- Maximise the use of apprentices as a means of supporting business growth
- Raising the profile of skills development with both employers and employees
- Risk of Brexit affecting resources and language skills

Digital

- Ensuring we have the specialist online marketing skills and understanding within our team to exploit online channels and conversion to business
- Alignment of partners' digital resources
- Developing better CRM
- Diversification of online channels
- Development of 'bookable' product slow
- Production of good content

Sustainability, Green Tourism and Accessibility

- Encourage the private sector to embrace these issues widely and see them as mainstream commercial opportunities rather than niche markets
- Working one to one with businesses is very labour and resource intensive
- Global movement towards zero plastic and carbon can affect inbound tourism and travel

Transport Connectivity

- Funding for transport and infrastructure schemes
- Connectivity with Exeter and Newquay Airport remains an issue
- Railway line at Dawlish major issue to regional connectivity
- Resources required to support visitor friendly services such as park and ride, water taxis and city centre connectivity
- Airport in Plymouth remains closed
- Zero carbon movement globally

Market Intelligence

- Benchmarking nationally is not always consistent and regional data is not readily available
- Finding effective ways of sharing intelligence across members/stakeholders
- More regular benchmarking against similar sized cities in the UK (e.g. Southampton, Bristol, etc.) and similar global waterfront cities (e.g. Brest, Sydney)
- Cambridge model always one year behind, need more recent visitor stats to affect change in the short term
- Perception studies need to be more frequent to provide consistent data

OPPORTUNITIES

Leisure Tourism

- The city's high quality and diverse product is well placed to attract a larger share of the UK and European short break market
- Potential to develop specific leisure markets e.g. culture and heritage markets, water sports, yachting, diving and outdoor can help fill empty midweek rooms
- Exploit increasing midweek leisure business driven by Online Travel Agents
- UK Travel Trade especially coach trips and overnights have untapped potential for the city
- Large student population
- Plymouth is a key location within Devon/Cornwall largest UK visitor destinations

Skills and Employment

- Opportunities abound for new business start-ups in the sector
- Various national and locally specific funding schemes available for employability and skills training
- Skills and employment action plan in place for the Visitor Economy
- Careers in the Visitor Economy are successfully promoted through initiatives such as 'Welcome to Plymouth'
- Strong partnership working across the University of Plymouth, City College Plymouth and key stakeholders to drive this agenda

Digital

- Advances in technology can provide opportunities for new business and income generation
- Continue to evolve website and support revenue generation e.g. bookable options
- Social media provides a low-cost, effective way of promoting the destination
- Opportunity for visitor focussed smart card linking transport and attractions
- Virtual and augmented reality developments for showcasing city

Sustainability, green tourism and accessibility

- Providing for a diverse population in terms of age, ability, gender and sexual orientation will open up opportunities for the city in certain target markets
- Addressing environmental concerns such as climate change and impacts on the host community supports our brand values and encourages environmental tourism

Transport Connectivity

- Potential for growth through Exeter and Newquay airports into closer European and US markets
- Great Western Railway franchise for SW mainline offer partnership working opportunities to promote city
- Dawlish improvements will help rail resilience and confidence longer term
- Brittany Ferries partnership working can grow visitor markets in from France/Spain
- Re-development of cruise and ferry terminal at Millbay/Commercial Wharf for cruise
- Transforming cities fund provide more integrated city transport service including cycling/water
- Rapid movement towards zero carbon and green tourism

Market Intelligence

- Up to date and consistent data will inform market share growth
- Improved intelligence through ONS/VisitEngland Tourism Intelligence Unit linked to national data
- South West research and data hub - opportunity to provide added value research services
- Consider 'T'Stats as destination source data

4.0 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

THEME: BLUE-GREEN CITY PROJECT NAME: OCEAN PLAYGROUND

SUMMARY OF PROJECT:

Our aim is to build on existing waterfront assets to provide year-round access to activities by, on, in and under the water. Specific projects include Mount Batten centre and Hoe foreshore.

TIMELINE: 3 to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambition 1:* 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:

- New and more waterfront experience 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

Our waterfront is the city's jewel in the crown and is famous internationally, however, over a period has become tired and does not provide sufficient recreational opportunities for visitors currently to maximise its potential. There is opportunity for locals and for visitors to be able to enjoy activities more easily in, on and under the water e.g. paddle boarding, sailing, diving, kayaking, open water swimming and then take their 'après-sea' activities close by the water. Ability to secure major on water events going forwards.

KEY LOCATIONS:

Key access areas to the water include: Mount Batten Centre, Hoe Waterfront, Millbay, Royal William Yard, Devonport and Tamar areas, Drake's Island

THEME: BLUE-GREEN CITY PROJECT NAME: STORIES OF THE OCEAN – PLYMOUTH SOUND NATIONAL MARINE PARK

SUMMARY OF PROJECT:

Integrating culture into city centre and waterfront developments, exploring opportunities to expand the use of digital technologies to animate the city and its heritage assets.

TIMELINE: 3 to 8 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambition 1:* Our National Marine Park will be recognised for amazing experiences by, on, in and under the ocean.

Plymouth is aiming to be the UK's first National Marine Park providing education, access and recreation for all visitors to the city to inspire them to help preserve the environment.

Objectives of this project include:

- 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
- Engage more and connect the sea and waterfront with visitors and the local community.

KEY LOCATIONS:

City wide but particularly linked to Plymouth Sound and waterfront, Hoe, Oceansgate and Devonport working with key partners including National Marine Aquarium, Plymouth Marine Laboratory, Mount Batten Centre

THEME: BLUE-GREEN CITY **PROJECT NAME:** NATIONAL MARINE PARK GATEWAY

SUMMARY OF PROJECT:

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.

TIMELINE: 3 to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambition*

1: 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:

- Improved visitor experience
- Develop visitor product
- Support positioning and brand promise for Britain's Ocean City
- Increase dwell time
- Encourage exploration of other parts of city
- Improve accessibility

KEY

LOCATIONS:

National Marine Aquarium,
Plymouth Fisheries,
Sutton Harbour

THEME: BRILLIANT CULTURE AND HERITAGE **PROJECT NAME:** 'THE BOX' EFFECT

SUMMARY OF PROJECT:

Build on the legacy potential of The Box. Work with creative talent and local communities creating reasons for new audiences to explore wider 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. Build 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).

TIMELINE: Up to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambition 3:*

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

- 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

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. 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.

KEY

LOCATIONS:

City wide but particularly focusing on the 'cultural quarter' of the city including The Box, Plymouth College of Art, University of Plymouth, KARST, Drake Circus The Barcode

PARTNERS:

Real Ideas Organisation, The Box, Plymouth College of Art, University of Plymouth, Plymouth Culture, KARST - Plus others



4.0 Star Projects 2020 to 2030

THEME: BRILLIANT CULTURE AND HERITAGE PROJECT NAME: APRÈS SEA – DEVELOPING PLYMOUTH’S NIGHT TIME ECONOMY

SUMMARY OF PROJECT:

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.

TIMELINE: Up to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambitions 6 and 7:* We will be known nationally as a UK top ten city break / We will be renowned as the number 1 must do destination in Devon and Cornwall.

Objectives of this project include:

- 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

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.

KEY

LOCATIONS:

City centre,
Barbican, Royal
William Yard

PARTNERS:

Theatre Royal,
Drake Circus,
BIDs, Great
Western
Railway,
Plymouth
Culture, Music
Venue Trust

THEME: BRILLIANT CULTURE AND HERITAGE PROJECT NAME: CELEBRATING OUR MARITIME AND NAVAL HERITAGE

SUMMARY OF PROJECT:

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.

TIMELINE: 5 to 10 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambitions 3 and 5:* 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.

The National Museum of the Royal Navy (NMRN) is in the process of acquiring the Naval Heritage Centre and its artefacts 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.

Objectives of this project include:

- 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

KEY

LOCATIONS:

Naval Heritage
Centre, HMS
Devonport,
Devonport
Guildhall,
Market Hall

PARTNERS:

National
Museum of the
Royal Navy,
HM Royal Navy,
Real Ideas
Organisation,
Plymouth
City Council -
Oceansgate

THEME: PREMIER DESTINATION **PROJECT NAME:** CITY CONFERENCE CAMPUS

SUMMARY OF PROJECT:

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 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.

TIMELINE: 0 to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambitions*

6 and 8: Plymouth will be known nationally as a UK top ten city break/ Plymouth to be known as the destination of choice for meetings, events and conferences in Devon and Cornwall.

This project will help support visitor plan objectives by providing:

- Increased capacity in accommodation sector
- Opportunity to market to conference and meetings sector and grow off peak/improve productivity
- Converting 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

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.

KEY

LOCATIONS:
City centre, Hoe, Millbay, Derriford

PARTNERS:

Urban Splash, University of Plymouth, Plymouth City Council



City Conference Campus

THEME: PREMIER DESTINATION **PROJECT NAME:** BRUNEL PLAZA (at Plymouth Station)

SUMMARY OF PROJECT:

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 and support our carbon neutral ambitions by encouraging visitors to travel by rail.

TIMELINE: 0 to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambition*

2 and 3: We will become one of the UK's first carbon neutral destinations by 2030 supporting our city vision. We will have ambitions with seamless connectivity to international arrival hubs and be known for our water transport services.

As a major gateway to the city the railway station and its facilities has long outlived its original life span and is tired and ineffective in terms of providing a contemporary welcome experience. Plymouth station is one of the busiest stations in Devon and Cornwall regularly receiving thousands of passengers annually. Improvements to the station will provide the following:

- Improved experience for passengers including parking, public transport and information provision
- Increased capacity at peak times
- Increased dwell time and spend
- Opportunities for Britain's Ocean City branding and improved visitor perception on arrival

KEY

LOCATIONS:
Plymouth Railway Station campus and Intercity House

PARTNERS:

University of Plymouth, Plymouth City Council, Great Western Railway, Network Rail



GWR Train

4.0 Star Projects 2020 to 2030

THEME: PREMIER DESTINATION **PROJECT NAME:** PLYMOUTH CRUISE AND FERRY PORT

SUMMARY OF PROJECT:

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. This project will also support our carbon neutral ambitions by encouraging visitors to travel by ferry/cruise rather than fly to the region. 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.

TIMELINE: 0 to 5 years

PROJECT RATIONALE/OBJECTIVES: *Links to Strategic Ambitions 2 and 3:* We will become one of the UK's first carbon neutral destinations by 2030 supporting our city vision/We will have transport infrastructure to match our ambitions with seamless connectivity to international arrival hubs and be known for our water transport services.

Objectives of this project include:

- Increased capacity for cruise ships
- Opportunity to grow the cruise market particularly for specialist embarkations/small vessels and superyachts sub 150m
- Increased day visitors 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
- Encourage use of ferries for international visitors
- Reduce carbon footprint by bringing visitors on ferry/cruise (less than flying)
- Opportunity to extend cycling/walking route across Millbay Port to link in with national coast path

KEY LOCATIONS:

Millbay port/
Trinity Pier

PARTNERS:

Plymouth
City Council,
Associated
British Ports,
Brittany Ferries



5.0 Enabling Priorities

A successful tourism destination is reliant on excellent delivery of a range of services and infrastructure and good destination management is at the heart of a thriving visitor economy.

Within our 'Premier Destination' theme, we have four key enabling priorities:

- 1. Partnership**
- 2. People**
- 3. Ocean City infrastructure**
- 4. Our Distinctive Brand**

5.0 Enabling Priorities

1. Partnership

KEY ACTIONS TO SUPPORT PARTNERSHIP ACTIVITY:

- Feeding into strategies at high level regionally/nationally
- Establishing and attending meetings and events/ lobbying for the sector on key issues at government/regional level
- Partnership working nationally/ regionally/locally
- Assembling funding and resources

Acting as a voice for the sector and the city and looking outwards to ensure that opportunities are grasped and Plymouth as a brand and leading city destination remains high on the agenda for strategic partners including:

Visit Britain/Visit England

Cruise Britain

Department of Culture, Media and Sport

Tourism Alliance and Tourism Council

UKInbound

Heart of the South West LEP

South West Tourism Alliance

Visit Devon/Visit Cornwall

Activities to support this include feeding into strategies at high level, attending meetings and events for example the bi-annual Destinations Forum in London, providing meeting space and hosting locally as well as lobbying for the sector on key issues at government level. Benefits to this include a strong national and regional presence for the city, a voice for our businesses and early opportunities to lever into larger scale strategic grant funding programmes.

"Destination Plymouth has a key role in facilitating partnerships at local, regional and national level..."



5.0 Enabling Priorities

"Our strategic ambition is to be one of the top ten UK visitor destinations by 2030..."

2. People

People are at the heart of this visitor plan — our visitors and our community. Providing an exceptional welcome and memorable experience relies on the passion, commitment and quality of our businesses, the people they employ and the team we employ. Our continuing aim will be to drive innovation, excellence, sustainability and accessibility in all areas of our activity to achieve our ambitions.

2.1 Our Businesses

Growing and supporting our tourism industry is a key driver for this visitor plan. Our aim is to deliver improved productivity and 'wise growth' through attracting higher spending, longer staying target markets. A key part of Destination Plymouth's role is to support businesses to help them realise their potential while at the same time increasing their sustainability and helping them provide quality year-round jobs for Plymothians.

This area of our work has three key activities:

- Skills and employment
- Product development support
- Improving sustainability and green tourism

Skills and employment

A vibrant and successful sector requires a workforce with great skills, exceptional training and a passion for the consumer. In a world where global competitive tourism is still growing, it is the quality of the experience that the visitor receives which will determine their lasting perception of a destination, their messaging of this to the wider world and ultimately whether they will come back time and time again! The skills of our workforce are therefore vital to support our visitor welcome, the great experiences that our visitors require and the productivity of our sector overall.

However, there are real issues to contend with both locally and nationally, including:

- Staff churn and retention
- Perception of the sector as a career
- Low pay and seasonal hours
- Language skills and loss of EU workers

The tourism and visitor economy sector in Plymouth currently employs just under 7% of the overall workforce providing 7,985 jobs, of which 5,972 are FTE's (full time equivalents). These jobs are split out across the following different areas of visitor expenditure as shown below:

Estimated Actual Employment



Full Time Equivalent Employment (FTE's)



We have set out our shared vision, combined objectives and ambitions in a three-year plan that identifies key areas of activity, resources required and timelines to drive real change in the sector. Our aim is to work in partnership with strategic organisations across the city to encourage a shared vision for how we will deliver excellence, encourage joint working, the sharing of best practice and ultimately supporting growth of employment in the visitor economy, which allows our residents to benefit from quality job retention and creation for the future.

Delivering **our visitor plan will generate a further 1,000 jobs in the city bringing employment in tourism to just under 9,000** jobs. Our vision for skills and employment will be supported by a three year rolling action plan to support growth and develop skills.



The skills and employment plan has been written by key city partners including University of Plymouth, City College Plymouth, Conference Plymouth, Job Centre Plus, Springboard UK and Plymouth City Council Employment and Skills team and is endorsed by Plymouth Employment and Skills Board.

The emerging plan sets out the following vision:

VISION FOR SKILLS AND EMPLOYMENT

Our vision is to be a tourism and retail centre of excellence for the Devon and Cornwall region. We will support our businesses to realise their potential, increase their productivity and develop longer-term career paths for their staff. Our education, skills and training organisations will work together with key city partners and local businesses to promote the opportunities, inspire our communities and encourage them to take up careers of choice in the tourism and retail sector supporting this with an outstanding training offer.

The plan has the following key objectives:

Aim 1 — to increase the number of apprenticeships in the sector by 100% over the next two years

Aim 2 — to increase the number of new people entering the sector by a minimum of 1,000 over the next 10 years

Aim 3 — to develop a careers offer to parents, teachers and new entrants that is able to demonstrate the opportunities and pathways and careers routes available

Aim 4 — to develop a skills talent pipeline that will enable any entrant to reach the top of their profession, reduce staff churn and develop their capabilities

OUR KEY ACTIONS TO SUPPORT SKILLS AND EMPLOYMENT WILL USE THE FOLLOWING 5-STEP APPROACH TO DELIVERY:

Identify – establish relationships with businesses, employers and training providers to identify need and training opportunities/resources for project delivery

Promote – develop the concept of a regional tourism and retail centre of excellence, raise the sector profile, within schools/community and support national 10-year campaign to recruit more employees

Recruit – Encourage businesses to recruit trainees and apprentices now for 2020 onwards/ raise awareness of 't' levels and apprentice levy

Retain – provide signposting for employee/ employers to further training and development opportunities

Evaluate – Set targets for recruitment, training and retention and evaluate through regular monitoring and reporting

5.0 Enabling Priorities

Product development support

Many tourism businesses are already well established and benefit from the over 5.4 million visitors that come to the city every year. However in an increasingly competitive market place it is crucial that our local businesses are encouraged to deliver world class experiences for our visitors and are supported to provide accessible and where possible 'bookable' options. A key role for Destination Plymouth is to support businesses within the sector. **There are two key areas where we will focus our activity going forwards:**

- Quality schemes and accessibility
- Business support to develop product

Quality Schemes and Accessibility

There are plenty of ways a destination can better handle the support needs of its visitors. Whether it's providing ramps for pushchairs and wheelchairs, enabling assistance dogs to stay with their owners, or providing help for people with learning difficulties and other conditions. Destination Marketing Organisation's have an important role to play in making visitor destinations accessible to all. Information is key, with research showing 83% of people who look for access information when planning a trip will use destination websites. But only 39% find this information easily. The key is making access information easily accessible.

Encouraging businesses to be audited or quality assessed can help them provide a better level of service in a competitive environment, provide PR and more reach and in turn help the business to thrive. From boats to parks to pubs, restaurants and B & B's accreditation is available for them all. We will implement a recognised quality accreditation scheme, working with recognised partners which will provide a service from basic advice to a full rating scheme and advice on how to make your business as accessible as possible. Accreditation schemes give recognition and visibility for businesses and help them to stand out to consumers in a crowded marketplace.

Business support and product development

Over the past three years, Plymouth has benefitted from receiving 'Discover England Fund' grants, which have enabled one to one working with businesses in the city. This has resulted in over 30 new 'bookable' visitor experiences being developed. In many cases, these experiences are 'packaged' and linked together through introducing businesses to each other and encouraging them to work in partnership to tap into the opportunities that are available.

Training has been given to over 100 organisations and businesses in the city which includes, international marketing, taking England to the World, TXGB and specific aspects of product development. This work needs to continue and should be linked to our leading themes of blue-green city and brilliant culture to ensure that strong, authentic product experiences are developed for the specific target markets linked to these themes.

Destination Plymouth has a key role in sign posting best practice as well as continuing to seek project funding to enable more in depth training and support of local businesses on a one to one basis.



Sustainability and green tourism

'Our ambition is to be one of the first zero carbon destinations in the UK by 2030 supporting our wider city aims...'

By being sustainable, tourism businesses can reduce their carbon footprint, improve their customer experience, support the local economy and stand out from their competitors. We are committed to a low carbon future and finding new ways for our industry to reduce its footprint at the same time promoting the reduction of single use plastics. We aim to inform and inspire our participating businesses about the circular economy, ecological and cultural diversity and ensuring efficient use of our planet's resources. Living and operating sustainably is a process that involves promoting and caring for the natural environment, helping conserve the local area and its economy and supporting local suppliers of ethically produced, seasonally grown food and drink. Plymouth already has a city wide 'Plan for Plastics' and organisations across Plymouth are working together to tackle the issue of single use plastics and plastic pollution.

As Britain's Ocean City, we are very aware of the effects of plastic pollution and want to do all we can to reduce the amount of waste and the devastating effect it can have on our environment. A starting point for this is looking at the quick wins of reducing our reliance on single-use plastics like straws, disposable cups and plastic cutlery. We will encourage our tourism businesses and visitors to the city to support our 'Plan for Plastics' by adopting the key themes in the plan:

- **AVOID** contributing to the amount of plastic in Plymouth's environment; leading by example in taking positive action, however small.
- **CONNECT** to communities and visitors in the city; encourage people to take responsibility for the plastics they use, exchange ideas and encourage others to do the same.
- **INNOVATE** – think 'plastic free' and support the introduction of pilot design and develop eco-friendly alternatives.
- **RECYCLE** – encourage visitors and tourism businesses to

manage what we've got more responsibly; find ways of reusing plastic as often as possible and in the most sustainable way and recycle whenever they can

We will work with selected partners and affiliates to support our businesses to embrace 'Green Tourism' and to sign up to accreditation schemes that will help them achieve their green goals. For example implementing a 'Green Tourism' accreditation scheme, which promotes greener ways for businesses and organisations to operate.

KEY ACTIONS TO SUPPORT PRODUCT DEVELOPMENT:

- Encourage businesses to sign up to quality schemes for example 'Green Tourism' which includes auditing for accessibility and sustainability
- Signpost businesses, local community and visitors to areas of best practice and adopt local charters including 'Plan for Plastics' and 'zero carbon'
- Secure funding to provide training, share best practice and work one to one with businesses on product development



5.0 Enabling Priorities

2.2 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 Visitor Plan will put not just our visitors but also our local community at the heart of our activities.

There are five main areas that locals as well as visitors can benefit from tourism:

- Increased visitor numbers and spend produces more jobs for local people
- The spend from visitors supports local businesses who in turn support secondary and tertiary supply chains
- Services such as attractions, museums, retail, transport including buses, boats and taxis and overall accessibility are improved to benefit visitors and locals alike
- There is increased demand for local produce such as food, drink and local crafts
- Visitors come mainly to see the local scenery, heritage or culture so there is a requirement to maintain, protect and preserve which benefits the local community
- Our local community are able to use services such as attractions, museums, retail, green spaces and participate in events which benefits health, wellbeing and promotes pride

Within our 'Star Projects' we have multiple opportunities to engage with our local community through research, volunteering, acting as ambassadors, guides and more to support our key themes of 'Blue-green city' and 'Brilliant Culture'.





Key activities in this area of work will include embedding community opportunities into projects, building on existing initiatives including Mayflower Makers to **develop longer term Ambassadors** and working closely with other partners including The Box and National Marine Aquarium to engage local residents through ongoing programmes or annual events, for example English Tourism Week or **residents open days**.

2.3 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. We will work hard to be inclusive wherever is possible encouraging everyone to work towards access for all, eliminate discrimination, advance equality of opportunity, foster good relations and promote understanding.

Our people are our **'Ambassadors'** we will work hard to engage them, support them and help them to maximise their potential as part of a 'one team' approach.

Destination Plymouth is a shared leadership/shared delivery model with delivery spread across a number of key stakeholders and partners across the city. This model although complex ensures that budgets and staff resources are used effectively to support multiple elements of business plan delivery and leverage opportunities to increase leverage and funding when they arise. We cover this in more detail in section 7: The way we work.

KEY ACTIONS TO SUPPORT LOCAL COMMUNITIES AND OUR TEAM:

- Explore opportunities to continue 'Mayflower Maker' programme post-2020 and develop longer term approach to volunteering and community engagement linked to National Marine Park
- Encourage participation and engagement across capital programmes and cultural/event programme
- Approach our daily activities with a 'team Plymouth' culture encouraging inclusivity, diversity and accessibility



5.0

Enabling Priorities

3. Ocean City Infrastructure

World-class visitor destinations require world-class infrastructure providing safe, secure and convenient experiences for visitors whether they are coming for leisure, study or to do business. We recognise that as a growing visitor destination it is important to continuously work toward improvement and to develop new infrastructure to support that growth.

Our infrastructure priorities focus on three areas:

- Transport and public realm
- Digital connectivity
- Accommodation

3.1 Transport and public realm

Our ambition is to deliver an exciting sense of arrival and seamless connectivity for visitors arriving by car, train, coach, cycling, walking, ferry, cruise liner or boat and make the water part of the city's leisure transport system.

We will support the voice of 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 low carbon transport solutions including electric charging infrastructure for cars and public transport. We will aim to use the water to reinforce Plymouth Britain's Ocean City brand identity, including 'park & float' and improved ferry and small boat services that take visitors to different points along the city's coast and an internationally renowned cruise and ferry terminal. One of the special experiences of Plymouth is the opportunity to get out on the water. Several of our star projects incorporate boat trips or access to the water so we will continue to explore a 'joined up' approach to transport connectivity maximising the potential of the 'on water' experience.

Plymouth already has many miles of cycling routes through the city and is on national cycle route 2 and 27. We are also a major stopping off point on the South West Coast path so we will work closely with the Plymouth City Council transport team to support the Plymouth Local Plan and its specific policies.

We will work with key city partners to improve the signing and public realm environment between the city centre and the waterfront to encourage walking, cycling, more connectivity and a two-way flow of visitors to support longer stays and visitor spend across the city. This will include building on the Mayflower trails and developing further digital trail routes out into the wider city.

OUR TWO 'STAR PROJECTS' IN THIS AREA WILL BE TRANSFORMATIONAL FOR NOT JUST THE CITY BUT ALSO THE WIDER REGION:

Brunel Plaza and the redevelopment of the railway station will provide an exciting, modern gateway to Plymouth with improved parking, better connectivity to public transport and a strong visual introduction as visitors step off the train and enter through an appealing new route via North Hill.

Plymouth cruise and ferry port is an ambitious aspiration to develop Millbay port and modernise the existing ferry berthing and terminal facilities for use not just with ferry passengers but also for the emerging cruise market. Conceptual plans include changes to the road layout, improved tendering facilities for cruise passengers, a modernised terminal building with increased office space and improvements to the Trinity Pier side of the port for smaller vessels.

5.0

Enabling Priorities

KEY ACTIONS TO SUPPORT TRANSPORT AND PUBLIC REALM DEVELOPMENT:

- Work with Plymouth City Council and key transport partners to support the Plymouth Local Plan for the future security, reduction of carbon and sustainability of key transport routes including road, rail, air and sea
- Support development of star projects through facilitation and cross partner working
- Develop relationships with major carriers to secure a planned programme of marketing initiatives to encourage visits off-peak and extend the season
- Encourage carriers and tour operators to work together to take advantage of inclusive tour fares
- Actively promote cycling, walking and 'getting on the water' through targeted campaign activity and development of new digital trails

3.2 Digital

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

In the decade since the first Visitor Plan was written the two biggest changes in tourism have been:

- A seismic shift to using social media and online channels for tourism marketing and promotion
- Developing experiences that are appropriate for target audiences, e.g. hands-on activities, behind-the-scenes or after-hours tours/visits, chances to learn a new skill, a unique or unusual itinerary featuring things that are distinctive to the local area.

Add to that emerging **new digital trends** including 'filter bubble', the public driving social media content creation and brand related experiences, video as the new currency for storytelling, augmented and virtual reality all moving and developing rapidly. In fact, over the next ten years digital technology will transform

the way we all live and work as well as choose where we go to spend our leisure time. We will approach the use of intelligence, automation, digital connectivity and productivity in a completely different way.

To deliver against those requirements means that Destination Plymouth more than ever before needs to become an innovative, flexible marketing facilitator by forging relationships between businesses and creating good platforms for others to spread shared messages. That means working with a wide range of collaborators and creatives. Plymouth businesses need to be inspired to develop Ocean City experiences and promote them in partnership with Destination Plymouth.

We will need to be **creative with 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 create exciting digital interpretation and trails along the waterfront and on the water that are integral to our visitor experiences and improve the legibility of our city.

The future of destination marketing is digital and with increasing pressure on resources this is the most affordable and effective way to reach our target markets and offer a seamless visitor experience. Broadband access within the city's main footprint is generally good and with developments in 5G connectivity, this will continue to improve. Our aim is to develop a more sustainable approach to city promotional activity reducing print to zero by 2030, providing 'bookable' products which are readily available on mobile platforms and effectively 'dressing' our city digitally so that visitors start their experience even before they get here. We will work with creative and digital partners, local communities and businesses across the city to create memorable and authentic digital content, which is widely shared, and positions Plymouth as Britain's Ocean City globally.

Data will also become increasingly important in understanding our visitors, where they come from and what they like to do here.

Modern tourists are used to the increasingly digital world and are less dependent on traditional travel agencies thanks to the development of booking search engines, online comparison tools, review websites and photos uploaded by other travellers.

Automation developments are moving forwards at a pace and while not all of us necessarily like checking in with just a key pad as opposed to receiving a warm greeting from another human it is most definitely here to stay. As automation rises, how much you Do It Yourself (DIY) compared to how much is Done For You (DFY) will change. Thanks to advances in AI, automation is no longer limited to physical tasks. We are automating mental ones. While automation has already happened in the back end of travel, from inventory to reservation and staffing to transactions, AI will not stop there. Going forward investing in the digital skills, innovation and creativity of our team will be a major factor in determining the levels of success we are able to achieve overall. Working with city partners to share best practice, explore new digital opportunities and create new approaches to digital will be a key focus.

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

- Developing a new digital strategy
- Growing the reach of online and digital, in line with marketing plan targets
- Developing digital signposting and wayfinding solutions including exploring augmented and virtual reality
- Working with key city partners to develop compelling content connected to our core themes
- Ensuring our team has the specialist skills to develop compelling content and innovative approaches to digital activity
- Exploring opportunities around 5G



5.0 Enabling Priorities

3.3 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.

KEY ACTIONS TO SUPPORT ACCOMMODATION DEVELOPMENT INCLUDE:

- Produce a conference demand and feasibility study
- Market Plymouth internationally for accommodation investment
- Continue to benchmark accommodation supply and demand
- Work with existing hotel and accommodation providers to raise quality
- Lobby for improved legislation around Air BnB

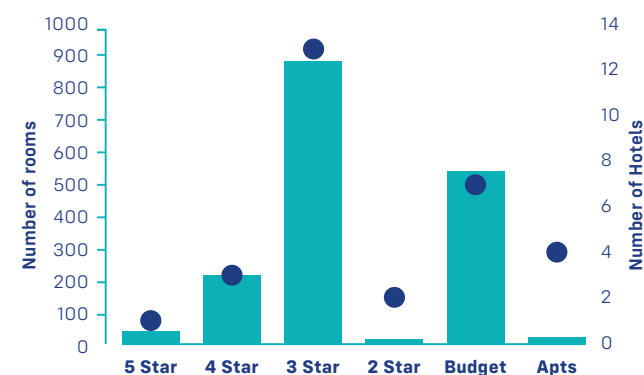
That means prioritising new hotels and conferencing facilities that create world-class quality and a distinctive offer including independent hotels and accommodation of character that become part of the Ocean City experience, for example on the waterfront or on the water. We will diversify our offer to ensure we can provide for the varied needs of our visitors from business guests to walkers, cyclists and water sports 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. The overall occupancy trend illustrates the strength of local hotel market conditions, also highlighting an undersupplied market. 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. The graph on this page demonstrates projected supply and demand given current pipeline activity and a snapshot of current hotel capacity by star rating.

Key activities in this area will include marketing Plymouth as an investment opportunity for hotel developers, working with existing suppliers to encourage them to upgrade to 4 star and lobbying nationally for 'safe and legal' schemes to offset the huge growth in Air BnB in the city. In addition, work to understand conference demand longer term will help inform a new conference and meeting strategy for the city.

OUR TWO 'STAR PROJECTS' IN THIS AREA WILL BE TRANSFORMATIONAL FOR NOT JUST THE CITY BUT ALSO THE WIDER REGION:

City Conference Campus - 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.



Rooms (2018)	40	237	880	19	535	23
Hotels (2018)	1	3	13	2	7	4

4. Our Distinctive Brand

In the highly competitive global market of tourism, it is important to stand out and be distinctive. Yet tourism destinations are so complex, and have so many stakeholders, it can be difficult to agree and project a strong, clear positioning and sense of 'place'.

The challenge is to find propositions that are clearly different from those of competitors, are positive and appealing to priority target markets, and are also authentic and true to the reality of the offer. It helps if as many as possible of the people who develop, market and promote the offer talk about it in the same way and style.

Place branding and positioning is about:

- Having a clear vision and purpose for the place that helps give it a distinguishable market position and then a recognisable brand identity
- Understanding the context of the product – the place it exists in and how it positively adds in terms of visitor, economic and community cohesion
- Being absolutely clear on the overall brand proposition – the mix of individual propositions that, taken together, seek to attract the target market audiences
- Testing propositions on target market audiences to respond to local needs

To help Plymouth to do this in 2013 we developed a 'shared story' for 'Plymouth Britain's Ocean city

OUR SHARED STORY

With its stunning waterfront, natural harbour and naval history, Plymouth is the UK's original marine city. It has a powerful place in English history with a rich maritime heritage. Yet today our lively port on the edge of the Atlantic has a European feel. This comes from our marinas, restaurants, seafront bars and historic buildings, and from the strong modernist architecture that lines Armada Way, the central boulevard. Of course, we also have an impressive natural setting between the ocean and the moors. Young people come from across the world to study and work in marine science here, giving the place a contemporary urban buzz. To round it off we are the regional capital for culture – with events, theatres, galleries and performing arts providing a great cultural experience to add to the laid-back lifestyle.

This 'shared story' was then used to develop the current brand narrative for the city in 2013. This brand system is used for the promotion of Plymouth internally and externally across all sectors and is set out in the brand strategy document in the appendices to the marketing plan. The purpose of a brand narrative and strategy is to bring Plymouth to the forefront of people's minds and amplify our 'USP', to make the people who live here proud of the place – and to create the conditions in which more and more people are stimulated to come here. Whether it's to visit, live, study, invest, work, shop, play, eat and drink or indeed all of the above. Ultimately, its purpose is to secure competitive advantage for Plymouth. In all the sectors in which it competes.

5.0 Enabling Priorities

4.1 Brand positioning

The 'Plymouth Britain's Ocean City' visual identity for the city brand and creative content has been used with some good success over the past six years to grow Plymouth's presence specifically in the visitor market sectors locally, nationally and internationally.

Specific advertising propositions and messaging have been developed for different target audiences and sectors, which will resonate and appeal to them and alongside this a creative style and content. However, extensive public relations activity in key target markets has also helped to shift perceptions of the city internationally.


KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

- Developing a more sophisticated creative approach for the city, building on the good work to date and positioning the city as a great place to live, work, study and visit
- Mapping key products and experiences that the city can confidently lead on exploring new market opportunities to support the city's growth and investment ambitions
- Developing a compelling narrative to position the city internationally
- Identifying opportunities for a campaign based approach into new target markets



Plymouth
Britain's Ocean City

Immerse yourself in Plymouth

See what's on the horizon



On holiday, studying or on business
Experience Britain's Ocean City. Immerse yourself...

visitplymouth.co.uk  [WhatsOnPlymouth](#)  [@WhatsOnPlymouth](#)



5.0 Enabling Priorities

4.2 Marketing Plan

This business plan is supported by our marketing plan detailing our priority visitor markets and how we should reach them along with our messaging and what delivery will look like. Our marketing plan is a destination marketing plan and at this point in time does not cover some specific wider city marketing activities including inward investment or for specific sector development although we will aim to continue to position Plymouth as a great place to do all these things.

The overarching objective of the marketing plan is to raise the profile and awareness of Plymouth as a city to visit, to study and to do business.

Our strategy in simple terms will be as follows:



Day visitors:

- Our aim is to continue to grow day visitors who are 85% of our market currently
- We will encourage day visitors, repeat visits and extend dwell times through an engaging cultural, events and activity programme annually
- Our regional target area will be Devon and Cornwall particularly at peak summer times tapping into the leisure holiday market



UK domestic market we will:

- Encourage UK domestic overnight stays particularly through extending the shoulder seasons
- Work with our key city attractions and partners to develop 'off peak' promotions to encourage visits
- Explore new market opportunities connected to our key themes of 'Blue-Green' and Brilliant Culture'



International market we will:

- We will build on the legacy of Mayflower 400 through ongoing work with the US, Canadian, Dutch and closer European international markets to grow our overseas visitors
- Grow our international visitor market by 55%
- Develop new product aimed at specific international target markets with our core themes of 'Blue-Green' and 'Brilliant Culture and Heritage'
- Explore new emerging markets working with key city and regional partners including Australia, China and France
- We will continue to develop products for the consumer which are experience based and 'bookable'
- We will work in the cruise sector to encourage more cruise ships to the city



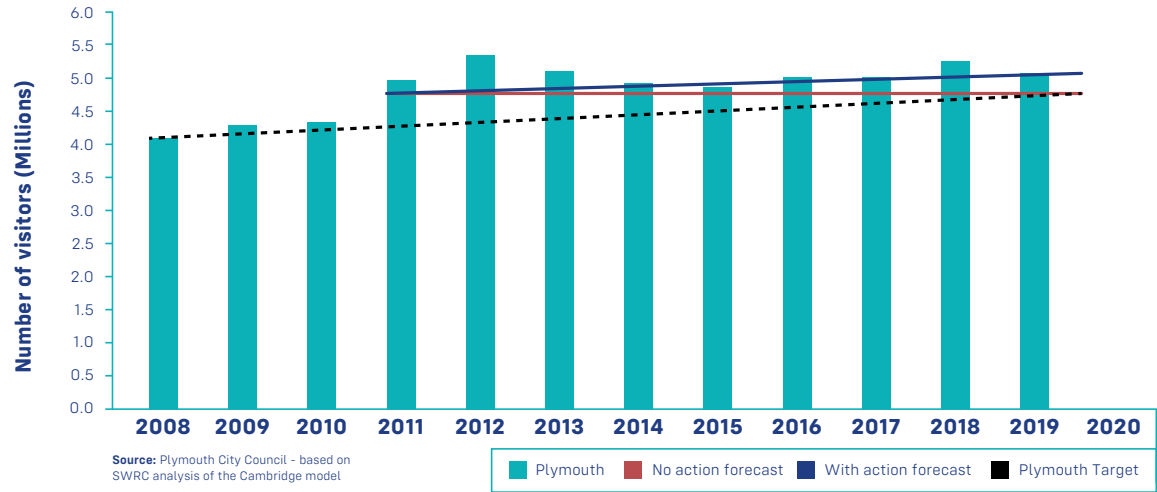
Meetings, incentives, conferences and events we will:

- Position Plymouth as the conference and meetings hub for Devon and Cornwall
- We will develop meetings, conference and business tourism in key vertical sectors and target markets that that reflect our city assets in marine, medical and creative industries
- We will support our creative industries by developing opportunities for Plymouth as a film location and creative city

Where are we now?

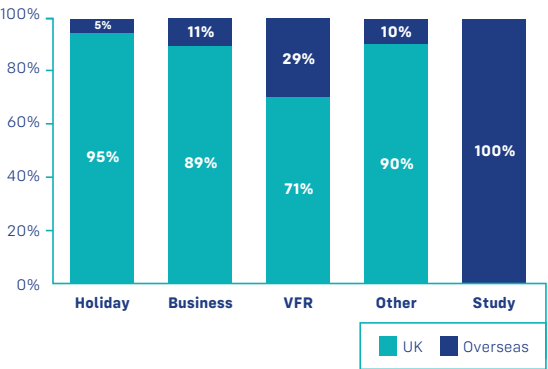
Our existing visitor base is currently 85% day visitors, 14% UK staying visitors and 1% international visitors. Currently it is estimated that around 93,000 staying visitors annually are here for business. Data does not currently exist for numbers of day visitors who may be here for business rather than leisure.

Grow visitor numbers by 20% by 2020

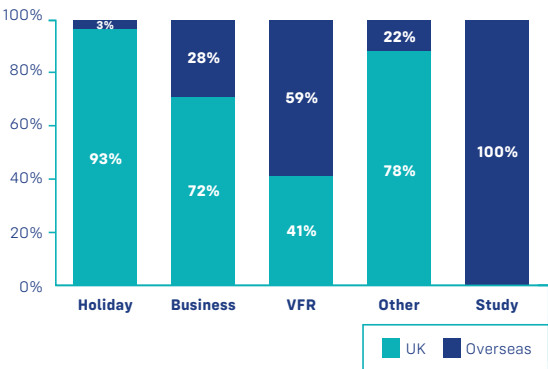


Staying trips by purpose (2019 data)

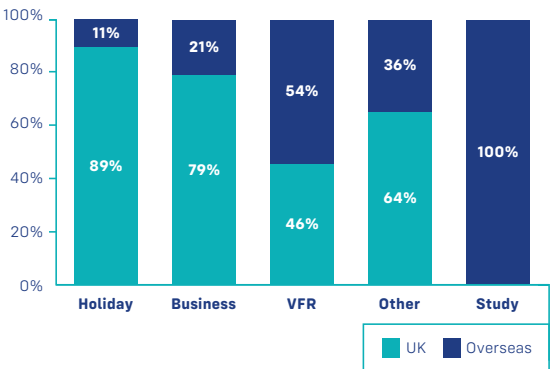
Trips



Nights



Spend



Domestic Tourists	Trips	Nights	Spend
Holiday	462,000	1,708,000	£90,164,000
Business	82,000	127,000	£14,608,000
Visits to friends & relatives	96,000	243,000	£13,656,000
Other	19,000	61,000	£2,681,000
Study	0	0	0
Total	658,000	2,139,000	£121,109,000

Overseas tourists	Trips	Nights	Spend
Holiday	23,000	126,000	£11,697,000
Business	10,000	49,000	£3,865,000
Visits to friends & relatives	40,000	350,000	£16,289,000
Other	2,000	17,000	£1,488,000
Study	2,000	108,000	£3,871,000
Total	78,000	650,000	£37,210,000

Target Markets Going Forwards

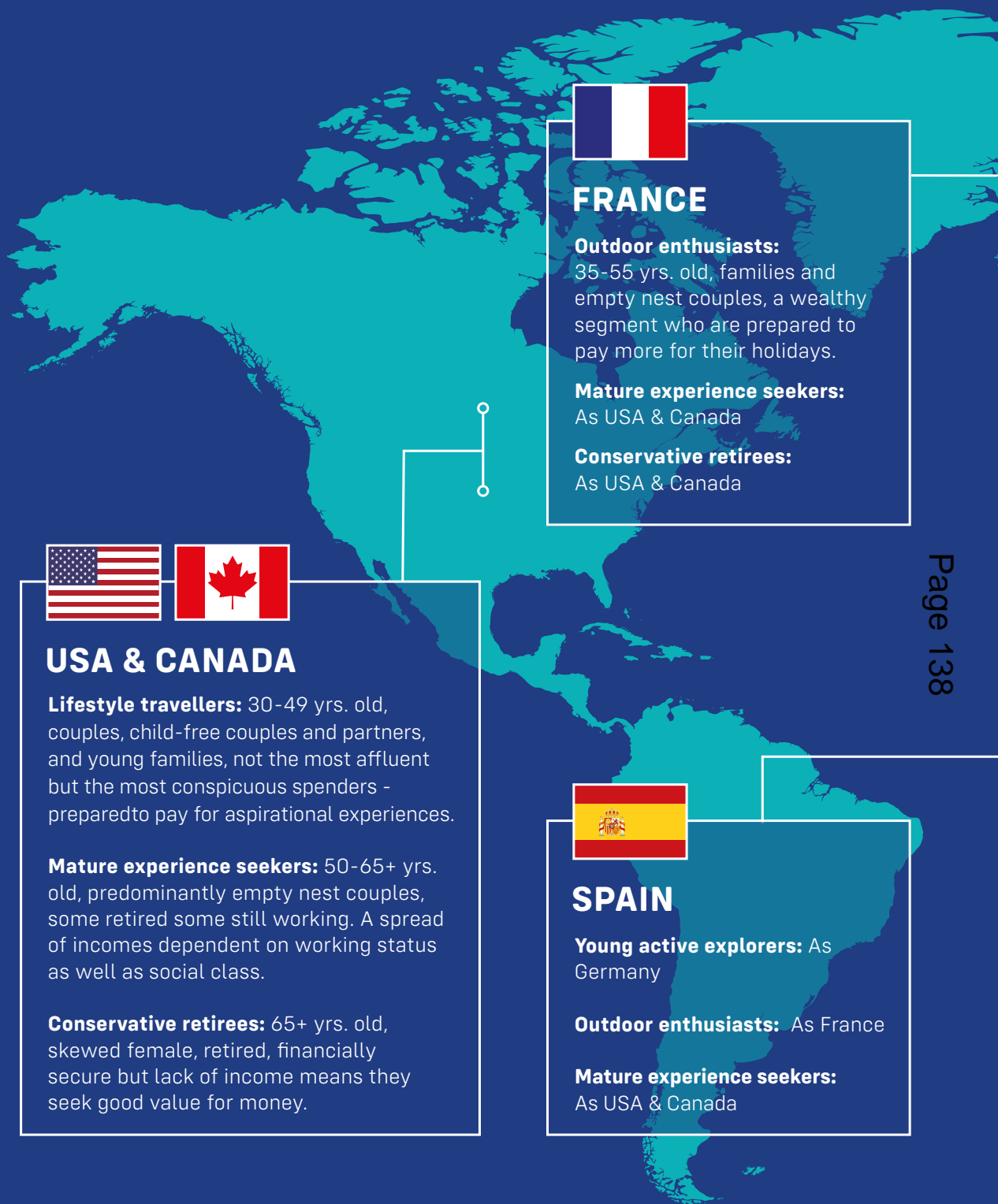
Given our current research our core targets markets going forward will be as follows:

Meetings, Conferences & Events

Key Attributes	
Local and Regional Businesses	Businesses from across the South West within 2 hours drive time for small meetings, conferencing and events
Weddings	South West region, London and SE. Young couples typically 20 to 35
Creative and Film	Development of city as a location for film tourism linked to key productions working with Creative England

Cruise

Key Attributes	
Cruise operators under 210m	Cruise operators using Britain as a destination. Specifically smaller operators with vessels under 210m although some larger ships are able to tender into port.



FRANCE

Outdoor enthusiasts: 35-55 yrs. old, families and empty nest couples, a wealthy segment who are prepared to pay more for their holidays.

Mature experience seekers: As USA & Canada

Conservative retirees: As USA & Canada



USA & CANADA

Lifestyle travellers: 30-49 yrs. old, couples, child-free couples and partners, and young families, not the most affluent but the most conspicuous spenders - prepared to pay for aspirational experiences.

Mature experience seekers: 50-65+ yrs. old, predominantly empty nest couples, some retired some still working. A spread of incomes dependent on working status as well as social class.

Conservative retirees: 65+ yrs. old, skewed female, retired, financially secure but lack of income means they seek good value for money.



SPAIN

Young active explorers: As Germany

Outdoor enthusiasts: As France

Mature experience seekers: As USA & Canada



NETHERLANDS

Cultural adventurers: - 25 - 39 yrs. old, couples, child-free couples and partners, and parents with young kids, successful professionals with high disposable incomes.

Lifestyle travellers: As USA & Canada

Mature experience seekers: As USA & Canada

Conservative retirees: As USA & Canada



GERMANY

Young, active explorers: 18-34 yrs. old, mainly singles and pre-nesters, mix of young working professionals with disposable income and students with less spending power.

Cultural adventurers: As Netherlands

Lifestyle travellers: As USA & Canada

Outdoor enthusiasts: As France

Mature experience seekers: As USA & Canada

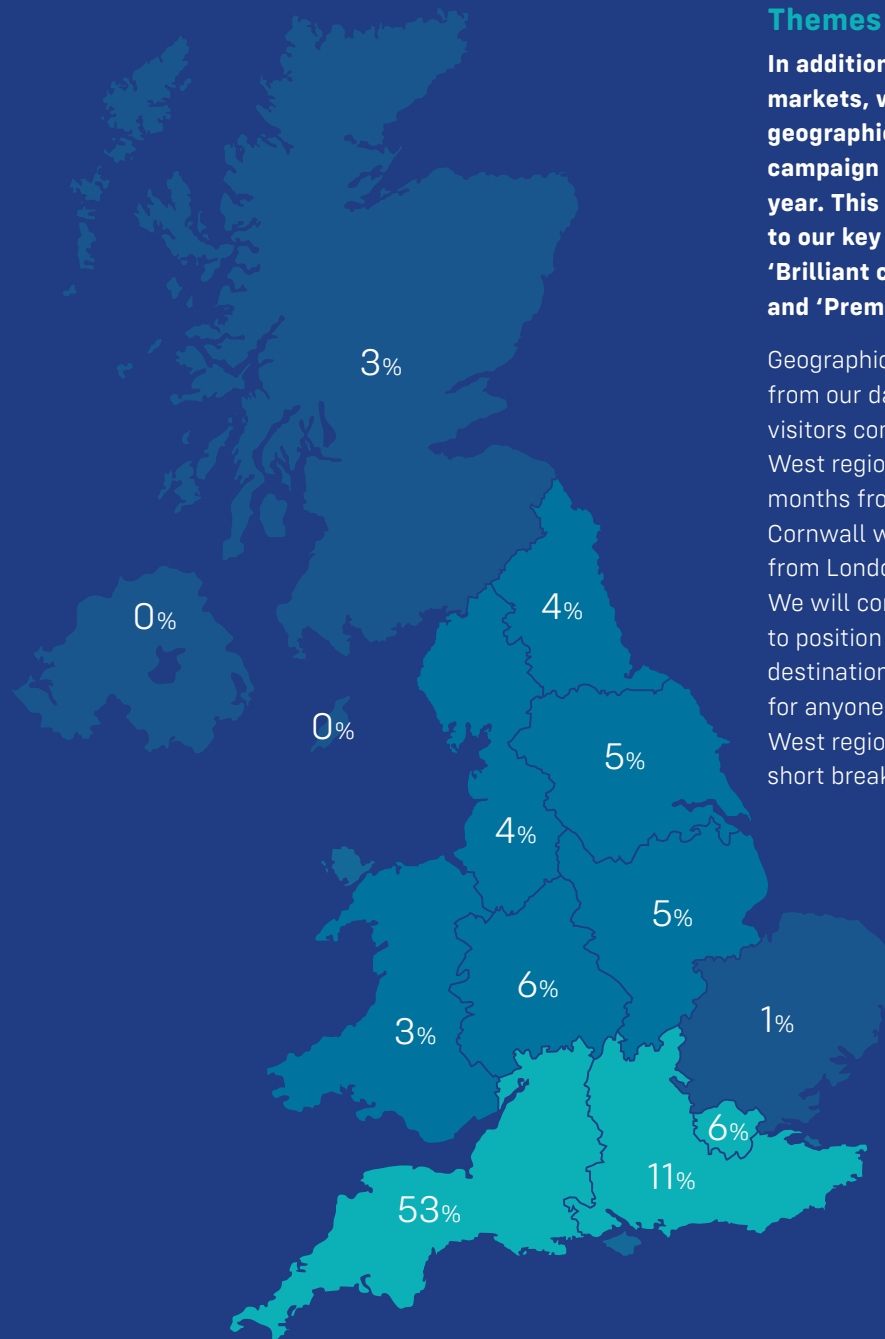
Conservative retirees: As USA & Canada



CHINA

Cultural adventurers: As Netherlands

Lifestyle travellers: As USA & Canada



Themes and Lifestyle:

In addition to our core target markets, we will explore specific geographic, lifestyle and thematic campaign activity throughout the year. This activity will be linked to our key themes of 'Blue-Green', 'Brilliant culture and heritage' and 'Premier Destination'.

Geographically within the UK we know from our data that many of our day visitors come from within the South West region (53%) and over the summer months from visitors to Devon and Cornwall with a predominance of visitors from London and the South East (17%). We will continue to explore opportunities to position Plymouth as a 'must do' destination within Devon and Cornwall for anyone who is visiting the South West region for their main holidays or short breaks.

Day Trips

Key Attributes

Resident Trippers	Day trips from home within 60 minute drive time. Span spectrum of age, economic profile and group type. Are disposed to come to Plymouth so challenge is to get them coming more often and spending more.
Entertainment Seekers	Families, day visitors from within 90 min travel time staying in holiday camps/caravans. Mid-market, family groups with mainstream expectations and values. Like things made easy and accessible. Want fun and enjoyment.
Boden Set	Families, day visitors from within 90 min travel time staying in quality self- catering. More discerning family groups with higher expectations. Well-travelled. Want quality experiences to enjoy together which create memories.

UK Staying

Key Attributes

Outdoor / country loving traditionalists	Empty nesters (55+) with traditional values, they are likely to have recently taken an outdoors/countryside break in England and enjoy unspoilt countryside/coast, clean and tidy environment, opportunities to eat/drink local food/produce.
Free and easy mini breakers	More likely than other segments to be 'young, free and single'. Demographically close to 'the average Joe', but they really stand out in their holiday behaviour. More likely than others to shop, explore the city, visit a museum or gallery, and/or indulge in cultural entertainment. Prefer a destination that is easy to get to by public transport, availability of festivals, music, sporting and cultural events.
Aspirational family	Typically information-hungry, London-based high earners with children at home, they regularly take city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits More likely than others to spend time at a theme park, zoo/ aquarium and/or sporting event. Prefer good range of water-based/beach activities, good nightlife and availability of festivals, music, sporting and cultural events.

Business tourism meetings, incentive, conference and events (MICE):

Business visits accounted for 22% of all inbound tourism to the UK in 2018. There were 8.4 million visits contributing £4.5 billion in spend. In Devon international business visits in 2018 accounted for 35,764 visits which is 8.36% of total international visits and in Plymouth this number is around 11,000 annually.

This is a good growth opportunity for the city particularly linked to key vertical sectors including marine technology, medical, creative industries and manufacturing. We will create an evidence base to understand the opportunities in this area going forwards and use this to develop a long-term strategy to grow meetings, incentive, conference and events business in the city.

Film tourism

Filming in the UK has reached record levels. 2014 saw a massive increase in film production in the UK, a 35% increase on 2013 and the highest recorded figure ever. Screen tourism is a growing phenomenon, The 'Quantifying film and television tourism in England' report 2015 highlights the following points in relation to the sector:

- 36.1% of all international tourists and 11.6% of all domestic tourists surveyed on site at six locations studied for this project can be defined as core screen tourists – i.e. a screen production was the primary motivator for their visit.
- The value of these visits is significant, with the best-performing sites attracting day-spend value from international visitors of up to £1.6 million annually. Combined with the day-visit value of domestic core screen tourists, the best performing site saw £4.3 million total screen tourism spend annually.

- International core screen tourism is valued in the range of £100 million-£140 million for the Rest of England in 2014.

As part of the iMayflower initiative, Creative England are working with Plymouth on developing film as a route for tourism and development. This links to the city's creative digital clustering and includes the drive for Plymouth to become a Film Friendly city, attracting productions. This opportunity will allow us to develop additional leisure tourists based on productions which are filmed locally but will also allow development of opportunities for businesses including production companies, filming, catering companies, venues, digital pre and post production but to name a few.

Cruise market

Since 2016, Destination Plymouth has been working in the cruise market to market Plymouth as a key cruise destination for the UK. Initially working in the US market there has been great success and significant growth from zero visits in 2017 to 12 visits planned in 2020 and bookings for 7 ships already in 2021.

For each passenger visiting the spending impact per call is £128. The ambition is to grow cruise visits to 30 or more annually by 2030. Over 40% of the cruise market is vessels under 210m, which will comfortably fit onto the existing berth. Marketing activity in this area will focus on building on existing B2B relationships through meetings, familiarisation visits and events and providing an excellent standard of port welcome to ensure visitors have a great experience. Our branded 'Cruise ambassadors' are a key part of the port welcome and provide meet and greet and information services to passengers while on shore. Key partners are Associated British Ports, Brittany Ferries, Cattewater Commissioners, Royal Navy, Plymouth Waterfront Partnership and Plymouth City Centre Company.

OUR 'STAR PROJECT' IN THIS AREA WILL BE TRANSFORMATIONAL FOR VISITORS TO THE PORT AND THE WIDER REGION:

Plymouth cruise and ferry port is an ambitious aspiration to develop Millbay port and modernise the existing ferry berthing and terminal facilities for use not just with ferry passengers but also for the emerging cruise market. Conceptual plans include changes to the road layout, improved tendering facilities for cruise passengers a modernised terminal building with increased office space and improvements to the Trinity Pier side of the port for smaller vessels.



Press and PR – get Plymouth widely talked about with media coverage achieved through press trips, releases, news generation as the most cost-effective way to achieve this, building on the profile achieved through the Mayflower 400 anniversary.



Digital marketing – e-marketing and social media will be the most effective and efficient route to market for all target segments – we will aim to be best in class in this activity not just for information pre-visit but providing effective information services digitally through handheld technology when people are in destination.



Direct sales – for business meetings and working in specific target markets including conference, cruise, groups etc.



We will take a tight focus on both markets and communications channels to make a real impact rather than a scattergun effect across numerous communications channels. Destination Plymouth will oversee the marketing plan and deliver some of the activity directly; other elements will be outsourced or delivered by partners. Some of our activities will be focused on consumers and some of them will be in the B2B environment.



We will aim to provide the best possible communications support to our partners and members through our channel activity.

Route Map

Page 142

es to rket



Advertising – to be used to lever other activity e.g. press coverage, capitalising on VisitEngland or VisitBritain activity or for specific opportunities associated with events or for joint promotions with appropriate brands.

CRM

Customer Relationship Management (CRM) – we will continue to build a relationship with our visitors, members and trade contacts by managing and maximising opportunities and communicating regularly with them to encourage repeat visits and more business interactions.



In-destination print – thematic guides should inform and orientate visitors around the city encouraging spend. Our aim will be to reduce the use of printed guides where possible in favour of digital solutions including apps or online information.



Website – Plymouth continues to evolve the Visit Plymouth website to deliver our image and provide inspiration, ideas and information. Our ambition is to make this website at the forefront of destination sites and sit among the very best in the UK.

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

- Developing short term detailed delivery plan – up to 3 years
- Assembling target funding and resources to deliver activity across the different target markets

5.0 Enabling Priorities

Our Visitor Marketing Plan

The marketing plan will be delivered by the Destination Plymouth, Plymouth City Council and Business Improvement District teams – see section 7 ‘The way we work’. We have been very successful in leveraging funding to support visitor marketing over the past three years. This has included just under £1.5 million from Visit England and DCMS to support Mayflower 400 and the US Connections project. This increased funding has led to some very successful delivery, particularly in relation to the international market in the USA and Netherlands and the cruise market. In order to maintain this level of activity longer term the following target expenditure will be required annually.

MARKETING ACTIVITY	TARGET EXPENDITURE	NOTES
International marketing (B2B)	£100,000	Revenue costs for staff, attending trade shows and events, trade communications, familiarisation visits, content development and media activity – DEF II opportunity
Cruise marketing (B2B)	£40,000	Revenue costs for staff, attending trade shows and events, trade communications, familiarisation visits, content development and media activity – DEF II opportunity
Domestic travel trade and groups (B2B)	£30,000	Revenue costs for staff, attending trade shows and events, trade communications, familiarisation visits, content development and media activity – support from BIDS/city partners
Conference marketing (B2B)	£30,000	Revenue costs for staff, attending trade shows and events, trade communications, familiarisation visits, content development and media activity, subvention – support from hotels and key city partners
Local and general consumer marketing (consumer)	£100,000	Costs for website, PR, digital and content, general print local advertising and promotional activity – support from BIDS/city partners
City marketing (consumer)	£100,000	Creative development, content creation, digital campaigns, above the line activity and media purchasing
Total marketing activity	£400,000	



£400,000
Target Marketing Activity

5.0 Enabling Priorities

4.3 Events and cultural programme

In our previous Visitor Plan, we focused on 'Signature Events' as one of our star projects and a key priority for the city. Plymouth has seen great success with this approach building on regular events such as Flavour Fest, Pirates Weekend Plymouth and British Firework Championships, and bringing to the city major events including MTV Crashes, La Solitaire du Figaro and the British Diving Championships over the the past few years.

Alongside this, a varied annual event programme has been developed working closely with key city partners including Plymouth City Council, the two Business Improvements Districts and Plymouth Culture to name a few. Events that recur regularly enhance identity of place and provide a high quality, distinctive experience for visitors and local people as well as generating economic impact through visitor spend and increasing city dwell times. Major events, one-off opportunities with international appeal help to generate significant media coverage and have the potential to attract significant volumes of visitors as well.

Currently events are classified as:

Major: one-off itinerant events with international appeal

Signature: regularly recurring events that strengthen the destination's identity

Growth: events with regional and local appeal such as Flavour Fest and Ocean City Blues N Jazz Festival.

Local: events aimed primarily at residents.

As a visitor destination, it is our aim to continue to grow and enhance our existing event programme to ensure we have variety throughout the year. This will encourage new audiences not just across the peak summer season but also by pushing activities into the shoulder months to extend the season, encourage day and overnight stays and attract media coverage wherever possible.

Going forward we will use our key themes of **'Blue-Green city'**, **'Brilliant culture and heritage'** and **'Premier destination'** to provide strategic focus for our event and cultural programme as a key part of our city's marketing and promotional activities. Our aim is that by 2030, Plymouth will be recognised internationally as a cultural destination capable of curating world-class experiences, which can be enjoyed by all. 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. The aim is to have at least one transformational event a year delivering an economic impact of at least £10 million and major events with a value of at least £5 million across the themes of culture, music, heritage, sports, maritime and business supported by a varied programme of cultural activities city wide.

Current focus for events is spatially along the waterfront, Barbican, Royal William Yard and city centre; however, Plymouth has much more to offer as an event space and a city with ambitions to develop an in-depth cultural and event programme all year round. The concept of the city as a 'stage' providing a blank canvas for new events, cultural activities and programming is gaining support and is being tested with some of the key Mayflower 400 events and activities. This concept can become increasingly powerful if it is nurtured and developed with Plymouth City Council's Events team acting as a key facilitator and enabler for wider city partners to work with on cultural and event programming.



Key partners for developing ideas for the cultural programme will be members of Plymouth Culture, University of Plymouth and Plymouth College of Art, Real Ideas Organisation and The Box as well as local artists and performers, although this list is by no means exhaustive. A steering group comprising some of the key partners would be highly effective in identifying lead themes, exploring opportunities for new activities and events and prioritising on an annual basis.

STEERING GROUP ROLE	
Enabling	Championing, coordinating, programming and promoting, advocating, planning and providing events focus for the city. Working as partners and developing cooperative arrangements for events.
Organising	Providing the organisation of events that add value to the tourism experience and the local economy
Partnering	Investing in events organised by others in line with strategy. The investment can be either in kind or financial support.
Regulator and Host	Having a regulatory and advisory role through the Events Safety Advisory Group (ESAG) and via licencing arrangements



The Plymouth City Centre Company and the Plymouth Waterfront Partnership (in future the Waterfront BID) are responsible for animation of public spaces including street performers; small out-door performances and events and markets and stalls. These create buzz and interest in Plymouth's impressive public spaces, attract people and encourage them to extend their stay and spend.

The Plymouth City Centre Company and the Waterfront BID will continue to prioritise street animation and work with Destination Plymouth and the Plymouth City Council's Events team to ensure it supports signature and growth events. School and public holidays are also priority times for animation. Animation of Royal William Yard will reinforce it as a mini-destination in its own right.

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

- Setting up a city wide events and cultural programming group
- Auditing key city locations and agreeing what they are best used for
- Promoting the city as a stage/venue through our marketing activities
- Targeting specific events connected to our key themes and products



5.0 Enabling Priorities

Outline City Events Plan 2021 to 2023

CATEGORY	VISITOR PLAN ALIGNMENT	ACTIONS
MAJOR EVENTS 2021: British Art Show 2022: Sail GP	THEMES: Blue-Green City specifically Ocean Playground project by delivering to brand promise 'Britain's Ocean City' and aligning engagement activity with events. Brilliant Culture solidifying Plymouth's reputation as a cultural destination. High spend visitors. High economic impact.	Connectivity with The Box. How can we support the British Art Show?
SIGNATURE EVENTS British Firework Championships Armed Forces Day Music Concerts and other ticketed cultural events Britain's Ocean City Half Marathon Illuminate National Diving Championships	THEMES: Brilliant Culture specifically Après Sea - music and night time product, encouraging local communities	Chair strategy planning group including Plymouth Culture, University of Plymouth. Explore opportunities for new events and prioritising on an annual basis. Live music development in line with cultural strategy Feasibility for large scale ticketed events in parks and other spaces across the city. Feasibility for Marathon, Triathlon using iconic city landmarks eg. Tamar Bridge. Consider Future of Illuminate
GROWTH / REGIONAL EVENTS Flavour Fest Pride Blues n' Jazz Pirates Weekend Seafood & Maritime Festival Lonely Rock Race/other home grown race	Adding to critical mass of cultural offerings as above. Blue-Green Theme around seafood and yacht races/water events.	Continue conversations with Grassroots Music Alliance for Blues n' Jazz future Growth potential for Pride. Audit of existing events, particularly on water events and how to better profile them as a marketing package
COMMUNITY EVENTS Pride Funky Llama Megaride Freedom Fields	Distinctive and authentic events as part of cultural offering. Community development and engagement.	Audit of existing events with potential to grow. Development of 'how to' guide. Identify other organisations that can provide support and ways we can simply support
LOCAL EVENTS Lord Mayors Day Remembrance Sunday Bonfire Night Christmas Lights and Markets.	Community.	Continue as previous.
BUSINESS TOURISM EVENTS Marine Tech Expo National Marine Park Conference	Development of conferences in marine, medical and creative digital.	Conference Plymouth to become part of Destination Plymouth New strategy will be developed during 2021 targeting longer term growth in the sector

5.0 Enabling Priorities

"Our brand personality needs to be reflected in everything we do, from our visual identity to our communications, digital assets, merchandising, and commercial services and most importantly in the product offer of the city and the experiences it promises".

4.4 Welcome and Visitor Information

Good destination management will ensure that when a visitor arrives in the city they experience a warm welcome, the best service and timely information provision at key touch points. A clean, safe environment will encourage a positive image of the city and enhance customer experience overall. The Plymouth City Centre Company and Plymouth Waterfront Partnerships BIDS have a clear role in ensuring consistent and well-managed public spaces. These actions are important underpinning support for the Visitor Plan and benefit everyone who uses the city centre and the waterfront.

Plymouth will provide a joined-up, cost-effective and consumer-focused visitor information service using, digitally accessed information, print and personal service. Information services will complement and link to each other:

- Information points at key venues across the city and at gateway sites using branded print or where possible digital screens, supported by staff training
- We will build on the digital trails app developed as part of our Mayflower 400 programme and extend the reach by developing new trails across the city
- We will explore opportunities to connect key attractions and points of interest across the city through a 'passport style' visitor/access card
- Many of our day visitors, in particular those on holidays in Devon & Cornwall, will continue to arrive by car and we will make it easy for them by continuing to provide clear directional signing, including the city entry signage on the A38
- We will encourage our short-break markets to travel by train, so we are investing in the station and its environs to improve first impressions
- The bus station was re-developed in 2014 to make it more welcoming, particularly for passengers travelling by coach

and regular intercity express services. We need to improve and provide a better offer for leisure coach operators to encourage them to drop off and pick up in key city areas providing ease of access for all

- We will explore opportunities to continue 'Ambassador Style' visitor welcome through volunteering at key entry points to the city during peak season or for specific events and develop the guiding offer working with businesses and guiding organisations locally.

"Our strategic ambition is that, by 2030, Plymouth will be known globally for our National Marine Park and recognised for amazing experiences, by, on, in and under the ocean as well as being known internationally for jaw dropping art, authentic cultural experiences and our urban spirit..."

Plymouth is well placed to deliver on these ambitions and we can provide a number of key entry points into the city, which will enhance the brand proposition and experience of the visitor from the beginning, setting the scene, emphasising the narrative and signposting our visitors to the wider parts of the city. These locations include The Box as a cultural and creative heritage attraction of national significance, the National Marine Aquarium and Ocean Conservation Trust as a gateway to the National Marine Park and fishing quarter, and the Tourist Information Centre on the Barbican as an Elizabethan House and our authentic maritime heritage.

KEY ACTIVITIES RECOMMENDED IN THIS AREA INCLUDE:

- Review existing information provision and explore future opportunities connected to digital and new technologies and passport style schemes
- Reinforce Britain's Ocean City branding and emerging new creative concepts at all key gateways
- Continue with volunteer 'Ambassadors' and develop guiding offer post Mayflower 400

6.0 Destination Plymouth and Partners

Destination Plymouth Limited was formally incorporated on 8 June 2010 as a public private sector partnership with the remit to drive growth in the visitor economy. Its key role is to establish a clear strategic approach and to lead and coordinate the work of partner organisations in delivering management and marketing of Plymouth as a destination.

Strategic context:

Destination Plymouth works within the ambit and influence of other strategic bodies:

- **Plymouth Growth Board**
responsible for Local Economic Strategy
- **Plymouth City Council**
responsible for Local Development Framework and strategy, (Plymouth Plan to 2034) transport, planning, leisure and cultural provision
- **Plymouth and Devon Chamber of Commerce**
providing leadership and coordination across the business sector
- **Plymouth Culture**
providing a unified voice and leadership for the cultural sector
- **Heart of the South West Local Enterprise Partnership**
LEP for the region and responsible for the Local Industrial Strategy and Productivity Strategy
- **Great South West Partnership**
emerging Great South West plan

Governance and Management

Destination Plymouth is a company limited by guarantee and is governed by its Board. The makeup of the board reflects the public-private partnership of the organisation drawing from Plymouth City Council, Business Improvement Districts, businesses with a visitor economy interest, cultural sector and the University of Plymouth. Destination Plymouth has a subsidiary company, Plymouth Waterfront Partnership Ltd. which is the Business Improvement District for the waterfront.

Destination Plymouth currently has six board Directors representing these key businesses and stakeholders from across the city including the council.

The structure of Destination Plymouth is unusual as many destination management organisations (DMO's) are typically arm's length from the local authority with their own dedicated staff. This separate identity appeals strongly to the private sector and makes it very clear that the organisation has to operate commercially to be sustainable. Within the UK during recent years, many local authorities have reduced funding into tourism organisations so this structure allows Destination Plymouth to be entrepreneurial and commercial to enable income generation via multiple channels.

To enable successful delivery across the partners all the respective delivery plans need to be aligned across both the city as well as the wider regional stakeholders. The original model, has been very productive in many ways, however, the structure remains somewhat cumbersome to manage effectively. This has prompted much discussion through consultation for this new business plan and agreement that longer term the current model needs further review to enable streamlining of efficiencies as well as broadening the scope of Destination Plymouth into a wider 'place marketing' organisation.

During consultation, it was agreed that moving forwards Destination Plymouth should be more about:

- Place marketing and management
- Be more flexible to respond to opportunities
- Continue to be a strategic organisation
- Lead work with city partners as well as nationally
- Be known for making things happen
- Explore the National Marine Park as the next big focus
- Review the makeup of the Board of Directors to reflect the diverse nature of cross city partnerships

Given the delivery timeline for Mayflower 400 in 2020 it was agreed that the current Board and structure will remain unchanged, however, there should be a transition process in 2021 where the Board formally reviews structure and governance. The aim being for a new structure to be in place by 2022.



Aerial view of Plymouth

7.0 The Way We Work

Destination Plymouth is a shared leadership/shared delivery model with delivery spread across a number of key stakeholders and partners across the city. This model although complex ensures that budgets and staff resources are used effectively to support multiple elements of business plan delivery and leverage opportunities to increase leverage and funding when they arise.

Destination Management Organisations differ across the country and deliver different functions depending on their purpose, funding, history and governance some of which are strategic and some more delivery focused.

Within any DMO the leadership needs to ensure that the skills, funding and mandate is there to deliver its core activities. Many DMO models require collaboration, investment, and joint working across authority boundaries between major strategic organisations such as LEP's, BIDS and neighbouring local authorities so strong leadership is required to enable influencing of key decision makers.

STRATEGIC FUNCTIONS

- Leadership – industry advocate, owner of VES, strategic responsibility for delivery
- Research and market intelligence
- Product development for marketing purposes e.g. trails, bookable product
- Product development – infrastructure and capital projects
- Brand leadership
- Industry voice and representative of local tourism businesses

DELIVERY FUNCTIONS

- Marketing – B2C, campaigns etc.
- Partnership and collaboration
- Media and PR activity
- Skills and training
- Information services
- Sales – conference, travel trade, events, B2B
- Income generation
- Business support, marketing support and tools

Within Destination Plymouth, these key functions are currently split out across the following key partners:

Destination Plymouth Ltd.

- Governance of strategy
- Executive leadership
- Delivery of specific projects
- Research and intelligence
- Business and sector relationships

Plymouth City Council:

- Hosting of DP team
- Marketing activities
- Tourist Information Centre
- Events delivery
- Delivery of major capital projects, planning and infrastructure including The Box

Business Improvement Districts:

- Place welcome, animation and interpretation
- Cleanliness and safety

BOARD OF DIRECTORS



Adrian Vinken
OBE
Chairman of Destination Plymouth Ltd., Mayflower 400 and Chief Executive of Theatre Royal Plymouth



Cllr. Tudor Evans
OBE
Leader of Plymouth City Council, Director HOSWLEP



Judith Petts
Vice-Chancellor and Chief Executive, University of Plymouth, Director HOSWLEP



Commodore Peter Coulson
BEng, MSC, MA, CEng, FIET
Royal Navy



Richard Stevens
Managing Director Plymouth Citybus, Director of HOSWLEP



Nigel Godefroy
Chairman Plymouth City Centre Company Ltd.

OFFICERS



Amanda Lumley
MTMI, FCIM
Executive Director Destination Plymouth Ltd.



Charles Hackett
Chief Executive Mayflower 400/ Destination Plymouth Ltd.

OBSERVERS



Tracey Lee
Chief Executive Plymouth City Council



Hannah Harris
Chief Executive Plymouth Culture



David Draffan
Service Director for Economic Development, Plymouth City Council

BUSINESS IMPROVEMENT DISTRICTS



Diane Mansell
Chief Executive Plymouth Waterfront Partnership Ltd.



Steve Hughes
Chief Executive Plymouth City Centre Company Ltd.

8.0 Financial

Destination Plymouth was incorporated in 2010 and since 2016, the business has been used as a delivery company for Mayflower 400. As a result the business has grown in turnover and human resources significantly. In the current financial year (19/20), the company has turned over just over £1 million mainly because of significant grants secured for Mayflower 400.

Income in the financial year 2019 to 2020 is currently identified as core funding, grant funding, commercial and other.

Core funding

Core funding is used to support the key business overheads including operating costs and executive team.

Current 2019/20 funding from key stakeholders is set out below and this will be a minimal annual target amount going forwards:

ORGANISATION	20/21
Plymouth City Council	150,000
Plymouth City Centre Company	50,000
Plymouth Waterfront Partnership	10,000
University of Plymouth	50,000
Total	260,000

Grant funding

Destination Plymouth has been particularly successful as an organisation in leveraging in grant funding over the past three years directly into either the company or working with partners to help secure specific funding for projects, which benefit the city as a whole.

Using 'seed' funding from Plymouth City Council Destination Plymouth secured £1.46 million of funding from Visit England over the three-year period from 2016 to 2019. This funding has been used to support international and cruise marketing activity with excellent results to date. In total Mayflower 400 has generated additional grant funding valued at £7.7 million, which has been drawn down through Destination Plymouth and strategic city partner organisations. It is worth highlighting that this represents significant leverage and demonstrates the power of a partnership approach across key city stakeholders.

Commercial

Destination Plymouth Ltd. has limited assets, which it can lever for commercial use, these include:

- Website (visitplymouth.co.uk) – advertising and online shop (10% commission)
- TXGB platform
- Mayflower website (mayflower400uk.org) – advertising
- Mayflower Trails App
- Plymouth Trails App
- Marketing campaign income – currently around £5,000 per annum

Working with its partners across the city over the past three years Destination Plymouth has helped to generate commercial income across a number of areas which are set out below:

Advertising on visitor guide

The annual visitor guide is 'break' even and covers costs of print, production and distribution annually.

Membership

Due to the structure of the organisation with the BIDS as key strategic partners all BID businesses receive a complimentary membership as part of their BID levy. There are businesses outside of the BID area, which can be members, however, many of the local tourism businesses are in the waterfront area, which means that opportunity for significant income generation is reduced. BID members have the opportunity to 'upgrade' to higher-level memberships and over all this generates a net surplus annually.

Sponsorship

Destination Plymouth has limited assets, which it is able to sell for sponsorship. The annual conference is sponsored and therefore

is cost neutral and partnership activities either generate 'in kind' or cash support.

Mayflower sponsorship:

Opportunities to sponsor key events and activities have been developed over the past three years and an external funding agency procured to support income generation activity for Mayflower. This has had some success to date securing national, local and regional sponsorship for key events and activities within the cultural programme.

Founders club:

During the run up to 2020 key strategic city partners were approached to support Mayflower 400 activity as 'Founding partners'. This approach has been used in many other regions with some success for example 'Welcome to Yorkshire' has strategic partners across the county who provide core funding for the business. Each partner in the Founders Club has contributed annually for three years.

Merchandising:

Destination Plymouth does not produce any merchandise directly. Partners including the Tourist Information Centre operated by Plymouth City Council produce specific Plymouth merchandise. Recently an online shop has been set up on Visitplymouth.co.uk, which sells merchandise from third parties at a 10% commission. Early indications are that this will be a positive move; however, volumes of product are not expected to be high at this stage.

In kind:

Destination Plymouth receives in kind support from multiple partners across the city for press trips, trade visits, campaign prizes and activities and VIP activity. This is not currently recorded, however, it is a saving on expenditure and therefore important not only in terms of overall budgets but also wider partner relationships.

9.0 Risk assessments

Our Strategic Risk Register identifies the key barriers to completing the prioritised actions in the Visitor Plan alongside the supporting Business Plan and the Marketing Plan. The Strategic Risk Register looks at the high-level risks over the short, medium and longer term and proposes mitigation to reduce the likelihood of the risk happening. Over a 10-year period, the macro environment can change significantly as has already been seen in our first Visitor Plan. Factors including the economy, climate and environment, social perceptions and ethics, politics, changes to statutes and technical advances will all affect our ability to deliver our plan.

The Destination Plymouth Board has identified the following as the key risks to delivery of the Visitor Plan.

Abbreviations:

DP = Destination Plymouth

PCC = Plymouth City Council

University = University of Plymouth

NMA = National Marine Aquarium

BIDS = Business Improvement Districts

GWR = Great Western Railway

ABP = Associated British Ports

PC = Plymouth Culture

NMP = National Marine Park

RISK NO.	RISK	MITIGATION
	DESTINATION/STRATEGIC	
1.	Ambitions may be greater than already available funding and resources.	Project led approach, secure core funding
2.	National Marine Park intent, delivery and lead(s) for it (e.g. Destination Plymouth), are insufficiently clear to enable strong delivery from March 2021 onwards.	Continued drive by PCC and partners to maximise early NMP progress, including demonstration of progress through wider projects that can be seen to deliver on the NMP. DP and PCC to agree DP's role in delivery of NMP
3.	Accommodation sector slow to respond to market demand resulting in insufficient rooms particularly 4 star and above – will affect staying visitor numbers.	Continued marketing nationally/ internationally for hotel investment opportunities
4.	Political Visitor economy may not be seen as priority sector by city political leadership.	Regular cross party briefing and engagement of members regularly
5.	Innovative Star Projects may not be developed quickly enough to source and secure essential external funding. Factors may include new ideas raising unknown issues and disagreement amongst partners and stakeholders. Some projects may not happen e.g. waterfront may not be regenerated.	Early and clear identification of lead, partners and other relevant stakeholders to enable early and full identification, ownership and engagement of potential issues. Secure feasibility funding where possible to identify issues early in project. Flexibility of order of development of Star Projects during 10 year period
6.	New relationship with EU may reduce foreign nationals working in hospitality, leading to shortfall in staff recruitment and retention.	Improve local perception of sector to encourage recruitment. Work with businesses to address seasonality and increase automation
7.	Environmental credentials Plymouth is pursuing an ambitious green agenda, and the Visitor Plan and its implementation needs to align with and promote this agenda to ensure a positive reception.	Environmental standards incorporated in Events Team planning Key ambition identified as one of UK's first carbon neutral destination Embed green, clean growth agenda across all activities
8.	Competition South West – Devon and Cornwall competing for grant and larger scale structural funding.	Ensure strong partnership working across the region, align key objectives at strategic level Develop 'Tourism Zone' shared approach
9.	Low unemployment , competition among similar sectors, poor perception of the sector as a career and staff churn is affecting employer's ability to recruit and retain staff. This coupled with risk 6 above is significantly affecting staff recruitment and productivity.	Skills and employment action plan will help mitigate this

RISK		MITIGATION
GOVERNANCE		
10.	Sign-off by PCC and buy-in by key partner bodies in the overall plan and its Star Projects may not be fully achieved.	Early engagement by DP, with and supported by PCC, with clear communication of the delivery value of the plan and its star projects, working with political leaders and key agencies as appropriate.
11.	Leadership at board level – retention of key board members or recruitment of new ones crucial to ensure authority with key stakeholders is round the table and skill sets covered	Regular review of Board and succession planning
FINANCIAL		
12.	Post 2020 Funding for DP to be secured - Key funding streams from 2021 not confirmed - Wider opportunities to secure grant funding will be limited - City Centre Bid renewal due in 2020 - Waterfront Bid renewal due in 2022	Stakeholder buy-in to visitor plan Increased commercial activity Regular engagement with BIDS and communicating joint successes to stakeholders
13.	Changed/changing funding limiting project deliverability.	Clear identification and communication of the value of full delivery of the Visitor Plan and its full multiplier effects across the economy Identify and deliver new, emerging opportunities within the wider, long-term plan.
DELIVERY		
14.	Staff resources Reduced resources post Mayflower 400 Continuity of senior team	Adopt Visitor Plan early 2020 to enable early identification and assembly of funding to support staff resources
15.	Innovation/Technological - Management of data and website following departure from EU - Use of big data to identify trends and opportunities - Automation to improve productivity - Creation of inspiring and organic content/platforms - Information for management decisions	Brexit readiness of our current digital data and websites has already been completed. Ongoing, avoid need to share data with non-UK based organisations. Work closely with Visit Britain/Visit England on emerging digital opportunities nationally Explore opportunities to automate processes where possible internally Develop digital skills in team/recruit in Continue to maintain evidence base e.g. Cambridge stats/perception studies etc.
16.	Marketing and brand Using Mayflower 400 as a platform for the Britain's Ocean City brand Evolving the creative approach Galvanising key city partners to support activity connected to the brand	Strong Britain's Ocean City messaging woven into Mayflower 400 programme and national marketing Develop creative approach before end 2020 Partner relationships activity/prospectus looking forwards
17.	Reputation Mayflower 400 seen as a failure partners lose confidence	Excellent delivery of programme/partner/media management and messaging

Abbreviations

DP = Destination Plymouth PCC = Plymouth City Council University = University of Plymouth NMA = National Marine Aquarium BIDS = Business Improvement Districts GWR = Great Western Railway ABP = Associated British Ports PC=Plymouth Culture



10.0 Key performance indicators

We will use the following indicators to measure progress annually or at regular intervals determined by ongoing activities and key projects.

- **Higher profile of Plymouth as a city to visit** – measured by media coverage and undertaken by the appointed PR agency using media agency e.g. Kantar
- **Brand tracking of perceptions of Plymouth** - among target visitor markets, via commissioned research
- **Numbers of jobs created and sustained** – tracking local employment through industry forums, Chamber of Commerce, university and colleges and business surveys
- **Growth in volume and value of tourism** – measured by The Cambridge Model
- **Greater community pride** – measured by local authority surveys
- **Greater visitor satisfaction** - measured by surveys using the Tourism Intelligence Unit guidelines endorsed by Visit England and commissioned research annually
- **Industry satisfaction** - measured by surveys using the Tourism Intelligence Unit guidelines endorsed by Visit England and using Destination Plymouth, Plymouth City Centre Company and Waterfront BID members as a core sample.

Cambridge Model

The Cambridge Model provides information on the volume and economic value of tourism visitors to the city. It has been run on an annual basis since 2008 and provides a model, which builds on the current trend data and provides comparability by local authority district across the region. That means Plymouth is able to monitor growth against other parts of the South West and nationally.

Great Britain Tourism Survey (GBTS) - The Great Britain Tourism Survey is undertaken by TNS for VisitEngland and partners and is based on approximately 2,000 face-to-face interviews per week throughout the year as part of TNS's RSGB Omnibus survey. It provides basic headline data on the volume and value of domestic tourism, for England as a whole, for the English regions and for the counties or unitary authorities.

International Passenger Survey (IPS) - The International Passenger Survey is conducted by Office for National Statistics and is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel, together with visitors crossing the land border into Northern Ireland. Around 0.2% of all travellers are interviewed, with approximately 55,000 interviews of overseas visitors obtained throughout the year.

Great Britain Day Visits Survey (GBDVS) - In 2011, VisitEngland, Visit Scotland and Visit Wales commissioned a new survey to measure volume and value of tourism day visits in England. A number of earlier surveys were conducted to measure this key sector of the economy, most recently in 2005, but it has been difficult to make comparisons over time due to changing definitions and survey methodologies. In the new survey, interviewing is carried out weekly, using an online methodology, and an annual sample of over 38,000 interviews with GB adults. The GB Day Visits Survey is an Official Statistic, and is produced in adherence with the Code of Practice for Official Statistics (2009).

Visitor perception studies

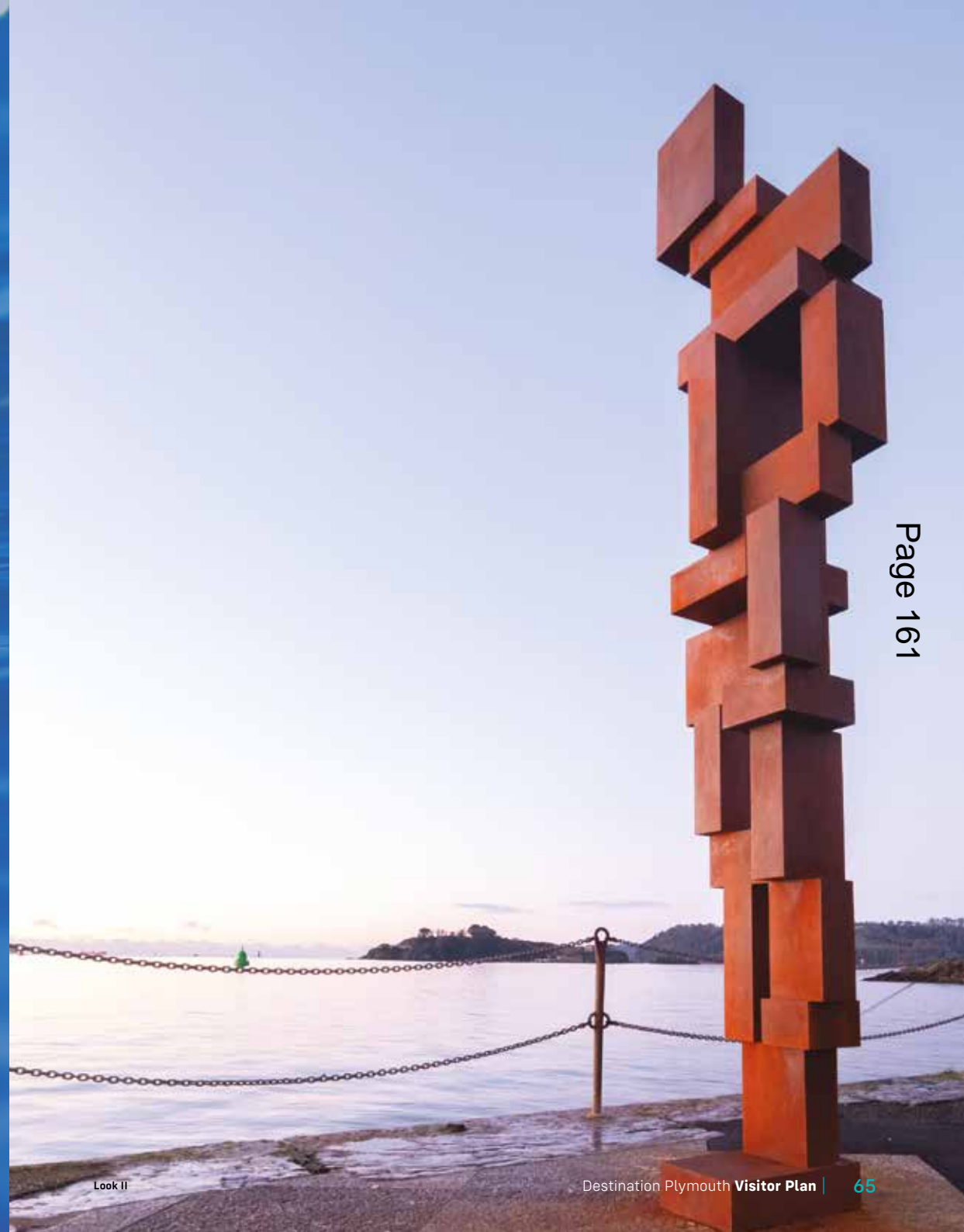
Since 2014 we have implemented bi-annual perception studies to understand existing visitor perceptions of the city and to benchmark quality overall within the destination. This also determines the types of visitor coming to Plymouth and where they are from which aids targeting and future market development. Currently the 'Arkenford' lifestyle profiling system is used for this work, which determines visitors, by the activities that they are likely to undertake.

Digital metrics

We regularly capture digital metrics across all of our current communications channels including website, social media, e-newsletters and database acquisition. This includes click through, numbers of visitors, likes and engagement with different channels.

Media

Media reach and audience types is currently measured using a professional media monitoring agency. This captures the profile and type of media as well as circulation, reach or distribution dependant on type of media.



Section 12.0 — Activity plan

ACTIVITY AREA	ACTIVITIES AND MILESTONES	ACTIVITY LEAD
GOVERNANCE AND FUNDING	Secure core funding from 2021 to 2024 (Confirm by Jan 2021) Review longer term structure post 2021 (Confirm by end 2021) Identify longer term funding opportunities (Confirm by end 2021)	DP Board
STAR PROJECTS		
Ocean Playground – National Marine Park	Feasibility study on Mount Batten area – Sept 2020 — Identify and assemble funding options	PCC/University/ Mount Batten Trust
Stories of the Ocean – National Marine Park	NMP grant application — Develop digital product — Engage community with Ambassador programme	PCC
National Marine Park Gateway	Feasibility and re-imagination of National Marine Aquarium — Feasibility of fish market — Identify and assemble funding options	PCC/NMA/ Sutton Harbour
The Box effect	Develop 3 year rolling exhibition/cultural programme — Maximise British Art show 2021 Identify wider cross city linked product offer — Source funding to support programme	The Box/PCC/PC
Après sea – Developing our night time economy	Work with Plymouth Culture to identify music opportunities for city — Map and develop existing product, gaps and opportunities — Develop marketing plan and campaigns to promote	PC/BIDS
Celebrating our maritime and military heritage	Work with NMRN and RN to vision and agree future for Naval heritage centre — Identify suitable building — Clarify ‘Courageous’ timeline — Assemble feasibility funding/resources	National Museum of Royal Navy/Navy
City Conference campus and accommodation	Demand study for conference meetings and events — Bid for Future high streets fund — Project feasibility — Assemble funding	PCC/University/ Urban Splash
Brunel Plaza	Partnership agreement signed — Funding assembled — Planning permission — Demolish parking — Refurbish intercity house	PCC/University/ Network Rail/GWR
Plymouth cruise and ferry port	Meeting with ABP and key partners to agree scope — Assemble funding	ABP/PCC/ Brittany Ferries
ENABLING PRIORITIES		
PARTNERSHIPS	<ul style="list-style-type: none"> Feeding into strategies at high level regionally/nationally Establishing and attending meetings and events/ lobbying for the sector on key issues at government/regional level Partnership working nationally/regionally/locally Assembling funding and resources 	DP
BUSINESSES Skills and employment:	<ul style="list-style-type: none"> Identify – establish relationships with businesses, employers and training providers to identify need and training opportunities/resources for project delivery Promote – develop the concept of a regional tourism and retail centre of excellence, raise the sector profile, within schools/community and support national 10-year campaign to recruit more employees Recruit – Encourage businesses to recruit trainees and apprentices now for 2020 onwards/raise awareness of ‘t’ levels and apprentice levy Retain – provide signposting for employee/employers to further training and development opportunities Evaluate – Set targets for recruitment, training and retention and evaluate through regular monitoring and reporting 	PCC skills team/DP
BUSINESSES Product development	<ul style="list-style-type: none"> Encourage businesses to sign up to quality schemes for example ‘Green tourism’ which include auditing for accessibility and sustainability Signpost businesses, local community and visitors to areas of best practice and adopt local charters including ‘plan for plastic’ and ‘zero carbon’ Secure funding to provide training, share best practice and work one to one with businesses on product development 	DP
COMMUNITY AND TEAM People	<ul style="list-style-type: none"> Explore opportunities to continue ‘Mayflower Maker’ programme post 2020 and develop longer term approach to volunteering and community engagement linked to National Marine Park Encourage participation and engagement across capital programmes and cultural/event programme Approach our daily activities with a ‘team Plymouth’ culture encouraging inclusivity, diversity and accessibility 	DP/ PCC/ Our Plymouth

Abbreviations

DP = Destination Plymouth PCC = Plymouth City Council University = University of Plymouth NMA = National Marine Aquarium BIDS = Business Improvement Districts GWR = Great Western Railway ABP = Associated British Ports PC=Plymouth Culture

ACTIVITY AREA	ACTIVITIES AND MILESTONES	ACTIVITY LEAD
ENABLING PRIORITIES		
OCEAN CITY INFRASTRUCTURE Transport and public realm	<ul style="list-style-type: none"> • Work with the city council and key transport partners to support the strategic plan for the future security and sustainability of key transport routes including rail, air and sea • Support development of star projects through facilitation and cross partner working • Develop relationships with major carriers to secure a planned programme of marketing initiatives to encourage visits off peak and extend the season • Encourage carriers and tour operators to work together to take advantage of inclusive tour fares • Actively promote cycling, walking and 'getting on the water' through targeted campaign activity and development of new digital trails 	PCC/DP
OCEAN CITY INFRASTRUCTURE Digital	<ul style="list-style-type: none"> • Developing a new digital strategy • Growing the reach of online and digital in line with marketing plan targets • Developing digital signposting and wayfinding solutions including exploring augmented and virtual reality • Working with key city partners to develop compelling content connected to our core themes • Ensuring our team has the specialist skills to develop compelling content and innovative approaches to digital activity • Exploring opportunities around 5G 	DP
OCEAN CITY INFRASTRUCTURE Accommodation	<ul style="list-style-type: none"> • Produce a conference demand and feasibility study • Market Plymouth internationally for accommodation investment • Continue to benchmark accommodation supply and demand • Work with existing hotel and accommodation providers to raise quality • Lobby for improved legislation around Air BnB 	PCC/DP
OUR DISTINCTIVE BRAND Positioning	<ul style="list-style-type: none"> • Developing a more sophisticated creative approach for the city, building on the good work to date and positioning the city as a great place to live, work, study and visit • Mapping key products and experiences that the city can confidently lead on • Exploring new market opportunities to support the city's growth and investment ambitions • Developing a compelling narrative to position the city internationally • Identifying opportunities for a campaign based approach into new target markets 	DP
OUR DISTINCTIVE BRAND Marketing plan	<ul style="list-style-type: none"> • Developing short term detailed delivery plan — up to 3 years • Assembling target funding and resources to deliver activity across the different target markets 	DP
OUR DISTINCTIVE BRAND City events and cultural programme	<ul style="list-style-type: none"> • Setting up a city wide events and cultural programming group • Auditing key city locations and agreeing what they are best used for • Promoting the city as a stage/venue through our marketing activities • Targeting specific events connected to our key themes and products 	DP/PCC/PC
OUR DISTINCTIVE BRAND City welcome and visitor information	<ul style="list-style-type: none"> • Review existing information provision and explore future opportunities connected to digital and new technologies and passport style schemes • Re-inforce Britain's Ocean City branding and emerging new creative concepts at all key gateways • Continue with volunteer 'Ambassadors' and develop guiding offer post Mayflower 400 	DP/PCC

Abbreviations

DP = Destination Plymouth **PCC** = Plymouth City Council **University** = University of Plymouth **NMA** = National Marine Aquarium **BIDS** = Business Improvement Districts **GWR** = Great Western Railway **ABP** = Associated British Ports **PC**=Plymouth Culture

Plymouth Visitor Plan

2020 to 2030

Our thanks go to the following key city organisations for their help and support in developing our Visitor Plan:



bluestone⁵⁶⁰

For their creative inspiration in our print and design

BLUE SAIL ▶

VISITORS PLACES DESTINATIONS

For facilitating the process, guiding and inspiring us

Photo credits

City College Plymouth, Theatre Royal Plymouth, Boringdon Hall & Spa, Urban Splash, Sponge UK, Mayflower 400, Andy Fox, Plymouth Culture, Mount Batten Watersports & Activities Centre, Jay Stone, Real Ideas Organisation, One Plymouth, GWR, Boringdon Hall Hotel & Spa.

In addition we would like to thank the many organisations across the city who took time to help shape our new vision, we couldn't have done it without you all.

Travel Trade Update Nov 2021 to Nov 22

Trade Shows attended

WTM Live 1-3 November 21 - Excel London

Pre Show marketing – newsletter went out to 1162 contacts in the Solomon Database inviting them to come and visit us on the UKInbound stand.

81 leads in total taken over the 3 days.

Which includes the following:

- 15 tour operators/DMC
- 22 press/bloggers/media

A follow up email to all 81 leads has been sent out and will be further followed up over the coming weeks.

WTM Virtual - 8/9 November 21

29 meeting invitations sent out (Max 40) to DMC's/tour operators in France, Spain, Germany, UK Canada, US and Sweden. 5 meetings confirmed over the 2 days.

All the above have had 121 follow up and I have also sent them the new 360 video and Mayflower digital brochures and links to US connections website.

BIM – 28th January 22 - Intercontinental London

22 Appointments and follow up included Mayflower product. Lots of interest in NMP and Mayflower

BIM Virtual - 1st Feb 22 – online 121 appointments

10 appointments .Great interest in Mayflower product and all itineraries have been sent in the follow up. The main line of interest seems to be in the Genealogy tourism and connections with family heritage to the Mayflower and UK as a whole. New tourism products like The Box which reflects on the Mayflower Connections was also popular plus the other Mayflower Destinations.

Excursions – Jan 28th 22 at Twickenham.

Took a stand partner option with Visit Devon, alongside Visit Exeter, English Riviera and Visit South Devon

Mayflower product was distributed to UK GTO's and lots of interest in creating legacy tours now.

We sponsored the VIP Buyers lounge and showcased local Devon food produce. Database collated was approx. 300

Explore GB - March 22

Virtual event this year over 4 days. We had 65 appointments with US, Spanish, French, German and Dutch markets. The US market are still very much interested in Mayflower and Maritime Heritage plus Faith Tourism.

Group Leisure Show – October 2022

Attended Group Leisure Show at Milton Keynes as part of the Devon Tops Attraction Stand – met GTO's and buyers who are interested in whats new in Plymouth. 300 new contacts collected

WTM – Nov 22

Attended WTM as a guest this year and met with 9 new contacts. Follow up underway and will invite them to Plymouth for Fam Visit. New NMP Travel Trade flyer has been sent as follow up.

Additional Travel Trade Activity

- New Travel Trade area on www.visitplymouth.co.uk has been created with Mayflower and US Connection product information. We are using this new area – www.visitplymouth.co.uk/traveltrade to refer our trade contacts for more information on group visits to Plymouth.
- Travel trade contact database. Quarterly newsletters are sent out
- New travel trade guide has been designed and added to the Travel Trade website - [Plymouth Group Travel Guide.pdf \(visitplymouth.co.uk\)](#)

Launching a new Destination Plymouth Travel Trade Campaign for businesses in the city and surrounding areas to buy into our 2023 activity

- Developed a new itinerary for the Travel Trade in line with the National Marine Park – a collection of bookable experiences which are commissionable to the travel trade.
- Continue to work on developing the new travel trade area on the Visit Plymouth website [Travel Trade - Visit Plymouth](#)
- Travel Trade newsletters are sent out bi monthly to our database showcasing the groups offer of Plymouth. Working on the next newsletter which will include the new NMP Collection and whats new for 2023
- Joined CTA in March 2022 – looking at what events we can get involved with plus we have full access to the members database. Dedicated Newsletter to be sent out to these contact by Xmas

DP Travel Trade (sessions unavailable as it's a page on VP compared to CP microsite) Webpage went live this summer [Travel Trade - Visit Plymouth](#)

Page views: 1,350

Top pages:

- 1) Homepage – 503
- 2) Coach Groups – 399
- 3) Travel Trade and Groups – 107
- 4) Group Attractions – 77
- 5) Group accommodation – 70

Conference Plymouth Update November 2021 to November 2022

Trade shows attended

MeetGB Virtual – February 2022

We scheduled to have approx. 40 appointments over 2 days and have been given access to the full delegate list and follow up has been sent to them and they are all added to our database. Interested in new incentive ideas and new venues.

MIA Agents Connect Day at Sandy Park – August 2022 New contact for the large booking conference agents. Very worthwhile event. Looking at attending future Agent Days.

Plymouth and Devon Chamber Business Show - September 2022

Exhibited at a stand at the Plymouth & Devon Chamber Business Show in September with The Box and Duke of Cornwall as stand partners. We showcased Xmas parties and venue hire

Additional Marketing Activity

- Christmas newsletter has been sent out to the CP database which is approx. 2000 contacts of corporate buyers, agents and associations. The newsletter focused on Christmas for corporates and news for 2023
- National Marine Park Experience Collection has been added to the CP website and included with ongoing marketing as a new incentive offering to buyers.
- Collating content for the next CP newsletter focusing on Teambuilding and Incentives.
- Joined MIA – Meetings Industry Association as a Destination Partner – first destination meeting in December 22
- We have recently tendered to host the MIA Destination Summit in March 2023 but unfortunately we have been unsuccessful
- We have launched a new membership scheme for Conference Plymouth this month to help increase income and to also deliver more marketing activity. We have had a 25% uptake so far.
- Working with our venues to supply content and blogs in line with our Content Plan
- Establishing a new Plymouth/South West PA Network in partnership with the previous Bristol PA Network Chair – looking at branding and venues to host.
- Working Visit Britain/Meet England to ensure we have representation at a National Level.
- Presented to EMA for a destination feature in partnership with MeetEngland
- Working with Loganair to get them onboard as a member and to look at hosting a joint fam trip with them for agents and buyers connecting up the Aberdeen and Norwich routes to Exeter.

Conference Plymouth Website Stats – 22 Nov 2021 to 22 Nov 2022

- Users: 2,575
- New Users: 2,568
- Sessions: 2,972
- No. of sessions per user: 1.15
- Page views: 6,495

Top pages visited on website

1. Homepage – 855
2. Venues and Suppliers, Venues – 785
3. Devonport Guildhall – 211
4. Crowne Plaza – 201
5. Unique Venues

Growth and Infrastructure Overview and Scrutiny Committee



Date of meeting:	07 December 2022
Title of Report:	Plymouth Sound National Marine Park Update
Lead Member:	Councillor Pat Patel (Cabinet Member for Customer Services, Culture, Leisure & Sport)
Lead Strategic Director:	Anthony Payne (Strategic Director for Place)
Author:	Elaine Hayes (NMP Interim CEX) and Kathryn Deeney (Head of Environmental Planning)
Contact Email:	Kathryn.deeney@plymouth.gov.uk
Your Reference:	221207 Scrutiny Report - PSNMP Update
Key Decision:	No
Confidentiality:	Part I - Official

Purpose of Report

The purpose for the report is to update on two elements of the Plymouth Sound National Marine Park development.

- Firstly an update on the NMP Horizons project, funded by the National Lottery Heritage Fund (NLHF) Project. The report provides an interim update on the year of listening, providing feedback and insights from the summer programme. The summer programme connected with over a million people and gained views about the NMP from over 8600 people. This work has led to a greater understanding of how people would like to play a part in the NMP and enjoy all it has to offer, as well as highlighting current barriers to use and enjoyment. The report also provides details on the next steps to producing a 'Delivery Stage' bid that will be submitted to the NLHF in summer 2023.
- Secondly a progress update from the Interim CEX of the NMP on the National Marine Park development work which covers, work to date, vision, purpose, delivery and next steps.

Recommendations and Reasons

Recommendation – Note the National Marine Park updates

Reason – Acknowledge the progress that has been made on the development of the National Marine Park and the engagement work that has been conducted by the NMP Horizons project that is informing the development of the Delivery Phase bid.

Recommendation – Instruct officers to return to Scrutiny in Spring 2023 with a report that sets out the framework for the NMP Horizons Delivery Stage bid.

Reason – To enable Members of the Scrutiny panel to review the content of the NLHF bid and provide recommendations for any changes and/or additions.

Recommendation – Request the NMP Interim CEX returns to Scrutiny in 6 month's time with a more detailed update on progress.

Reason – The NMP programme will be more advanced in 6 month's time and will enable Scrutiny Members to have the opportunity to input into the development of the UK's first National Marine Park.

Alternative options considered and rejected

Option - Officers could not return to Scrutiny to present a proposed framework of content for the NLHF Delivery stage bid. This would not give the Scrutiny Members the chance to influence the content of the bid.

Options – The NMP Interim CEX does not return to Scrutiny with further detailed work on the development of the NMP and Scrutiny Members are not able to influence further the development of the UK's first NMP.

Relevance to the Corporate Plan and/or the Plymouth Plan

The NLHF Heritage Horizons funding will support the City's aspiration to develop the UK's first National Marine Park within Plymouth Sound. The programme will deliver against policies within the Plymouth Plan including policy 'INT1 - Implementing Britain's Ocean City'. The NMP has been designed to support the City Vision as well as Plymouth City Council priorities: 'unlocking the City's potential' by making more of one of our greatest assets and due to the focus on engagement and inclusion it will also support the priorities within 'Caring for People and Communities', particularly reducing health inequalities, by providing more opportunities for a wider group of people to access the health and wellbeing benefits the NMP can offer.

The way the project will be delivered, with a focus on people and environment, will also support the City aspirations to be net zero by 2030.

Implications for the Medium Term Financial Plan and Resource Implications:

This update report has no direct financial implications.

Financial Risks

This update report has no direct financial risks.

Carbon Footprint (Environmental) Implications:

The National Marine Park and all its component parts are being designed to support a positive transition to net zero. Each part of the NMP Horizons project is being developed will be designed to maximise carbon reduction and encourage behavioural change which supports the Climate Emergency 2030 ambition.

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

** When considering these proposals members have a responsibility to ensure they give due regard to the Council's duty to promote equality of opportunity, eliminate unlawful discrimination and promote good relations between people who share protected characteristics under the Equalities Act and those who do not.*

This update report has no direct other implications.

Appendices

**Add rows as required to box below*

Ref.	Title of Appendix	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>						
		1	2	3	4	5	6	7
A	221207 NMP Horizons Project Update Final							
B	221207 NMP Horizons Project Update Final Appendix I							
C	221207 National Marine Park Horizons Project - Summer Report 2022							
D	Equalities Impact Assessment (if applicable)							

Background papers:

**Add rows as required to box below*

Please list all unpublished, background papers relevant to the decision in the table below. Background papers are unpublished works, relied on to a material extent in preparing the report, which disclose facts or matters on which the report or an important part of the work is based.

Title of any background paper(s)	Exemption Paragraph Number (if applicable) <i>If some/all of the information is confidential, you must indicate why it is not for publication by virtue of Part 1 of Schedule 12A of the Local Government Act 1972 by ticking the relevant box.</i>

	1	2	3	4	5	6	7

Sign off:

Fin		Leg		Mon Off		HR		Assets		Strat Proc	
Originating Senior Leadership Team member: David Draffan											
Please confirm the Strategic Director(s) has agreed the report? Yes											
Date agreed: 28/11/2022											
Cabinet Member approval: Councillor Patel – Cabinet Member for Customer Services, Culture, Leisure & Sport, approved by email.											
Date approved: 25/11/2022											

Plymouth Sound National Marine Park Update Horizons Project & NMP Development Progress Report



Summary

The Plymouth Sound National Marine Park (NMP) will reconnect an entire city to the Sea, rekindling a golden thread between citizens, the marine environment and its history. It will nurture our natural and cultural heritage for the benefit of current and future generations, whilst aiming to develop a sense of marine citizenship and support sustainable heritage management. This report provides an update on the NMP Development Work and on the Horizons Project, the first of the NMP projects that is starting to bring the Park to life.

NMP Development Work

This report provides an update on the significant progress made to date in establishing the Plymouth Sound National Marine Park, the first of its kind in the UK. Key achievements to date:

- Artwork project Millbay
- Delivery SailGP Inspire and Impact programme. 0.5m people heard about the National Marine Park on Sky TV
- Queens Green Canopy Kelp Award the only award of its kind given by H M Queen Elizabeth. Global reach 2 billion.
- Vision for the NMP developed and agreed by the Board
- >£400,000 in new projects being developed or in flight

NMP Horizons – Year of Listening Progress Update

The UK's first National Marine Park (NMP) will create opportunities for residents and visitors to reconnect with and explore the ocean in exciting ways. Only a community-led approach will ensure we met our ambition of establishing the Plymouth Sound NMP as the people's 'Park in the Sea'. The NMP Horizons project is funded by the National Lottery Heritage Fund and is the first major investment. At its core focus there is a focus on inclusive engagement and will therefore start to create the new relationship between people and the Park.

To ensure the project enabled an inclusive approach to designing the NMP Horizons project with communities a year of listening commenced in April 2022. The goal is to engage a diverse range of people with the project, from those who are already passionate about the NMP to those who have never visited before. The engagement approach is set out in the Activity Plan for the development stage of the project and was brought to scrutiny in February of 2022. The purpose of the

development stage Activity Plan is to enable a test and trial approach to the engagement to see which activities and approaches communities really liked, to enable the identification of the current barriers to a greater number of people enjoying the Park and what people would like enhanced as part of the project.

Since April the project has delivered a number of mass engagement events including an open weekend at the National Marine Aquarium in April where thousands of people attended over two days to find out about and give their views on the NMP and the Big Blue Splash in July where people could try for free lots of different ways to get in on under and next to the water and over 74% of attendees tried something new. This has been complimented with small scale more bespoke engagement including the mini blue splashes where groups that had little or no contact with the NMP participated in a range of activities and provide hugely valuable insights into how the Park could become more accessible for them. The NMP team has also attend other events to talk to people about the Park and gain their views including the Sail GP weekend, respect festival and community led events.

This paper includes information on activities and consultation which have happened since April 2022, the insights and learning from the programme so far and the next steps for the project leading to the submission of the Delivery Stage bid in summer 2023.

NMP HORIZONS PROJECT: YEAR OF LISTENING – PROGRESS TO DATE

Background

Our goal is to establish Plymouth Sound NMP as the people's 'Park in the Sea' and that can only be achieved through an enabling an inclusive approach to engaging and empowering communities.

As a reminder of the process the NMP project funded by the National Lottery Heritage Fund (NLHF) Heritage Horizon Awards is subject to a phased funding approach as follows:

- Development Stage that runs until summer 2023 - £921,500 of NLHF secured for this stage.
- Submission of Delivery Stage bid summer 2023 - non-competitive application stage where we need to present a delivery project that meets our original ambitions.
- Delivery Stage – Winter 2024 to winter 2028 (exact dates dependant on NLHF decision timelines) – around £8.66million of NLHF ring fenced for this stage.

The development phase Activity Plan which was presented to Scrutiny in February 2022 has been driving the inclusive engagement programme since April. The activities are grouped under eight programme headings to ensure that the project begins to create a new relationship between the city

and the ocean, through community led engagement and that by the summer of 2023 we have developed a fully inclusive bid that we will be proud to submit to the NLHF.

Year of Listening – Activities to Date

A detailed update on activities that have been undertaken since April are presented in full in Appendix A. The table in Appendix A lists the Activity Plan work programmes and progress against each one to date. The NMP Horizons summer report also provides a brilliant visual summary of the work that has been happening.

In summary the year of listening has to date included:

Large Scale Engagement Events: NMP Horizons project directly produced events that enabled the team to talk to a wide section of the community about the NMP. The events had inclusion planned in as a core element and everything from the way the tickets were distributed to how the events were planned and delivered encouraged a broad audience. These events included the NMP Open Weekend at the National Marine Aquarium in April and the Big Blue Splash in July. Thousands of people took part in these events and we connected with a huge audience through our social media activity.

PSNMP channel reached **139k people** across social media channels linked to the events.

Focused and Targeted Events – The large scale events have been complemented by a programme of more focused events and activities designed to ensure inclusion in our approach. This has included for example:

- Sea in the Park – taking the wonders of the NMP to communities;
- Mini Blue Splashes – small scale events testing activities with smaller groups to help ensure the design of the Big Blue Splash encouraged as many people as possible to participate.
- NMP BOX takeover – taking NMP activities and engagement to the Box over the summer to engage with different audiences and gain different views.
- Marine Archaeology camp – 2 schools participated in a pilot archaeology camp uncovering the exciting history of Plymouth Sound out onsite and in the mud!

Connecting with Others – In addition to curating events direct the NMP Horizons project attended lots of other events to talk to people about the NMP with the idea it would broaden the projects reach to engage with different communities. This including attending SailGP in the blue/green village, the Respect Festival, Queens Green Canopy event, the (successful!) Merfolk world record attempt. The Ranger team have also co-designed activities with other including the Plymouth youth service, Swim Safe and Hope refuge centre.

The 5 key barriers that have been identified so far are as follows:

- Knowing where to go, the different venues and what is on offer there and when.
- The cost of getting to the NMP, whether bus, ferry, walk or car.
- The lack of access to kit such as wetsuits, snorkels, buoyancy aids etc. to borrow rather than buy.
- Fear of the unknown - trying new things, putting a wetsuit on, feeling silly, not having the correct equipment, sharks in the water, not being able to swim, want to do if they got into trouble in the water, lack of lifeguards.
- Wanting to enjoy the NMP but not in an active, getting wet way, and feeling there is no dry option.

We also want people to help shape what the project delivers and so they have been sharing thoughts on things they would like to see change as a result of the project including:

- Enhanced water quality
- Good access/ pathways into the Sea
- Spaces and infrastructure that enable quiet enjoyment of the NMP without getting wet.
- Information on the wildlife of the Sound and surrounding green spaces
- Better transport options

Our engagement activities are enabling people to get across their views in many ways, from online questionnaires and face to face conversations to drawings. Much of the information will enable a quantitative review of ideas and views but due to the inclusive approach to engagement we are also getting lots of qualitative feedback and some insightful comments, such as:

- *'We had the best time. My children were able to do something they've never done before. It was amazing!'*
- *'The SUP YOGA was insane! So much fun. Instructor was amazing, kind, encouraging and fun. Great activity. Thank you'*
- *The big blue splash was an absolutely brilliant idea – I hope something similar is repeated again. My main comment is that there needs to be more and better access to the water around Plymouth Sound. Some of the steps and railings have been improved but there needs to be more done.*
- *'It was a wonderful weekend of fun and happiness. Plymouth has so much to offer.'*
- *'I was only volunteering for one day, but I have had a lot of fun, I asked to volunteer again. I am learning about Plymouth by volunteering for the NMP.'*

The outcomes of the engagement activities to date are being used to enable us to identify any gaps in terms of people or places we still need to link with and gain views. We will be seeking to ensure we have a good level of coverage by the end of our year of listening.

All of the insights, comments and identified barriers are being used to inform all aspects of the NMP Horizons project from the capital programme interventions to what goes into the Delivery Stage activity plan.

Next Steps

The year of listening is already given hugely valuable direction to the development of the NMP Horizons project and we will continue to listen, learn and evolve the project as a result. All the work will help shape the bid that will be submitted to the NLHF next summer. With the warmer, calmer season behind us for this year there will be a focus on engaging people with the Park in different ways, which are a bit drier! This will include:

- Commencing our digital NMP engagement work – testing and trialling approaches to bringing the treasures of the Sound to life and discovering new ways of connecting with people through innovations in digital;
- Developing plans to enhance the wildlife of Plymouth Sound – co-designing a marine nature recover project with communities and stakeholders;
- Continuing to pilot our NMP Ranger team;
- Integrating the engagement work insights into the designs for the physical changes to the NMP gateways to help overcome barriers to access and enjoyment;
- Deliver a pilot NMP schools programme – generation ocean;
- Develop the Delivery Stage bid.

NATIONAL MARINE PARK - DEVELOPMENT UPDATE

The NMP Horizons Project is the first large scale investment in the NMP but it won't be the last and has a specific focus. This report provides the opportunity to update on progress on the Plymouth Sound National Marine Park (PSNMP) development programme to date.

Work to Date

The work to establish Plymouth Sound National Marine Park began in earnest in March with the appointment of the Interim CEX. The task is to develop a credible PSNMP that within two years will be self-sustaining and able to deliver the Vision and Purpose for the marine park.

Since March much of the work has focused on engaging with people and organisations to bring them up to date with the process of setting up the NMP and ensuring a clear and consistent message for all. The two year hiatus whilst we all dealt with Covid has not helped the process and anxieties and pre-conceptions of what the park will be have developed and it has taken some time to unpick this.

Early wins

Whilst developing the necessary structural elements of the PSNMP there have been opportunities to deliver and support delivery of a number of great projects including Bath Street hoarding, SailGP and the Kelp Award.

Bath Street

The old HSL site is what greets visitors and people disembarking from the ferry. We wanted to create an eye-catching statement of welcome that aligned with our brand narrative.



SailGP

The NMP co-ordinated the Inspire and Impact programmes for the SailGP event. An incredible week and amazing weekend of sport, community engagement and delivery of climate change projects. A few highlights NMP highlights:

- 250 physically disabled young people and adults on the water, many for the first time ever

- 400 young people involved in STEM events to encourage them to continue with these subjects
- 4 community groups now have solar panels to help offset their energy bills and reduce carbon
- Half a million plus views of Beneath the surface – a film all about Plymouth and The Sound

Kelp Award

Lewis Pugh was appointed as the NMP Ambassador and worked with HM The Queen and Queen's Green Canopy to secure the only kelp award for the UK. This generated huge international interest with press reach worth millions.



Delivery Strategy

The early request from the Board was to develop a delivery strategy that articulates what needs to be done and when but not the detail of the delivery. This is being used as a roadmap for the delivery of the PSNMP.

There are 4 key themes for the strategy:

- Vision and development plan
- Engagement plan (this includes comms)
- Strategic opportunities
- Funding

Following extensive discussion the Vision, Purpose and Delivery themes for the marine park have now been agreed and are given below. This then forms the framework for the development of governance and strategy.

Vision

Our National Marine Park will value the environment, heritage and tradition of Plymouth Sound and its estuaries. It is where people and planet will come together to realise a new, sustainable relationship with the sea.

Purpose

- Take us back to the sea
- Inspire each and every generation
- Restore a sense of pride and identity for the city
- Enhance our marine environment
- Improve the health and wellbeing of people through better access
- Support the development of a truly sustainable economy

Delivery

- **Blue-green economy** - The blue economy can be defined as “the exploitation, preservation and regeneration of the marine environment” and this is what we plan to do. Plymouth is a coastal city with a thriving maritime economy but there are huge opportunities for expansion of the blue economy. Key areas are aquaculture, marine innovation and renewable energy. By 2030 the blue economy will be worth £3.2 trillion and Plymouth needs to be part of this
- **Marine nature recovery (TECF lead)** - Our oceans, including Plymouth Sound face some serious threats: from pollution, from climate change and from non-native species. All of these will require us to enhance and sustain vital habitats in order to ensure that our marine environment here in Plymouth can be as resilient. This work is led by TECF and the NMP will support.
- **Marine science, education and skills** - With 3 universities and 2 leading marine research establishments in the city the role of the NMP is to work with all of them. However there are significant skill gaps in the city notably in marine innovation and through the Horizons project and beyond we will work to reduce these. We need to ensure that the skills of the next generation match the needs of industry.
- **Cultural identity and engaged communities** - This work strand is all about developing the sense of place and pride in the city. The culture work will be delivered through the network of culture-based organisations across the city, working to develop the marine identity for the city and its citizens through a broad range of interventions. Alongside this we are working with Destination Plymouth and Plymouth Culture to ensure brand alignment and a common platform for developing placemaking in the city.

- **International recognition** - Working with the city to show what it has to offer to an international audience, through events, conferences and raising the profile of the city.

Project Development

Against the 5 themes a number of projects are already in development, working with a range of local organisations to facilitate delivery. Currently there are 15 projects being scoped under the five headings; these include projects as diverse as aquaculture and the arts.

Work has already progressed well on drawing together partnerships; in collaboration with the university funding has been secured for a Knowledge Transfer Officer to enhance communications between the University Plymouth Marine Labs and the MBA all of which will support the development of key projects for the marine park.

In partnership with the South West Aquaculture Network and MBTC we are looking at opportunities to bring aquaculture to Plymouth, starting with a project with the university to understand the opportunities and constraints involved.

Working with Tamar Estuaries Consultative Forum and other conservation bodies we are soon to submit a saltmarsh restoration and recreation project. Saltmarsh is a very important habitat for fish and invertebrates; for specialist plants such as samphire and sea lavender and importantly also they are huge carbon sinks and are able to take up carbon which supports our journey to net zero as well providing natural flood defences.

Within the culture work stream we are supporting a local CIC to develop and deliver a sea festival next summer. This will be an art festival with content generated by the people who live in the community and will culminate with a celebration of the sea.

Working with Pam Buchan and the Ocean Conservation Trust we are developing the work on ocean literacy and marine citizenship to build a body of evidence that will help us understand how we can transform our city into ocean citizens who will love and respect the sea.

Public Relations

It is vitally important that as many people as possible know about the marine park. SailGP and the kelp award have both brought press column inches. To support this there is also an NMP newsletter, a blog and a series of podcasts all linked to marine issues. Members can sign up to receive the newsletter from the website.

Next Steps

The next stage in the process will be to develop the governance and funding arrangements for the NMP that can deliver the scale of our collective ambitions. Until an entity is created it is difficult to secure funding. Alongside the governance work we will be developing the funding strategy that sets out a longer term robust model to ensure that the NMP can operate into the future.

Recommendations

Recommendation – Note the National Marine Park updates

Reason – Acknowledge the progress that has been made on the development of the National Marine Park and the engagement work that has been conducted by the NMP Horizons project that is informing the development of the Development Phase bid.

Recommendation – Instruct officers to return to scrutiny in spring 2023 with a report that sets out the framework for the NMP Horizons Delivery Stage bid.

Reason – To enable Members of the scrutiny panel to review the content of the NLHF bid and provide recommendations for any changes and/or additions.

Recommendation – Request the NMP Interim CEX returns to scrutiny in 6 months' time with a more detailed update on progress.

Reason – The NMP programme will be more advanced in 6 months' time and will enable Scrutiny Members to have the opportunity to input into the development of the UK's first National Marine Park.

This page is intentionally left blank

NMP Horizons Project Update FINAL – APPENDIX I

Engagement programme	Development activity submitted	Update on Activity	Lead
PI Interpretation	<ul style="list-style-type: none"> • Interpretation designers employed • Interpretation scheme developed 	<ul style="list-style-type: none"> • The engagement activities over the summer with a wide range of people have given insights into why the Park is important to people, what barriers exist to inclusive access and what would help overcome those barriers. • A consultant will work with the team in the new year to utilise all this intelligence and design an interpretation scheme for the project. 	<ul style="list-style-type: none"> • NMP CEX with support from NMP team.
P2 Digital engagement	<ul style="list-style-type: none"> • 6 'innovation labs' to explore the art of the possible • develop a marine observation post (Breakwater) • Hidden treasures of the sound project development • Consultation to develop a website "front door" for the park 	<ul style="list-style-type: none"> • We have completed a tender exercise to bring a consortium of digital engagement experts from Plymouth to help shape a digital engagement framework for the NMP Horizons project. • This will include a platform to develop an NMP digital community. • It will also include some proposal for innovations in digital engagement for the delivery phase, some sparkle events that will bring the NMP to life through cutting edge digital opportunities. • This work will commence in the new year and digital options will be tested and trailed before being evolved and form part of the bid submission. • The NMP website is up and running but how it will grow and develop will form part of the above commission. 	<ul style="list-style-type: none"> • NMP Team + External consultant

P3 Activate	<ul style="list-style-type: none"> • 2x open NMP Festival events • 30+ pilot targeted 'Give it a go' events • 3+ Pilot walking events and challenges potentially with digital innovation* • 20x 'Sea in the park' events (taking the park to communities) • "sea at the park" engagement alongside existing events programme 	<ul style="list-style-type: none"> • NMP Open Weekend at the NMP - Free weekend at the NMA that highlighted all aspects of the NMP and provided a first opportunity to start helping to shape the Parks future. Ticket distribution was planned to ensure an inclusive event. • Sea in the Park - aimed at bringing the sea to different areas of Plymouth. Sixteen community events around Plymouth were chosen to host Sea in the Park. These events were selected with the help of community workers. Over 1,300 were engaged through events in their communities. • NMP Mini Blue Splashes - The mini splashes were used to inform the Big Blue Splash event. We trailed different activities over four consecutive weeks and by utilising the same group we allowed familiarisation, confidence building and the breakdown of barriers • NMP Big Blue Splash – A mass engagement event on 23/24th July. Not the best weather but still 2,200 people took part in a diversity of activities with 74% of participants trying something new. • NMP BOX Takeover – over the summer different aspects of the NMP were shared with people attending the Box different activities conducted – overall 2,971 were engaged through the programme. • Sail GP Blue/Green Village - Throughout the weekend of Sail GP the NMP ran activities in the Blue-Green village, engaging people with the NMP, as well as the race communications talking about the NMP to attendees. • STEM GP - nearly 400 children taking part in STEM-related activities delivered by 10 different Plymouth-based organisations. The NMP activities were based around a remote-controlled Waste Shark provided by the Preventing Plastic Pollution project 	<ul style="list-style-type: none"> • NMP Team Mount Batten WSC, NMA, Mount Edgcumbe • BOX team
-------------	---	---	--

P4 Communities	<ul style="list-style-type: none"> • 1x pilot community neighbourhood project in Ernesettle 	<ul style="list-style-type: none"> • Community pilots are being progressed at Firestone Bay and Ernesettle Creek. • There is a need to co-design any proposed physical changes or activities during the delivery stage with the community. • Discussions and initial workshops have taken place to look at the art of the possible and further joint work will be completed before final proposals are included as part of the bid, 	<ul style="list-style-type: none"> • NMP team
P5 Community History	<ul style="list-style-type: none"> • 1x pilot community history project 	<ul style="list-style-type: none"> • A marine archaeology camp was trialled in July with 22 school children from 2 schools led by Mount Edgcumbe NMP hub. • The students learnt about the maritime history that lies within and around Plymouth's National Marine Park, from the 1,000s of shipwrecks that still rest here, to Plymouth being one of the oldest ports in Britain. • Students handled real artefacts recovered from Plymouth Sound, touched rare roman and prehistoric artefacts from Plymouth • The BOX led work to integrate the NMP as part of the History Festival in May this year. 	<ul style="list-style-type: none"> • Mount Edgcumbe + Box
P6 Enrich: Enterprise Support	<ul style="list-style-type: none"> • NMP Enterprise Network established • Taster meet ups for starter enterprises • Pilot sustainable fisheries initiatives 	<ul style="list-style-type: none"> • Through match funding provided by the Community Renewals Fund we have managed to engage with xxx businesses encouraging them to become part of the Green Tourism Award programme and conduct environmental audits of their business. • The NMP CEX is leading a project to engage communities with fishing through opportunities to 'go fishing' through to a trail and interpretation on what fish is caught and landed in Plymouth. • We will also be commissioning in the New Year work to support the delivery stage bid on what projects could support a wider range of people benefiting from sustainable fisheries in Plymouth. 	<ul style="list-style-type: none"> • CRF Team • NMP Team

P7 Schools and Future Careers	<ul style="list-style-type: none"> • Involvement in 10 in school activities • Involvement in 2 out of school activities • Content development of Ocean Citizenship scheme of work • Develop apprenticeship programme • Develop work experience programme 	<ul style="list-style-type: none"> • Generation Ocean - Piloting elements of what is planned to be a large scale sustained engagement with schools through curriculum led activities will begin in 2023. Over 27 schools will be part of the cohort. The pilot above will provide insights to develop a delivery stage programme of activity. • Volunteering and Micro-Interns - The volunteering and micro-intern programmes is helping to inform what an apprenticeship programme would look like. The NMP recruited four micro interns (1-month placements) during July. They were recruited through the University of Plymouth micro-internship program. We are seeking to participate in a further round of micro-interns later this year. The NMP Ranger volunteering programme is gaining insights into what a scheme could look like that would enable people to gain some kind of credit/badge for participation. • Apprenticeships - The development of an apprenticeship framework will commence in 2023. 	<ul style="list-style-type: none"> • NMA • NMP Team
P8: Environmental Ambassadors: Volunteering and Guardianship	Pilot Park Ranger Team	<ul style="list-style-type: none"> • The Rangers have spent the summer trialling different approaches to engaging people with the NMP • This has included guided walk, beach cleans and establishing a regular volunteering groups. • They have also attend other events to engage people with the Park including – Respect festival, Green Tech Boat Show, Green Minds Festival of Nature, Hope Refugees Men’s Group, Queens Green Canopy, Merfolk world record, swim safe programme and Reclaim the Sea. 	<ul style="list-style-type: none"> • NMP Team
Evaluation	<ul style="list-style-type: none"> • End to end evaluation of 	<ul style="list-style-type: none"> • All of the consultation and engagement responses from the first part of the year of listening are forming part of the evaluation for the development phase and will inform the Delivery phase bid. 	NMP Team. Partners and external contract

	development period. <ul style="list-style-type: none"> • Active learning approach • Specific evaluation testing 	<ul style="list-style-type: none"> • Over 10,000 people have been engaged with the Park since April 2022. The insights have been hugely valuable and the barriers and opportunities are being reviewed by the team. • An evaluation of the Development phase will be developed next year and submitted with the Delivery Stage bid. 	
Activity Planning Delivery Phase Bid	To develop the activity plan for the Delivery stage bid based on the learning from the development phase	<ul style="list-style-type: none"> • The review of the activities conducted so far as part of the year of listening is being used to help draft out what should be included in the Delivery Stage bid. • Work on the Activity Plan will start in January 2023. 	NMP Team + External contract

This page is intentionally left blank



Plymouth Sound National Marine Park Horizons Summer Report 2022

age 191



National Marine Park Horizons Project - Summer Report 2022

The National Marine Park has engaged with over **162,000** people and connected with over **2.3 million** people!

At all of our events during our busy summer of activities we asked people for their thoughts on the National Marine Park - what they enjoyed and how they would like to see the Park develop.

In this stage of the project, we can test and trial ways to make the NMP even better and ensure more people enjoy the fantastic blue spaces around Plymouth, your ideas are essential!

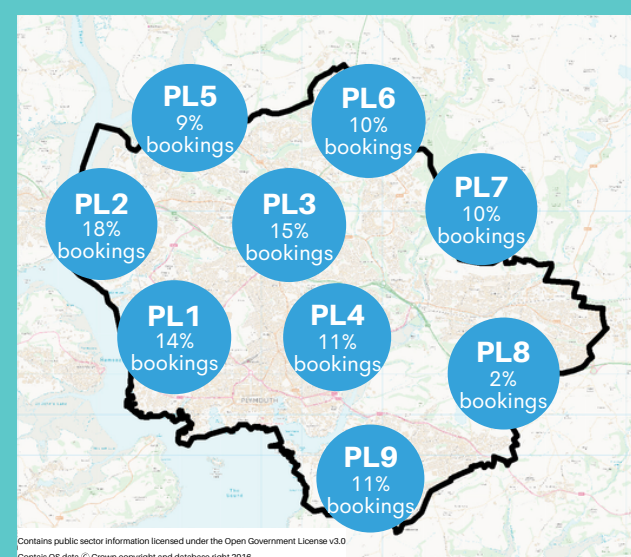


The Big Blue Splash was a celebration of Plymouth Sound with over 30 providers offering a chance explore and discover activities in the area for free, from charcoal drawings to sailing and SUP Yoga

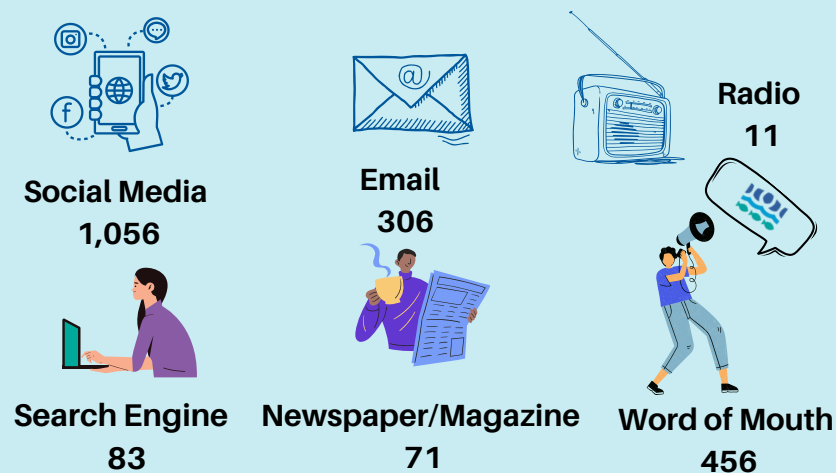
Half the tickets were offered to the wider public and the other half were offered to community groups, but people could also turn up on the day.

74% people tried an activity for the first time in this free event!

Bookings by postcode



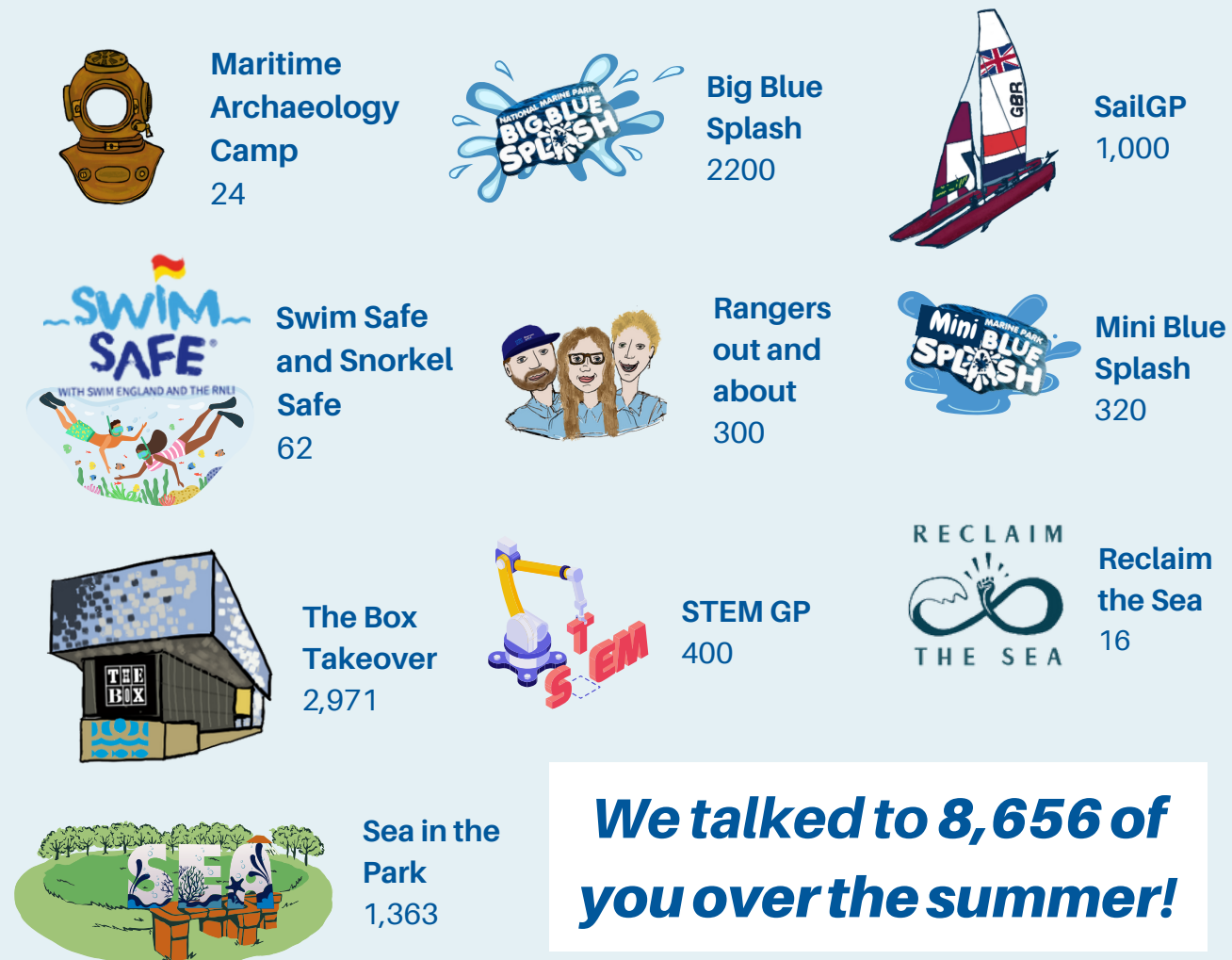
How people heard about the Big Blue Splash



Other 104

Billboard adverts, Brittany Ferries, Community groups, Friends and Family, Posters, Schools, Tourist Information Centre, Work and Website.

Where we spoke to you



We talked to 8,656 of you over the summer!

Great British Sail Grand Prix

30,000 estimated spectators across the land and water.

51m views of SailGP in Plymouth on TikTok

2 mentions an hour for the National Marine Park on Sky Sports throughout the live broadcast (25 million subscribers)

1,137 young people directly involved in the Inspire programme, including 225 children and adults with additional needs

Over 350 students took part in the two-day STEM GP event at Tinside Lido

150 young people will be gaining sailing qualifications as part of the Legacy programme

6 organisations took part in the Blue/Green village with around 1,000 people actively taking part and providing feedback for the NMP/Horizons.

600 free tickets for community groups including looked-after children

What we learnt

It has been great working with our partners and talking to you to see how new ideas and different types of events have worked.

What you told us that you enjoyed the most:

- Trying new things - from SUP Yoga to charcoal art workshops.
- Feeling good and sleeping well after spending time by the NMP.
- That the events were free and the NMP is free and open for all.
- Making new memories.
- The feeling of freedom yet being connected to nature.

You also told us your top 5 barriers to getting involved with the NMP:

- Knowing where to go, the different venues and what is on offer there and when.
- The cost of getting to the NMP, whether bus, ferry, walk or car.
- The lack of access to kit such as wetsuits, snorkels, buoyancy aids etc. to borrow rather than buy.
- Fear of the unknown - trying new things, putting a wetsuit on, feeling silly, not having the correct equipment, sharks in the water, not being able to swim, want to do if they got into trouble in the water, lack of lifeguards.
- Wanting to enjoy the NMP but not in an active, getting wet way, and feeling there is no dry option.

So, what now?

- This is the **Park in the Sea and belongs to you all**; we are taking your feedback and co-creating an autumn/winter programme of activities and events.
- We will also be **curating an activity plan for the project for the next 5 years** based on your feedback. It will be full of exciting, calm, wet, dry, accessible events that will enable as many people as possible to get involved.
- The feedback will **inform the physical changes** we will make to our gateways to enable more people to access the NMP.
- We are creating a **digital gateway** bringing the Park to life through technology, allowing you to see the treasures of the Sound without getting wet.
- More details to follow of how you can help!



"I came to a session in the Lido with my community group, I enjoyed the activity so I was invited to do my school work experience with the company doing the activity. I now want to do my apprenticeship with them"

Year 10 student from Stonehouse



"My daughter has SEND, she went rockpooling and I got to sit on the beach, quietly, with a rare hot cup of tea, and watch her. I felt so relaxed. I was able to breathe. She slept so well that night; none of the usual bedtime battles. We both felt refreshed ready for the next day."

Mum from Plympton



"I was only volunteering for one day, but I have had a lot of fun, I asked to volunteer again. I am learning about Plymouth by volunteering for the NMP."

New resident to Prince Rock



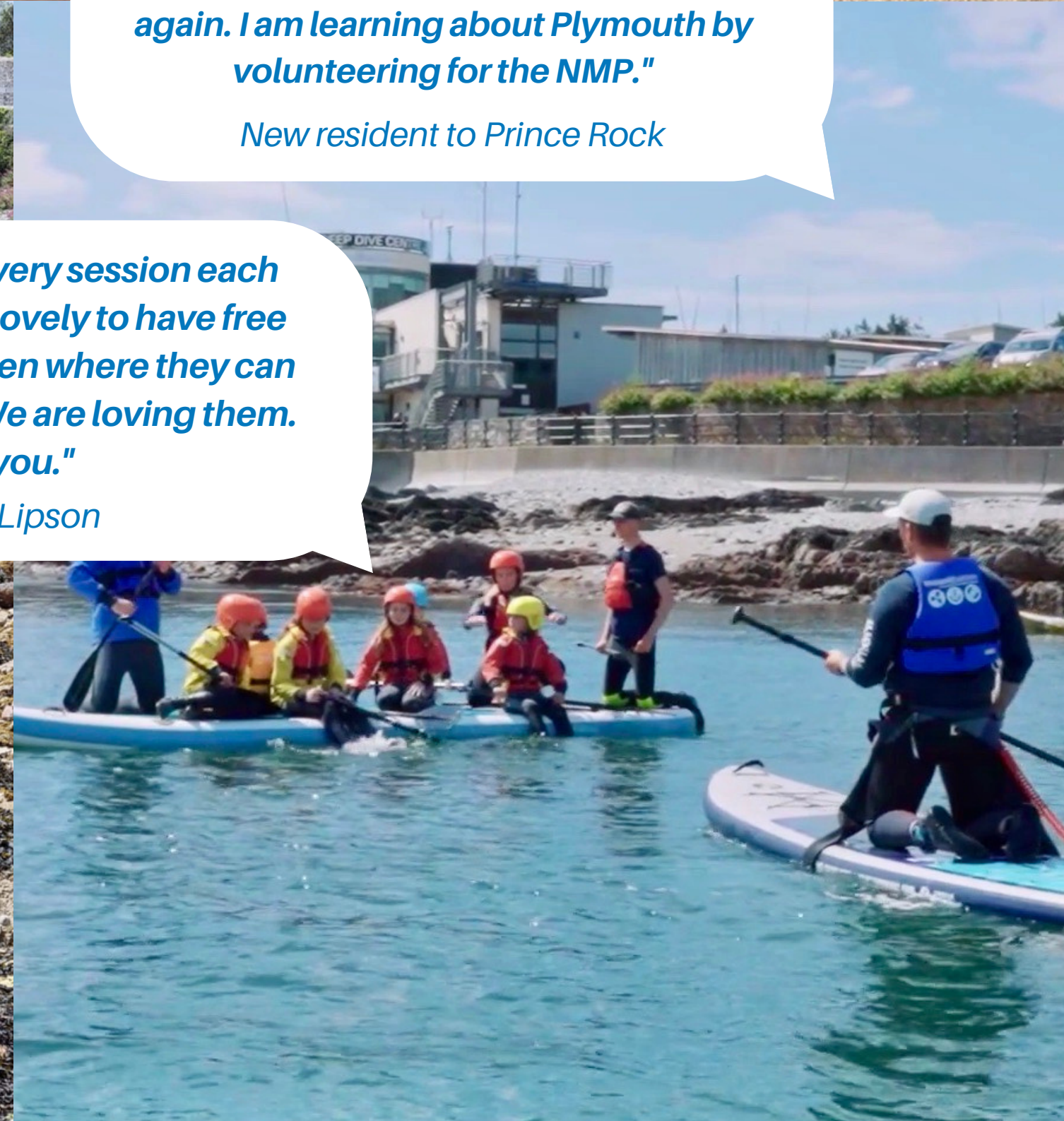
"We had the best time. My children were able to do something they've never done before. It was amazing!"

Dad from Efford



"We have come to every session each week and it is really lovely to have free workshops for children where they can learn and have fun. We are loving them. Thank you."

Carer from Lipson



This page is intentionally left blank

Growth and Infrastructure
Overview Scrutiny Committee
 Work Programme 2022/23



Please note that the work programme is a 'live' document and subject to change at short notice. The information in this work programme is intended to be of strategic relevance.

For general enquiries relating to the Council's Scrutiny function, including this Committee's work programme, please contact Jamie Sheldon Senior Governance Advisor on 01752 668000.

Date of meeting	Agenda item	Prioritisation Score	Reason for Consideration	Responsible Cabinet Member /Officer
1 March 2023	Climate Emergency Action Plan 2023-2025	(5)		Councillor James Stoneman/Paul Barnard
Items Raised by the Committee to be scheduled for 2022/23				
2022/23	Environment Act 2021	(5)	Identified for consideration by the Committee at its July 2021 meeting	Paul Barnard
2022/23	Sustainable Transport in the City	(5)	Identified for consideration by the Committee at its July 2021 meeting	Paul Barnard
2022/23	Position statement UK - EU Trade and Cooperation Agreement - Fisheries	(5)	Position Statement following scrutiny of this issue in February 2021	Kevin McKenzie
2022/23	Bus Service Delivery and Improvement in the City	(5)	Identified for consideration by the Committee at its February 2022 meeting	Paul Barnard
2022/23	Commercial Estate including Plymouth Airport	(5)	Identified for consideration by the Committee at its February 2022 meeting	David Draffan
Issues Identified for Select Committee Reviews				

Date of meeting	Agenda item	Prioritisation Score	Reason for Consideration	Responsible Cabinet Member /Officer
2022/23	The Delivery of Taxi Services within Plymouth	(5)	The issues impacting the delivery of taxi provision within the city	Rachael Hind
Items to be scheduled				

Annex I – Scrutiny Prioritisation Tool

		Yes (=1)	Evidence
Public Interest	Is it an issue of concern to partners, stakeholders and/or the community?		
Ability	Could Scrutiny have an influence?		
Performance	Is this an area of underperformance?		
Extent	Does the topic affect people living, working or studying in more than one electoral ward of Plymouth?		
Replication	Will this be the only opportunity for public scrutiny?		
	Is the topic due planned to be the subject of an Executive Decision?		
	Total:		High/Medium/Low

Priority	Score
High	5-6
Medium	3-4

Low	I-2
-----	-----

This page is intentionally left blank

Growth and Infrastructure Overview and Scrutiny Committee – Tracking Decisions 2022/23

Minute No.	Resolution	Target Date, Officer Responsible and Progress
Minute 52 Climate Emergency Action Plan 2022 and Corporate Reduction Plan 2022 – in year monitoring reports 22 June 2022	Accept the Cabinet Member's offer to ring-fence the money within the concessionary bus fare budget should there be a surplus (whilst being mindful that budget pressures and priorities may change moving forward).	Target Date: June 2022 Officer: Paul Barnard Update sent to members 25 November 2022
Minute 60 Policy Update 10 October 2022	Update on capping bus tickets to £2. What are the plans? Is the Council bidding?	Target Date: 9 November 2022 Officer: Philip Heseltine Update sent to members 9 November 2022
Minute 60 Policy Update 10 October 2022	Update on social prescribing provision in walking and cycling.	Target Date: 9 November 2022 Officer: Philip Heseltine Update sent to members 9 November 2022
Minute 62 Update on The Box 10 October 2022	The Committee recommended that they were to be provided with up-to-date information on visitor numbers to The Box per ward to see which wards have lower engagement levels.	Target Date: 1 November 2022 Officer: Victoria Pomeroy/Chloe Hughes Update sent to members 1 November 2022

Growth and Infrastructure Overview and Scrutiny Committee – Tracking Decisions 2022/23

Minute 62 Update on The Box 10 October 2022	The Committee recommended that they were to be provided with - a report on schools by ward that have been engaged with so Councillors can use their Community Grant fund to assist local schools that are currently not engaged with The Box due to funding for transport, information to speak to schools.	Target Date: 1 November 2022 Officer: Victoria Pomeroy/Chloe Hughes Update sent to members 1 November 2022
Minute 63 City Centre Update 10 October 2022	Report on the Armada Way sustainable transport solutions design process and how they will be implemented.	Target Date: 15 November 2022 Officer: David Draffan/Martin Ivatt Update sent to members 29 November 2022
Minute 63 City Centre Update 10 October 2022	Full report regarding for the aborted start to the Old Town Street and New George Street project.	Date: Ongoing Officer: Anthony Payne/David Draffan Progress: Agreed with Chair and Vice Chair at Agenda Setting meeting (31 October 2022) that committee would wait for conclusion of ongoing issues before report can be created.